

WEB UI SETUP AND USER GUIDE

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

StiboSystems

STEP Trailblazer 8.1

Table of Contents

Table of Contents	2
Web User Interfaces	14
Web UI Getting Started	15
Privileges	15
Web UI Access Privileges	15
Creating a New Web UI	17
Creating a Web UI from a Template	17
Duplicating an Existing Web UI	19
Accessing a Web UI	21
Direct Browser Access	21
Launch Button Access	22
Managing Web UI Configurations	23
Reverting to an Older Revision	23
Purge a Web UI Configuration Revision	24
Delete a Web UI Configuration	24
Edit a Web UI Configuration	25
Designer Access	28
Applying an Update Web UI Configuration Action Set	28
Entering Design Mode	29
Launch Button on Homepage	29
Launch Button on Other Pages	30
Append URL in Browser	31
Design Mode Basics	32
Creating a New Screen	33

Deleting a Screen	33
Renaming a Screen	34
Changing the Web UI Style	34
Saving Changes to a Configuration	36
Exiting Design Mode	36
Selecting Components	37
Choose a Screen and Enter Design Mode	37
Select Components to Edit	38
Navigating Up and Down the Component Structure	39
Selecting a Parent Component	39
Selecting a Child Component	40
Configuring Components	42
Properties Area	42
Child Components	44
Adding and Configuring a Child Component	44
Changing the Sequence of Child Components	45
Removing a Child Component	46
Help Text	46
Invalid Properties	47
Using Web UI	48
Action Buttons	49
Action Button Configuration on a Node List	50
User-Added Toolbar Action Buttons on Node Lists	50
Enabling / Disabling Button Labels	50
Configuring Custom Labels for User-Added Toolbar Actions	51

Configuring Custom Icons for User-Added Toolbar Actions	54
Upload a Single Icon Directly From a Node List	54
Upload Multiple Icons From the Designer's Web UI Styles Tab	55
Address Detail	57
Simple Address Component Model Configuration	58
Prerequisites	58
Data Model Considerations and Requirements	58
Component Model Configuration	61
Editing the Component Model	64
Address Detail Configuration	66
Prerequisites	66
Configuring the Screen	66
Configuring the Node Editor	70
Configuring the Address Detail Component ..	71
Using the Find Existing Action	78
Address Detail Country ISO-Code Integration	79
Country ISO Code Attribute	80
Address Detail Country LOV Attribute	82
Setting Up the LOV and Country Attribute	83
Configuring a Country Attribute Value Component	84
Advanced Search	86
Advanced Search Initial Configuration	87
Adding Advanced Search to the Homepage ..	87

Editing Advanced Search Screen Properties ..	90
Adding and Modifying Search Criteria	92
Completed Search Criteria	98
Mapping Task List to Workflow State	99
Restricting and Sharing Advanced Searches	105
Restricting User Groups	105
Applying a Share Search Action Set	107
Sharing Saved Searches	109
Considerations and Limitations	111
Using Advanced Search	112
Performing an Advanced Search	112
Building a Search Query	112
Saving a Search	119
Using Saved Searches	119
Collapsible splitter feature	121
Considerations and Limitations	122
Attribute and LOV Creation and Maintenance in Web UI	123
Attribute and LOV Creation and Maintenance Configuration	124
Adding the Stack Panel	124
Configuring the System Setup element in Web UI	127
Attribute Group Management Screen	132
Configuring the Attribute Group Management Screen	132
Using the Attribute Group Management Screen	134
Creating Attributes	134

Creating Attribute Groups	135
Maintaining Attribute Groups	136
Attribute Management Screen	138
Configuring the Attribute Management screen	138
Using the Attribute Management screen	140
List of Values Group Management Screen	141
Configuring the List of Values Group Management screen	141
Using the List of Values Group Management screen	142
Creating Lists of Values	142
Creating List of Values Groups	144
Maintaining List of Values Groups	146
List of Values Management Screen	147
Configuring the List of Values Management screen	147
Using the List of Values Management screen	149
Asset Handling in Web UI	150
Asset Image Value	151
Prerequisites	151
Configuring Asset Image Value	151
Upload Asset Parameters Configuration	154
Asset Mid Sized	158
Prerequisites	158
Configuring Asset Mid Sized Component	158
Upload Asset Parameters Configuration	161
Asset Value Component	165
Prerequisites	165

Configuring Asset Value Component	165
Upload Asset Parameters Configuration	167
Asset Thumbnail Component	171
Prerequisites	171
Configuring Asset Thumbnail Component	171
Asset Importer Widget	173
Configuration	173
Importing Assets	175
Drag and drop	175
'Select file' option	176
Asset Previews in Web UI	178
Asset Preview Screen	178
Using the Asset Preview Screen	179
Previews of PDF, Microsoft Office, and Video Files	180
Creating an Asset Preview Screen	183
Previews Using the Asset Image Value and Asset Mid Sized Components	187
Asset Image Value	187
Asset Mid Sized	189
Considerations and Limitations for Asset Previews in Web UI	189
Attribute Link Editor Screen	191
Configuring the Attribute Link Editor Screen	192
Creating a New Attribute Link Editor Screen	192
Adding the Attribute Link Editor as a Sub Screen Tab	192
Configuring the Attribute Link Editor screen	192

Determining the Metadata Attribute Columns	193	Attribute Value Components	219
Configuring display of standard buttons ...	195	Component Properties Configuration	220
Configuration of Node Picker	196	Enable Tag Conversion	222
Configuring default orientation of table	198	Attribute Value Group Components	224
Making the screen read only	200	Component Properties Configuration	225
Applying the auto-save feature	200	Enable Tag Conversion	228
Configuring the default sorting and filtering	201	Attribute Value Group LOV Type-Ahead Functionality	229
Configuring display of the attribute link buttons	201	Property Settings	229
Editing Attribute Links in Web UI	203	Excluding Attributes	229
Select all / Clear all	203	Attribute Value History	230
Filtering	204	Configuring Attribute Value History	230
Clear Filter	206	Background Process List Screens	232
Configuring the Attribute Link Toolbar Actions	206	Setting up the Background Process Screen	232
Create Attribute Link	207	Background Process Messaging and Identification	235
Make Attribute Link Local	207	Calculated Attributes in Web UI	242
Remove Attribute Link	208	Identifying Calculated Attributes	243
Columns	209	Editing Calculated Attributes	244
Adding Announcements to the Login Page	211	Company Hierarchy Visualization and Maintenance	245
Configuring the announcement feature	213	Prerequisites	245
Adding the properties to the configuration file	213	Overview of a Company Data Hierarchy Screen	245
Attribute Help Text in Web UI	215	Using a Company Data Hierarchy Screen	248
Prerequisites	215	Editing a Company Hierarchy	248
Identify the metadata attribute used for help texts in System Settings	215	Collapse children	249
Set Component Properties in Web UI	216	Expand children	249
		Collapse parent	250

Expand parent	250	Attribute Values At Create	271
View hierarchy	250	Find Similar Search Tab	272
Unlink parent	250	Add the Find Similar Search Tab	273
Set parent	250	Configure the Find Similar Search Tab	274
Add child	251	Comparing Data Using Hide Equal and Mark Different	281
Optional Tools for 'Set parent' and 'Add child' Actions	252	Example	281
Create Tab	252	Conditional Attribute Handling	283
Find Similar Search Tab	254	Conditional attributes handling in Web UI ..	283
Configuring a Company Data Hierarchy Screen	256	Configuring a Deduplication Clerical Review	286
Prerequisites	256	Create and Configure the Deduplication List	286
Creating a Company Data Hierarchy Screen	256	To Specify Node Details Buttons	287
Configuring Access to a Company Data Hierarchy Screen	259	To Create a Task List	288
Configuring Hierarchy Representation Properties	259	To Specify Mappings	288
Optional Configurations for the Hierarchy Representation Component	263	Confirmed Matches Component	290
Prerequisites	263	Prerequisites	290
Search Tab	263	Configuring the Confirmed Matches component	291
Add the Search Tab	263	Confirmed Non Matches Component	293
Limit Object Type Search Results (Optional)	265	Prerequisites	293
Add Search Plugins (Optional)	266	Configuring the Confirmed Non Matches component	293
Adding the 'Name Or Id Or Attributes' component:	266	Data Visualization	295
Configure Attributes to Include in the Search Tab:	267	Using Data Visualization	295
Create Tab	267	Exporting Web UI Definitions as Comments	300
Add and Configure the Create Tab	268	Find Existing	301
		Prerequisites	301

Using Find Existing on Store Single Referenced Target	301
Configuring Find Existing on Store Single Referenced Target	304
Using Find Existing on Address Detail	309
Configuring Find Existing on Address Detail	312
Find Similar	318
Configuring Find Similar on an Initiate Item Screen	319
Using Find Similar on an Initiate Item Screen	324
Configuring Find Similar on an Add Reference Action	327
Using Find Similar on an Add Reference Action	330
Follow Single Reference	334
Preconditions and Considerations	334
Follow Single Reference Configuration	335
GDSN in Web UI Overview	338
Create a GDSN Web UI	339
GDSN Registration Tab	341
Display an attribute value in the publication table	341
GDSN Hierarchy Tab	344
Configuring Multiple IPGLNs in Web UI	345
Selecting Multiple Target Markets in Web UI	348
GDSN Error Messaging	351
GDSN Web UI Buttons	353
Adding a GDSN button to a Node Details page	353
Adding a GDSN button to a Node List page	356

GDSN Register Action Button	359
GDSN Publish Action Button	362
GDSN Hierarchy Link Action Buttons	365
GDSN Hierarchy Withdrawal Action Button	368
Using Business Rules with GDSN	370
Business action on inbound messages	370
Business Actions for GDSN	370
Execute command	370
Create CIC Object and Start Workflow	371
Set CIC Status for Publication	372
Update Package Hierarchy Status	372
'Evaluate JavaScript' with Binding to 'GDSN Publisher Product Validation'	373
Set Pending File	373
Execute Pending File	373
Handling Duplicated Attributes in Web UI	374
Create Attribute Group(s) to Hold Attributes Known to Exist in Multiples Groups	374
Setting up Blacklisted Attribute Groups in Web UI	374
Homepage Widgets	376
Asset Importer Widget	376
HTML Asset Widget	376
KPI Widget	376
Links Widget	376
Mass Creation Widget	376
Search Widget	377
Simple Importer Widget	378

Smartsheet Export Widget	378	Configuring the Parameters	403
Status Selector Homepage Widget	378	Mappings	403
Text Widget	379	Height / Width Settings	404
User Widget	379	Representation List	406
Workflow Profile Historical Data Widget	379	Advanced	407
Workflow Profile Live Data Widget	379	Child Components	409
Adding Widgets to a Homepage	379	Examples of Component Usage	411
Data Profile Widgets in Web UI	384	Child Components Example	411
Approve Status	384	Corner Bar Example	412
Attribute Values	385	Merging Confirmed Matches	414
Average Object Completeness	385	Configuration	414
Condition Status	386	Add Merge Nodes Screen	414
Least Complete Attributes	387	Map Merge Node Screen	415
Most Complete Attributes	388	Add Merge Confirmed Match From Grid Action	416
Object Count	389	Performing a Merge	417
Object Type Count	389	Multi Context Screen	420
Translation Status	390	Prerequisites	420
Mass Creation Widget	392	Adding a New Multi Context Screen	420
Adding a Mass Creation Widget Grid	392	Configuring a Multi Context Screen	421
Configuring a Mass Creation Widget	393	Using a Multi Context Screen	424
Text Widget	397	Multi Language Screen	430
Prerequisites	397	Using a Multi Language Screen	430
Configuring the Text Widget	397	Selecting Languages	431
Localizable Dates in Web UI	399	Editing Attribute Values	432
Localization Setup	399	Configuring a Multi Language Screen	435
Considerations and Limitations	401	Prerequisites	435
Main Properties	402	Creating a New Multi Language Screen	435

Configuring Access to a Multi Language Screen	436	Configuring a Multi Revision Screen	476
Configuring Multi Language Screen Properties	437	Configuring a Multi Revision Editor	477
Configuring Multi Language Editor Properties	438	Examples: Filtering Revisions	481
Configuring Headers for the Multi Language Editor	440	Multi-Select from the Tree Navigator	484
Configuring Specific Language Dimensions	441	Setting up the Multi-Select from Tree Navigator	484
Multi Reference Editor	444	Multi Workspace Screen	489
Multi Reference Properties	446	Using a Multi Workspace Screen	489
Node List Properties	446	Editing Attribute Values	490
Display Modes	447	Configuring a Multi Workspace Screen	492
Actions	448	Prerequisites	492
Considerations and Limitations	450	Creating a New Multi Workspace Screen	492
Add Reference Action	451	Configuring Access to a Multi Workspace Screen	493
Add Reference Action Properties	451	Configuring Multi Workspace Screen Properties	493
Create	454	Configuring the Multi Workspace Editor Properties	494
Create From Template	455	Configuring Headers for the Multi Workspace Editor	496
Find Similar Search	461	Node Details Component	498
Suppressing References in the Multi Reference Editor	469	Prerequisites	498
Configuring Reference Suppression	469	Adding a New Node Details Screen	498
Reference Suppression header	469	Configuring Node Details Properties	498
Suppression toolbar actions	471	Main Components	499
Suppressing References in the Multi Reference Editor	473	Child Components	500
Multi Revision Screen	475	Example Node Details Screens	503
Configuration Prerequisites	476	Node Editor Component	505
Adding a New Multi Revision Screen	476	Prerequisites	505
		Configuring Node Editor Properties	505

Examples of Configured Node Editor Components	506
Node List Component	509
Prerequisites	509
Configuring Node List Master Component Properties	509
Configuring Node List Child Component Properties	514
Onboarding Multiple Objects Using Web UI Screens	517
Prerequisites	517
Mass Creation Screen	517
Mass Creation Widget	517
Configuring a Mass Creation Screen	518
Adding a New Mass Creation Screen	518
Configuring a Mass Creation Screen	519
Using a Mass Creation Screen and Widget	523
Steps to Multiple Object Creation	523
Example	526
Validating Data	528
Packaging Hierarchy Editor	530
Configuration of the Packaging Hierarchy Editor in STEP Workbench	531
Data Structure and STEP Workbench Setup	531
Create object types for packaging objects	531
Create references between the packaging objects	531
Create quantity attribute	532
Set up the Component Model	533
Set Up of the Packaging Hierarchy Editor	535

in Web UI	
Create a new screen	535
Configure the Packaging Hierarchy Editor Screen	535
Validation of packaging hierarchy	539
How to Use the Packaging Hierarchy Editor	541
Create or modify a packaging hierarchy	542
Collapsible splitter feature	545
Parameterized Business Actions in Web UI	546
Configuration of Parameterized Business Actions in STEP Workbench	546
1. Creating a JavaScript business action with binds	546
2. Embedding the business action in a bulk update configuration	550
Making Parameterized Business Actions Available in the Web UI	553
1) BulkUpdateList Action	554
2) BulkUpdateTemplateAction	555
3) RunBulkUpdateTemplateAction	556
Potential Duplicates List	557
Configuring the Deduplication Table	557
Rich Text Editor	561
Rich Text Editor Icon	561
Format Text Options	561
Formatting Styles	562
Remove Format	562
Character tag	562

Add/edit Hyperlink	563
End Hyperlink	564
Add/edit Footnote	564
Add/edit Inline Reference	566
Shared Data Handling	569
Shared Target Information on Node Editor ..	569
Shared Object Save Warning	570
Reference Cloned Target Action	571
Simple Export	573
Adding a Simple Export Action to toolbar	573
Configuring The Simple Exporter Action ..	573
Using the Simple Export Action	574
Mapping	575
Limiting the object types to export	577
Format	577
Simple Importer	579
Prerequisites	579
Valid File Types	579
Adding an Importer Widget to Homepage ...	579
Using the Simple Importer Widget	580
Mapping	581
Map Keys on Import	582
Smartsheets in Web UI	584
Smartsheet Export Action	585
Prerequisites	585
Configuration	585
Smartsheet Export Widget	588

Prerequisites	588
Configuration	588
Smartsheet Import Action	591
Prerequisites	591
Configuration	591
Tab Pages	593
Adding Tab Pages	593
Tab Page Data Error Indicator	598
Adding Sub Screen Tab Pages	599
Target Hierarchy Column	600
Tree Navigator Component	601
Configuring the Child Components	601
Configuring the Main Properties	604
Height / Width Settings	604
Advanced	605
Stack Panel Example: Displaying a Tree Navigator Component	607
User Configurable Views	610
Prerequisites	610
Applying a View	610
Apply a recent view	611
Show all views	611
Creating a New View	612
Editing an Existing View	614
Copying a View	615
Deleting a View	615
Renaming a View	615
Sharing a View	616

Enabling User Configurable Views	617
Prerequisites	617
Steps to Enable a User Configurable View	617
Using Checkbox Selection and Details Icons	620
Checkboxes and Selection Dependent Actions	620
Details Icon	622
Workflows in Web UI	626
Getting Started with Workflows in Web UI	627
Screen / Component Configuration and Mappings for Workflows	628
Status Selector Homepage Widget	629
Adding a Status Selector Widget	629
Setting up the Status Selector Homepage Widget Properties	629
Status Selector Sidebar Widget	634
Adding a Status Selector Widget	634
Setting up the Status Selector Sidebar Widget Properties	634
Initiate Item Screen	639
Adding a New Initiate Item Screen	639
Configuring Initiate Item Properties	639
Using an Initiate Screen	647
Bypassing the Initiate Item Screen	650
Preconditions	650
Required Configuration to use the Create Object in Workflow Screen	650
Using the Create Object in Workflow Screen	654

Using a Template to Create and Initiate an Object in a Workflow	656
Using Templates with Create Object in Workflow	656
Configuring the Create Object in Workflow Properties	657
Considerations and Limitations	661
Start Workflow Action	662
Task List	665
Prerequisites	665
Adding a New Task List Screen	665
Configuring Task List Properties	666
Configuring a Multi Edit Display Mode for a Task List Screen	669
Workflow State Component	671
Configuring the Workflow State Component	671
Mapping Workflow States in Web UI	673
Using Advanced Search with Workflow Tasks	675
Advanced Search as a Results Screen	675
Working with Tasks in Workflows	678
Initiating Objects in a Workflow using Web UI	679
Initiating New Objects	679
Create Object in Workflow	679
Initiate Item	680
Initiating Existing Objects	680
Moving Tasks through a Workflow in Web UI	682
Processing Tasks in a Workflow	682

Tasks Tab on an Object	685
Claiming / Releasing Workflow Tasks in Web UI	686
Claiming / Releasing tasks using an Assign to Me Header	686
Claiming / Releasing Workflow Tasks in Node Details	686
Configuring the 'Task Assignment Action' Button	687
Dun & Bradstreet Integration in Web UI	691
Prerequisites	691
Creating a New D&B Match Candidates Screen	691
Adding and Configuring a D&B Workflow Status Selector Widget	693
Using Web UI for Dun & Bradstreet Integration Matching	695
Using Web UI for Dun & Bradstreet Detailed Company Profile	698
Advanced Web UI Workflow Topics	700
Status Flags in Web UI	701
Status Flags in Screen Mapping Conditions	704
Monitoring Workflows Using Web UI	705
Workflow Profile Screen	706
Prerequisites	706
Adding a New Workflow Profile Screen	706
Configuring Workflow Profile Screen Properties	708
Adding the Workflow Profile Screen to the Homepage	708
Linking the Workflow Profile Screen from a Homepage Widget	710

Using the Workflow Profile Web UI Interface	712
Live Data Tab	712
Historical Data Tab	713
Workflow Profile Historical Data Widget ..	715
Configuration	715
Workflow Profile Live Data Widget	718
Configuration	718
Workflow Mandatory Attributes in Web UI ..	721
Handling Workflow State and Transition Mandatory Attributes in Web UI	721
Working with Data Containers in Web UI ..	723
Data Container / Attribute Maintenance	723
Additional Web UI Functionality	725
Data Container Editor	727
Prerequisites	727
Adding a Data Container Editor	727
Configuring a Data Container Editor	728

Web User Interfaces

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

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

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

Web UI Getting Started

There are some prerequisites to Web UI configuration / usage.

Privileges

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

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

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

Web UI Access Privileges

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

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

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

The screenshot shows the 'Privilege Rules' configuration window. The 'Action Set' section on the left contains a table with the following data:

Name	Value
ID	WebUIAccess
Name	Web UI Access
Action Type	Setup Action

Below the table is an 'Actions' section with the following items:

- View context
- View setup group

A red arrow points from the 'Web UI Access' value in the table to the 'Add Privilege Rule' dialog box. The dialog box has the following fields:

- Action Set: Web UI Access (WebUIAccess)
- Attribute Group: (empty)
- Setup Group: (empty)
- Valid for Object Type: (empty)
- Apply to Group: Web UI Group (WebUIGroup)
- Dimensions: (empty)
- Language: <ANY>
- Country: <ANY>

The dialog box also has 'Save' and 'Cancel' buttons.

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

Creating a New Web UI

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

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

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

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

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

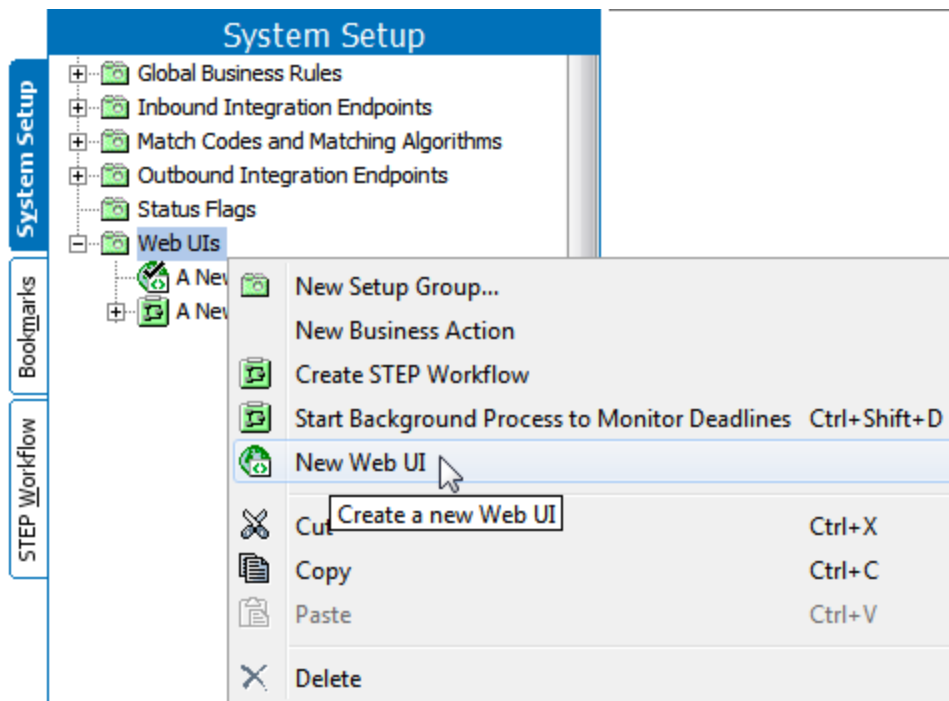
Users can also choose to duplicate an existing Web UI, and the steps are outlined later in this topic. Once a new Web UI is created from a template or duplicated from another Web UI, it can be modified and customized to meet business needs.

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

Creating a Web UI from a Template

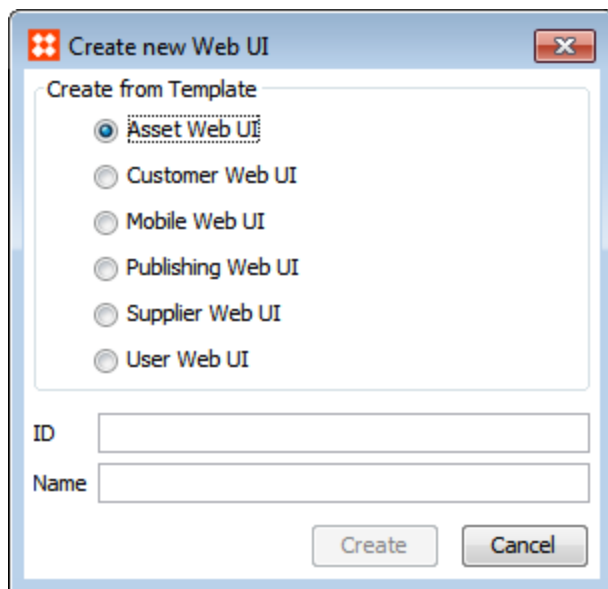
To create a new STEP Web UI:

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



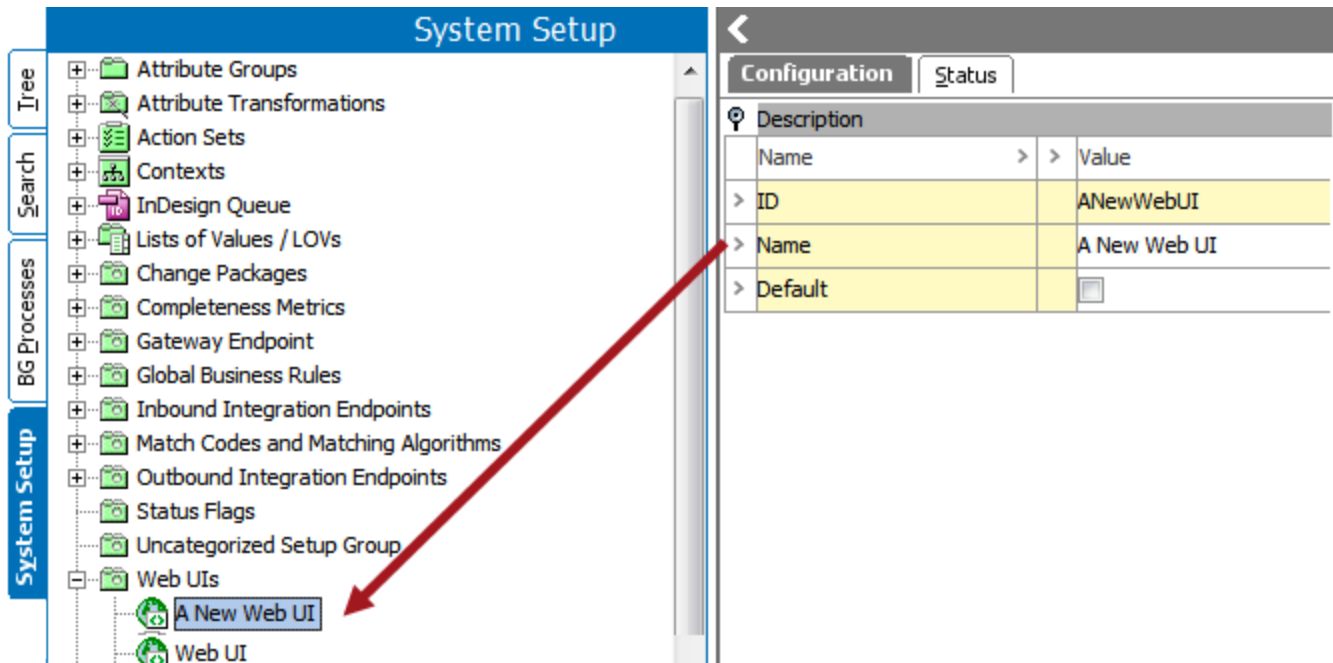
2. In the **Create new Web UI** dialog, select the preferred template.
3. Enter an **ID** and a **Name** for the configuration, and then click **Create**.

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



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

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



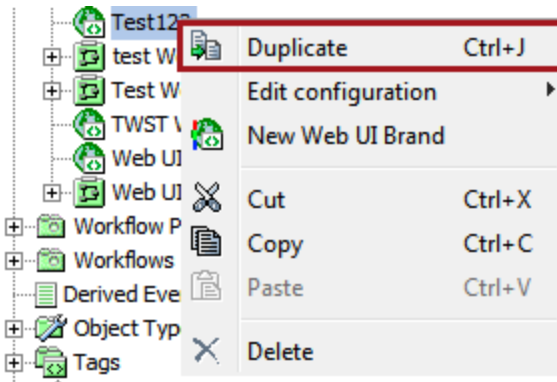
If **Default** is enabled / checked on the Configuration tab, the Web UI can be accessed via a simpler URL (no Web UI configuration ID required) than what is used for non-default Web UIs. For more information, see the **Accessing a Web UI** section of the **Web User Interfaces / Web UI Getting Started**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

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

Duplicating an Existing Web UI

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

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



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

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

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

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

- Managing Web UI Configurations
- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- 'Web UI component configuration reference' available at [system]/webui/docs

Accessing a Web UI

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

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

Direct Browser Access

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

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

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

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

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

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

STEP User Portal



The image shows a login form for the STEP User Portal. It has a light gray background with rounded corners. There are two input fields: 'Username' and 'Password', both with white text and light gray borders. Below the 'Password' field is a 'Login' button with a right-pointing arrow icon and the text 'Login'.

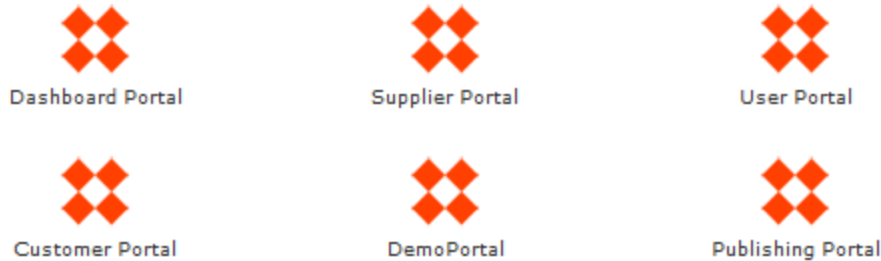
To access the Web UI homepage:

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

Launch Button Access

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

Launch Web UI



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

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

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

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

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

- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- 'Web UI component configuration reference' available at [system]/webui/docs for more information.

Managing Web UI Configurations

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

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

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

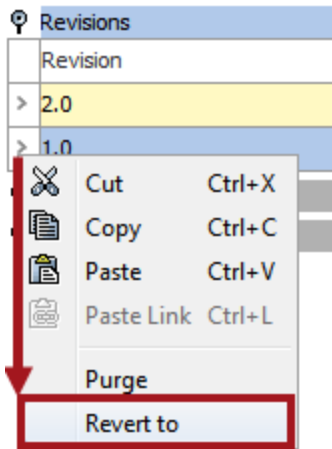
The screenshot shows the 'System Setup' interface. On the left, a sidebar lists various configuration categories under 'System Setup', including 'Web UIs'. A red arrow points from the 'A New Web UI' item in this list to the 'Status' tab on the right. The 'Status' tab displays a table of revisions for 'A New Web UI rev.2.0'.

Revision	Created	Edited	Major
2.0	Fri Dec 04 15:49:49 EST 2015	Fri Dec 04 15:49:49 EST 2015	X
1.0	Fri Dec 04 15:49:49 EST 2015	Fri Dec 04 15:49:49 EST 2015	X

Reverting to an Older Revision

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

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

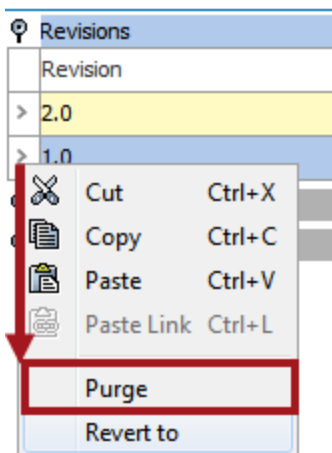


The Web UI configuration is now reverted to the selected revision and a new revision is created.

Purge a Web UI Configuration Revision

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

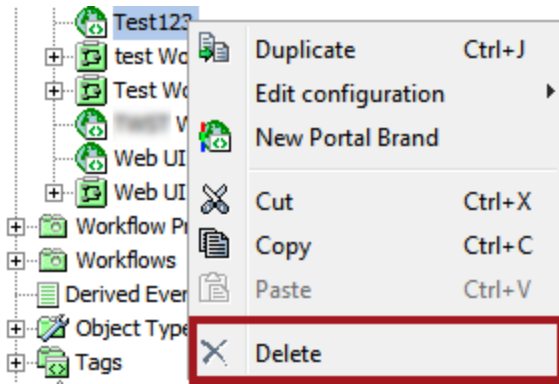
1. In **System Setup**, select the relevant Web UI configuration.
2. On the **Status** tab, click the arrow to the left of the row that contains the revision to purge, and then click **Purge**.



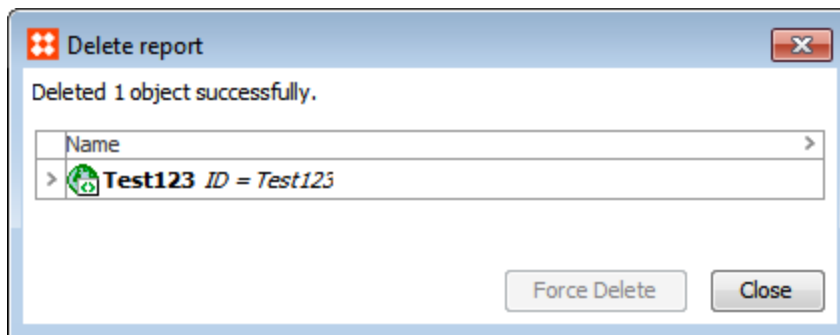
Note: If you purge a Web UI configuration revision and then later revert a workflow to a version that is dependent on the purged configuration revision, it may result in the workflow and/or Web UI configuration not working as expected.

Delete a Web UI Configuration

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



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



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

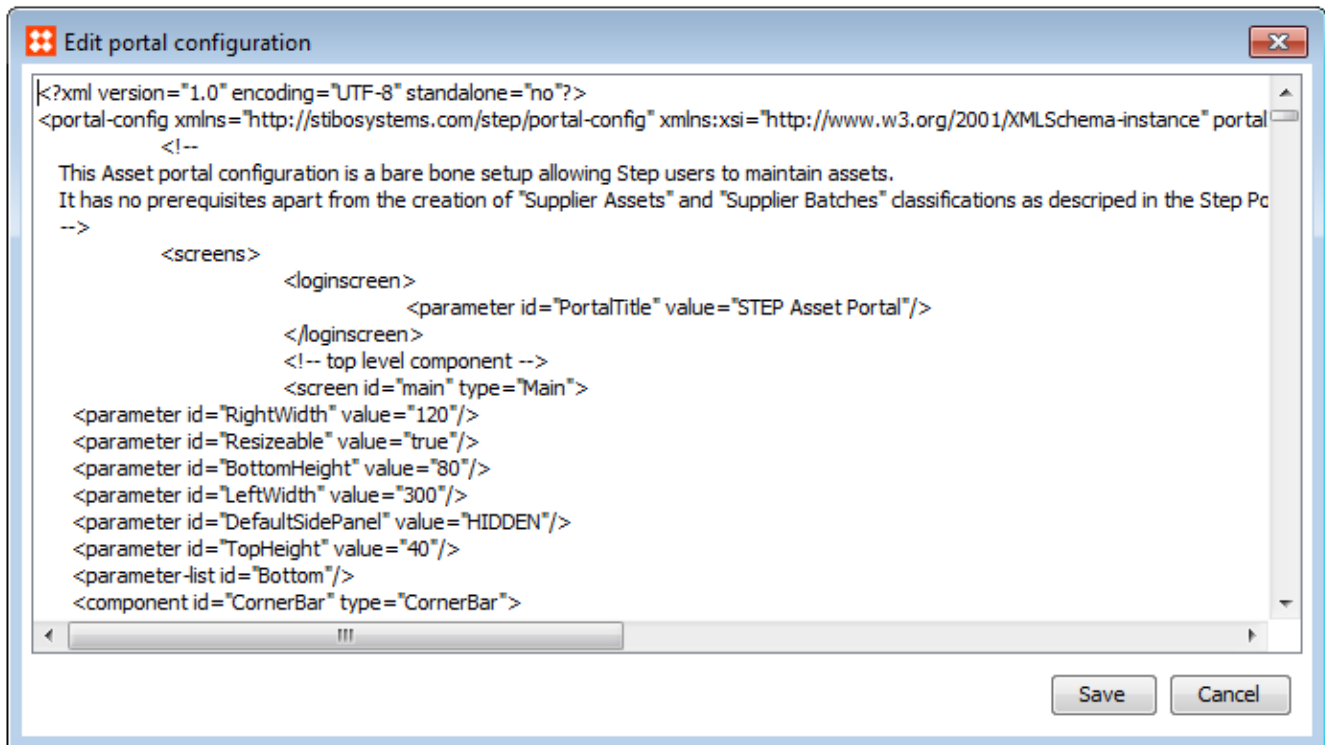
Edit a Web UI Configuration

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

To edit the Web UI XML:

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

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



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

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

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

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

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

- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- 'Web UI component configuration reference' available at [system]/webui/docs.

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

Designer Access

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

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

Applying an Update Web UI Configuration Action Set

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

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

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

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

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

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


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

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

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

Entering Design Mode

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

Launch Button on Homepage

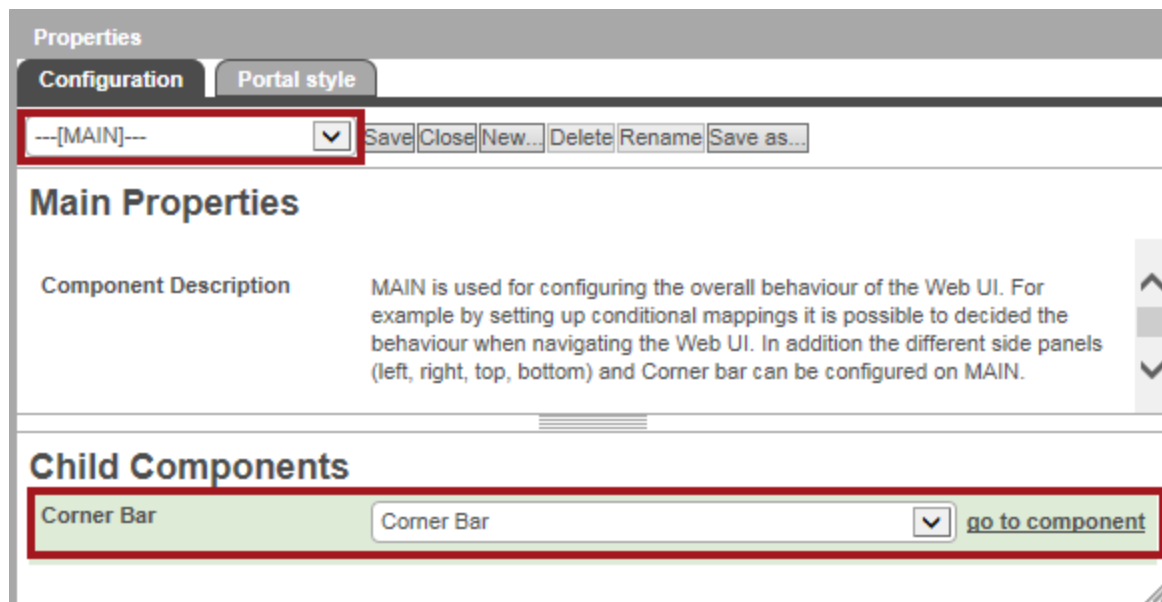
1. Log in to the Web UI.
2. Click the design mode launch button icon found on the homepage (shown in the user widget).



Launch Button on Other Pages

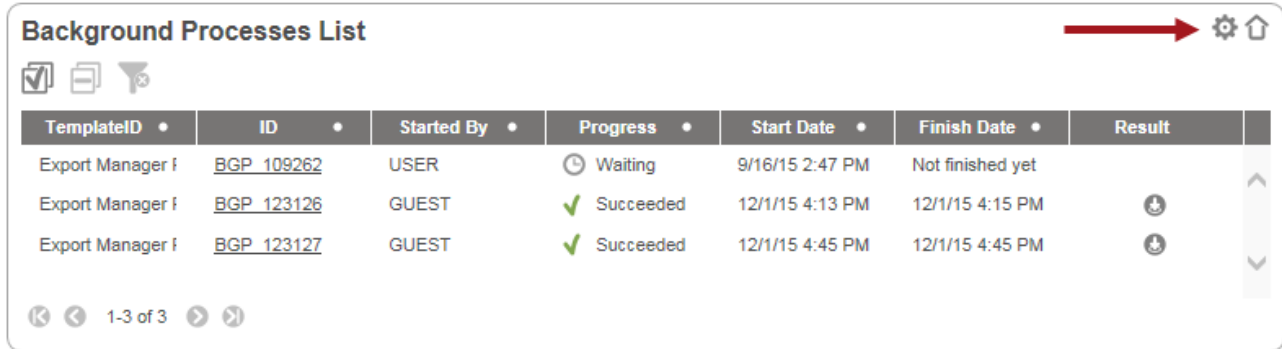
A design mode launch button can also be configured to show in the Corner Bar component. Once configured, a user can click the icon and enter design mode from any page within Web UI.

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



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

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

TemplateID	ID	Started By	Progress	Start Date	Finish Date	Result
Export Manager f	BGP_109262	USER	⌚ Waiting	9/16/15 2:47 PM	Not finished yet	
Export Manager f	BGP_123126	GUEST	✓ Succeeded	12/1/15 4:13 PM	12/1/15 4:15 PM	⬇
Export Manager f	BGP_123127	GUEST	✓ Succeeded	12/1/15 4:45 PM	12/1/15 4:45 PM	⬇

Append URL in Browser

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

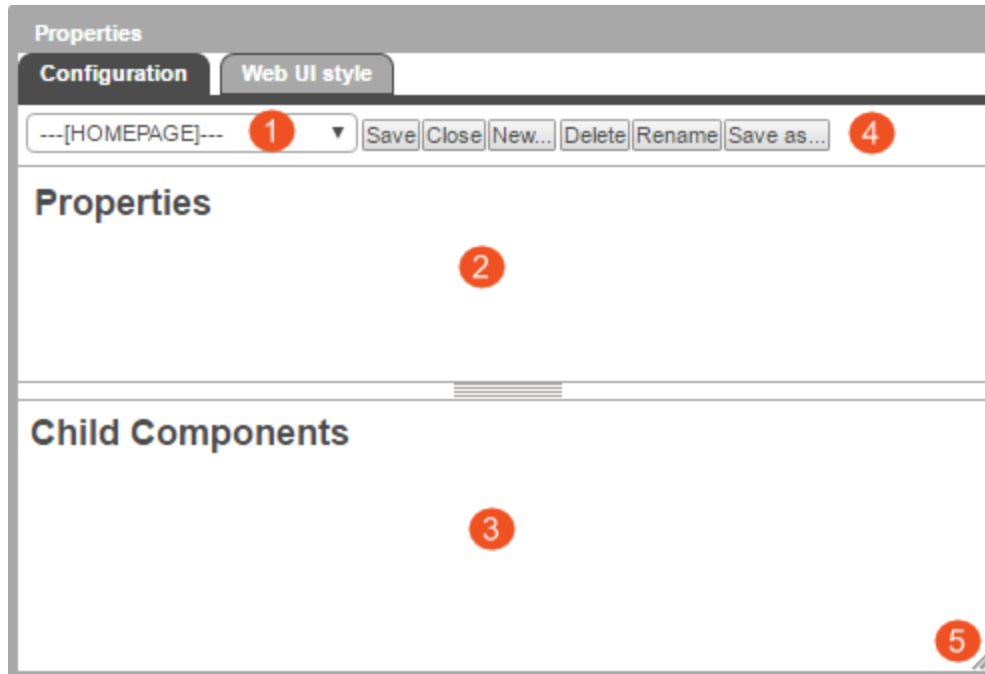
As a basic example, here is what the URL will look like in both cases for a Web UI configuration where the system name is 'your-system' and the Web UI configuration ID is 'ANewWebUI':

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

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

Design Mode Basics

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

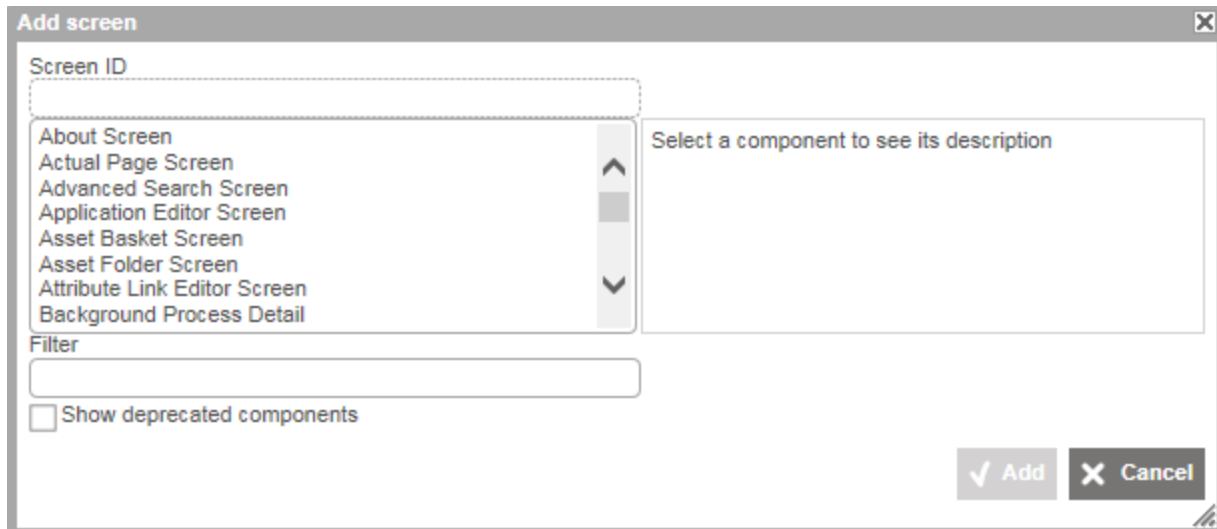


1. **Screen dropdown:** Here you can select which screen / component to review and edit.
2. **Properties area:** The main component properties of a selected screen are displayed and edited here.
Parameters are grouped together on the component properties screens for easier understanding of parameter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

Creating a New Screen

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

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



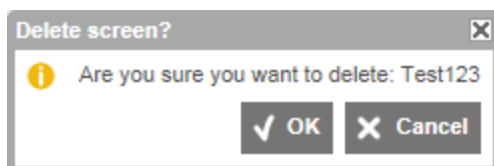
2. In the 'Add screen' dialog, enter an ID for the new screen in the **Screen ID** field. Make it descriptive so that it can be easily identifiable when a user looks through Screen IDs to make a selection.
3. In the screen type list, select the screen type you want to create by clicking on the displayed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

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

Deleting a Screen

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

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



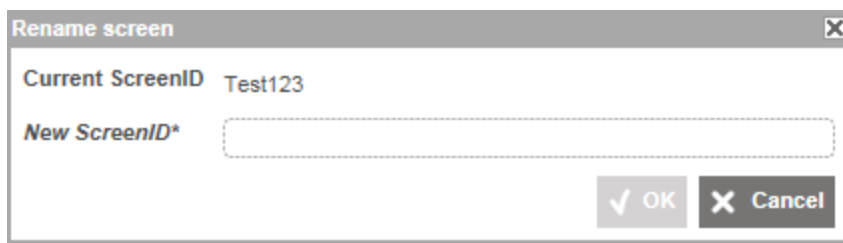
The screen is now deleted.

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

Renaming a Screen

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

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



4. Click **OK**.

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

Changing the Web UI Style

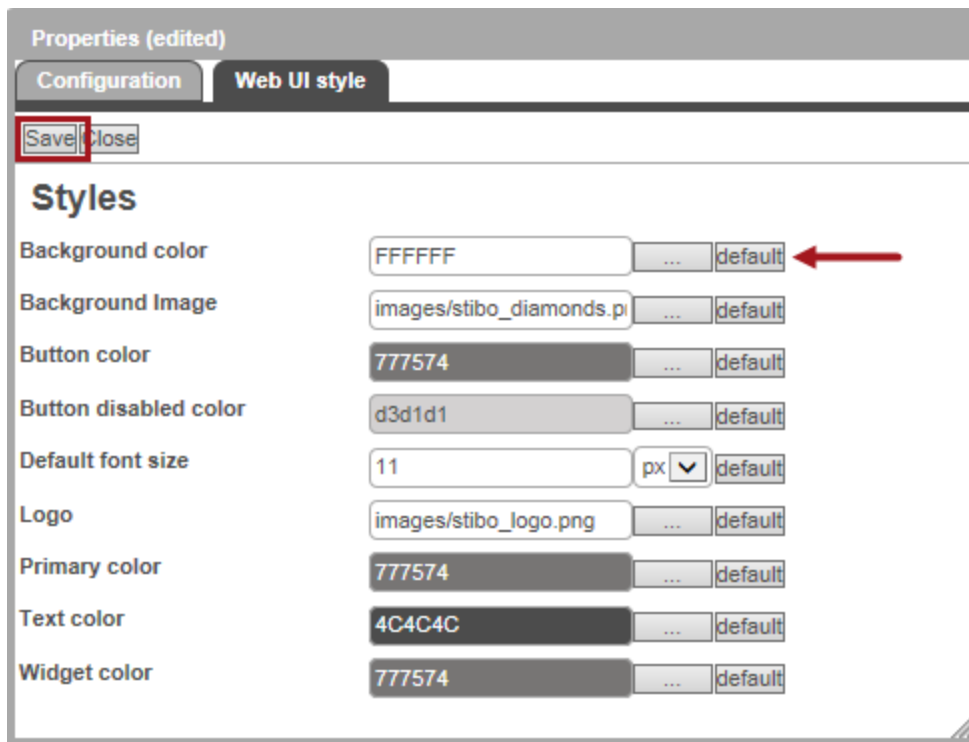
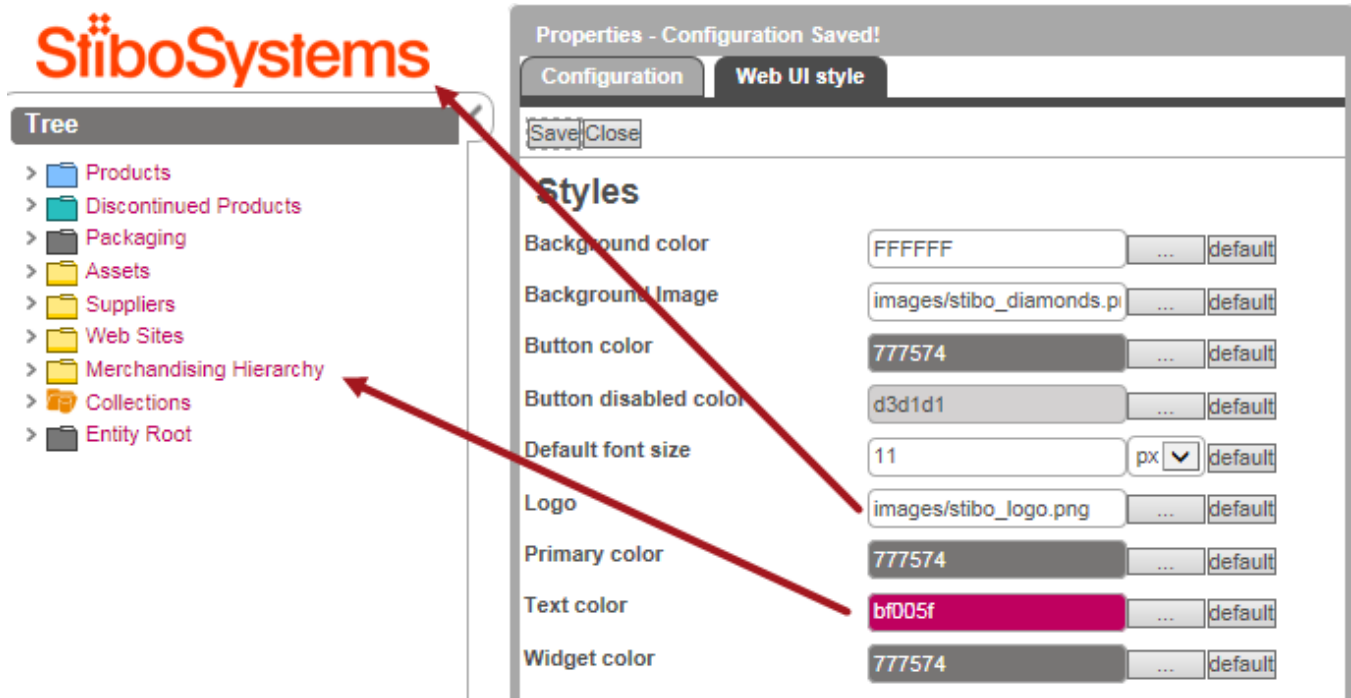
The settings on the **Web UI style** tab can be changed any time designer is open. The Web UI style is applicable to the entire Web UI and not just for the screen and/or component being configured.



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

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

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



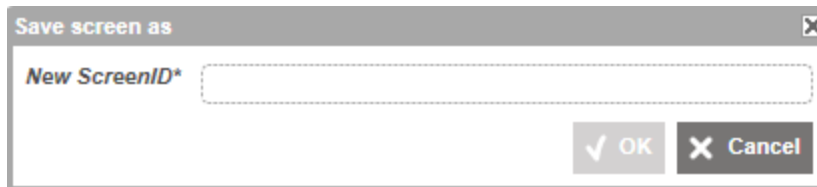
Saving Changes to a Configuration

There are two options for saving screens in the Designer.

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

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

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

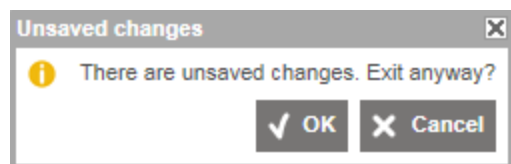


2. When the 'Save screen as' dialog appears, enter an ID for the new screen. Make it descriptive so that it can be easily identifiable when a user looks through Screen IDs to make a selection. Both the new screen ID and the original screen ID show in the screen dropdown list.

Exiting Design Mode

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

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



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

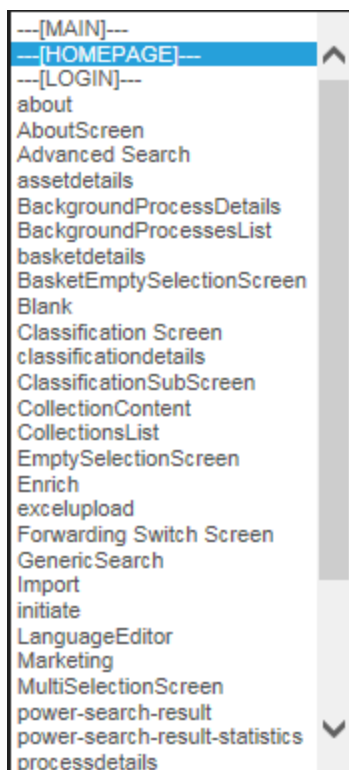
After closing / exiting Designer, the Web UI is now in normal mode.

Selecting Components

Choose a Screen and Enter Design Mode

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

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



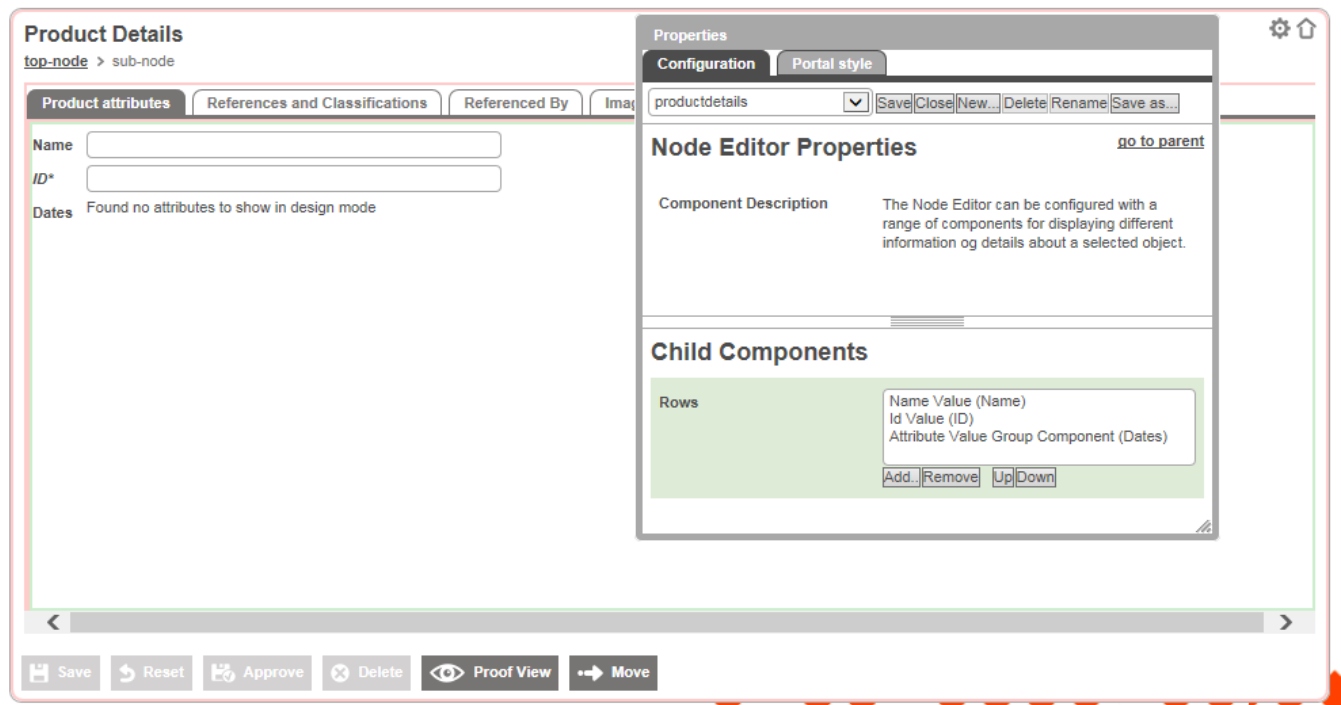
Now you can use Designer to edit the screen properties by configuring the components shown in the properties area and the child components area.

Select Components to Edit

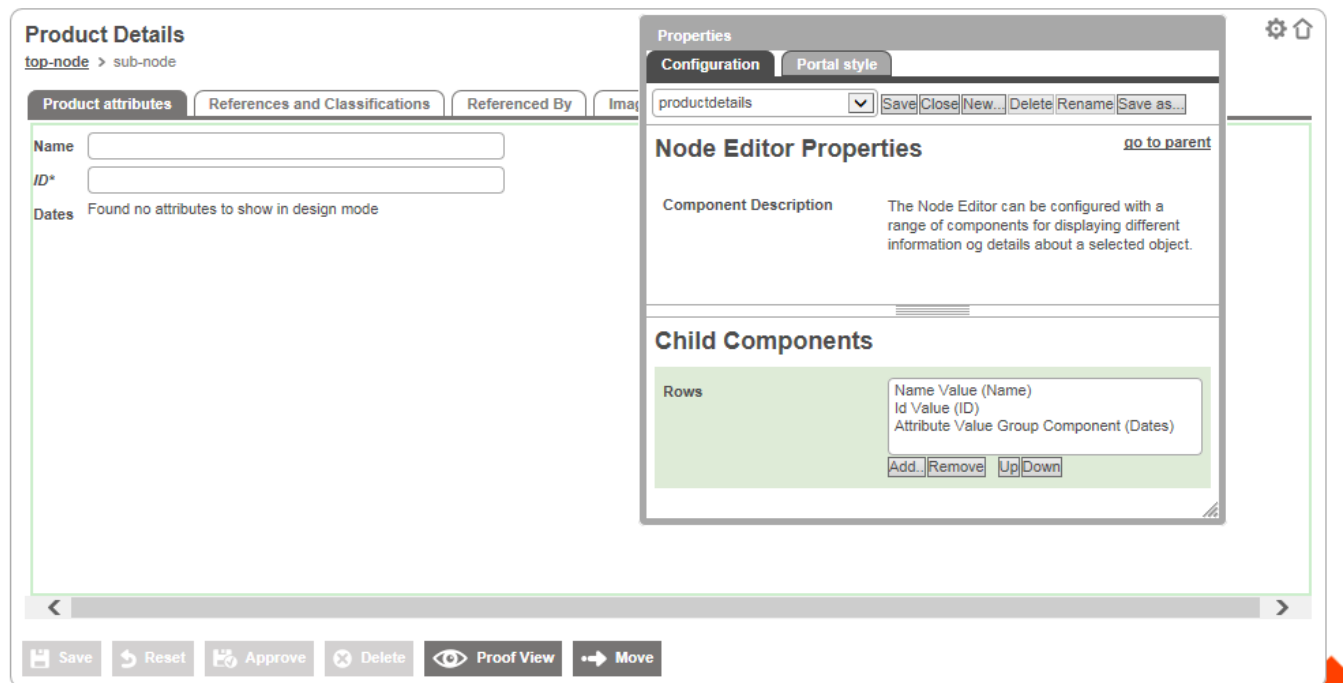
To select a component on a screen, simply click it and the Designer is updated based on the selection. Moving the cursor over the different components on a screen highlights the components that are selectable.

The highlighting patterns are outlined below:

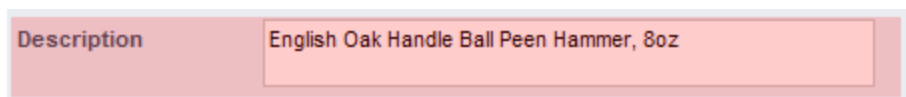
1. Red frame: When you mouse over the component, the red frame indicates that the component can contain child components.



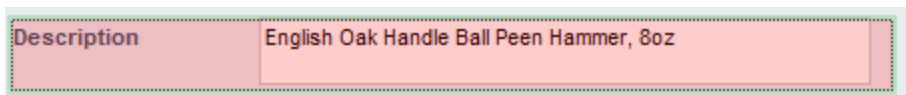
2. Green frame: The green frame is displayed if a component that can contain child components is selected.



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



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



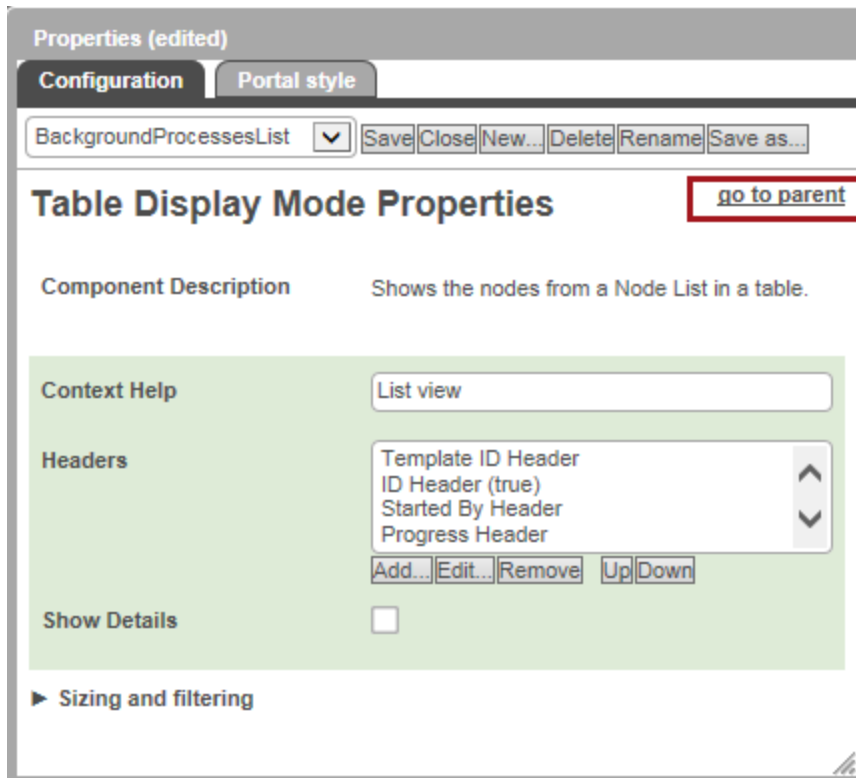
Navigating Up and Down the Component Structure

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

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

Selecting a Parent Component

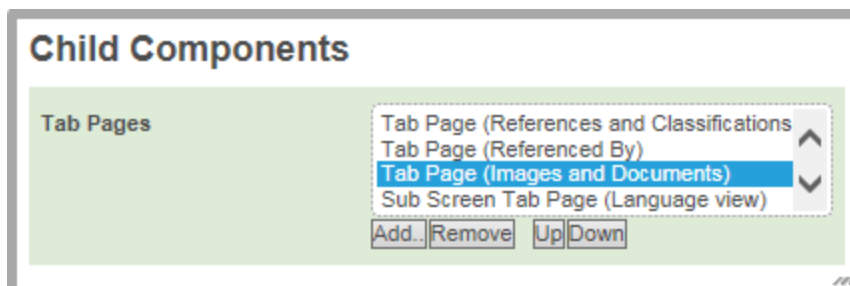
If you have selected a child component and want to select the parent component, use the '**go to parent**' link in the upper right corner of the Properties area to navigate to the parent component. When the 'go to parent' link is no longer showing, you know you are at the top level for that particular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



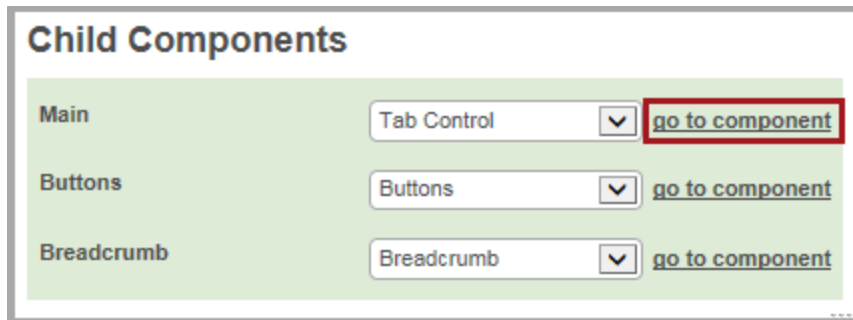
Selecting a Child Component

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

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



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



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

For descriptions of the components available within the Web UI Designer, see the **Web UI component configuration reference** available at [system]/webui/docs.

Configuring Components

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

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

Properties Area

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

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

Properties

Configuration
Portal style

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

Node List Properties
[go to parent](#)

Component Description

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

Hide Standard Buttons
☐

ID*

Lookup Screen Type For Navigation
☒

Page Size

Use Details Overlay
☐

Default Sorting Order
Ascending

Enable Default Sorting
☒

Label Texts

Selection Screens

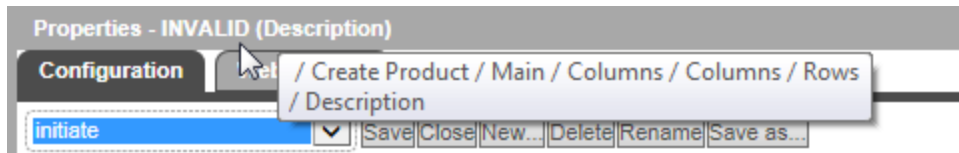
Child Components

Display Modes

Add...
Remove
Up
Down

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

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



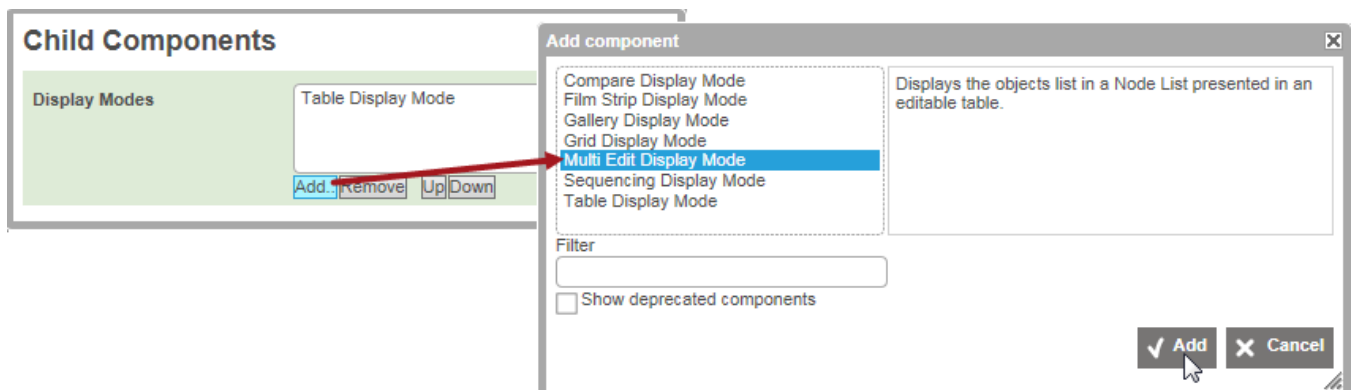
Child Components

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

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

Adding and Configuring a Child Component

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



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

Add component - configure required properties

The Sub Screen Tab Page component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Sub Screen Tab Page Properties

Component Description A component for displaying a tab which shows another screen

Details Screen*

Title

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

Child Components

Display Modes

- Table Display Mode
- Multi Edit Display Mode

Properties

Configuration **Portal style**

BackgroundProcessesList

Table Display Mode Properties

[go to parent](#)

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

Context Help

Headers

- Template ID Header
- ID Header (true)
- Started By Header
- Progress Header

Show Details ☐

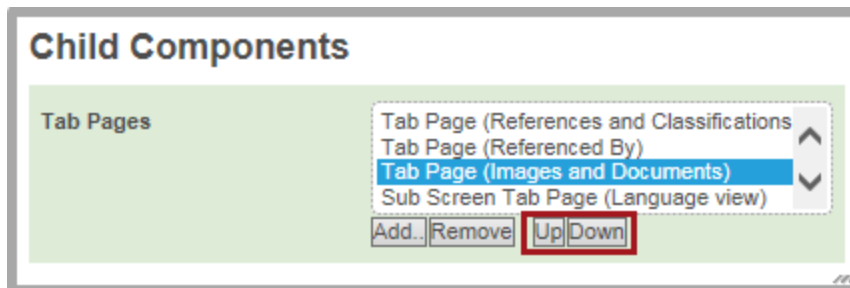
► **Sizing and filtering**

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

Changing the Sequence of Child Components

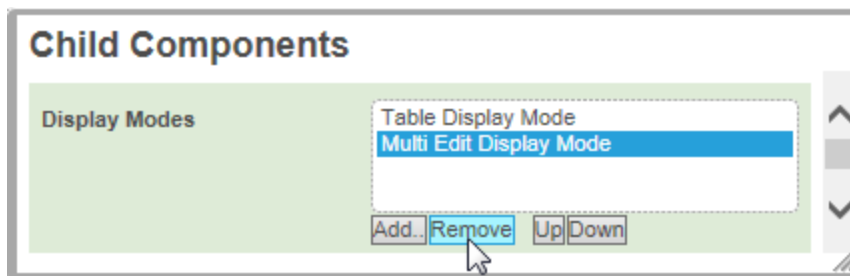
- In the child component area, click to select the child component to be re-sequenced. In the next screenshot, 'Tab Page (Images and Documents)' is selected.

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



Removing a Child Component

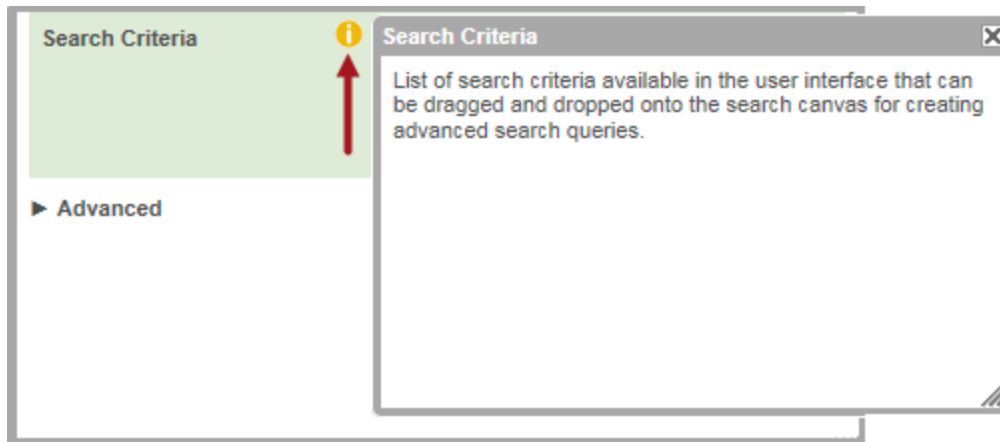
1. In the child component area, click to select a child component. In the next screenshot, 'Multi Edit Display Mode' is selected.
2. Click the Remove button. The child component is removed from the screen.



Help Text

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

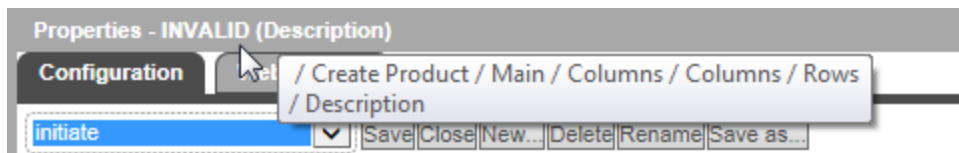
Access help text by placing the cursor over the component / parameter name. A yellow circle icon with an 'i' inside of it will show. Simply click the icon and a dialog box will appear with descriptive help text. To remove the help text box, click the 'x' in the top right corner of the box.



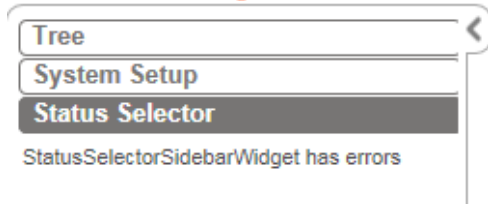
Invalid Properties

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

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



StiboSystems



For descriptions of the components available within the Web UI Designer, see the 'Web UI component configuration reference' available at [\[system\]/webui/docs](#).

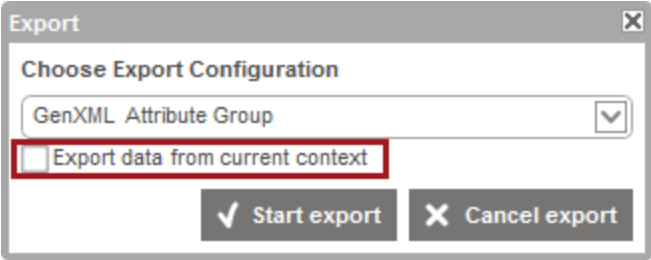
Using Web UI

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

Action Buttons

In Web UI design mode, action buttons can be added to one or more types of screens and/or components. The following list is not an all-inclusive list.

For configuration of some of these action buttons that appear on a Node List, see the **Action Button Configuration on a Node List** topic in the **Web User Interface** documentation.

Action Title	Description	Screen / Component Configuration
Export Action	Downloads selected items using the selected export configuration. - By default, STEPXML and Advanced STEPXML configurations export data from the current Web UI context. - By default, non-STEPXML configurations export data from the context saved in the export configuration. To overwrite the configuration context and export data from the current Web UI context, check the 'Export data from current context' parameter. 	Node List component on a Task List screen

Action Button Configuration on a Node List

In Web UI action buttons aid users in performing various tasks. In some cases these action buttons are configurable to allow for better ease of use. Below are the various options for configuring action buttons on Node Lists.

User-Added Toolbar Action Buttons on Node Lists

In Web UI, user-added toolbar action buttons on Node Lists help users perform various actions. A few examples are: exporting data, creating collections, submitting a task from one state to another in a workflow, etc. Because there are so many different types of actions that a user may need to use on a Node List, it is sometimes hard to remember what each button does. For this reason, text and icons of user-added toolbar actions can be customized to make it clear to the user what action the button represents.

Order Process - Initial - Normal

Clear all

Clear filter

List view

Film strip view

Gallery view

Multi edit view

Download as excel spreads...

Excel export

Submit

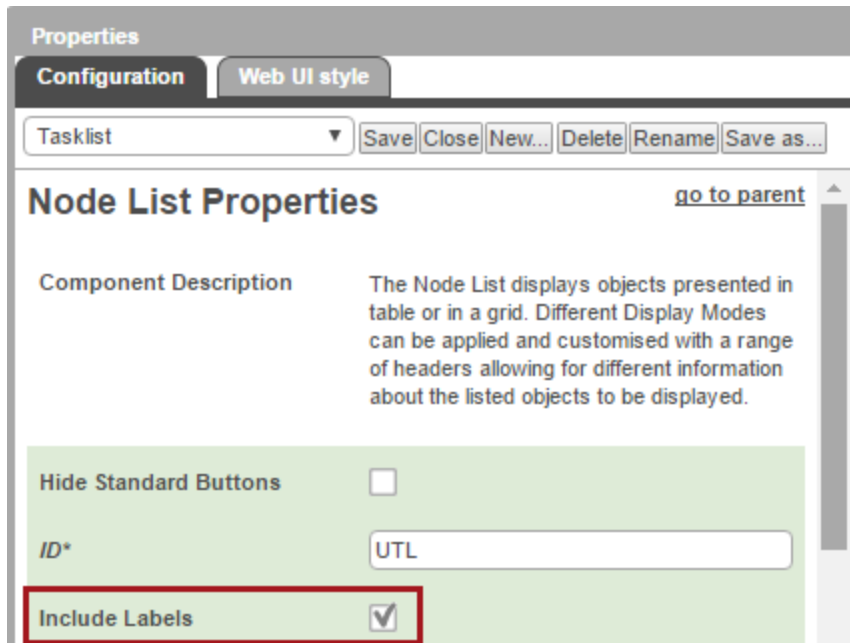
Create collection

Parent •	Thumbnail •	Assigned to n •	ID •	Workflow Vari •	Title •	Object Type •
Heels - High: 3" or higher			135828	undefined	20714A	Item

It is important to note that some of these user-added actions are shared between Node List toolbar actions and child actions on a Node Details screen. Therefore, the custom label and icon parameters are available on these shared actions, though only functional when the actions are applied as toolbar actions on Node Lists.

Enabling / Disabling Button Labels

The presence / absence of text labels is determined by the parameter **Include Labels** on a Node List.



Properties

Configuration Web UI style

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

Node List Properties [go to parent](#)

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

Hide Standard Buttons ☐

ID* UTL

Include Labels ☒

Once checked, all toolbar actions display predefined set labels, though administrators can configure user-added toolbar actions with distinct text labels to display instead of set labels.

Configuring Custom Labels for User-Added Toolbar Actions

To configure user-added toolbar actions with custom text labels go to Node List Properties > Child Components > and double click on the desired action.

Properties

Configuration

Web UI style

Tasklist

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

Node List Properties

go to parent

Component Description

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

Hide Standard Buttons

☐

ID*

UTL

Child Components

Display Modes

Table Display Mode

Film Strip Display Mode

Gallery Display Mode

Multi Edit Display Mode

Add..

Remove

Up

Down

Actions

Download Assets Action

Create Collection Action

Excel Export All Action

Export Action

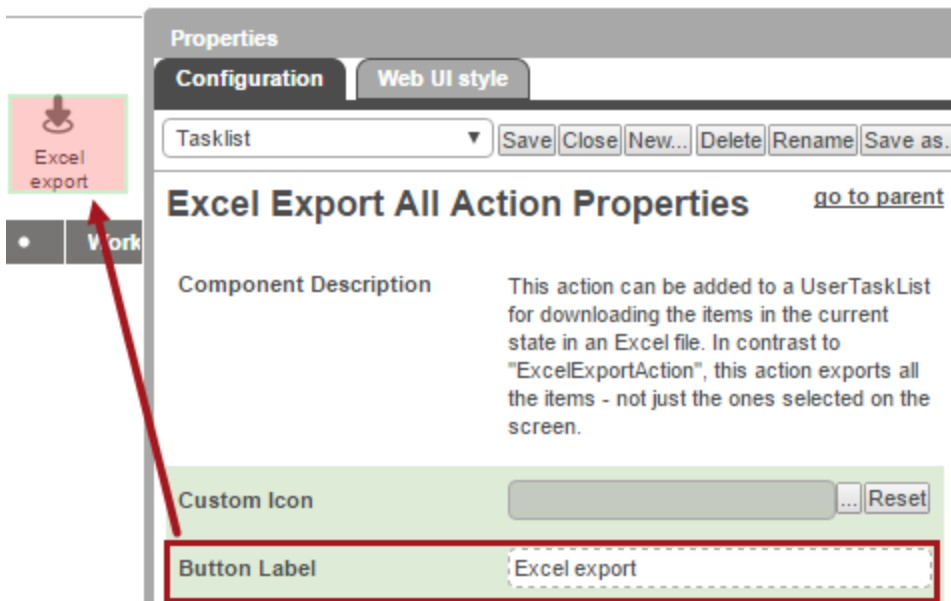
Add..

Remove

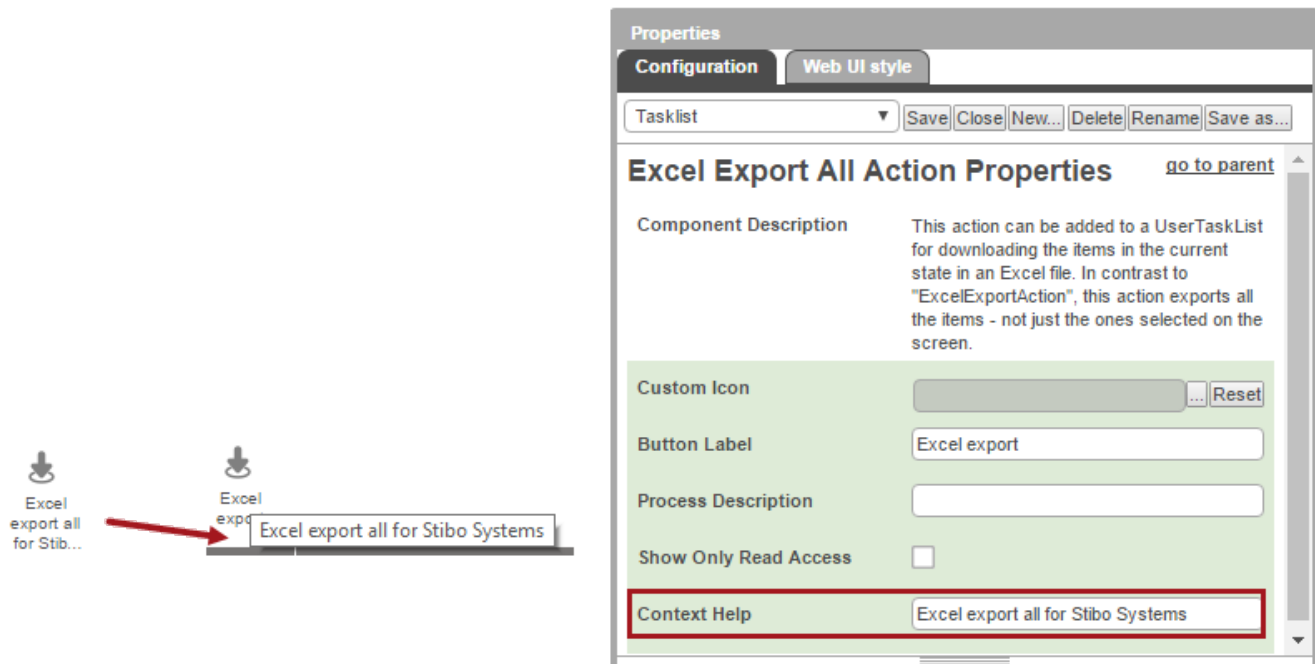
Up

Down

Once opened, a user can configure the **Button Label** field by entering the desired text label.



Note that if the text label is more than 60 pixels long it will wrap onto the next line. A text label longer than three lines at a max of 60 pixels per line shows an ellipsis, indicating that the whole title cannot be displayed. If a user needs a label that is longer than three lines, they should put the full name in the Context Help field where there is no word or pixel limit, and use an abbreviated name in the Button Label field or leave it blank.



To revert to the default Stibo button label settings, clear the Button Label field, and then save and close the designer.

Configuring Custom Icons for User-Added Toolbar Actions

There are two ways to add icons to Web UI for use on a Node List when configuring custom icons.

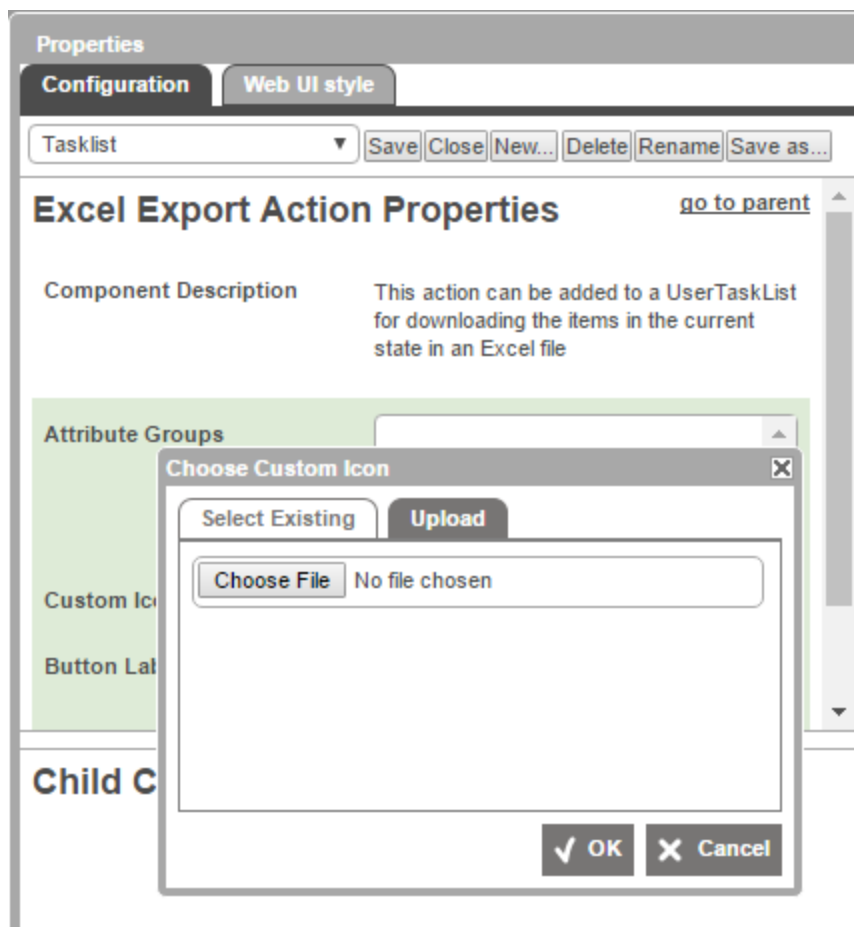
- Upload a single icon directly from a Node List configuration
- Upload multiple icons from the designer's Web UI Styles tab

Note: All uploaded images should be either a JPG or PNG file, and it is suggested that it is between 20 pixels high and 40 pixels wide.

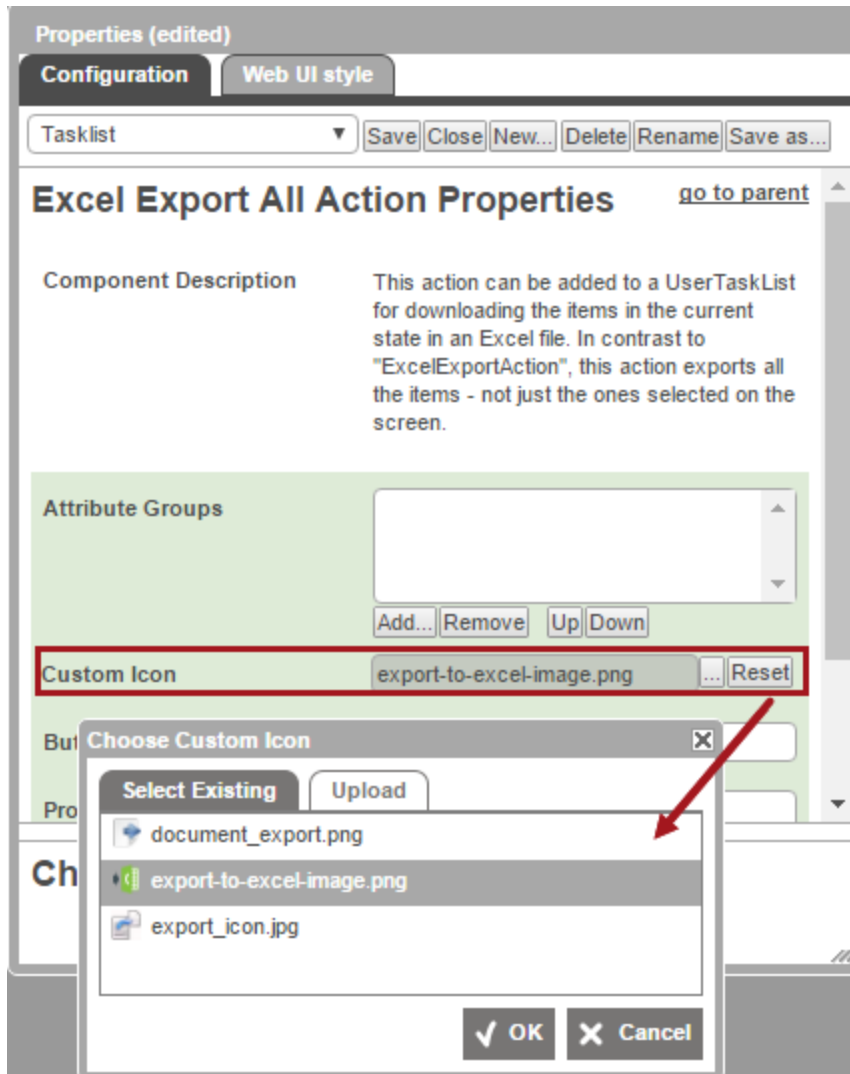
Upload a Single Icon Directly From a Node List

To add a custom icon to user-added toolbar actions go to Node List Properties > Child Components > and double-click on the desired action.

Once opened, a user can configure the **Custom Icon** field by clicking the ellipsis button, selecting the **Upload** tab, and uploading a new image. Once selected, save and close the designer.



If selecting an image already uploaded to Web UI, choose the image from the **Select Existing** tab.

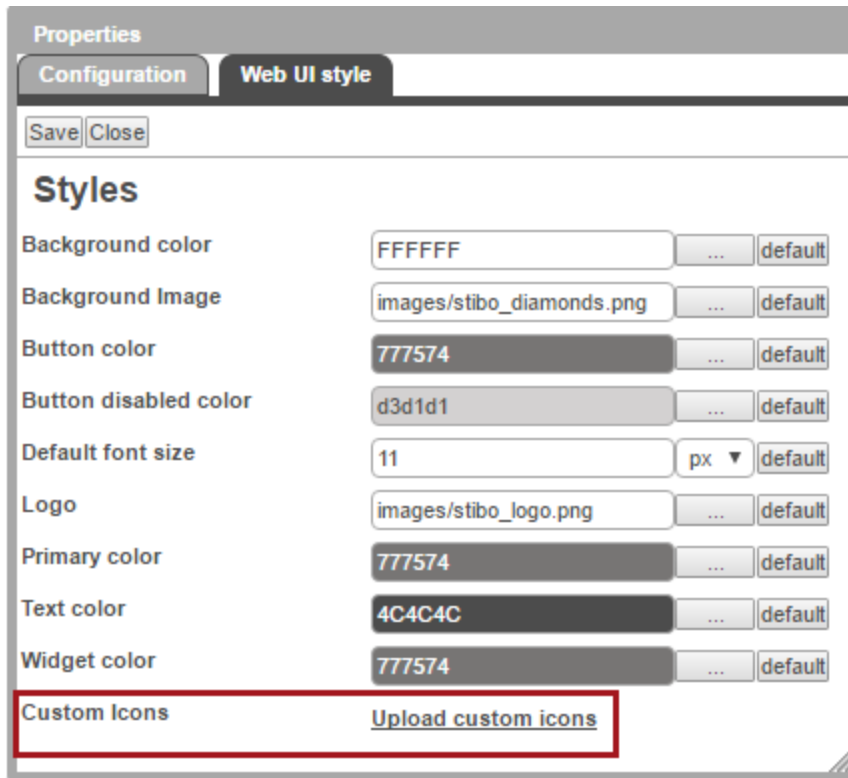


To revert to the default icon setting, select the **Reset** button next to the ellipsis button, save, and close the designer.

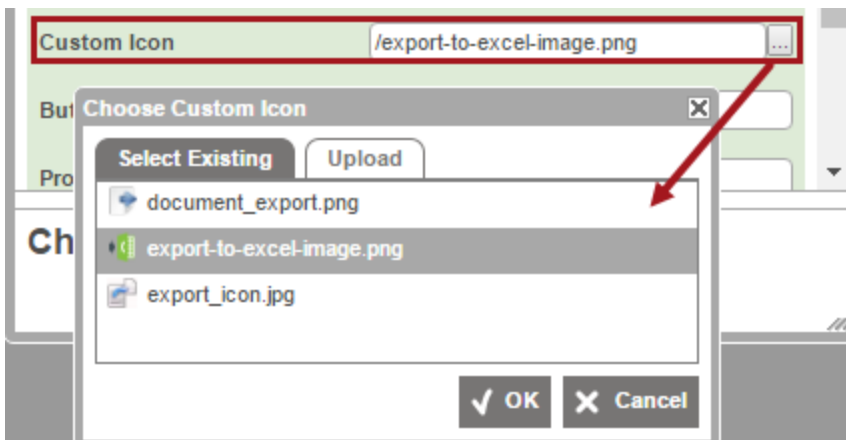
Upload Multiple Icons From the Designer's Web UI Styles Tab

The option to upload many images at one time ensures that images are ready to use when needed. For example, if an administrator is configuring multiple Node Lists, having the images already in the system to choose from will save time and make the configuring process easier.

To upload multiple icons at the same time, open the designer > Web UI Style tab > **Upload toolbar actions icon**. From here multiple files can be selected.



Once uploaded, apply the icons by going to Node List Properties > Child Components > double clicking on the desired action > Custom Icon > **Select Existing**.



To revert to the default icon setting, select the **Reset** button next to the ellipsis button, save, and close the designer.

Address Detail

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

Search

Axel Kiers Vej 11, 8270 Højbjerg, Denmark

Map

Satellite



Street Address

Axel Kiers Vej 11

City

Højbjerg

State

Zip

8270

Country

Denmark

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

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

Simple Address Component Model Configuration

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

Prerequisites

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

Data Model Considerations and Requirements

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

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

The screenshot displays the 'System Setup' interface. On the left, a tree view shows the hierarchy: 'Object Types & Structures' (Availability) -> 'Basic Object Types' -> 'Entity user-type root' -> 'Customer Data Root' -> 'Address Root' -> 'Address'. The 'Address' object type is selected. On the right, the 'Object Type' tab is active, showing a table of attributes and their values. The 'ID Pattern' attribute is highlighted with a red box, showing the value 'ADD_[id]'.

Object Type		References	Log
Description			
Name	>	>	Value
ID			CD_Address
Name			Address
Last edited by			2016-03-10 15:32:12 by USER2
Name Pattern			
ID Pattern			ADD_[id]
Enable Profiling			No
Icon			
Dimension Dependencies			
Revisability			Global Revisable

Important: Data container types can also be used and mapped as a Simple Address Object Type. It is important to note that the component can only be configured with data container types that are single valued and have auto-ID enabled. The attributes mapped to the component model fields must be valid for the specified data container type or types.

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

The screenshot shows the 'System Setup' interface with a tree view on the left and a configuration panel on the right. The tree view is expanded to 'Entity Reference Types' > 'Customer To Address'. The configuration panel shows the 'Reference Type' tab for 'Customer To Address'.

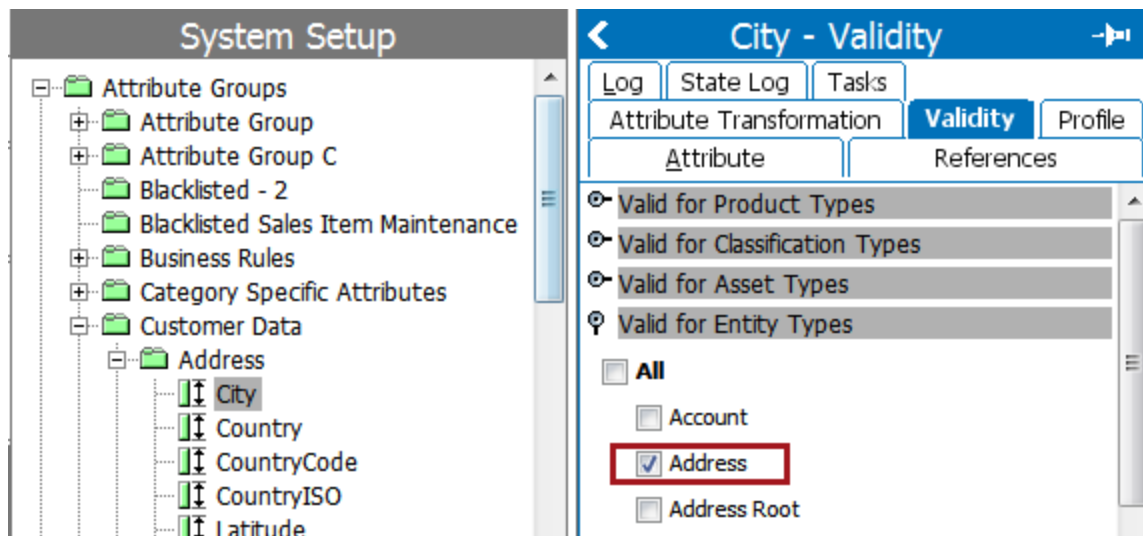
Description	
Name	Value
ID	CustomerToAddress
Name	Customer To Address
Last edited by	2016-03-14 18:41:49.724 by USER2
Externally Maintained	No
Dimension Dependencies	
Allow multiple references	Yes
Mandatory	No
Parent/Child relation	Source as parent, Target as Child
Inheritance	None
Completeness Score	1/23
Purpose	abc

The screenshot shows the 'System Setup' interface with a tree view on the left and a configuration panel on the right. The tree view is expanded to 'Entity Reference Types' > 'Customer To Address'. The configuration panel shows the 'Validity' tab for 'Customer To Address'.

Valid Source Types	
ID	Name
CD_Customer	Customer
Modify Source Types	
Valid Target Types	
ID	Name
CD_Address	Address
Modify Target Types	

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

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



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

Special note: UK addresses

STEP handles UK addresses in the following manner: the UK county maps to the State field / attribute; and the attribute mapped to the Country field will display England, Scotland, Northern Ireland, or Wales.

For example, *Kett House, Station Rd, Cambridge CB1 2JY, UK*:

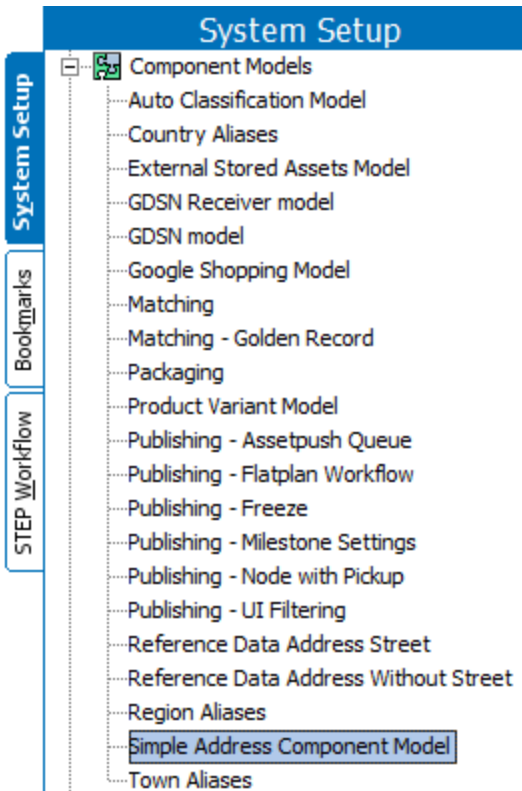
Street	Kett House, Station Road
City	Cambridge
State	Cambridgeshire
Country	England
Country ISO Code	GB
Zip	CB1 2JY

Component Model Configuration

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

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

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



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

Component Model Configuration

Name >	>	Value >	Description >
> Simple Address		Address	Simple Address Object Type
> City		City	The City
> Country		Country	The Country
> Country ISO Code		Country ISO Code	The ISO 3166-1 Alpha-2 code
> Latitude		Latitude	The Latitude
> Longitude		Longitude	The Longitude
> Quality		Quality	Quality attribute for simple address
> Standardized City			The standardized city
> Standardized Country			The standardized country
> Standardized Country ISO Code			The Standardized ISO 3166-1 Alpha-2 code
> Standardized Latitude			The standardized latitude
> Standardized Longitude			The standardized longitude
> Standardized State			The standardized State
> Standardized Street			The standardized street
> Standardized Street Name		Standardized Street	The standardized street name
> Standardized Street Number			The standardized street number
> Standardized Street Post Qualifier			The standardized street post qualifier
> Standardized Street Pre Qualifier			The standardized street pre qualifier
> Standardized Street Type			The standardized street type
> Standardized Zip			The standardized Zip
> State		State	The State
> Street		Street	The Street
> Street Name			The Street Name
> Street Number			The Street Number
> Validation Response		Validation Response	The Cached Validation Response
> Zip		Zip	The Zip
> Edit			

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

- The Simple Address mapping must be configured. The selection should be the address object type referred to in step 1 of the data model considerations and requirements, above.
- The Street, Street Name, and Street Number parameters are closely related. Street is used to hold a complete street address, including a house or building number, as well as a street name. Street Name holds the street name only, while Street Number holds the building / house number only. These separated fields are especially useful when dealing with standardization and/or deduplication of addresses. Note that Street is required, while Street Name and Street Number are optional.

- Any attributes for which address data should be stored must be populated. Some mappings are required, while others are optional. The screenshot above displays a configuration with only the required mappings populated - this is the minimum configuration required to enable saving and use of the component model.

Editing the Component Model

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


Edit Component Model Configuration

>	Name	>	>	Value	>	Description
>	✓ Simple Address	+		Address		Simple Address Object Type
>	✗ City	+				The City
>	✓ Country	+		Country		The Country
>	✓ Country ISO Code	+		Country ISO Code		The ISO 3166-1 Alpha-2 code
>	✓ Latitude	+		Latitude		The Latitude
>	✓ Longitude	+		Longitude		The Longitude
>	✓ Quality	+		Quality		Quality attribute for simple address
>	✓ Standardized City	+				The standardized city
>	✓ Standardized Country	+				The standardized country
>	✓ Standardized Country ISO Code	+				The Standardized ISO 3166-1 Alpha-2 code
>	✓ Standardized Latitude	+				The standardized latitude
>	✓ Standardized Longitude	+				The standardized longitude
>	✓ Standardized State	+				The standardized State
>	✓ Standardized Street	+				The standardized street
>	✓ Standardized Street Name	+		Standardized Street		The standardized street name
>	✓ Standardized Street Number	+				The standardized street number
>	✓ Standardized Street Post Qualifier	+				The standardized street post qualifier
>	✓ Standardized Street Pre Qualifier	+				The standardized street pre qualifier
>	✓ Standardized Street Type	+				The standardized street type
>	✓ Standardized Zip	+				The standardized Zip
>	✓ State	+		State		The State
>	✓ Street	+		Street		The Street
>	✓ Street Name	+				The Street Name
>	✓ Street Number	+				The Street Number
>	✓ Validation Response	+		Validation Response		The Cached Validation Response
>	✓ Zip	+		Zip		The Zip

Save
Restore live settings
Save pending
Cancel

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

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

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

Address Detail Configuration

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

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

Prerequisites

It is very important to note that system administrator action is required to use the Address Detail component.

Stibo Systems must provide each customer with a Google Map channel parameter before users can make use of the Address Detail component. The parameter will go into a configuration property that needs to be added to the `sharedconfig.properties` file before the Google Map API will function. If Address Detail was previously functional in another version of STEP Trailblazer, it will no longer work without the channel parameter. Contact your Stibo Systems account manager to obtain the required information. Also, if using the Address Detail Map within the Address Details component, when contacting your account manager, you will need to provide the URL(s) used for accessing the Web UI that is configured with the Address Detail component to ensure that the map will also function. A Google error will show in place of the map if Google is unable to authenticate the URL that makes the map call.

Once the channel parameter is in place, to configure the Address Detail component, the Simple Address Component Model configuration must have been previously completed. Additional information can be found in the Simple Address Component Model section.

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

Configuring the Screen

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

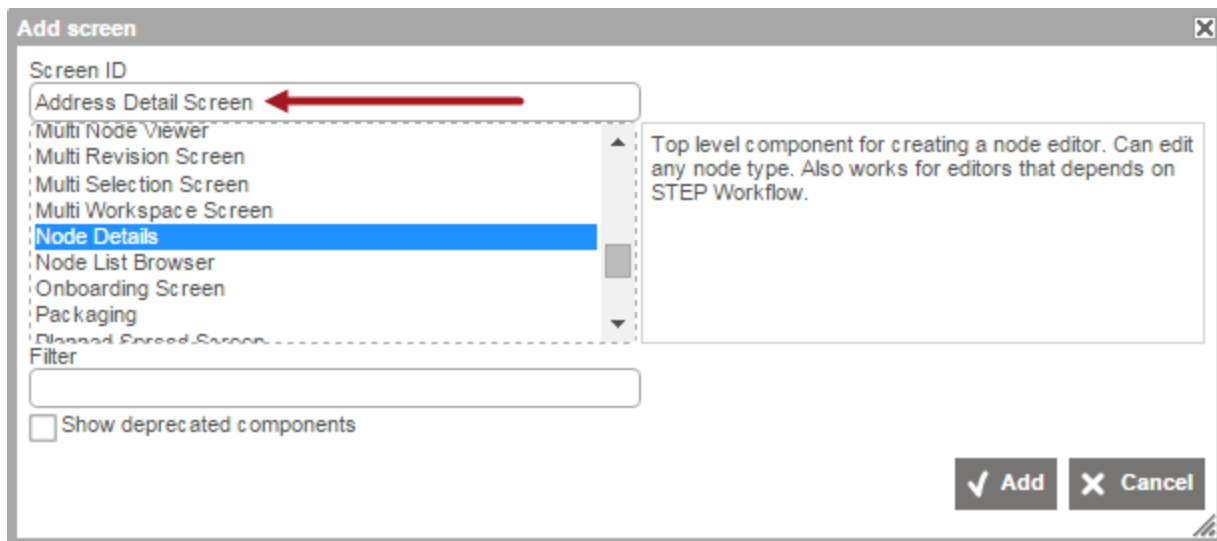
For simplicity, this example will use a new Node Details screen with a Node Editor child component. However, it should be noted that the Address Detail component could also be configured using a Tab Control child on the Node Details screen (followed by a Tab Page child on the Tab Control component and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

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

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



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



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

Properties (edited)

Configuration Web UI style

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

Node Details Properties

Component Description Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title

Css Class

► Validation

► Multiple Target References

Child Components

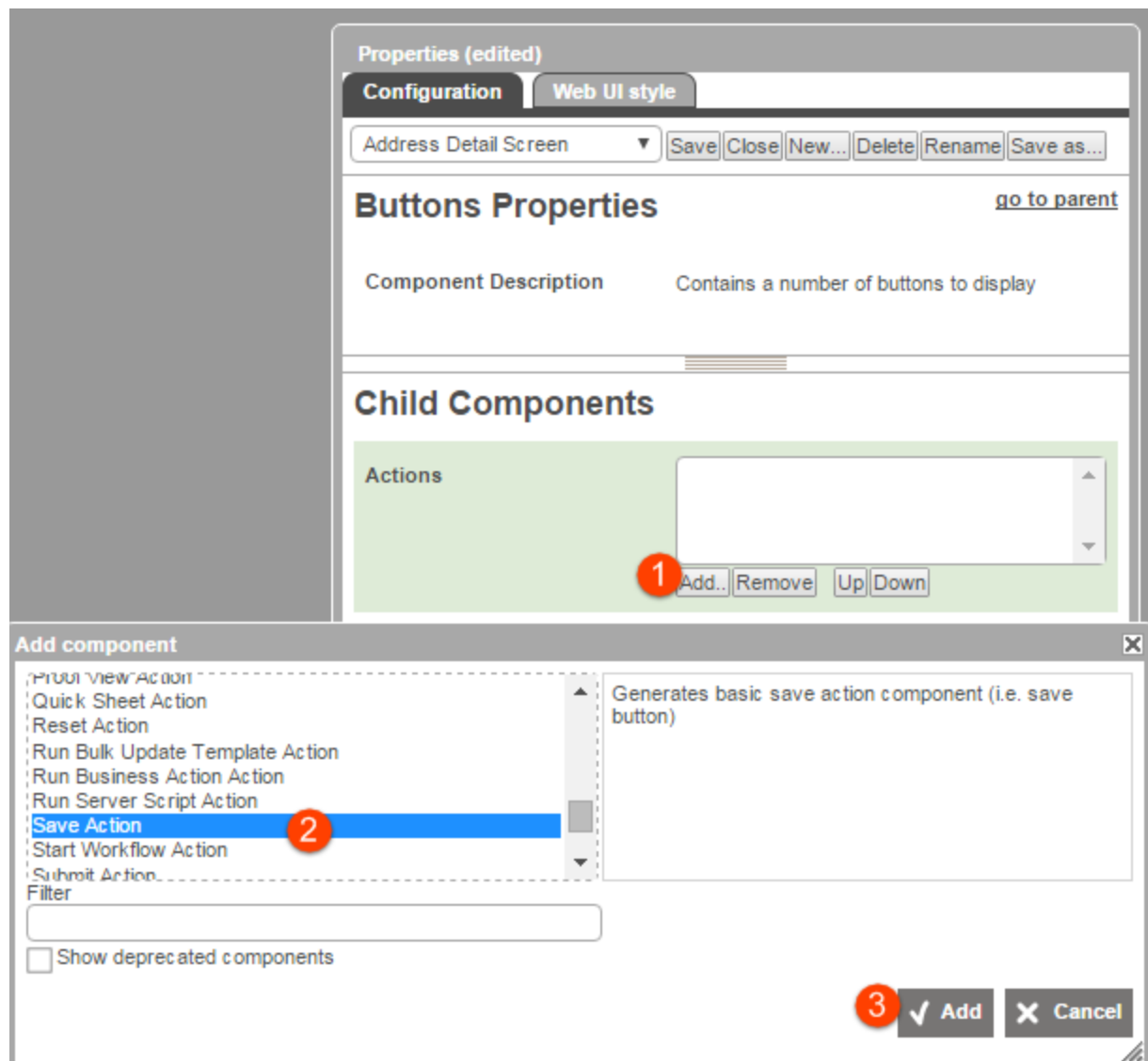
Main	Node Editor	go to component
Buttons	Select a child comp	go to component
Breadcrumb	Select a child comp	go to component

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

Child Components

Main	Node Editor	go to component
Buttons	Buttons	go to component
Breadcrumb	Select a child comp	go to component

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



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

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

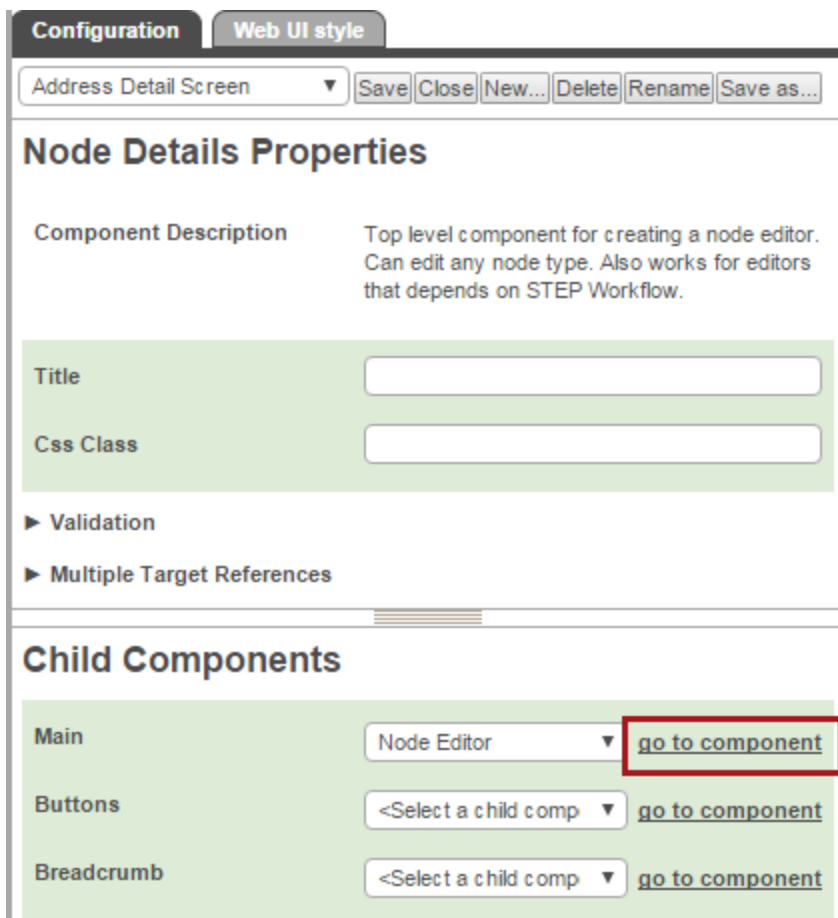
At this point you have created a place for the Address Detail component to be added, and added a Save button to that location, but have not yet added the component to your configuration. This is done via configuration of the Node Editor.

Configuring the Node Editor

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

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

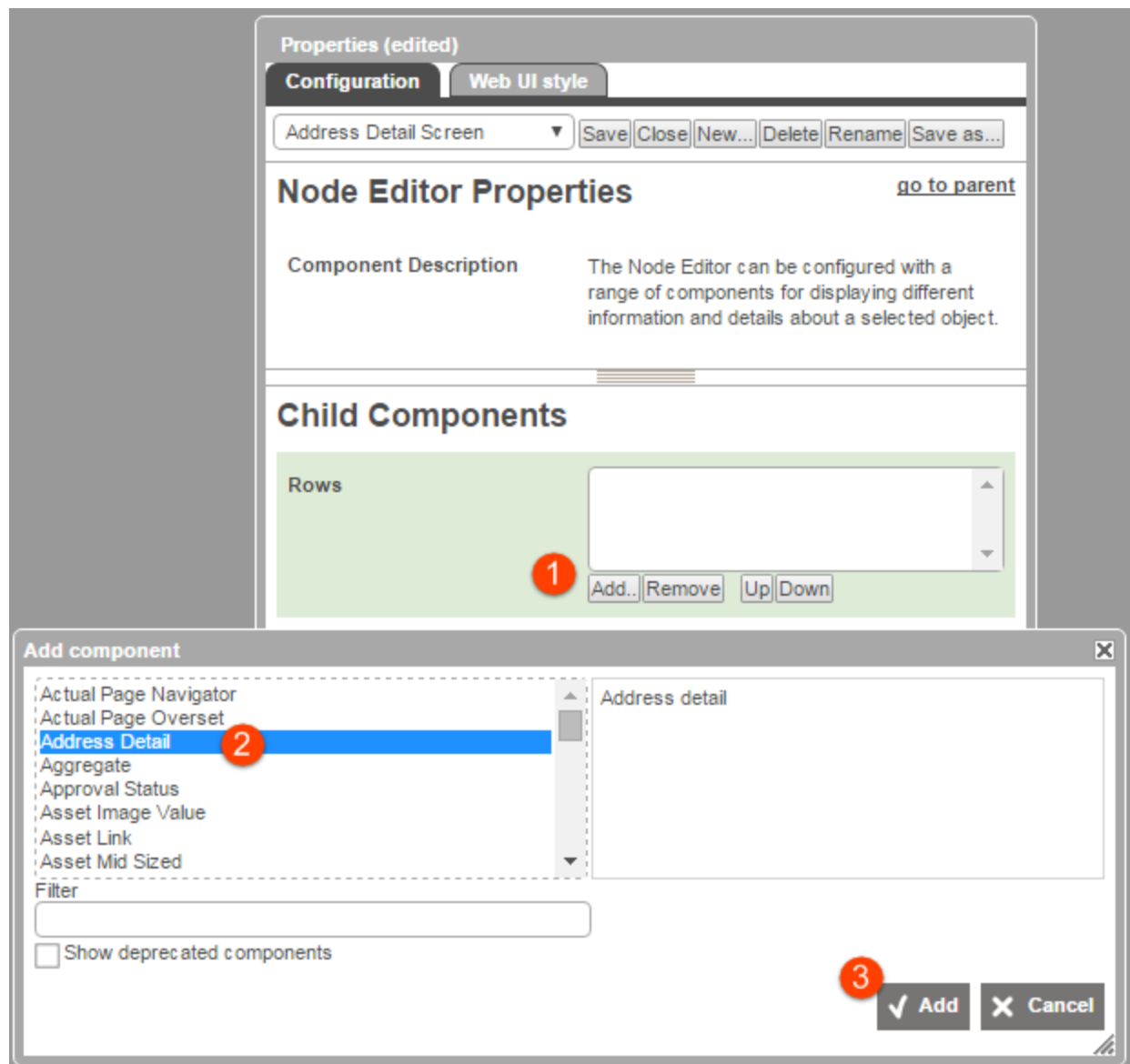
1. Navigate to the screen and component where you have added a Node Editor and click the **go to component** link to configure it.



The screenshot shows the Stibo Systems configuration interface. At the top, there are two tabs: 'Configuration' (selected) and 'Web UI style'. Below the tabs is a dropdown menu showing 'Address Detail Screen' and several action buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Node Details Properties'. It contains a 'Component Description' field with the text: 'Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.' Below this are two input fields: 'Title' and 'Css Class'. Underneath these fields are two expandable sections: 'Validation' and 'Multiple Target References'. The bottom section is titled 'Child Components' and contains a table with three rows: 'Main', 'Buttons', and 'Breadcrumb'. Each row has a dropdown menu and a 'go to component' link. The 'Main' dropdown is set to 'Node Editor', and its 'go to component' link is highlighted with a red box. The 'Buttons' and 'Breadcrumb' dropdowns are set to '<Select a child comp' and their 'go to component' links are also visible.

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

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

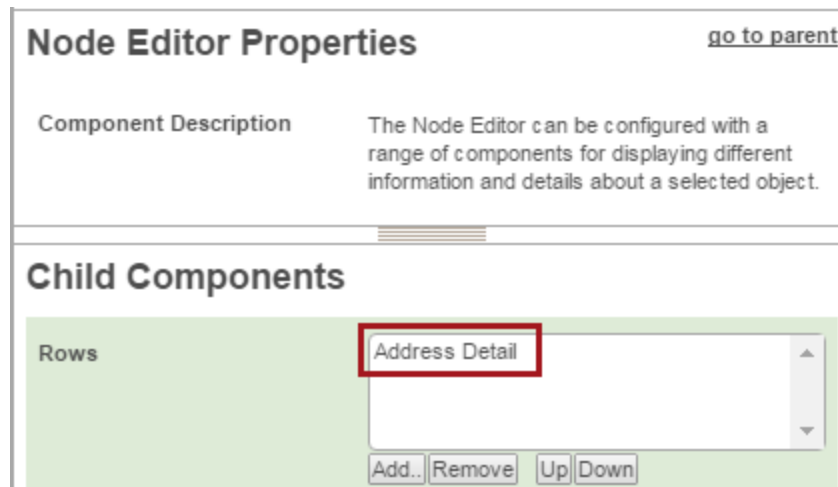


At this point, you have added the Address Detail component to the configuration but have not yet configured the component itself. This is done via configuration of the Address Detail component.

Configuring the Address Detail Component

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

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



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

Properties

Configuration

Web UI style

Address Detail Screen

Save

Close

New...

Delete

Rename

Save as...

Address Detail Properties

[go to parent](#)

Component Description

Address detail

Css Class

stibo-managed-node

Data Container Type

... Clear

Duplicate Handler

<Select an option>

▼ Edit...

Label

Object Type

... Clear

Parameter Mapping

Add...

Edit...

Remove

Up

Down

Parent

<Select an option>

▼ Edit...

Reference Type

... Clear

Temp Parent For Find Existing

<Select an option>

▼ Edit...

Child Components

Actions

Add..

Remove

Up

Down

Rows

Add..

Remove

Up

Down

3. A specific **Data Container Type** should only be specified if the Simple Address Component Model is configured to use a data container type (or types) as a Simple Address Object Type.

It is important to note that the component can only be configured with data container types that are single valued and that are auto-ID enabled. Have the data container auto-ID enabled means that the Address Detail component can create a Data Container instance on, for example, Save.

4. The **Object Type** parameter should be configured by clicking the ellipsis and selecting the object type that has been configured for address objects on the system.
5. **Duplicate Handler** should only be set if using the Find Existing action. See the **Using the Find Existing Action** section at the end of this topic for more information.
6. The **Parameter Mapping** parameter can be left blank. If working with data containers, you must leave this blank as the parameter mappings are not supported for that use.
7. The **Parent** parameter can be left blank or configured to use the Configured Address Detail Parent Handler. If left blank, each address object will be created under the selected object. This requires that the data model support child objects of the object type selected in step 3 and is used when address objects should be created as children to, for example, a customer object. If the Configured Address Detail Parent Handler option is selected, the properties dialog for this handler is automatically opened, and a parent must be selected. This is used when all address objects should be created under a single parent and is used in the case where, for example, a flat hierarchy is used and all address objects exist under a single root node.
8. The **Reference Type** parameter should be configured by clicking the ellipsis and selecting a reference that has the address object type selected in step 3 as a *target* of the reference. In addition, the selected object must also be a *source* of the reference.

To clarify, it must be understood that the Address Detail component can work in two ways.

- When accessed from an address object selection in Web UI, the component lets you edit the selected address and no Reference Type is needed. You may experience unexpected results if a Reference Type is selected and you are editing existing addresses.
- When accessed from a non-address object selection, e.g., a customer, the component creates a *new* address object and a reference between it and the selected object, using the reference type configured in this parameter. If the parameter is not configured with a valid reference that uses a valid source and an address object target, the component can only be used to edit existing addresses.

9. **Temp Parent for Find Existing** should only be configured to use the Configured Address Detail Parent Handler if using the Find Existing action. See the **Find Existing Action** section at the end of this topic for more information.

To configure the child components, continue with the steps below:

10. When using Address Detail with a non-address object selection, e.g., a customer, intending to create a *new* address object and create a reference between it and the selected object, then Find Existing functionality can be used and the action can be added. In Child Components > Actions, click the **Add** button and select **Find Existing Action** from the Add Component dialog. Next, click the **Add** button and select **Reset** from

the Add Component dialog. This adds a Find Existing action and Reset button that displays below all child component rows configured for Address Detail Properties. Additional configuration is required to use Find Existing functionality, and more information can be found in the Using the Find Existing Action section at the end of this topic.

11. In Child Components > Rows, click the **Add** button and select **Address Detail Search** from the Add Component dialog. This adds a field to the page so that users can type in an address to be searched via Google.
12. Optionally, in Child Components > Rows, click the **Add** button and select **Address Detail Map** from the Add Component dialog. This adds an interactive map to the page so that users can drag and drop a pin to populate an address and/or see their searched address appear on the map. This configuration is optional and the component will function without its addition.
13. In Child Components > Rows, click the **Add** button and select **Attribute Value Component** or **Attribute Value Group Component** from the Add Component dialog. It is a good idea to use the group option and set up all the desired attributes into that group, so that there is no need to repeat this step several times to display all the desired attributes. Typically this will include the attributes mapped in the Simple Address Component Model, as well as any other attributes on address objects that end users should have access to. For each attribute or attribute group added, the Enable Tag Conversion parameter must be manually unchecked.

Attributes that have an base validation type of 'List Of Values' are not supported for data container address modeling usage.

Add component - configure required properties

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

Attribute Value Group Component Properties

Component Description

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

Attribute Group*

Address

Blacklisted Attribute Group

Clear

Context Help

Display Mode

<Select a value>

Enable STEP Tags

☐

Enable Tag Conversion

☐

Exclude Filters

Add... Edit... Remove Up Down

Note: Configuration options are available to use country ISO-code integration, where the Country attribute value / field auto-populates an ISO alpha-2 code based on the Google Map API. Detailed information can be found in the **Address Detail Country ISO-Code Integration** topic. There is also information regarding how to setup and use a user-created LOV attribute for Country, rather than a free text attribute, within the **Address Detail Country LOV Attribute** topic.

A complete sample configuration of the Address Detail component is shown below.

Properties - Configuration Saved!

Configuration

Web UI style

Address Detail

SaveCloseNew...DeleteRenameSave as...

Address Detail Properties

go to parent

Component Description

Address detail

Css Class

stibo-managed-node

Data Container Type

... Clear

Duplicate Handler

<Select an option> Edit...

Label

Address Details

Object Type

CD_Address ... Clear

Parameter Mapping

Add... Edit... Remove Up Down

Parent

Configured Address Detail Parent Handler Edit...

Reference Type

Address ... Clear

Temp Parent For Find Existing

<Select an option> Edit...

Child Components

Actions

Add... Remove Up Down

Rows

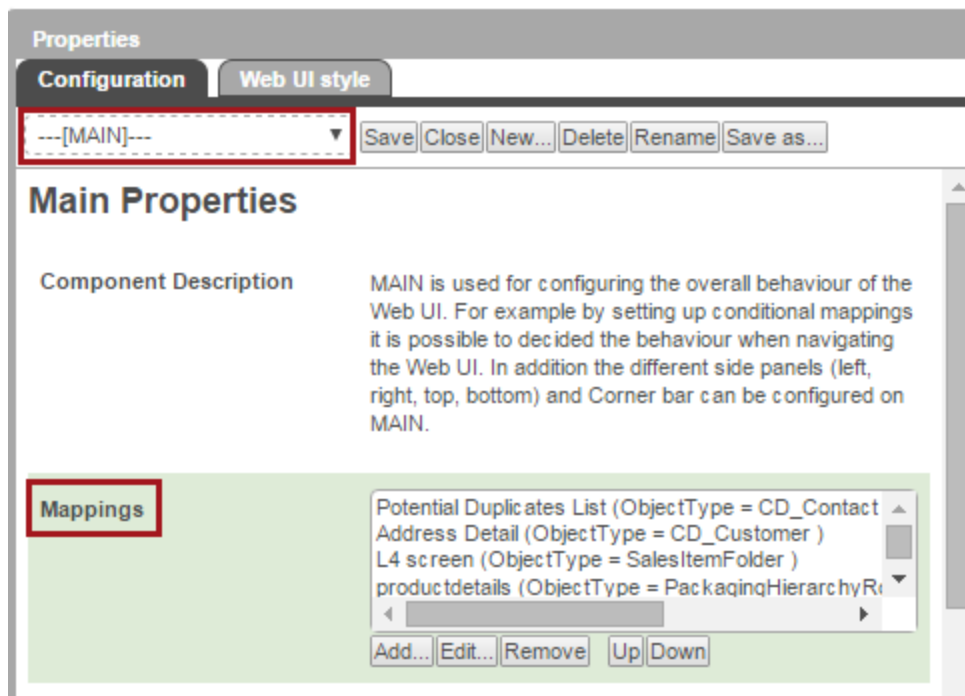
Address Detail Search (Address)

Address Detail Map

Attribute Value Group Component

Add... Remove Up Down

At this point, the component is fully configured. However, as with any screen, it must be mapped appropriately in Main Properties > Mappings for end users to be able to access it. For more information about mapping, see the **Main Properties** documentation.



Using the Find Existing Action

In an effort to avoid the creation of duplicate addresses in STEP, Find Similar functionality can be added to the Address Detail component via the Find Existing action. Users can input an address and then run a Find Existing action that searches objects for a similar match using the matching setup that the customer creates and uses for duplicate handling. If similar objects are found after running the action / algorithm, the user is provided with the results in a user-configured detailed list.

Please note that the Find Existing action will only be active in Web UI if using Address Detail in 'reference mode.' This means that the data model being used, for example, has an object (e.g., customer) that references an address object containing address attributes.

The Find Existing action works with the referenced address objects, is not applicable, and should not be configured to display when viewing the screen for an address node itself. Also, if Find Existing is configured when using the Address Detail in any other way or mode (embedded / data container), the Find Existing action button will not be visible since the action is not intended for use in other situations.

Detailed information on how to set up the Address Detail Component to utilize the Find Existing action can be found in the **Find Existing** topic in the **Web User Interfaces** documentation.

Address Detail Country ISO-Code Integration

The Address Detail component can be set up to auto-populate ISO 3166-1 alpha-2 country codes (e.g., CN instead of CHN for China, or DK instead of DNK for Denmark) returned by Google when doing address searches and using the Google map. Using these country codes, and not pulling from a List of Values (LOV) or manually entering countries, promotes data consistency and standardization.

When the Google API call is made, the ISO alpha-2 country code of the chosen Web UI locale is returned to STEP. The ISO code is then stored in the attribute that has been bound to the new Country ISO Code field in the component model. If configured correctly, the code will auto-populate in Web UI.

Search

Axel Kiers Vej 11, 8270 Højbjerg, Denmark

Map

Satellite

☐ Terrain

Street

Axel Kiers Vej 11

City

Højbjerg

State

Country

Denmark

Country ISO Code

DK

Zip

8270

To get the integration to work, the Simple Address Component Model in workbench and the Address Detail component in Web UI must be configured properly. This means that the attribute that you map to the component model Country ISO Code field is the attribute that you will add to the Address Detail component, either as part of an attribute group or with each part of the address added as individual values. An example is shown above.

Component Model Configuration		
> Country ISO Code		Country ISO Code The ISO 3166-1 Alpha-2 code

Country ISO Code Attribute

The attribute set up to be mapped to the Country ISO Code field in the component model should be set to Externally Maintained = Yes, and on the Validity tab within the object editor, the attribute needs to be valid on the applicable Entity Types and Entity Reference Types.

Attribute		References	Attribute Transformation	Validity	Profile	Log	State Log	Tasks
Description								
Name	>	>	Value	>				
ID			CountryISOCode					
Name			Country ISO Code					
Last edited by			2016-10-25 13:16:37 by USER8					
Full Text Indexable			No					
Externally Maintained			Yes					
Hierarchical Filtering			None					
Calculated			No					
Type			Description					
Dimension Dependencies								
Mandatory			No					
Cryptographic Key			<No Encryption>					
Attribute Help Text		abc						
Completeness Score		123						
Condition								
Display Name		abc						
DisplaySequence		123	50					
Attribute Validation								
Name	>	Value	>					
Validation Base Type			Text					
List Of Values			N/A					
Multi Valued			No					
Mask								
Minimum Value			N/A					
Maximum Value			N/A					
Maximum Length			#Undefined#					
Edit Validation Rule								
Aspects								
Component	>	Name	>	Description	>			
Simple Address Component Model		Country ISO Code		The ISO 3166-1 Alpha-2 code				

When adding this attribute into the Address Detail > Child Components > Rows, verify your settings are described as follows:

1. When adding the Attribute Value Component for the country attribute or an Attribute Value Group Component that contains the country attribute, disable / uncheck the **Enable Tag Conversion** parameter.
2. If the **Read Only** parameter is set, the attribute field is uneditable by the end user. An admin may make this selection to keep a user from changing the country manually. Read-only country attributes will continue to populate automatically.

For more information regarding how to map the attribute to the Country ISO Code field in the component model, see the **Simple Address Component Model Configuration** topic.

Address Detail Country LOV Attribute

To use a country attribute that has a List of Values (LOV) as the validation base type, careful consideration must be taken regarding the setup of the LOV and configuring the country attribute to display in Web UI. **Within the last paragraph of this topic, you will find more information regarding country ISO-code integration and how that setup may be preferred over using a country LOV attribute.**

CountryCode



Setting Up the LOV and Country Attribute

CountryISO - List of Values

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

Description

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

In Attribute Groups

ID	> Name	>

[Add Attribute Group](#)

List of Values Validation

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

Values

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

[Add Value](#)

1. Log in to the workbench. User must have privileges to create and manage attributes and LOVs.
2. In **System Setup**, right-click on the List of Values / LOVs icon and choose **Create New List of Values**. At a minimum, make these selections:
 - Under Description, **Use Ids on values** must be set to Yes.
 - Under List of Values Validation, **Validation Base Type** must be set to Text.
 - Also under List of Values Validation, **Allow Users to Add Values** must be set to No.

3. Click on the **Add Value** link found under the Values section / flipper to begin entering the values and value IDs.
4. For each country, enter the country name as the Value ID and the desired display names / codes for Value.

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

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

Configuring a Country Attribute Value Component

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

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

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

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

 Invalid value. Australia

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

Sometimes using an LOV attribute with the country code does not work well with locale changes and different geolocations. It is recommended that country ISO-code integration option be used so that when the Google API call is made, the ISO alpha-2 country code of the chosen Web UI locale is returned to STEP. The ISO code is then stored in the attribute that is bound to the Country ISO Code field in the Simple Address Component Model. If configured correctly, the code will auto-populate in Web UI. For more information on this set up, see the **Address Detail Country ISO-Code Integration** topic.

Advanced Search

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

Advanced Search topics in online help include a mix:

- Advanced Search Initial Configuration
- Restricting and Sharing Advanced Searches
- Using Advanced Search

The topics listed below cover more advanced Advanced Search configurations, going beyond the basic setups described in the introductory material.

- Mapping Task List to Workflow State
- Using Advanced Search with Workflow Tasks

Advanced Search Initial Configuration

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

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

Adding Advanced Search to the Homepage

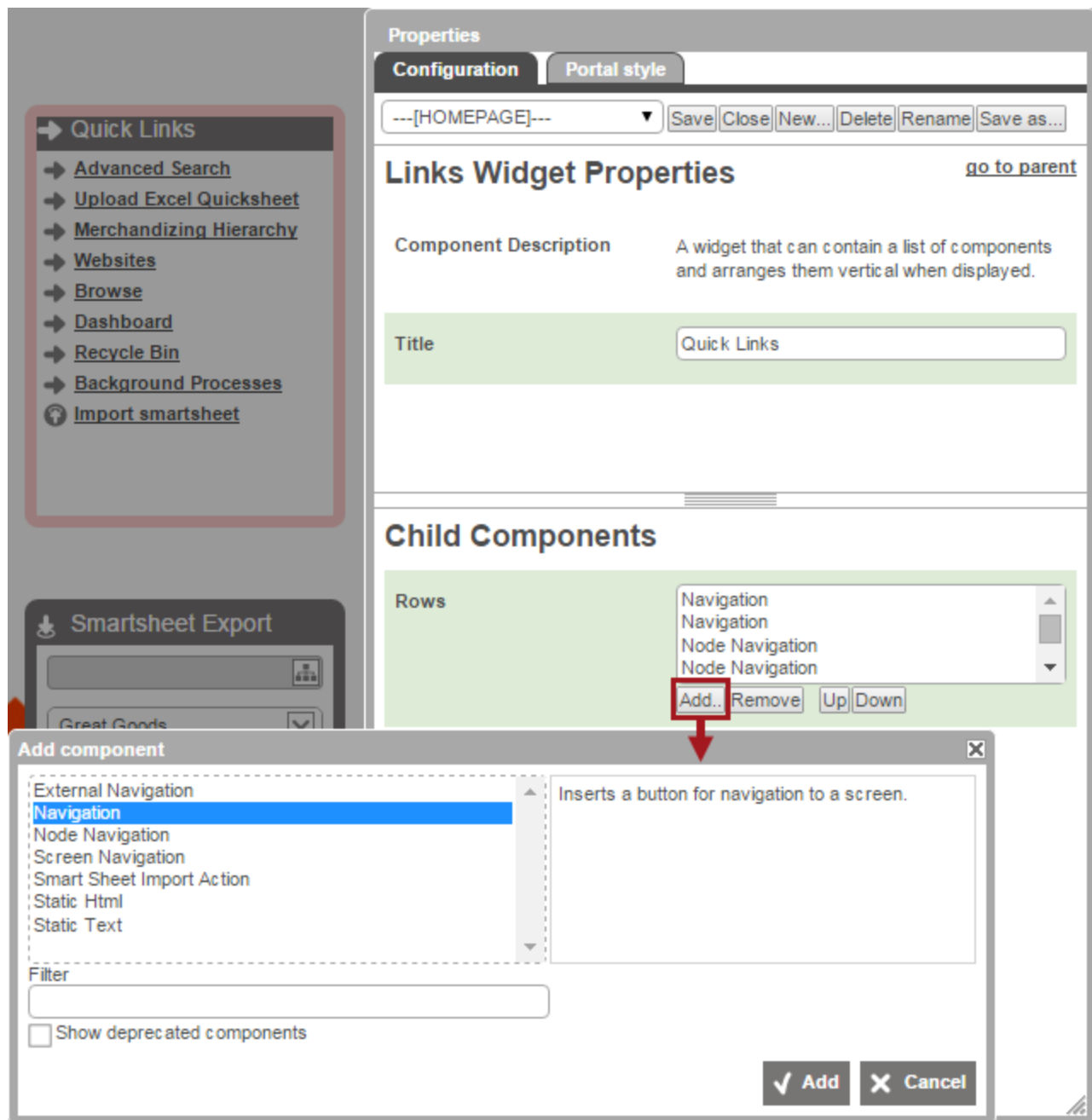
To add a link to Advanced Search on the homepage:

1. Log into the Web UI. User must have privileges to edit Web UI configurations.
2. Enter design mode.
3. The link must now be configured to display in the **Links Widget**.

Select HOMEPAGE from the screen dropdown in the designer and select the Links Widget in the applicable Widget Grid (found under Home Page Properties > Child Components > Content).

If the Links Widget has never been configured to display on the Homepage, it will need to be added to a Widget Grid. Details on how to do this can be found under the **Adding Widgets to a Homepage** section of the **Homepage Widgets** topic.

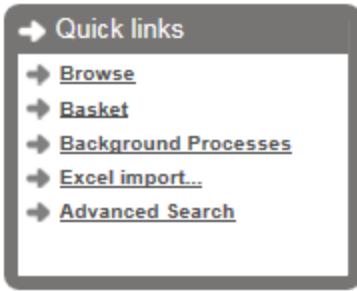
4. Within Links Widget Properties, go down to the Child Components section and click the Add button.



5. Choose the Navigation component and click Add.
6. On the Navigation properties screen, click the Add button to the right of the Screen field.
7. Select 'Advanced Search Screen' and input a ScreenID. Click Add.
The ScreenID you use should be something descriptive (e.g., Advanced Search or Search Advanced) since this will be the name shown on any design component list in the Web UI. ScreenIDs cannot be reused and must be unique.
8. Fill in the Label field with the name that will show on the links widget, then click Add.

The image shows two overlapping dialog boxes from the Stibo Systems interface. The top dialog box is titled 'Properties' and has two tabs: 'Configuration' (selected) and 'Portal style'. Below the tabs is a dropdown menu showing '---[HOMEPAGE]---' and several buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Navigation Properties' and includes a 'Component Description' field with the text 'Inserts a button for navigation to a screen.' and a 'go to parent' link. Below this is a green-shaded area containing several input fields: 'Context Help', 'Css Class', 'Label' (with the text 'Advanced Search'), 'Screen*' (with a dropdown menu showing 'Search advanced' and an 'Add' button highlighted with a red box), and 'Screen Parameter'. The bottom dialog box is titled 'Add screen' and has a close button (X). It contains a 'ScreenID' input field, a list of screen options with 'Advanced Search Screen' highlighted in blue, a text area describing the screen's functionality, a 'Filter' input field, and a checkbox for 'Show deprecated components'. At the bottom right are 'Add' and 'Cancel' buttons.

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



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

Editing Advanced Search Screen Properties

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

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

Properties (edited)

Configuration

Web UI style

Search advanced

Save

Close

New...

Delete

Rename

Save as...

Advanced Search Screen Properties

Component Description

A screen for building advanced search queries. A palette of search criteria are available on the right side of the screen and the result will be displayed in a NodeList which is configured as a parameter for the screen component.

Title

Advanced Search

Collapse Search Canvas

☐

Enable Workflow Selection

☐

Search Criteria

Hierarchy (Hierarchy)

Attribute (Attribute)

Object type (Object type)

Search from List (ISalesItemMarketingDesc

Add...

Edit...

Remove

Up

Down

Advanced

Unrestricted User Groups

Super user

Add...

Remove

Up

Down

Child Components

Search Exceed Limit Action

<Select a child compo

go to component

Node List

Node List

go to component

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

3. Edit the **Title**, if desired. Placeholders can be used in conjunction with, or in place of, that text to automatically insert workflow-specific information into the screen title. These placeholders ({WorkflowID}, {WorkflowState}, {WorkflowName}, and {StatusFlag}) can be used individually or together and display exactly what the name implies. The placeholders are ideal for identifying workflow information when accessing the Advanced Search screen via a Status Selector (Homepage / Sidebar) widget selection, and also when the search criteria is collapsed upon entering the screen.
4. Enable the **Collapse Search Canvas** parameter, if desired. When enabled, the search canvas where search criteria can be dragged and dropped to, is collapsed (not showing) when the screen is loaded. The tab with Search Criteria and/or My Searches is also removed from the screen.

This can be beneficial to users who use Advanced Search as a results screen when clicking on a task within a Status Selector. If the user already knows the search criteria being used to return the results, then there may be no need to see the criteria each time they navigate to the Advanced Search page.

5. The **Enable Workflow Selection** does not need to be enabled for setting up and running standard Advanced Searches.

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

6. Search criteria can be added (Add), removed (Remove), reordered (Up / Down), and renamed (Edit) to meet specific needs. This organization is done in the **Search Criteria** value field, and allows an admin user to limit the number of search criteria (if some are unused) and rename all of the search criteria with more indicative titles to help end users better understand the intended use. Some criteria can be pre-configured to always use certain nodes, and it may be best to have more than one of these pre-configurable criteria set up. Search criteria is described in detail in the **Adding and Modifying Search Criteria** section of this topic, below.
7. Click the Advanced heading to display the **Unrestricted User Groups** parameter. Initially, it is okay to leave this field blank. If there are no groups added, then all users will get access to the configured Advanced Search interface.

More details about restricting and sharing searches can be found in **Restricting and Sharing Advanced Searches** section of the **Using a Web UI** documentation.

Adding and Modifying Search Criteria

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

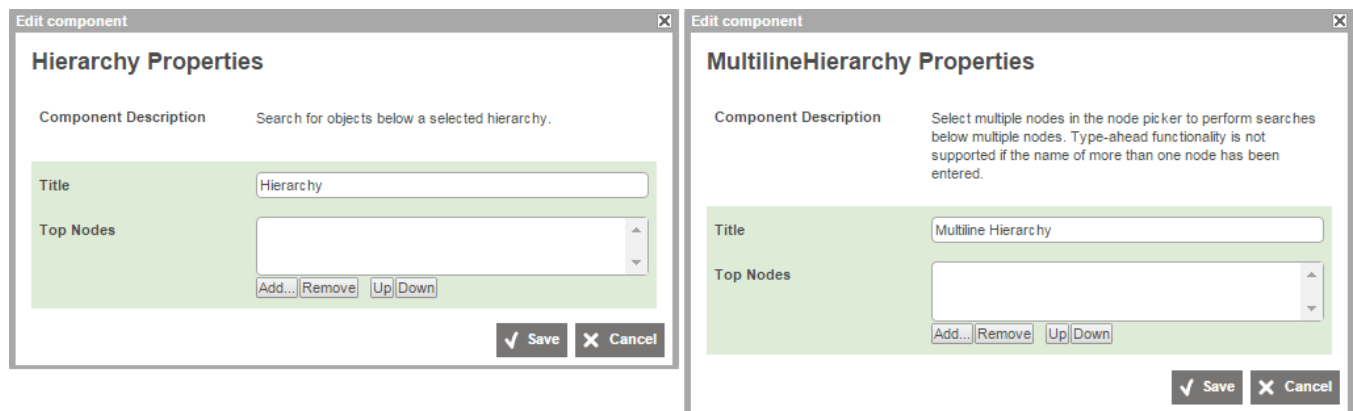
- **Hierarchy and Multiline Hierarchy**

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

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

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

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



• Attribute

Search or browse attributes to determine which one you want to search. Attributes include metadata, category-specific attributes, business rules, and bound (to a STEP attribute) Workflow Variables. Once an attribute is selected, choose an operator, and then enter a value. Most operators allow you to search for specific attribute values, but there are also operators that allow you to search for empty attribute value fields.

Note: The seven operators to choose from are less than (<), less than or equal to (≤), greater than (>), greater than or equal to (≥), equal to (=), search for missing values in current context (!), and search for missing values in all contexts (!!).

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

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



• Object type

Search through attributes, users, classifications, products, assets, entities, and other object types. These objects are maintained through the STEP Workbench, on the System Setup tab, and under the Object Types & Structures folder. Simply start typing in the field or drill down through the hierarchy to make a node selection.

• Search From List

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

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

Edit component

Search from List Properties

Component Description Paste in a list of entries from a third party textual application (e.g. Excel). It is possible to search for ID, Name, attribute values, and Unique Keys.

Title Search from List

Attributes

Add... Remove Up Down

Unique Keys

Key3

Add Remove Up Down

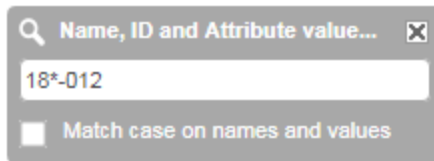
✓ Save ✕ Cancel

• Name, ID and Attribute value search

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

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

Advanced Search

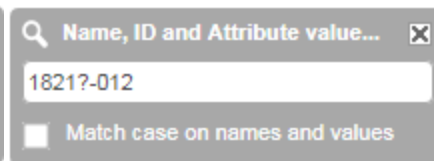


Q Name, ID and Attribute value... X

18*-012

☐ Match case on names and values

Advanced Search



Q Name, ID and Attribute value... X

1821?-012

☐ Match case on names and values

• Approval status

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

• Missing mandatory entries

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

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

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

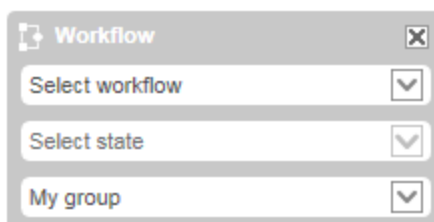
• Workflow

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

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

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

Advanced Search



Workflow X

Select workflow ▼

Select state ▼

My group ▼

Advanced Search

When accessing the Advanced Search screen via a workflow selection, please make note of the default screen behavior, with the third bullet being key to this functionality:

- The Advanced Search screen is configured as the result screen for a Status Selector (Homepage / Sidebar) widget
- A Status Selector task selection has been made
- The Workflow criteria is removed from, or not initially configured as one of, the valid Search Criteria selections through the Advanced Search Screen Properties

When users make a task selection in the widget operating under this scenario, the workflow criteria fields display on the screen (as long as the search canvas is not collapsed). The search criteria values are read-only, and the workflow criteria cannot be removed from the search area. Privileged users can add / remove additional criteria to do more focused searches, but the user is always left with the original workflow search criteria that they began with. This allows for end users to focus on their tasks without any concern that they may inadvertently take action on tasks that they do not own.

When accessing Advanced Search via any other method (e.g., a link in the Quick Links widget), the screen behavior is as expected.

• Referenced By and References

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

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

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

• Data Container Type

The data container criterion enables users to search either for entity objects for which specific data container types have been made valid, or for entities that may have specific attributes and attribute values linked via a data container.

The data container criterion enables a few different kinds of searches.

- Search by data container type, which will display all entities for which a data container has been added to the data container type being searched.
- Search by attribute name / attribute value to view entity objects that have any data containers populated with a specific value or values.
- Search a combination of both of the searches listed above: data container type and attribute name / attribute value.

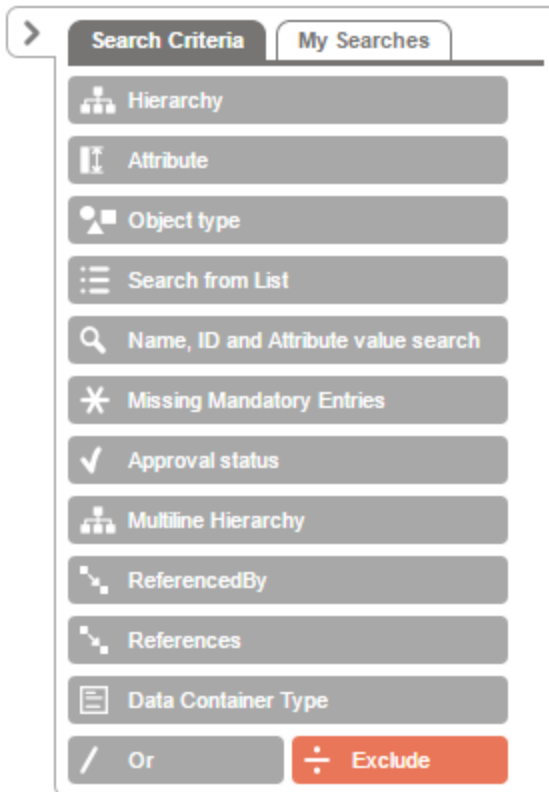
Important: Any criteria with a dropdown menu allows for a user to click on the dropdown and make a choice. No manual typing can be done in those fields. Any place the Node Picker icon () shows, click on it to expand the

options and select / search nodes. Users may also start typing in any of those value boxes to see a list of available choices.

Completed Search Criteria

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

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



The screenshot displays the 'Search Criteria' tab in the Advanced Search interface. It features a list of search criteria, each with a unique icon and a text label. The criteria are: Hierarchy (tree icon), Attribute (vertical bar icon), Object type (circle and square icon), Search from List (list icon), Name, ID and Attribute value search (magnifying glass icon), Missing Mandatory Entries (asterisk icon), Approval status (checkmark icon), Multiline Hierarchy (tree icon), ReferencedBy (arrow icon), References (arrow icon), and Data Container Type (document icon). At the bottom of the list, there are two buttons: 'Or' (with a slash icon) and 'Exclude' (with a divide icon).

Advanced Search is now set up and ready for use.

Mapping Task List to Workflow State

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

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

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

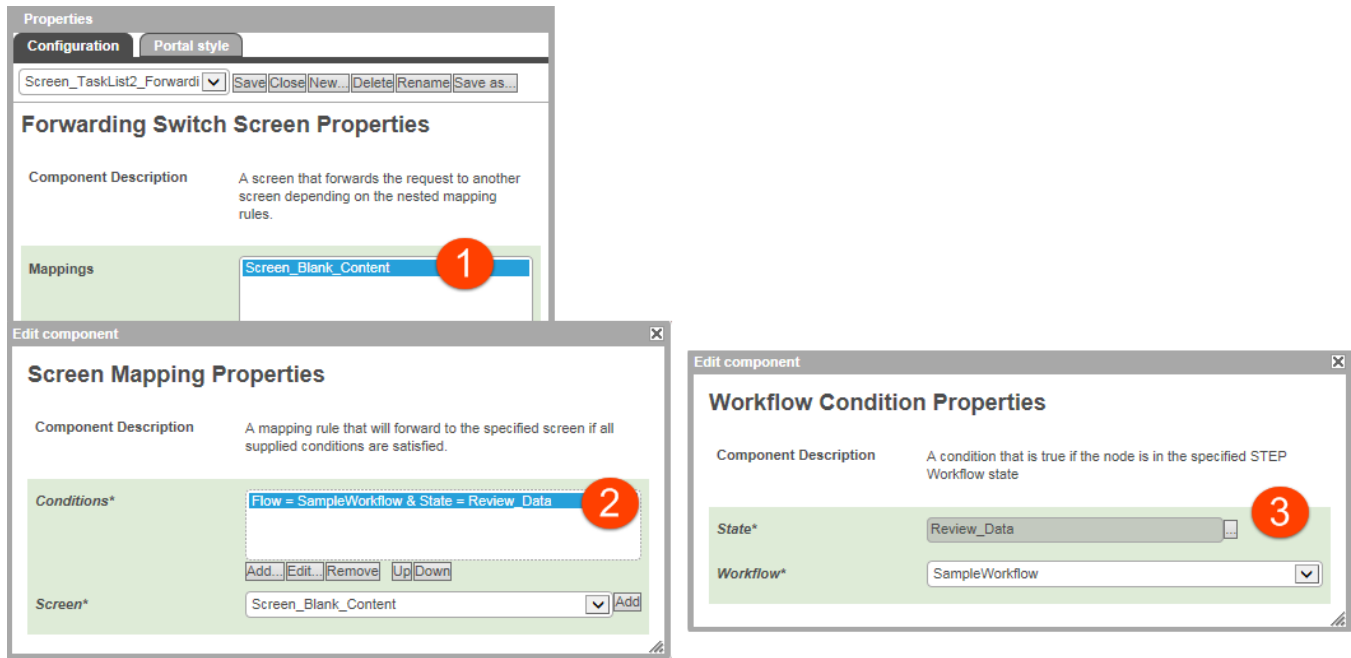
3. Select the Advanced Search Screen ID from the dropdown (it is Search advanced in the example below). Click the checkbox for the **Enable Workflow Selection** parameter in the Advanced Search Screen Properties. Save the selection before going on to the next step.

The screenshot shows the 'Advanced Search Screen Properties' configuration window. At the top, there are tabs for 'Configuration' and 'Portal style'. Below the tabs is a search bar with 'Search advanced' and a dropdown arrow, followed by buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Advanced Search Screen Properties'. It contains a 'Title' field with 'Advanced Search'. Below that is a checkbox labeled 'Enable Workflow Selection' which is checked and highlighted with a red box. Under 'Search Criteria', there is a list of criteria: 'Missing mandatory entries (Missing Mand...', 'Referenced By (ReferencedBy)', 'References (References)', and 'Search from List ([SalesItemMarketingDes'. Below this list are buttons: 'Add...', 'Edit...', 'Remove', 'Up', and 'Down'. A section titled 'Child Components' contains two rows. The first row is 'Search Exceed Limit Action' with a dropdown set to '<Select a child compo...' and a 'go to component' link. The second row is 'Node List' with a dropdown set to 'Node List' and a 'go to component' link. A red arrow points to the 'go to component' link in the 'Node List' row.

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

7. Select a Forwarding Switch Screen from the Product Selection Screen dropdown. Save the Node List Properties.
8. From the screen dropdown selector (to the left of the Save button), pull up the properties for the screen designated as the Product Selection Screen. In this example, it is the Screen_TaskList2_Forwarding screen.
9. In the Forwarding Switch Screen Properties, define the workflow condition that should show on the screen when selecting an object link within a Node List.
 - Click Add to add a mapping. This will open Screen Mapping Properties.
 - On Screen Mapping Properties, under the Conditions field, click Add.
 - Select 'Workflow Condition' from the component list and click Add.
 - Make a State and Workflow selection. Click Add again. Users should continue mapping any additional workflow states, if applicable, that will be going to the *same* screen. When done, click the dropdown for the Screen parameter and make a selection. Click Add.
 - Save the Forwarding Switch Screen Properties.
 - Repeat the steps in the previous bullets as needed.
 - Save any additional changes and close Web UI Designer.

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



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

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

Advanced Search

Workflow

Order Process

Review Data

My group

Search

Save

Create collection from search criteria

Select all

List view

Multi edit view

	Thumbnail	ID
☐		135832 ←
☐		22180

Advanced Search

Workflow

Sample Workflow

Review Data

My group

Search

Save

Create collection from search criteria

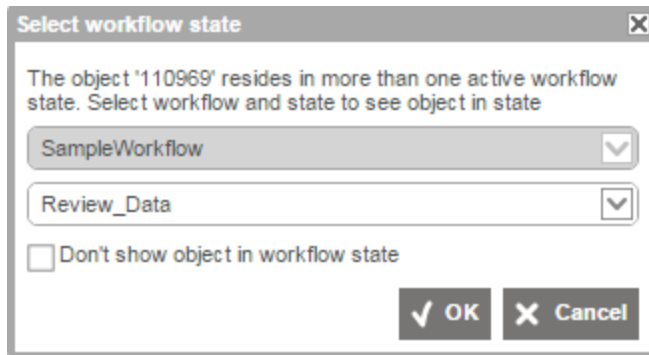
Sample Workflow - Empty Screen

Select all

List view

Multi edit view

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



Select workflow state

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

SampleWorkflow

Review_Data

☐ Don't show object in workflow state

✓ OK X Cancel

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

Restricting and Sharing Advanced Searches

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

Restricting User Groups

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

4. Click Add under **Unrestricted User Groups** and pick the applicable node from the selection menu.

The admin - or anyone who will be creating and sharing the saved searches - needs to be added to the Unrestricted User Groups. All other groups are considered to be restricted and, therefore, cannot create and save Advanced Searches themselves.

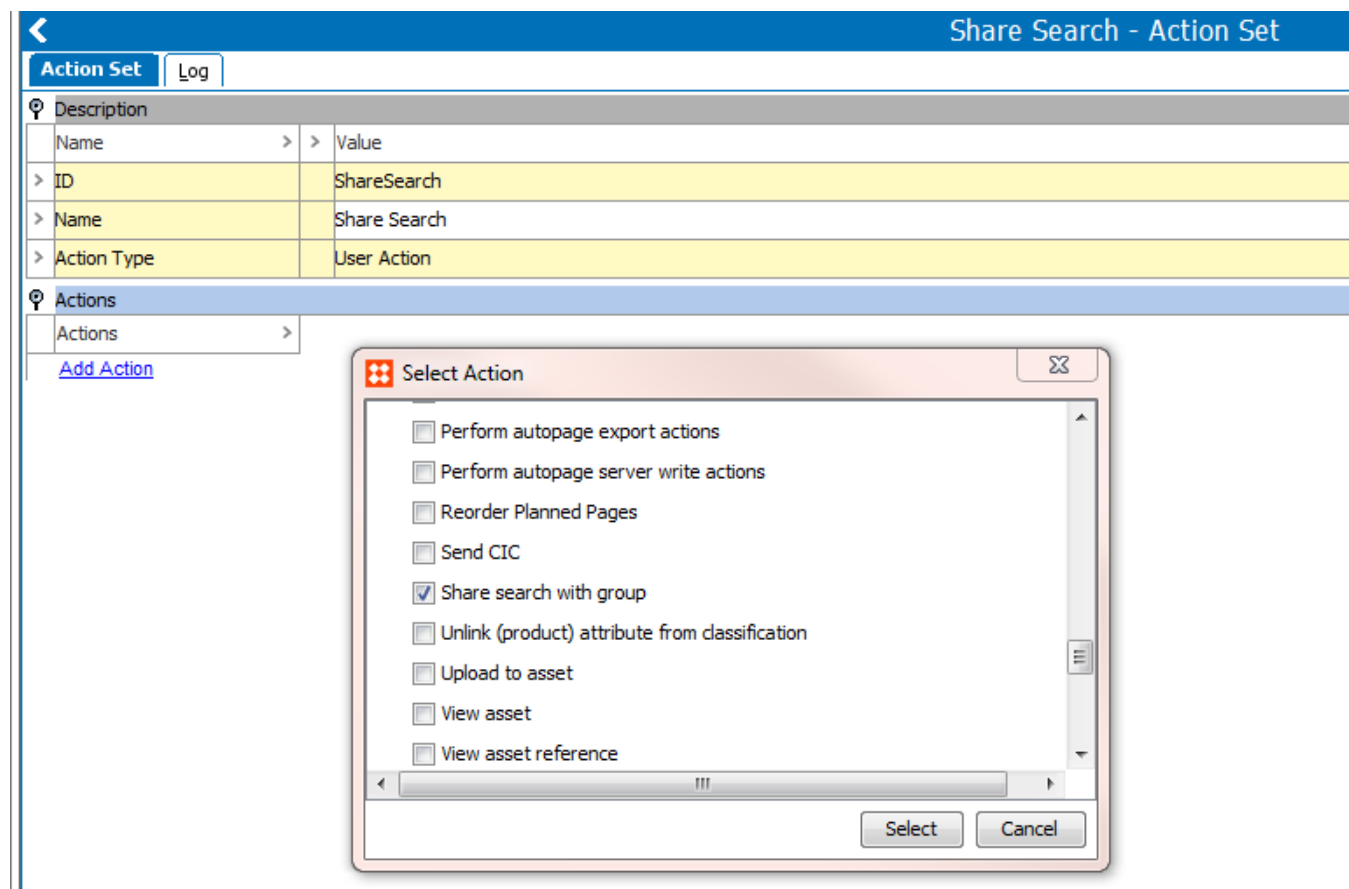
5. In the next screenshot, the 'Super Users' group has been given Unrestricted User Group rights. This means that a member of the Super Users group will be setting up / sharing searches.

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

Applying a Share Search Action Set

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

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



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

Name	Value
ID	ShareSearch
Name	Share Search
Action Type	User Action

The 'Actions' section has a dropdown menu labeled 'Actions' and a link labeled 'Add Action'. A modal window titled 'Select Action' is open, showing a list of actions with checkboxes. The 'Share search with group' action is selected.

Select Action

- ☐ Perform autopage export actions
- ☐ Perform autopage server write actions
- ☐ Reorder Planned Pages
- ☐ Send CIC
- ☒ Share search with group
- ☐ Unlink (product) attribute from classification
- ☐ Upload to asset
- ☐ View asset
- ☐ View asset reference

Buttons: Select, Cancel

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

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

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

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

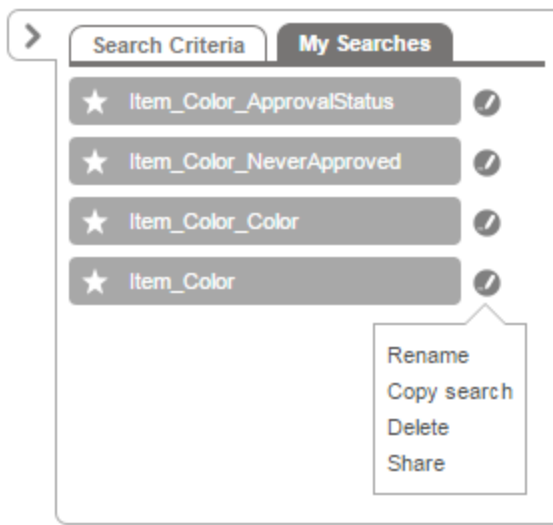
8. Click Save.

Setup in the STEP Workbench is now complete.

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

Sharing Saved Searches

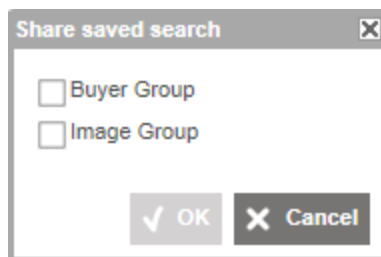
The administrator (unrestricted user) will need to log in to the Web UI to create an Advanced Search or access an existing saved search. Saved searches can only be shared with the privileged users. See the 'Applying a Share Search Action Set' section in this documentation.



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

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

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



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

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

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

Advanced Search

Object type

Item (Item)

AND

Attribute

Color (Color)

=

Orange

OR

Object type

Item (Item)

AND

Attribute

Color (Color)

=

White

Approval status

Never approved

Status in current context

Search

Create collection from search criteria

ID

Item Description Informal

Item Supplier Information

Item Manufacturer Inform.

109242

18213

18216

21882

1-5 of 5

English US

Main

My Searches

Demo Criteria

Saved Search 1

Item*Color*NeverApproved

Considerations and Limitations

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

Using Advanced Search

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

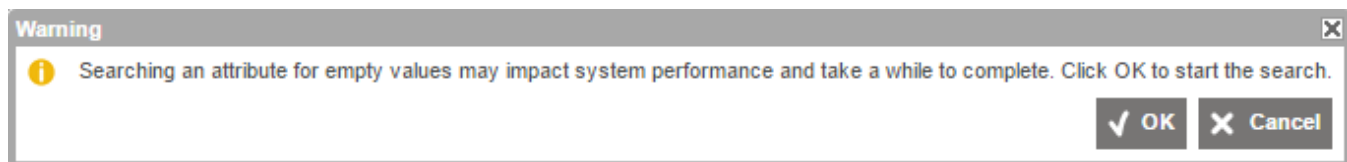
Performing an Advanced Search

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

Building a Search Query

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

Note: Using the Attribute criterion for searching (! and !! operators) attributes that have empty values is an easy way to identify objects in STEP that are not yet complete. It is important to note that performing these searches can be time consuming depending on the number of attribute values being searched and the complexity of the assembled search criteria. Because of this, when starting an empty-value search (either alone or with other criteria), users are presented with a message asking them to confirm that they want to move ahead given the potential resource and time constraints. When the end user clicks OK, the search is performed.



Examples

Here are some examples with screenshots that show basic searches with different operators: **And**, **Or**, and **Exclude**. The example screenshots do not show every search criteria available. For more information on adding / removing criteria shown to users, see **Advanced Search Initial Configuration** in the **Web User Interfaces** documentation.

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

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

While only one value is being searched, multiple values can be searched at one time (if applicable to the search). And, if searching an LOV-based attribute, users can use the a dropdown to access the actual list of values to enter an attribute value.

Advanced Search

Object type
Item (Item)

And

Attribute
Color (Color) = Orange

Search

Save

Create collection from search criteria

Search Criteria

My Searches

Hierarchy

Attribute

Object type

Search from List

Name, ID and Attribute value search

Missing Mandatory Entries

Approval status

Workflow

Multiline Hierarchy

ReferencedBy

References

Or

Exclude

ID

Item Description Information

Item Supplier Information

Item Manufacturer Information

135830

135831

135832

1-3 of 3

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

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

Advanced Search

Object type

Item (Item)

And

Attribute

Color (Color)

=

Orange

Or

Object type

Item (Item)

And

Attribute

Color (Color)

=

White

Search

Save

Create collection from search criteria

ID

Item Description Information

Item Supplier Information

Item Manufacturer

135830

135831

135832

1-7 of 7

Search Criteria

My Searches

Hierarchy

Attribute

Object type

Search from List

Name, ID and Attribute value search

Missing Mandatory Entries

Approval status

Workflow

Multiline Hierarchy

ReferencedBy

References

Or

Exclude

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

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

Advanced Search

Object type

Item (Item)

And

Attribute

Color (Color)

=

Orange

Or

Object type

Item (Item)

And

Attribute

Color (Color)

=

White

Approval status

Never approved

Status in current context

Search

Save

Create collection from search criteria

Search Criteria

My Searches

Hierarchy

Attribute

Object type

Search from List

Name, ID and Attribute value search

Missing Mandatory Entries

Approval status

Workflow

Multiline Hierarchy

ReferencedBy

References

Or

Exclude

ID

Item Description Information

Item Supplier Information

Item Manufacturer

135831

135832

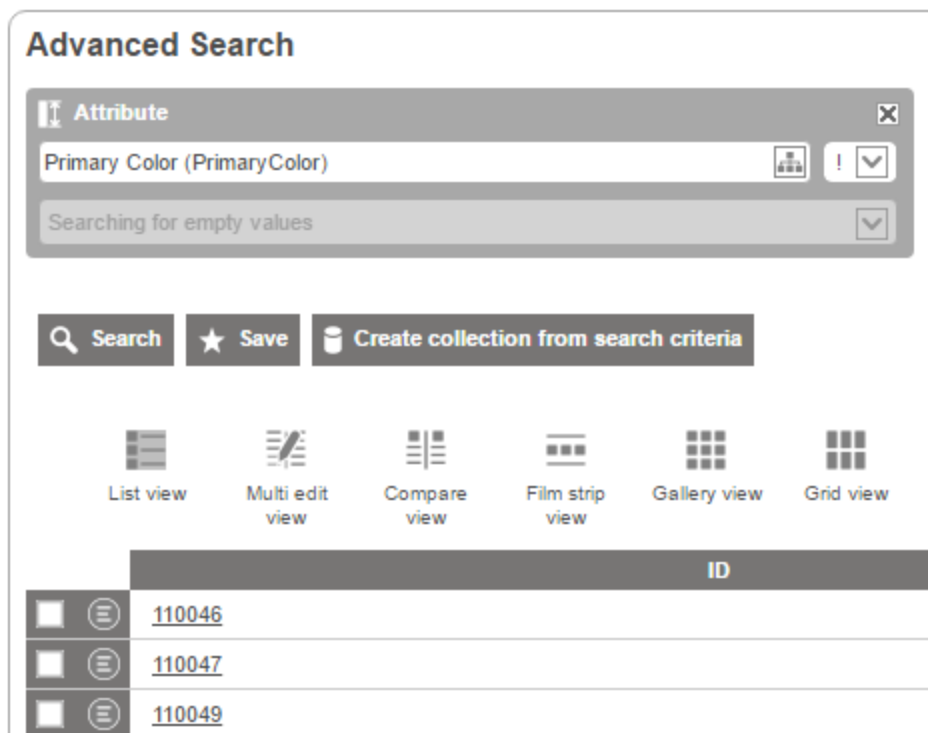
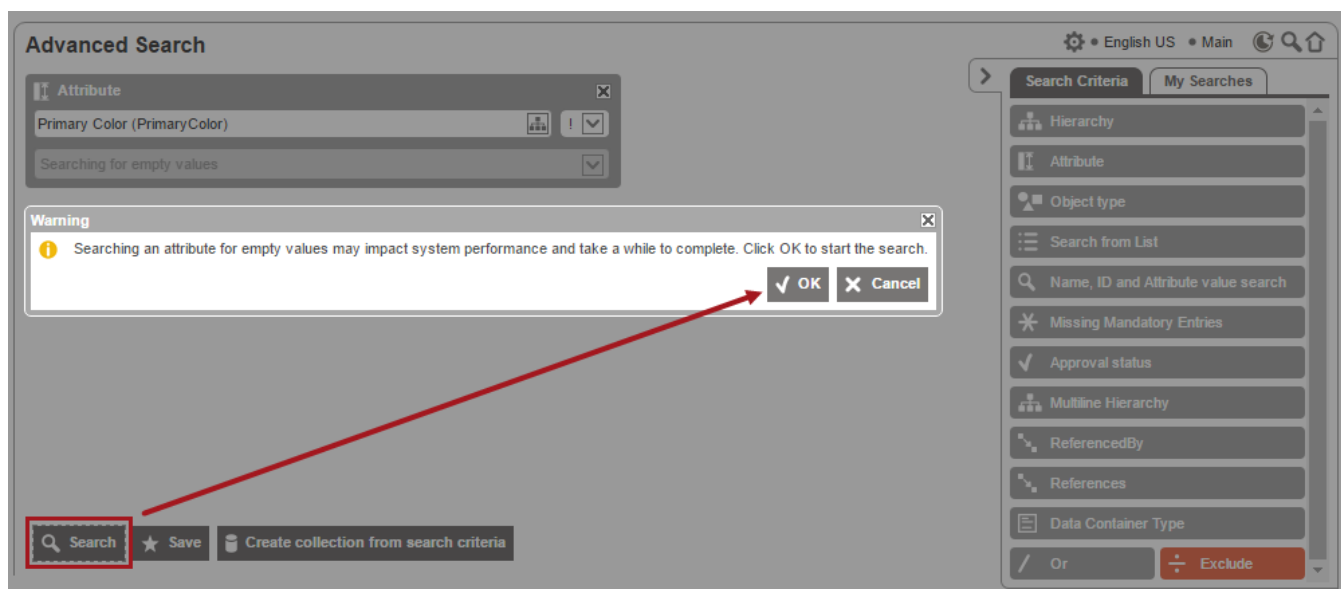
22180

1-7 of 22

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

Example 4: Empty value search for [Attribute (Primary Color)]

The search pulls objects that do not have a value for the Primary Color attribute within the current context (English US). A warning dialog is presented upon clicking the Search button. After pressing OK to confirm you want to continue, the search will process.



Example 5: Data Container Type searches

Example 5.1: Data Container Type search for [Shipping Address]

Advanced Search

English USMain

Data Containers

Shipping Address (ShippingAddress)

Enter attribute name

Select options...

Search

Save

Create collection from search criteria

Clear filter

ID	Title
CUS 101545	Customer A
CUS 107835	Customer B
CUS 107836	Customer C
CUS 114563	Customer D
CUS 114565	Customer E

1-5 of 5

By clicking the Node Picker icon () in the 'Enter data container type' field (in the screenshot above, the data container type 'Shipping Address (ShippingAddress)' displays in this field), users may either browse through or search for the data container types that have been created in the system. Once a selection is made and **Search** is clicked, a list of all applicable entities for which a data container has been created / added of the data container type specified will populate.

Example 5.2: Data Container Type search for [Shipping Address] and [Attribute (City)]

Advanced Search

English US
 Main

Data Containers

Shipping Address (ShippingAddress)

City (City)

Paris

Search

Save

Create collection from search criteria

Clear filter

ID	Title
CUS_114563	Customer D

1-1 of 1

Users may narrow the search further by also selecting an attribute linked to a data container of the specified data container type. To execute this kind of search, users must select an attribute by clicking the Node Picker icon in the 'Enter attribute name' field, or by typing the attribute into the field. Once the user makes their attribute selection, selects a search operator (equals (=), in this example), enters an attribute value, and then clicks **Search**, a list of all entities that have a data container added of the type specified, which also contain the selected attribute / attribute value combination, will populate.

Example 5.3: Data Container Type search for [Attribute (City)]

Advanced Search

English US

Main

Data Containers

Enter data container type

City (City)

=

Paris

Search

Save

Create collection from search criteria

Clear filter

0

Users can elect to search for attribute values that exist in attributes contained in any data container, irrespective of type. To execute this kind of search, user must select an attribute by clicking the Node Picker icon in the 'Enter attribute name' field, or by typing the attribute into the field. Once the user makes their attribute selection, selects a search operator ('equals (=)', in this example), enters an attribute value in the 'Select options' field, and then clicks **Search**, a list of all entities with an attribute value that matches the value specified for the selected data container-linked attribute will populate. By leaving the 'Enter data container type' field blank, the user is searching for attribute values within any existing data container.

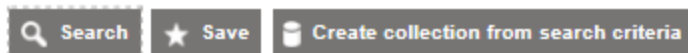
Note: When a user clicks on the 'x' to remove an 'Exclude' or 'Or' operator symbol, the system changes it to 'And'. To entirely remove a particular operator, remove the search parameters that come after that operator.

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

Saving a Search

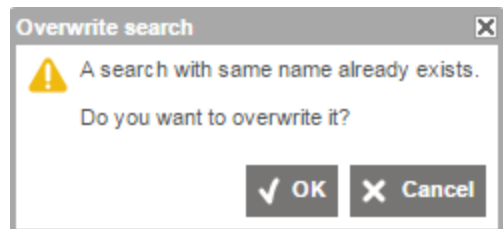
When an Advanced Search is built, a user may want to save the search to use again. Searches can be saved once parameters have been added. There is no need to run a search before saving it. However, it is a good idea to make sure the designated criteria are set up effectively and meet data / business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

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



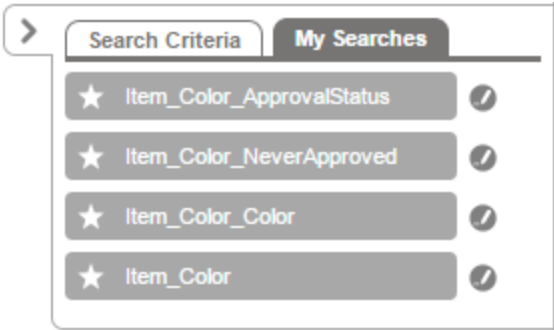
Click Save and name the search. Press OK to save it.

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



Using Saved Searches

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



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

Advanced Search

English US • Main

Object type

Item (Item)

AND

Attribute

Color (Color)

=

Orange

OR

Object type

Item (Item)

AND

Attribute

Color (Color)

=

White

Approval status

Never approved

Status in current context

Search

Create collection from search criteria

▼

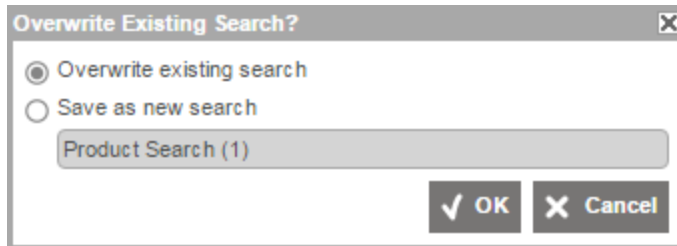
≡

▲

ID	Item Description Information	Item Supplier Information	Item Manufacturer
☐ 129708			
☐ 135828			
☐ 135829			

1-5 of 5

Users in unrestricted user groups can overwrite existing saved searches within Advanced Search. After opening an existing saved search from the My Searches tab, modifying it, and then clicking the Save button, a notification dialog appears in which the user can choose to overwrite the search or save the search with a new name. If the search is overwritten and has previously been shared with other users, then the search will also be overwritten for those users.



Collapsible splitter feature

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

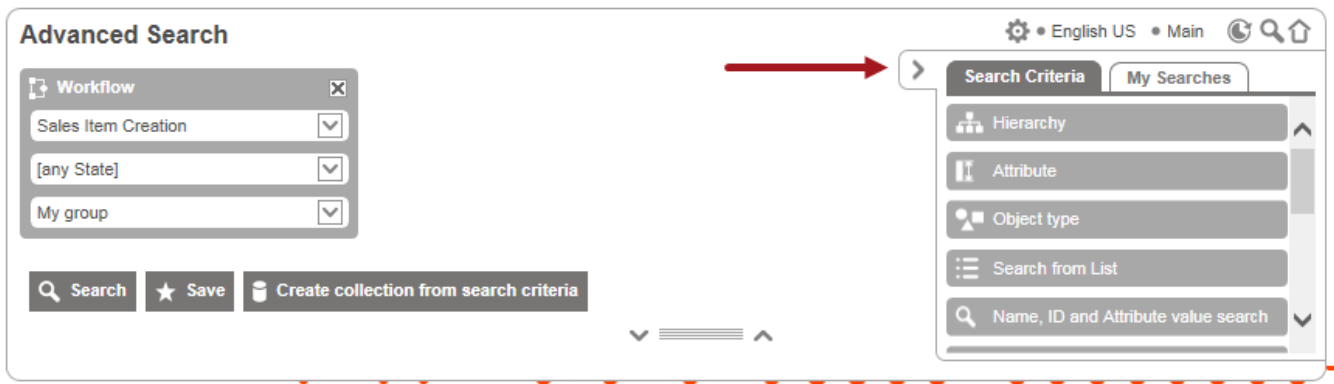
When the screen is configured with a horizontal split panel, a drag handle splits up the panels / components on the screen. The drag handle displays a down arrowhead to the left and an up arrowhead to the right.

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

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

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

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



Considerations and Limitations

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

Attribute and LOV Creation and Maintenance in Web UI

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

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

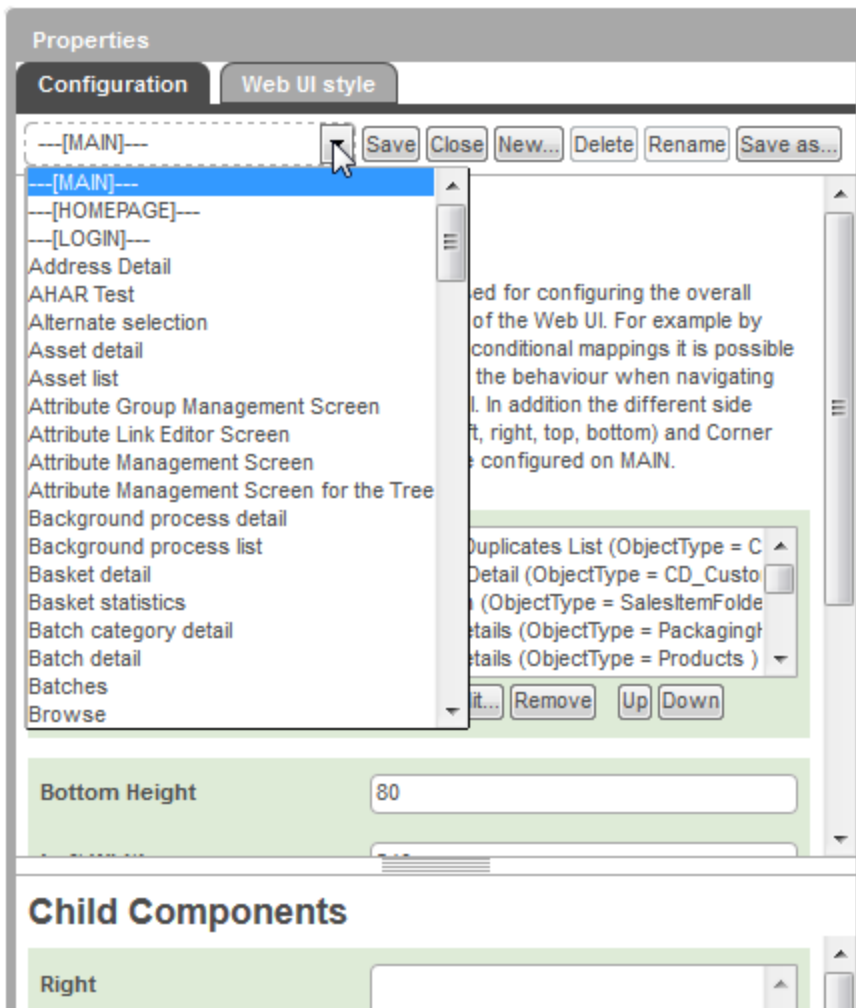
Attribute and LOV Creation and Maintenance Configuration

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

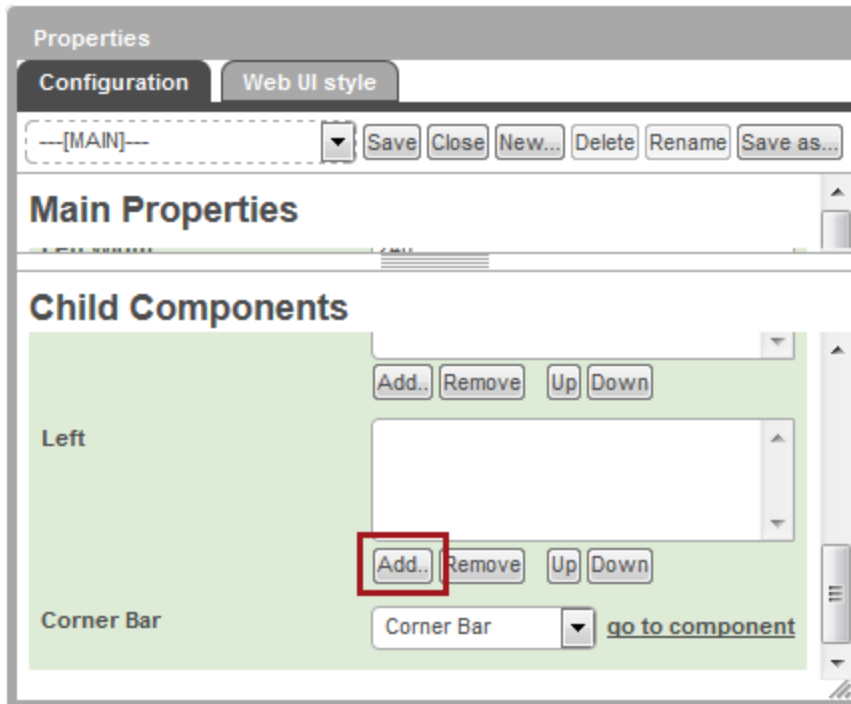
Adding the Stack Panel

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

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

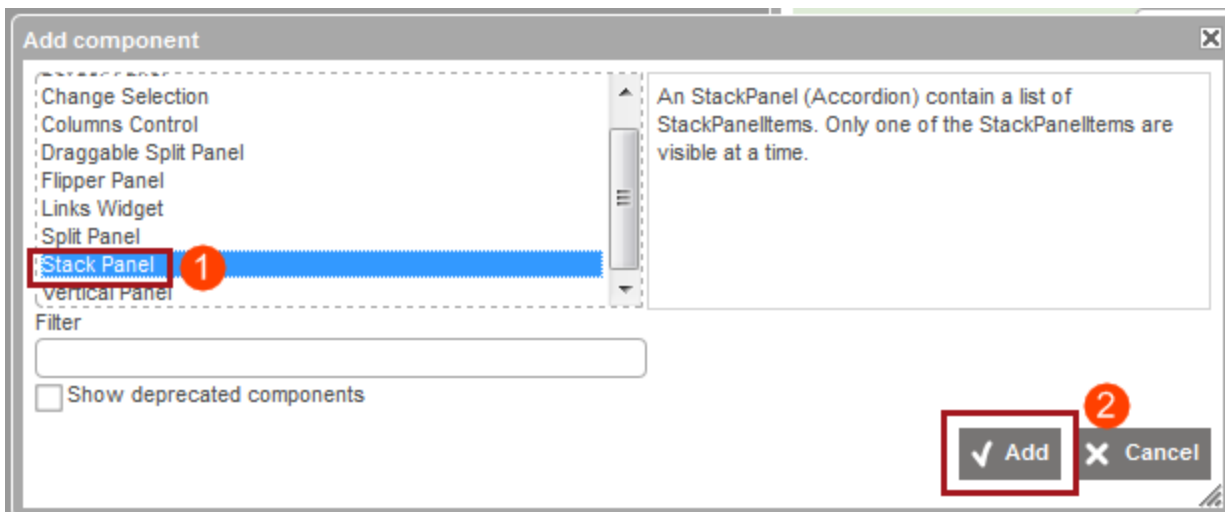


2. Under Main Properties, scroll down to the **Left** field in the **Child Components** section, and click the **Add** button.

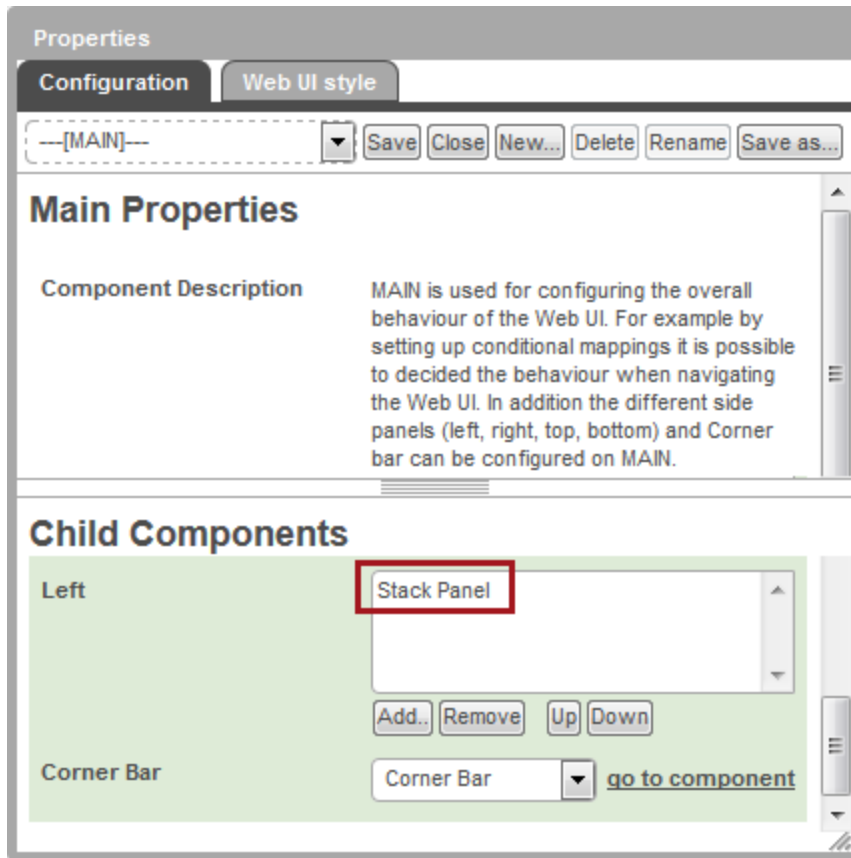


Note: It is also possible to configure access to these screens in a *right-screen* stack panel element, depending on the designer's preference.

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



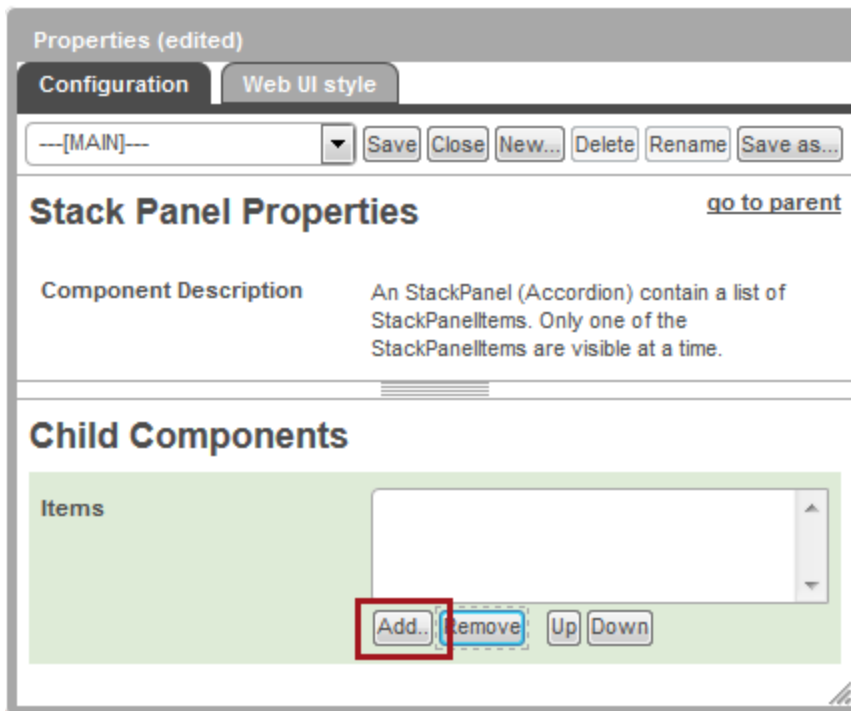
4. Double click the **Stack Panel** component that was just added. This will take the user into the **Stack Panel Properties** screen in order to begin adding the required components.



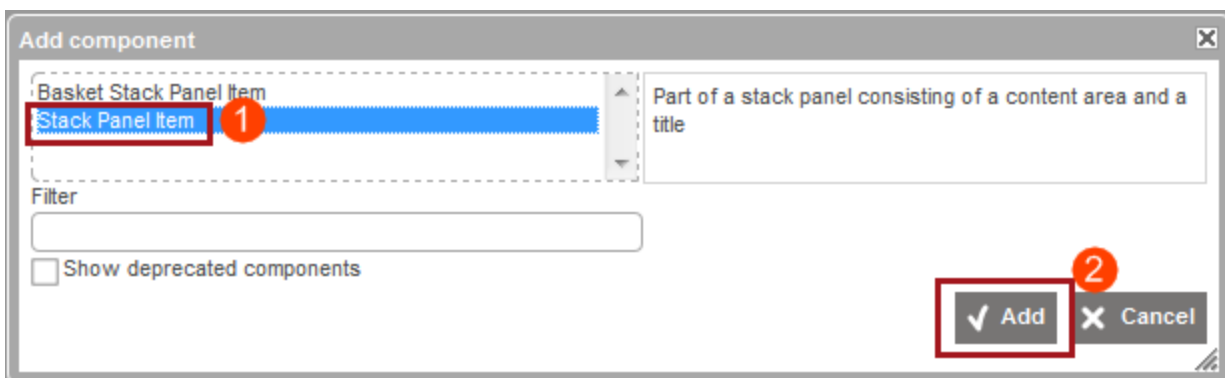
Configuring the System Setup element in Web UI

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

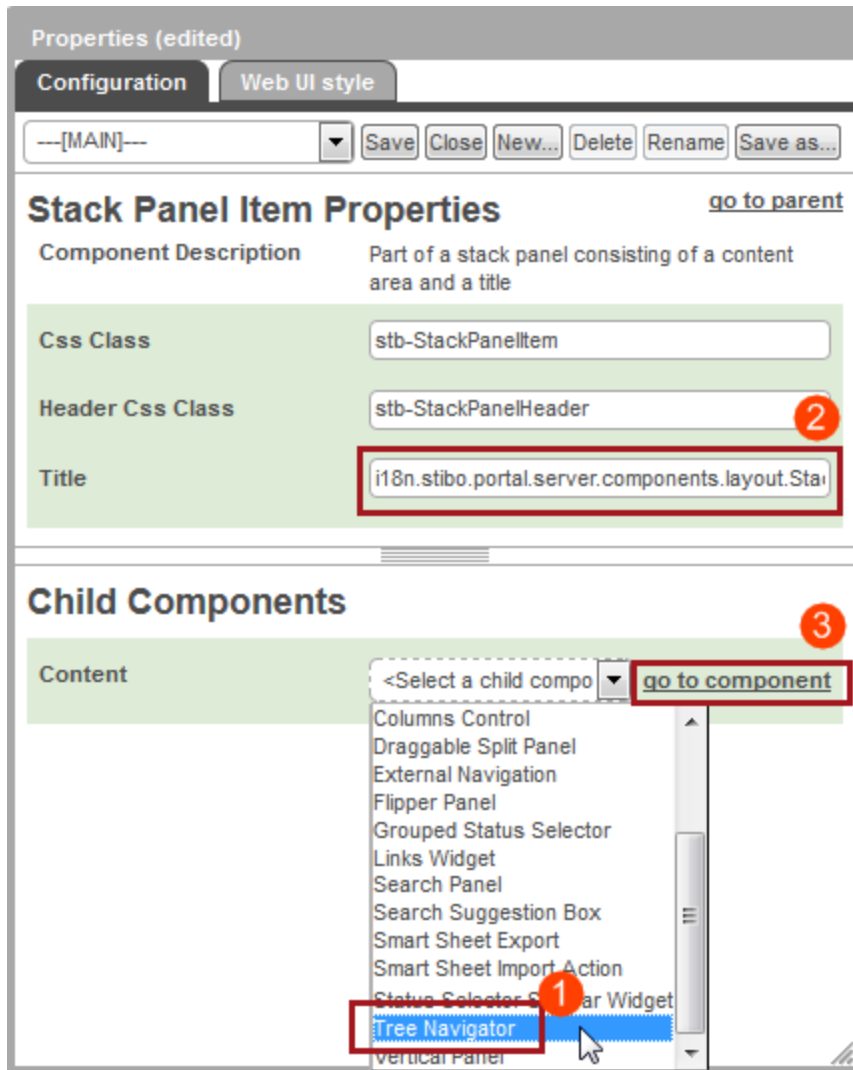
1. In the **Stack Panel Properties** window, click the **Add** button located beneath the **Items** field in the **Child Components** section.



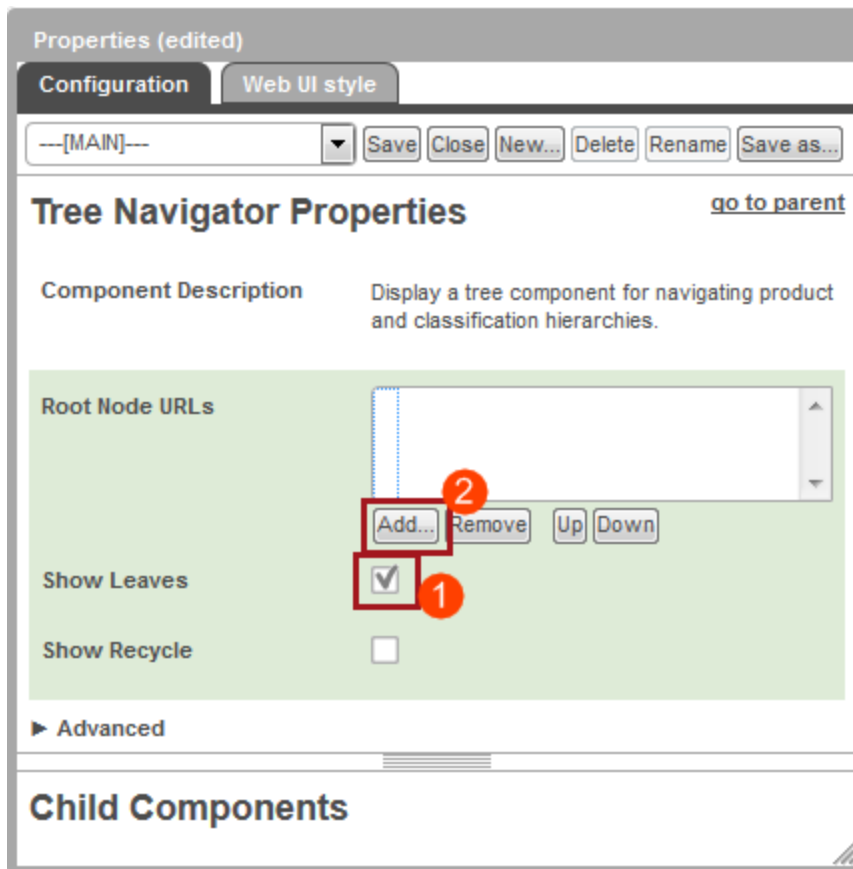
2. In the **Add component** dialog that appears, select **Stack Panel Item** and click **Add**. Once added, double click the new **Stack Panel Item** to navigate to its configuration.



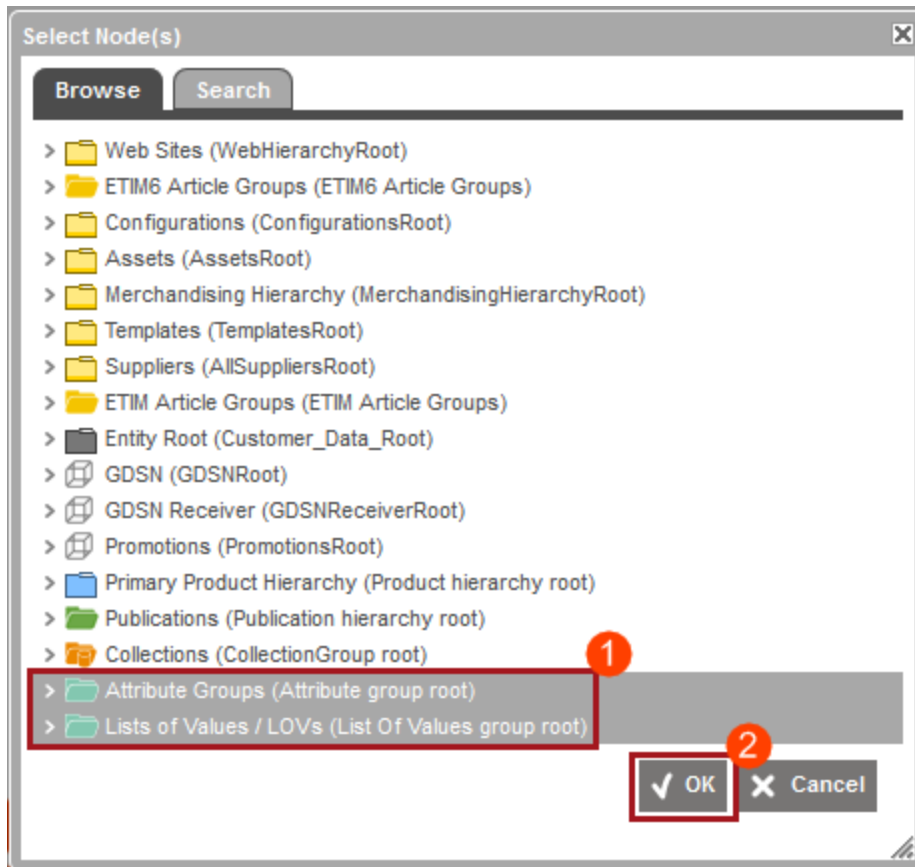
3. On the **Stack Panel Item Properties** configuration, click the **Content** dropdown in the **Child Components** section, and select **Tree Navigator**. In order to assign a useful name to this **Stack panel** element (the default is **Title**), you may consider amending the title in the **Title**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



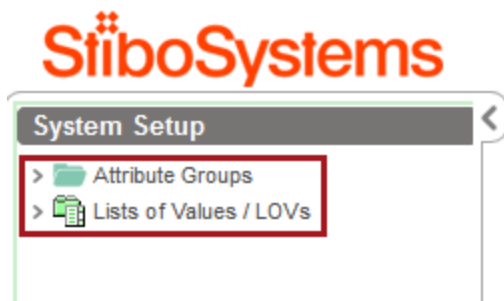
4. On the **Tree Navigator Properties**, check the box for **Show Leaves**. Checking this box allows all elements of the hierarchy being added to be viewable and editable, not just the parent nodes. Then, beneath the **Root Node URLs** field, click the **Add** button. This is where the designer can select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



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



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



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

Attribute Group Management Screen

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

Tree

System Setup

- Attribute Groups
 - ATTGroup
 - Attribute Group
 - Attribute Group C
 - Blacklisted - 2
 - Blacklisted Sales Item Maintenance
- Business Rules
- Category Specific Attributes
- Customer Data
- Dates
- DescriptionAttribute
- Dimensions
- Display
- ETIM6 Attributes
- ETIM Attributes
 - Event Filtering
- GDSN Receiver System Attributes
- GDSN System Attributes
- Party Data
- System
- System Attributes
- User Privileges
- User Test Attribute Group
- Workflows
- z-Test Attr Group
- Lists of Values / LOVs

Attribute Group Management

English US
Main

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

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

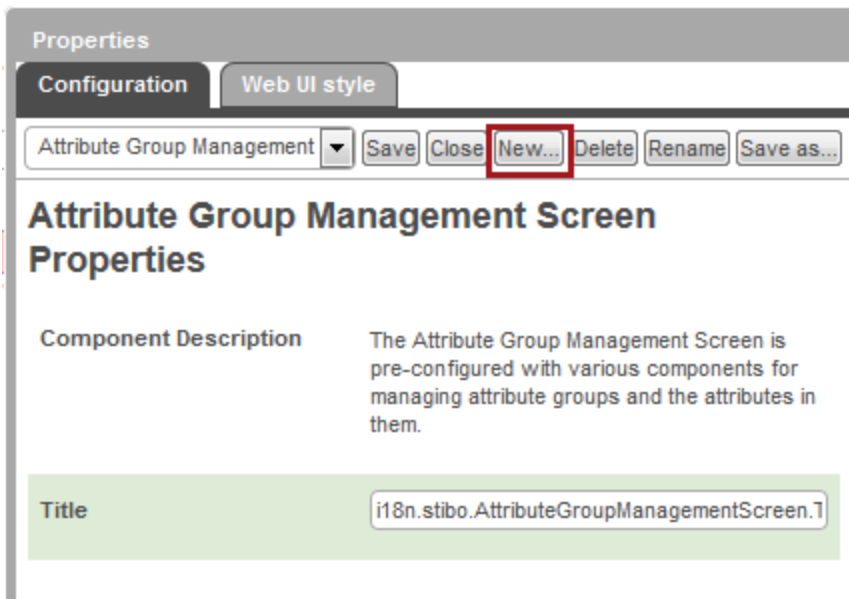
Save
Reset
Delete
Create

Configuring the Attribute Group Management Screen

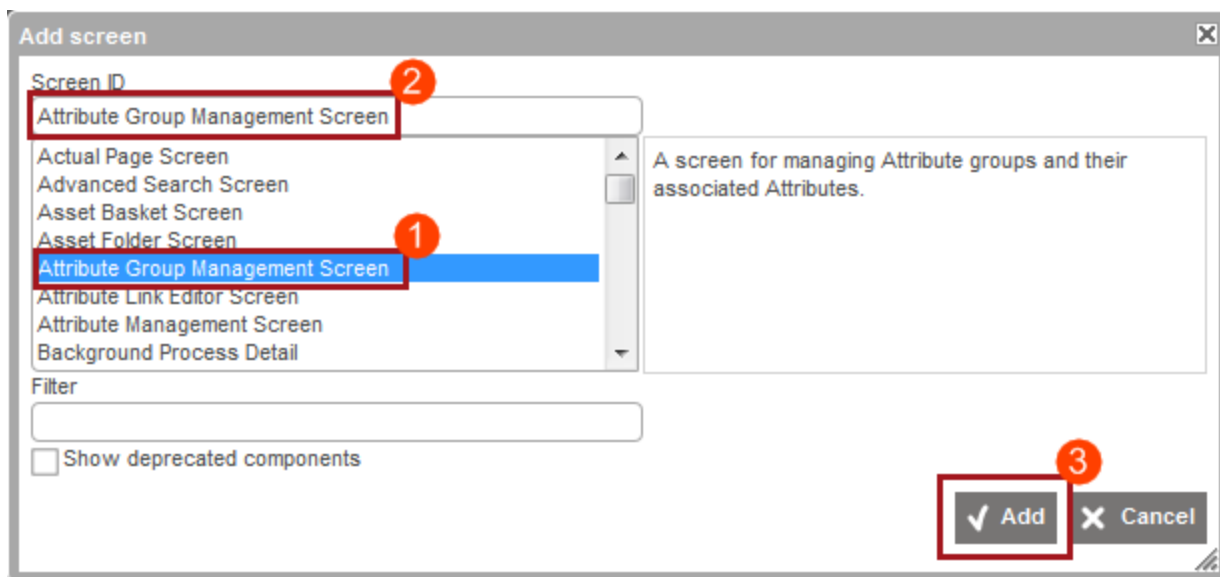
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so that users can access the screen via the stack panel.

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

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



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



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

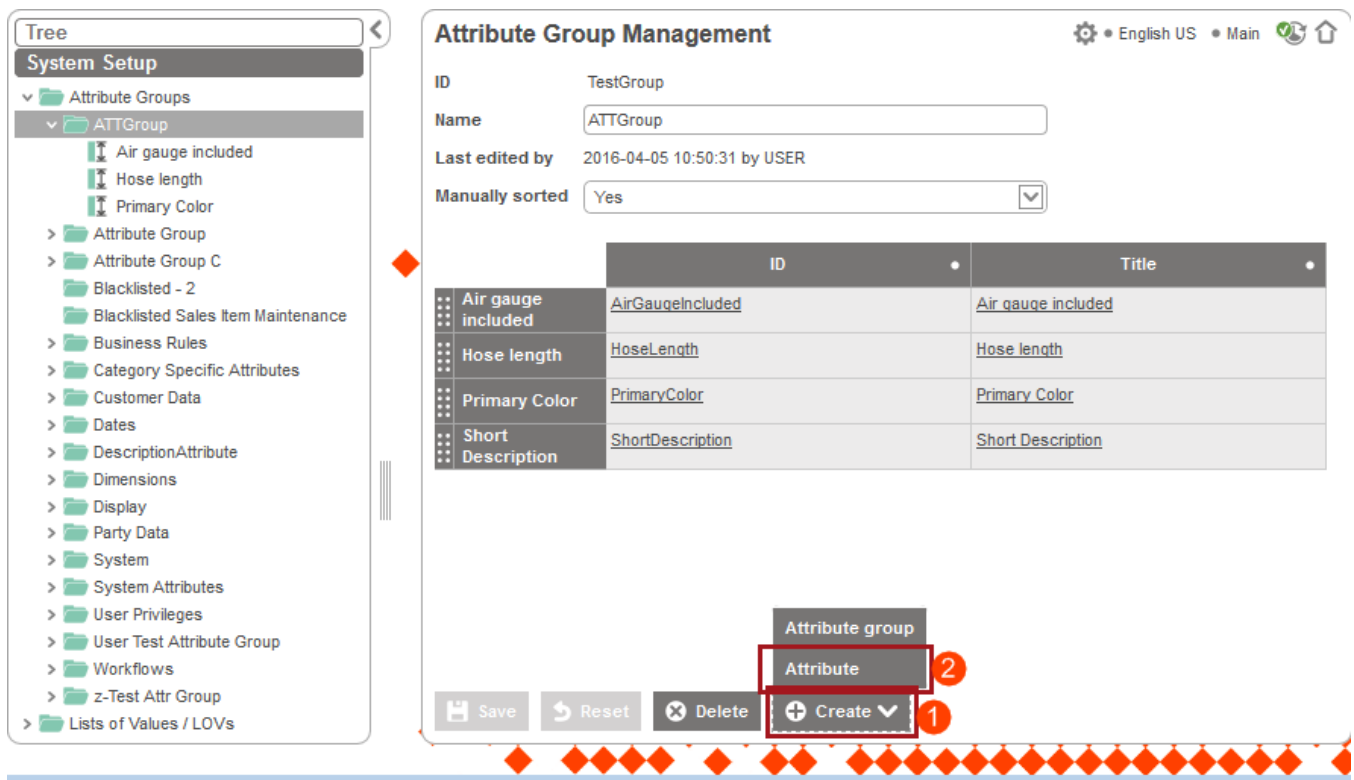
Using the Attribute Group Management Screen

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

Creating Attributes

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

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



The screenshot shows the **Attribute Group Management** screen. On the left is a **Tree** panel with **System Setup** expanded, showing **Attribute Groups** and **ATTGroup** selected. The main panel displays details for **TestGroup**, including **ID**, **Name** (ATTGroup), **Last edited by** (2016-04-05 10:50:31 by USER), and **Manually sorted** (Yes). Below this is a table of attributes:

	ID	Title
Air gauge included	AirGaugeIncluded	Air gauge included
Hose length	HoseLength	Hose length
Primary Color	PrimaryColor	Primary Color
Short Description	ShortDescription	Short Description

At the bottom of the screen, the **Create** button (indicated by a red circle 1) is highlighted, and the **Attribute** option in the dropdown menu (indicated by a red circle 2) is selected.

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



The **Create new attribute** window is shown. It has two input fields: **ID** (containing 'ShortDescription') and **Name** (containing 'Short Description'). At the bottom, the **OK** button is highlighted with a red box.

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

Tree

- System Setup
 - Attribute Groups
 - ATTGroup
 - Air gauge included
 - Hose length
 - Primary Color
 - Short Description
 - Attribute Group
 - Attribute Group C
 - Blacklisted - 2
 - Blacklisted Sales Item Maintenance
 - Business Rules
 - Category Specific Attributes
 - Customer Data
 - Dates
 - DescriptionAttribute
 - Dimensions
 - Display
 - ETIM6 Attributes
 - ETIM Attributes
 - Event Filtering
 - GDSN Receiver System Attributes
 - GDSN System Attributes
 - Workflows
 - z-Test Attr Group
 - Lists of Values / LOVs

Attribute Management

English US • Main

Attribute Details | **Validity**

Description

ID: ShortDescription

Name: Short Description

Last edited by: 2016-04-12 10:05:03 by USER

Externally maintained: Yes

Calculated: No

Type: Specification

Dimension dependencies: [Icon]

Mandatory for approval: No

Attribute Validation

Validation: Text

Multi valued: No

Mask: [Input Field]

Maximum length: 400

Save Delete Reset

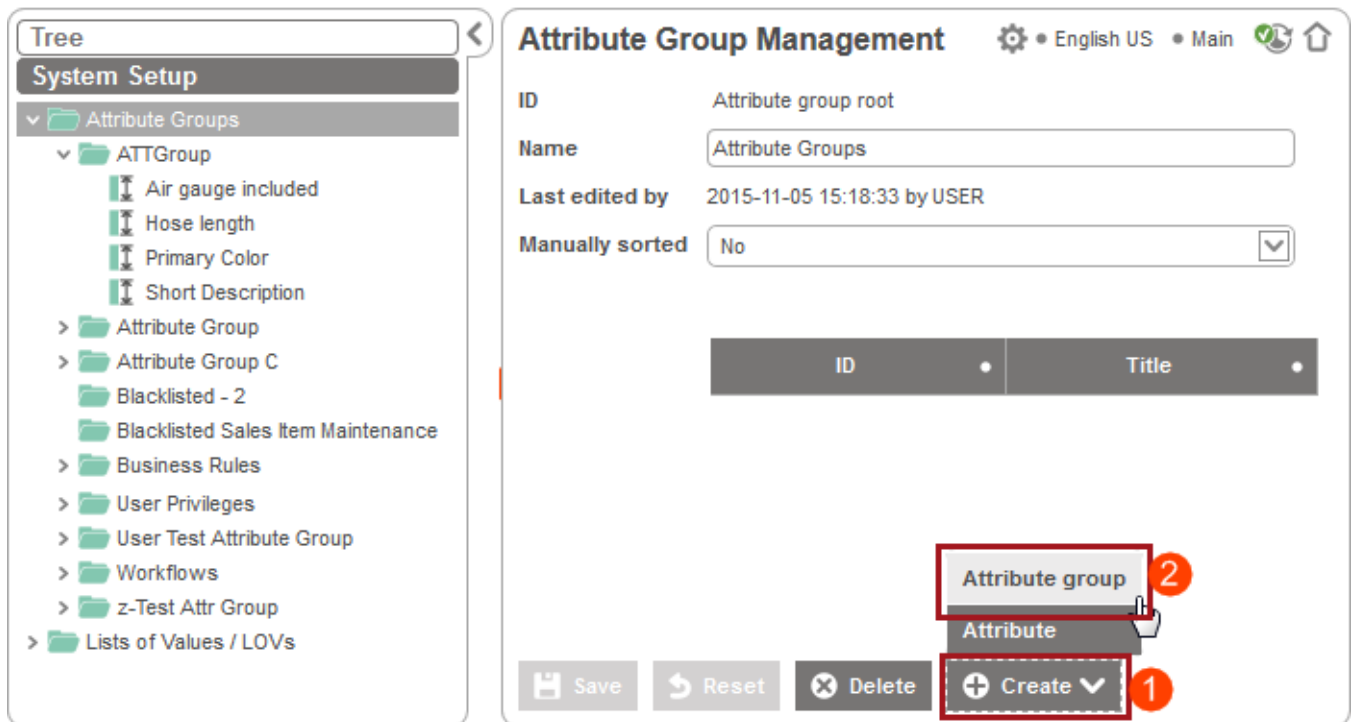
- To edit and configure the attribute, follow the instructions outlined in the **Attribute Management screen** section of the **Web User Interfaces** documentation.

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

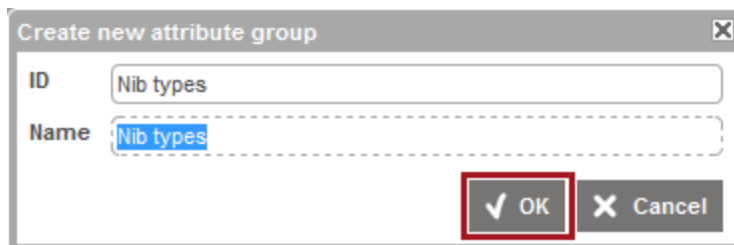
Creating Attribute Groups

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

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



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

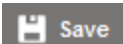


4. The new attribute group is created.

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

Maintaining Attribute Groups

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

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

 button.

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

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

Manually sorted

Yes

	ID
Attribute 1	Attribute 1
Attribute 2	Attribute 2
Attribute 3	Attribute 3

Attribute Management Screen

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

Attribute Management

English US • Main

Attribute Details | **Validity**

Description

ID: AirGaugeIncluded

Name: Air gauge included

Last edited by: 2016-03-16 15:03:52 by USER

Externally maintained: No

Calculated: No

Type: Specification

Dimension dependencies: [Grid Icon]

Mandatory for approval: No

Attribute Validation

Validation: List of Values

List of Values: Yes/No (translatable) (YesNo) [Grid Icon]

Multi valued: No

Save Delete Reset

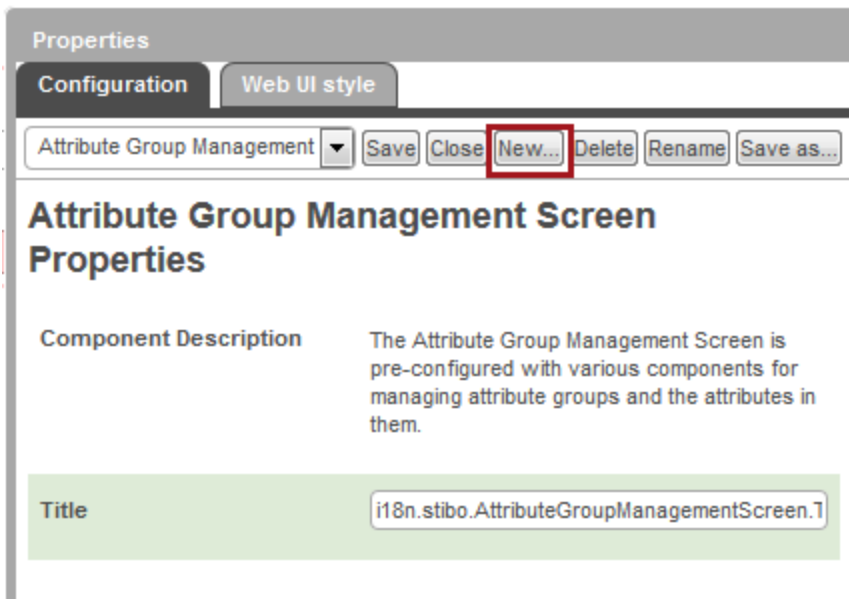
Note: Use of Web UI for this functionality is intended to provide basic attribute management capabilities. As such, some of the more advanced attribute configuration options are available only in the workbench.

Configuring the Attribute Management screen

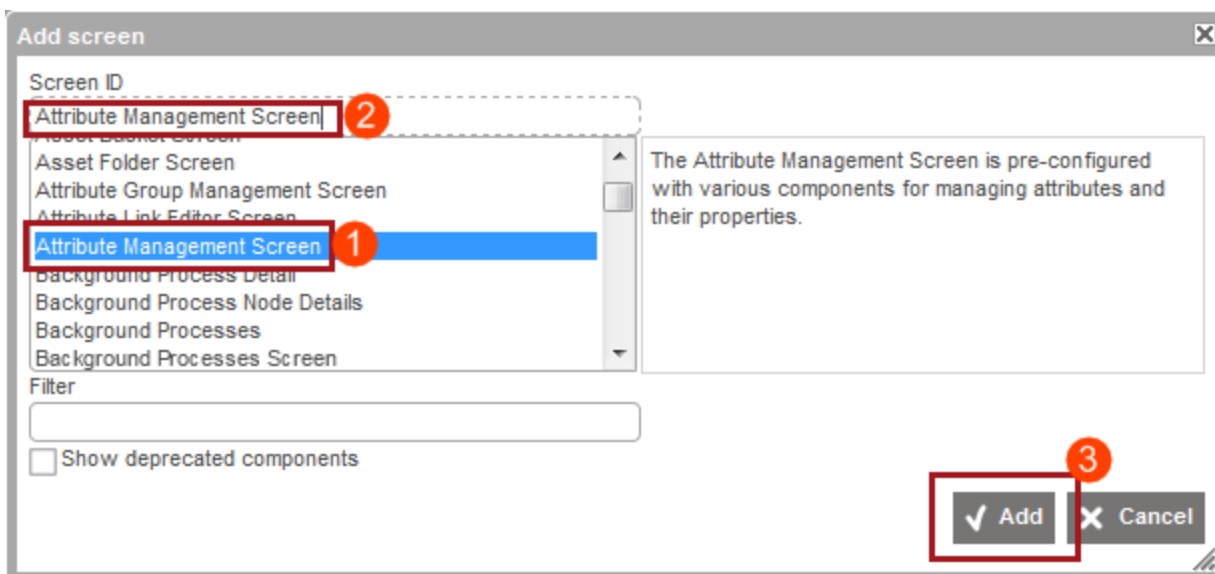
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so users can access the screen via the stack panel.

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

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



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



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

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

Using the Attribute Management screen

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

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

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

List of Values Group Management Screen

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

System Setup

- > Attribute Groups
- > Lists of Values / LOVs
 - Battery Type
 - Colour
 - Country/ISO CODE
 - Country/LOV
- > Drinks
- > ETIM6 List Of Values
- > ETIM List Of Values
- > GDSN List of Values
 - Publication Status
 - Registration Status
 - Yes/No (translatable)
 - Yes/No External
 - Yes/No Revisable

List of Values Group Management

ID: GDSNLOVGroup

Name: GDSN List of Values

Last edited by: 2016-03-14 15:51:33 by USER

	ID	Title
Registration Status	GDSNRegistrationStatus	Registration Status
Publication Status	GDSNPublicationStatus	Publication Status

Save Reset Delete Create

Configuring the List of Values Group Management screen

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

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

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

Properties

Configuration Web UI style

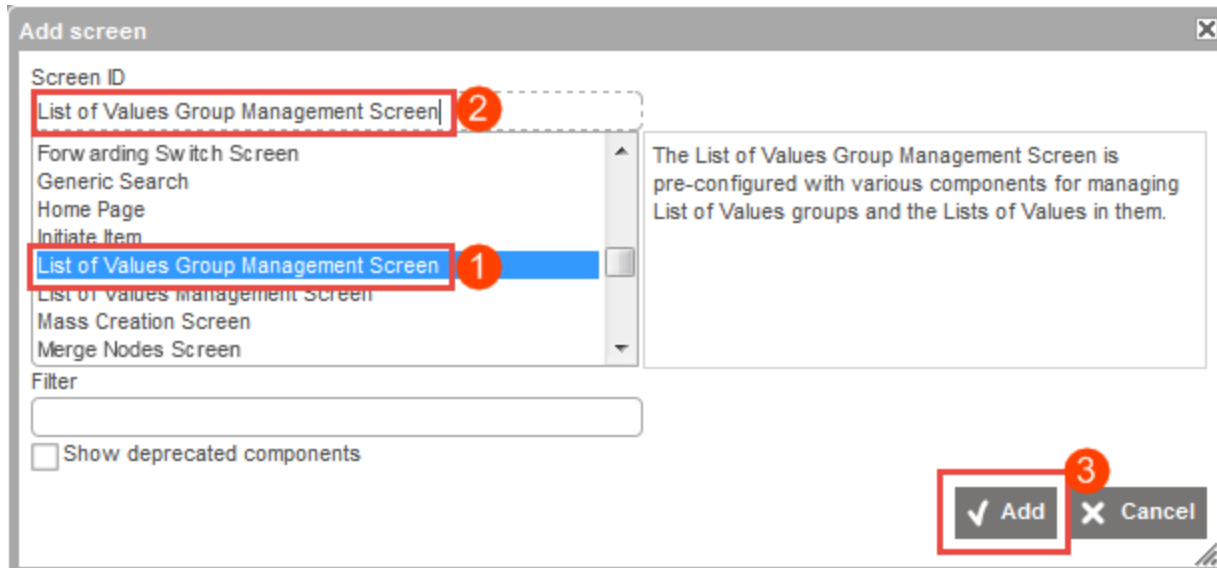
Attribute Group Management Save Close **New...** Delete Rename Save as...

Attribute Group Management Screen Properties

Component Description The Attribute Group Management Screen is pre-configured with various components for managing attribute groups and the attributes in them.

Title i18n.stiibo.AttributeGroupManagementScreen.1

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



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

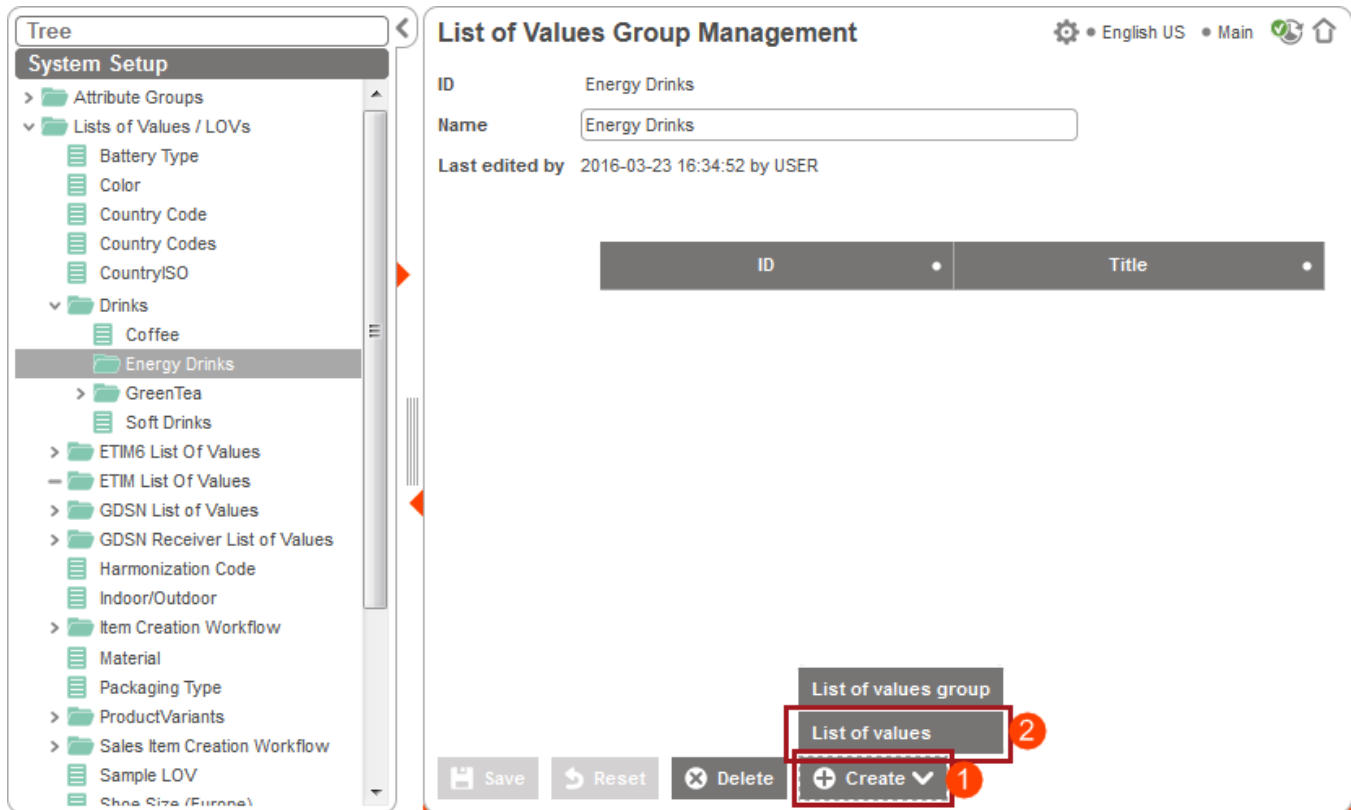
Using the List of Values Group Management screen

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

Creating Lists of Values

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

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



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



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

List of Values Management

English US
Main

List of Values Details

Values

ID

EnergyDrinkLOV

Name

Energy Drink LOV

Last edited by

2016-04-12 12:29:20 by USER

Dimension dependencies

Validation

Text

Mask

Maximum length

100

Allow users to add values

No

Use IDs on values

No

Save

Delete

Reset

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

Creating List of Values Groups

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

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

Tree

System Setup

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

List of Values Group Management

ID: Drinks

Name: Drinks

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

	ID	Title
Coffee	Coffee	Coffee
GreenTea	GreenTea	GreenTea
Soft Drinks	SoftDrinks	Soft Drinks

List of values group

List of values

Save

Reset

Delete

Create

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

Create new list of values group

ID: Energy Drinks

Name: Energy Drinks

OK

Cancel

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

List of Values Group Management

ID: Energy Drinks

Name: Energy Drinks

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

ID	Title

Save

Reset

Delete

Create

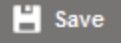
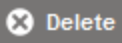
English US

Main

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

Maintaining List of Values Groups

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

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

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

List of Values Management Screen

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

List of Values Management

List of Values Details | **Values**

ID: BatteryTypeLOV

Name: Battery Type

Last edited by: 2016-03-23 11:59:43 by USER

Validation: Text

Mask:

Maximum length: 100

Allow users to add values: No

Use IDs on values: Yes

Use IDs for sorting: No

Value ID pattern:

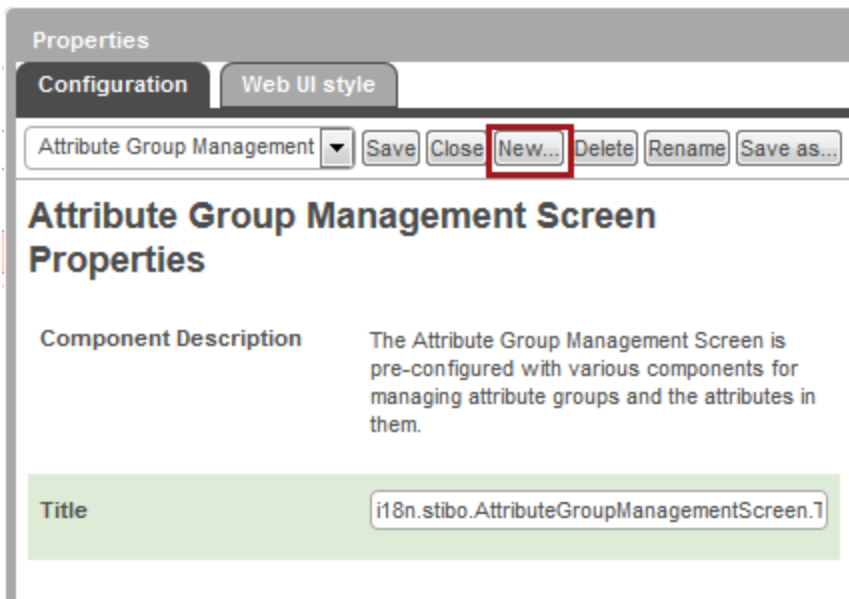
Save Delete Reset

Configuring the List of Values Management screen

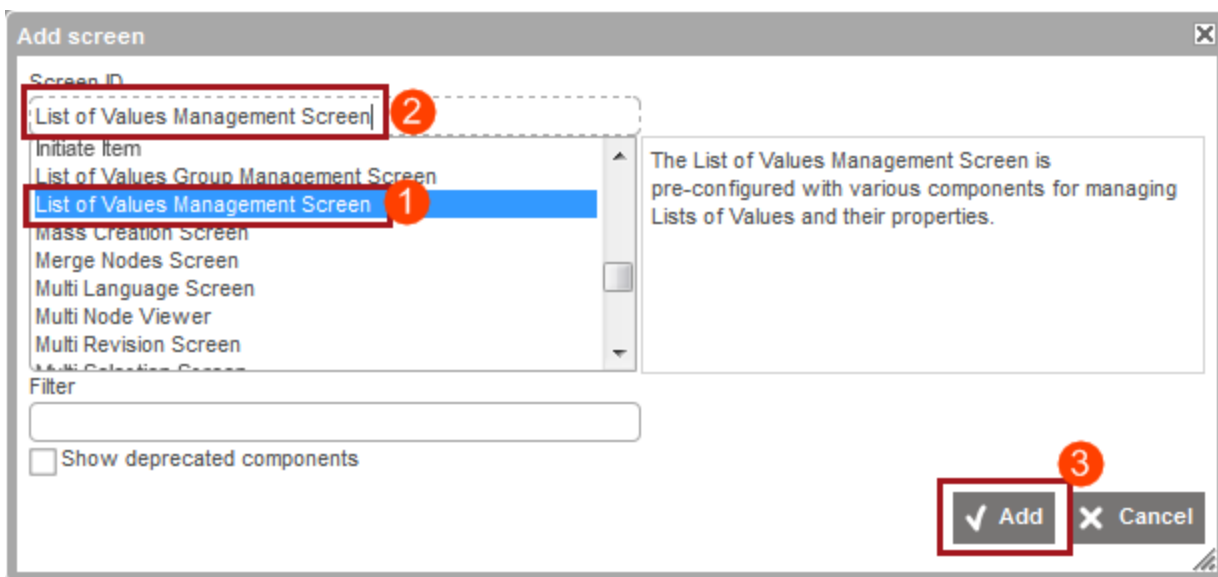
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so that users can access the screen via the stack panel.

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

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



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



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

Using the List of Values Management screen

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

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

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

Asset Handling in Web UI

In Web UI, assets can be created and maintained in a variety of ways, including via components configured on a product or asset node, or through the Asset Importer widget.

Assets can be handled via the following components / functionality:

- Asset Image Value
- Asset Mid Sized
- Asset Value Component
- Asset Thumbnail Component
- Asset Importer Widget
- Asset Previews in Web UI

Asset Image Value

The Asset Image Value component displays a thumbnail that represents the currently selected asset. With this component, users can easily create, delete, or replace asset content.

Asset Detail

Image





ID

20811

Asset Type

Product Image

Name

orange cap

Asset Object Type *fx*

Product Image

Calculated Asset File Name *fx*

20811-orange cap

Format

TIFF (Tagged Image File Format image)

Color Space

RGB

Prerequisites

It is expected that anyone configuring the Asset Image Value component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring Asset Image Value

A number of configuration options are available for this component, including options to create, delete, and replace asset content, directly download the asset on mouse click, represent the asset with a sub-component, specify an asset import configuration when uploading asset content, and more.

Properties (edited)

Configuration
Web UI style

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

Asset Image Value Properties [go to parent](#)

Component Description A component capable of showing an image representing the current asset.

Allow Create Local Content	☒
Allow Create Local Content Label	
Allow Delete Local Content Label	
Allow Replace Content	☒
Allow Replace Content Label	
Context Help	Graphical representation of image
Direct Download	☒
Label	Image
Pop Up Representation	<Select an option> Edit...
Process Description	{Configuration} ({ItemCount} files)
Representation	<Select an option> Edit...
Upload Asset Parameters	Upload Asset Parameters Edit...
Use Asset Import Configuration	<Select a value> v

1. **Allow Create Local Context:** For this parameter, check the box to add a 'Create Local Content' button to the component. This button allows users to import local asset content for a specific context. Note that this option is only available if assets are set as dimensionally dependent.



2. **Allow Create Local Content Label:** In this parameter, enter a label for the button configured in the above step.
3. **Allow Delete Local Content Label:** In this parameter, enter a label for the 'Delete Local Content' button
4. **Allow Replace Content:** For this parameter, check the box to add a 'Replace content' button () to the component. This button allows users to replace asset content with newly imported content. If assets are set as dimensionally dependent this will only change the content for the currently selected context, and only after 'Create Local Content' has been enabled via the associated button (), otherwise it changes the content in all contexts.



5. **Allow Replace Content Label:** In this parameter, enter a label for the button configured in the above step.
6. **Context Help:** In this parameter, enter the context help displayed for the field.
7. **Direct Download:** For this parameter, check the box to allow assets to be downloaded by simply clicking the asset thumbnail.
8. **Label:** In this parameter, enter a label for this field as it appears on the node details screen.
9. **Pop Up Representation:** In this parameter, specify how to present the image representing the current asset by selecting a sub-component from the dropdown. This sub-component displays in a pop-up window when the asset thumbnail is clicked.

Valid sub-components include: 'ConversionConfigurationInfo', 'ConversionScriptInfo', 'NoConversionInfo', 'PipelineInfo', and 'ThumbnailInfo'.
10. **Process Description:** In this parameter, create a template for the background process description. The template may contain a number of place holders that are expanded when the background process is started.

Available placeholders include:

- **[Action]:** The name of the action.
- **[Configuration]:** The asset importer configuration.

- **[ItemCount]**: The number of files to import.
- **[ImportFile]**: The name of the file(s) in a comma separated list.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Advanced'.

11. **Representation:** In this parameter, specify how to present the image representing the current asset by selecting a sub-component from the dropdown.

Valid sub-components include: 'ConversionConfigurationInfo', 'ConversionScriptInfo', 'NoConversionInfo', 'PipelineInfo', and 'ThumbnailInfo'.
12. **Upload Asset Parameters:** In this field, if import parameters are required, select 'Upload Asset Parameters' from the dropdown.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Basic'.

For more information on configuring this parameter, see the 'Upload Asset Parameters Configuration' section below.

13. **Use Asset Import Configuration:** In this parameter, select an asset importer configuration to use from the dropdown. This configuration will be applied if any asset content is imported via this component.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Advanced'.

For more information of using asset importer configurations with this component, see the **Asset Importer in Web UI** section of the **Asset Importer** documentation.

Upload Asset Parameters Configuration

1. To set upload parameters for the component, click the **Edit...** button next to the Upload Asset Parameters field.
2. The 'Upload Asset Parameter Properties' dialog appears.

The screenshot shows a window titled "Edit component" with a close button (X) in the top right corner. The main title is "Upload Asset Parameters Properties". Below the title, there is a "Component Description" section stating "Stores the parameters for the upload asset wizard." The main configuration area is highlighted with a light green background and contains the following elements:

- Classification Picker**: A dropdown menu showing "<Select an option>" with a downward arrow and an "Edit..." button to its right.
- Configuration**: A section header.
- Object Type Selection Shown**: A checkbox that is currently unchecked.
- Object Types**: A list box that is currently empty, with "Add...", "Remove", "Up", and "Down" buttons positioned below it.
- Show Id Choice Options**: A checkbox that is currently unchecked.

At the bottom right of the dialog, there are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

3. In the 'Classification Picker Configuration' parameter, select 'Node Picker Dialog' to enable a node picker that prompts the user to specify which classification folder to upload assets to. This is an optional parameter. When selected (or when you click the **Edit...** button) the Node Picker Dialog Properties window appears.

The screenshot shows a window titled 'Edit component' with a close button (X) in the top right corner. The main title is 'Node Picker Dialog Properties'. Below the title, there are two tabs: 'Component Description' (selected) and 'Configurable node picker dialog'. The 'Component Description' tab contains a green-shaded area with the following fields:

- Root Node Plugin***: A dropdown menu showing 'Static Root Nodes' and an 'Edit...' button.
- Tab Pages***: A large empty text area with 'Add...', 'Edit...', 'Remove', 'Up', and 'Down' buttons below it.
- Title**: A text input field.

 At the bottom right of the window are 'Save' (with a checkmark icon) and 'Cancel' (with an X icon) buttons.

- **Root Node Plugin**: In this parameter, select the plugin that provides the relevant root nodes from the dropdown. The three options include 'Attribute Group Root Node', 'Supplier Asset Folders', and 'Static Root Nodes', and may require additional configurations of their own. This is a mandatory field.
- If **Attribute Group Root Node** is selected, specify an attribute group to act as top root node for the node picker dialog via the 'Attribute Group' parameter. Click **Save** when the selecting is made.

The screenshot shows a window titled 'Edit component' with a close button (X) in the top right corner. The main title is 'Attribute Group Root Node Properties'. Below the title, there are two tabs: 'Component Description' (selected) and 'An attribute group root node'. The 'Component Description' tab contains a green-shaded area with the following field:

- Attribute Group***: A text input field containing 'CategorySpecificAttributes' and a small '...' button to its right.

 At the bottom right of the window are 'Save' (with a checkmark icon) and 'Cancel' (with an X icon) buttons.

- If **Static Root Nodes** is selected, specify the root nodes the node picker will use via the 'Root Node URLs' parameter.

Edit component

Static Root Nodes Properties

Component Description A static configuration of root nodes

Root Node URLs*

step://product?id=Product+hierarchy+root

Add... Remove Up Down

✓ Save ✕ Cancel

- **Tab Pages:** In this parameter, use the **Add...** (or **Edit...**) button to specify which tab pages should be available in the node picker dialog. This is a mandatory field.
 - **Title:** In this parameter, enter a title for the dialog. This is an optional field.
4. **Object Type Selection Shown:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to manually specify the object type of the asset, or have the system detect it automatically. This is an optional field.
 5. **Object Types:** In this parameter, specify the valid object types for imported assets via the **Add...** button. Object types listed here appear as options when manually specifying the object type of an asset. If no object types are specified, all asset object types will be listed. This is an optional field that requires 'Object Type Selection Shown' to be enabled.
 6. **Show Id Choice Options:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to use Filename as the ID, or Auto ID. This is an optional field.

Asset Mid Sized

The Asset Mid Sized component displays a thumbnail that represents the asset linked to the currently selected product. With this component, users can easily create, delete, or replace the content of a referenced asset.



Prerequisites

It is expected that anyone configuring the Asset Mid Sized component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring Asset Mid Sized Component

A number of configuration options are available for this component, including options to create, delete, and replace asset content, directly download the referenced asset on mouse click, specify a reference type for the asset, represent the asset with a sub-component, specify an asset import configuration when uploading asset content, and more.

Properties (edited)

Configuration
Web UI style

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

Asset Mid Sized Properties [go to parent](#)

Component Description A component capable of displaying an image representing the asset linked to the current product via the specified reference type. If there are more than one asset for the product with the specified reference type a random asset will be shown.

Allow Create Local Content	☒
Allow Create Local Content Label	
Allow Delete Local Content Label	
Allow Replace Content	☒
Allow Replace Content Label	
Context Help	i18n.stibo.AssetImageValue.default.ContextHelp
Direct Download	☐
Label	i18n.stibo.AssetImageValue.default.Label
Pop Up Representation	<Select an option> Edit...
Process Description	{Configuration} ({ItemCount} files)
Reference Type*	PrimaryProductImage ...
Representation	<Select an option> Edit...
Upload Asset Parameters	<Select an option> Edit...
Use Asset Import Configuration	<Select a value> v

1. **Allow Create Local Context:** For this parameter, check the box to add a 'Create Local Content' button to the component. This button allows users to import local asset content for a specific context. Note that this option is only available if assets are set as dimensionally dependent.



2. **Allow Create Local Content Label:** In this parameter, enter a label for the button configured in the above step.
3. **Allow Delete Local Content Label:** In this parameter, enter a label for the 'Delete Local Content' button
4. **Allow Replace Content:** For this parameter, check the box to add a 'Replace content' button () to the component. This button allows users to replace asset content with newly imported content. If assets are set as dimensionally dependent this will only change the content for the currently selected context, and only after 'Create Local Content' has been enabled via the associated button (), otherwise it changes the content in all contexts.



5. **Allow Replace Content Label:** In this parameter, enter a label for the button configured in the above step.
6. **Context Help:** In this parameter, enter the context help displayed for the field.
7. **Direct Download:** For this parameter, check the box to allow assets to be downloaded by simply clicking the asset thumbnail.
8. **Label:** In this parameter, enter a label for this field.
9. **Pop Up Representation:** In this parameter, specify how to present the image representing the current asset by selecting a sub-component from the dropdown. This sub-component displays in a pop-up window when the asset thumbnail is clicked.

Valid sub-components include: 'ConversionConfigurationInfo', 'ConversionScriptInfo', 'NoConversionInfo', 'PipelineInfo', and 'ThumbnailInfo'.
10. **Process Description:** In this parameter, create a template for the background process description. The template may contain a number of place holders that are expanded when the background process is started.

Available placeholders include:

- **[Action]**: The name of the action.
- **[Configuration]**: The asset importer configuration.
- **[ItemCount]**: The number of files to import.
- **[ImportFile]**: The name of the file(s) in a comma separated list.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Advanced'.

11. **Reference Type:** In this parameter, Click the ellipsis button (...) and select the reference type to be used for displaying the asset on the component.
12. **Representation:** In this parameter, specify how to present the image representing the current asset by selecting a sub-component from the dropdown.

Valid sub-components include: 'ConversionConfigurationInfo', 'ConversionScriptInfo', 'NoConversionInfo', 'PipelineInfo', and 'ThumbnailInfo'.
13. **Upload Asset Parameters:** In this field, if import parameters are required, select 'Upload Asset Parameters' from the dropdown.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Basic'.

For more information on configuring this parameter, see the 'Upload Asset Parameters Configuration' section below.

14. **Use Asset Import Configuration:** In this parameter, select an asset importer configuration to use from the dropdown. This configuration will be applied if any asset content is imported via this component.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Advanced'.

For more information of using asset importer configurations with this component, see the **Asset Importer in Web UI** section of the **Asset Importer** documentation.

Upload Asset Parameters Configuration

1. To set upload parameters for the component, click the **Edit...** button next to the Upload Asset Parameters field.
2. The 'Upload Asset Parameter Properties' dialog appears.

The screenshot shows a window titled "Edit component" with a close button (X) in the top right corner. The main title is "Upload Asset Parameters Properties". Below the title, there is a "Component Description" section stating "Stores the parameters for the upload asset wizard." The main configuration area is highlighted with a light green background and contains the following elements:

- Classification Picker Configuration:** A dropdown menu showing "<Select an option>" with a downward arrow and an "Edit..." button to its right.
- Object Type Selection Shown:** A checkbox that is currently unchecked.
- Object Types:** A large empty text area for listing object types, with "Add...", "Remove", "Up", and "Down" buttons positioned below it.
- Show Id Choice Options:** A checkbox that is currently unchecked.

At the bottom right of the dialog, there are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

3. In the 'Classification Picker Configuration' parameter, select 'Node Picker Dialog' to enable a node picker that prompts the user to specify which classification folder to upload assets to. This is an optional parameter. When selected (or when you click the **Edit...** button) the Node Picker Dialog Properties window appears.

Edit component [X]

Node Picker Dialog Properties

Component Description Configurable node picker dialog

Root Node Plugin* Static Root Nodes [v] [Edit...]

Tab Pages* [Empty list box] [Add...] [Edit...] [Remove] [Up] [Down]

Title [Empty text box]

[✓ Save] [X Cancel]

- **Root Node Plugin:** In this parameter, select the plugin that provides the relevant root nodes from the dropdown. The three options include 'Attribute Group Root Node', 'Supplier Asset Folders', and 'Static Root Nodes', and may require additional configurations of their own. This is a mandatory field.
- If **Attribute Group Root Node** is selected, specify an attribute group to act as top root node for the node picker dialog via the 'Attribute Group' parameter. Click **Save** when the selecting is made.

Edit component [X]

Attribute Group Root Node Properties

Component Description An attribute group root node

Attribute Group* CategorySpecificAttributes [...] [v]

[✓ Save] [X Cancel]

- If **Static Root Nodes** is selected, specify the root nodes the node picker will use via the 'Root Node URLs' parameter.

Edit component

Static Root Nodes Properties

Component Description A static configuration of root nodes

Root Node URLs*

step://product?id=Product+hierarchy+root

Add... Remove Up Down

✓ Save ✕ Cancel

- **Tab Pages:** In this parameter, use the **Add...** (or **Edit...**) button to specify which tab pages should be available in the node picker dialog. This is a mandatory field.
 - **Title:** In this parameter, enter a title for the dialog. This is an optional field.
4. **Object Type Selection Shown:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to manually specify the object type of the asset, or have the system detect it automatically. This is an optional field.
 5. **Object Types:** In this parameter, specify the valid object types for imported assets via the **Add...** button. Object types listed here appear as options when manually specifying the object type of an asset. If no object types are specified, all asset object types will be listed. This is an optional field that requires 'Object Type Selection Shown' to be enabled.
 6. **Show Id Choice Options:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to use Filename as the ID, or Auto ID. This is an optional field.

Asset Value Component

The Asset Value component displays a thumbnail(s) that represents the asset(s) linked to the currently selected product, and allows for the creation of additional asset references on the product.



Important: This component does not support Asset Importer configurations.

With this component, users can:

- Upload new assets or add existing assets to the product via the 'plus' (+) button. When clicked, two options are made available via the dropdown: 'Insert image(s)' and 'Upload and insert image(s)'. 'Insert image' allows users to add an existing asset(s) to the product via a node selector. 'Upload and insert image(s)' allows users to import an asset(s) via a file selector, and if necessary, specify a classification folder where the assets will be saved.
- Delete the reference to an asset via the 'X' (✕) button.
- Open the asset content in a new tab via the magnifying glass (🔍) button.
- Access the asset node in Tree via the pencil (✎) button.

Prerequisites

It is expected that anyone configuring the Asset Value component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring Asset Value Component

A small number of configuration options impact the functionality of this component, including options to pre-define a classification folder to load imported assets into, and specify the reference type for those assets.

Properties (edited)

Configuration
Web UI style

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

Asset Value Properties [go to parent](#)

Component Description A component capable of editing an asset reference

Asset Classification	8735 ...
Asset Reference Type*	ProductImage ...
Context Help	
Css Class i	
Label	
Mandatory	☐
Message Insert Image	i18n.stibo.assetreference.InsertImage
Message Insert Images	i18n.stibo.assetreference.InsertImages
Message Replace Image	i18n.stibo.assetreference.ReplaceImage
Message Upload Image	i18n.stibo.assetreference.UploadImage
Message Upload Images	i18n.stibo.assetreference.UploadImages
Read Only	☐
Upload Asset Parameters	Upload Asset Parameters ▼ Edit...

Child Components

1. **Asset Classification:** For this parameter, click the ellipsis button (...) and specify the classification folder that uploaded assets should be stored in via the node selector. If this option is not set, the user will be prompted to specify a classification folder upon import of a new asset(s). Additionally, this option must be set for this

component to be made available for non-supplier users.

2. **Asset Reference Type:** For this parameter, click the ellipsis button (...) and specify the reference type that should be used when linking assets to the product via the node selector. This field is mandatory.
3. **Context Help:** In this parameter, enter the context help displayed for the field.
4. **Css Class:** In this parameter, enter an optional name of a CSS-style to be set as the primary style for the component.
5. **Label:** In this parameter, enter a label for this field.
6. **Mandatory:** Checking the box for this parameter indicates that at least one asset must be added to the product.
7. **Message Insert Image:** In this parameter, enter the message to use when inserting images.
8. **Message Insert Images:** In this parameter, enter the message to use when inserting images (for multi valued asset references).
9. **Message Replace Image:** In this parameter, enter the message to use when replacing images.
10. **Message Upload Image:** In this parameter, enter the message to use when uploading images.
11. **Message Insert Images:** In this parameter, enter the message to use when uploading images (for multi valued asset references).
12. **Read Only:** Check the box for this parameter to make the component read only. In this state, the component cannot be used to upload assets, or add / delete asset references.
13. **Upload Asset Parameters:** In this field, if import parameters are required, select 'Upload Asset Parameters' from the dropdown.

Note: Only valid if the 'Asset Import Compatibility Mode' setting under **Users & Groups** is set to 'Basic'.

For more information on configuring this parameter, see the 'Upload Asset Parameters Configuration' section below.

Upload Asset Parameters Configuration

1. To set upload parameters for the component, click the **Edit...** button next to the Upload Asset Parameters field.
2. The 'Upload Asset Parameter Properties' dialog appears.

The screenshot shows a software window titled "Edit component" with a close button (X) in the top right corner. The main title is "Upload Asset Parameters Properties". Below the title, there is a "Component Description" section stating "Stores the parameters for the upload asset wizard." The main configuration area has a light green background and contains several fields: "Classification Picker" with a dropdown menu showing "<Select an option>" and an "Edit..." button; "Object Type Selection Shown" with an unchecked checkbox; "Object Types" with an empty list box and buttons "Add...", "Remove", "Up", and "Down" below it; and "Show Id Choice Options" with an unchecked checkbox. At the bottom right of the window are "Save" and "Cancel" buttons.

3. In the 'Classification Picker Configuration' parameter, select 'Node Picker Dialog' to enable a node picker that prompts the user to specify which classification folder to upload assets to. This is an optional parameter. When selected (or when you click the **Edit...** button) the Node Picker Dialog Properties window appears.

Edit component [X]

Node Picker Dialog Properties

Component Description Configurable node picker dialog

Root Node Plugin* Static Root Nodes [v] [Edit...]

Tab Pages* [Empty list box] [Add...] [Edit...] [Remove] [Up] [Down]

Title [Empty text box]

[✓ Save] [X Cancel]

- **Root Node Plugin:** In this parameter, select the plugin that provides the relevant root nodes from the dropdown. The three options include 'Attribute Group Root Node', 'Supplier Asset Folders', and 'Static Root Nodes', and may require additional configurations of their own. This is a mandatory field.
- If **Attribute Group Root Node** is selected, specify an attribute group to act as top root node for the node picker dialog via the 'Attribute Group' parameter. Click **Save** when the selecting is made.

Edit component [X]

Attribute Group Root Node Properties

Component Description An attribute group root node

Attribute Group* CategorySpecificAttributes [v]

[✓ Save] [X Cancel]

- If **Static Root Nodes** is selected, specify the root nodes the node picker will use via the 'Root Node URLs' parameter.

Edit component

Static Root Nodes Properties

Component Description A static configuration of root nodes

Root Node URLs*

step://product?id=Product+hierarchy+root

Add... Remove Up Down

✓ Save ✕ Cancel

- **Tab Pages:** In this parameter, use the **Add...** (or **Edit...**) button to specify which tab pages should be available in the node picker dialog. This is a mandatory field.
 - **Title:** In this parameter, enter a title for the dialog. This is an optional field.
4. **Object Type Selection Shown:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to manually specify the object type of the asset, or have the system detect it automatically. This is an optional field.
 5. **Object Types:** In this parameter, specify the valid object types for imported assets via the **Add...** button. Object types listed here appear as options when manually specifying the object type of an asset. If no object types are specified, all asset object types will be listed. This is an optional field that requires 'Object Type Selection Shown' to be enabled.
 6. **Show Id Choice Options:** In this parameter, check the box to add two radio buttons to the dialog which allow users to choose whether to use Filename as the ID, or Auto ID. This is an optional field.

Asset Thumbnail Component

The Asset Thumbnail component displays thumbnails of all assets linked to the currently selected product via the Asset Value Component.



For more information on the Asset Value Component, see the **Asset Value Component** section of the **Web User Interfaces** documentation.

Prerequisites

It is expected that anyone configuring the Asset Thumbnail component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring Asset Thumbnail Component

The only configuration option that impacts the functionality of this component is the 'Asset Reference Type' parameter.

Properties

Configuration

Web UI style

Sales Item detail ▼

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

Asset Thumbnail Properties

go to parent

Component Description

A component capable of showing thumbnails for a specified asset reference type. Always read-only and will be ignored in Excel export

Asset Reference Type

ProductImage ... Clear

Context Help

Css Class

Label

Child Components

1. **Asset Reference Type:** For this parameter, click the ellipsis button (...) and specify the reference type of the assets to be displayed by this component via the node selector.
2. **Context Help:** In this parameter, enter the context help displayed for the field.
3. **Css Class:** In this parameter, enter an optional name of a CSS-style to be set as the primary style for the component.
4. **Label:** In this parameter, enter a label for this field.

Asset Importer Widget

The Asset Importer Widget offers users a simple method of importing assets from the Web UI Homepage. Multiple asset importer configurations can be mapped to the same widget, which are accessed individually by dragging and dropping files into the appropriate area on the widget or by clicking on the **Select File** button for the corresponding configuration.



Before this widget can be used, ensure that the Asset Importer functionality has been enabled and that there are configurations available on the system.

For more information on enabling Asset Importer, see the **Asset Importer Initial Setup** section of the **Asset Importer** documentation [here](#).

For more information on creating asset importer configurations, see the **Asset Importer Configuration Overview** section of the **Asset Importer** documentation.

Configuration

It is expected that anyone configuring the Asset Importer Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer.

For information on adding a widget to the homepage, please see the **Adding Widgets to a Homepage** section of the **Homepage Widgets** document.

1. When configuring the Asset Importer Widget for the Homepage, there are four optional parameters to consider; Label, Process Description, Upload Asset Parameters, and Use Multi Drop Area.

2. In the 'Label' parameter, enter a label for the widget.
3. In the 'Process Description' parameter, create a template for the background process description. The template may contain a number of place holders that are expanded when the background process is started. Available placeholders include:
 - **[Action]**: The name of the action.
 - **[Configuration]**: The asset importer configuration.
 - **[ItemCount]**: The number of files to import.
 - **[ImportFile]**: The name of the file(s) in a comma separated list.
4. In the 'Upload Asset Parameters' field, click **Add** (and follow the below steps) to map an asset import configuration to the widget. If no selections are made, the user will be prompted to specify which configuration to use among all those present on the system upon import.
 - In the dialog that appears, enter a label for the area in which the configuration will reside.
 - Select the desired Asset Configuration.
 - Click **Add** when finished.

Add component - configure required properties

The Asset Import Configuration Parameter component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Asset Import Configuration Parameter Properties

Label

Use Asset Import Configuration* ☐ ...

- In the 'Use Multi Drop Area' parameter, check the box to enable multiple drop areas on the widget. Each of these drop areas represent an individual asset importer configuration that was specified in the above step. If unchecked, the widget will have one large drop area, that when used, will prompt you to select a configuration from those specified in the previous step.

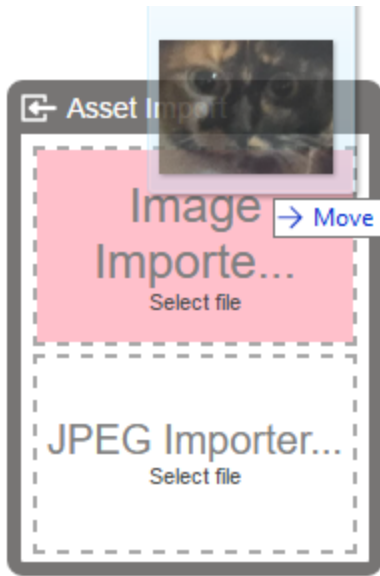
Note: It is recommended to leave the box unchecked if you want to map many different configurations to the same widget.

Importing Assets

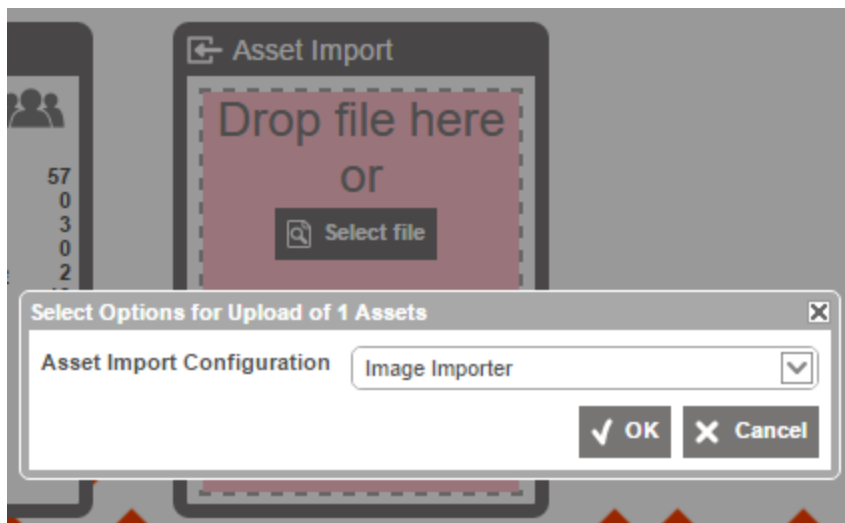
Once the widget is configured, assets can be easily uploaded by either dragging and dropping the relevant file into the widget drop area or by clicking on the **Select File** button for the corresponding configuration.

Drag and drop

Files can be dragged and dropped directly into the widget. Once dropped, the user will be provided with a link to the background process.



If 'Use Multi Drop Area' is not configured, the user will be prompted to select a configuration. Once a selection is made, click **OK** and the import will initiate.



'Select file' option

In addition to drag and drop, users can simply click **Select file** for the corresponding importer configuration.



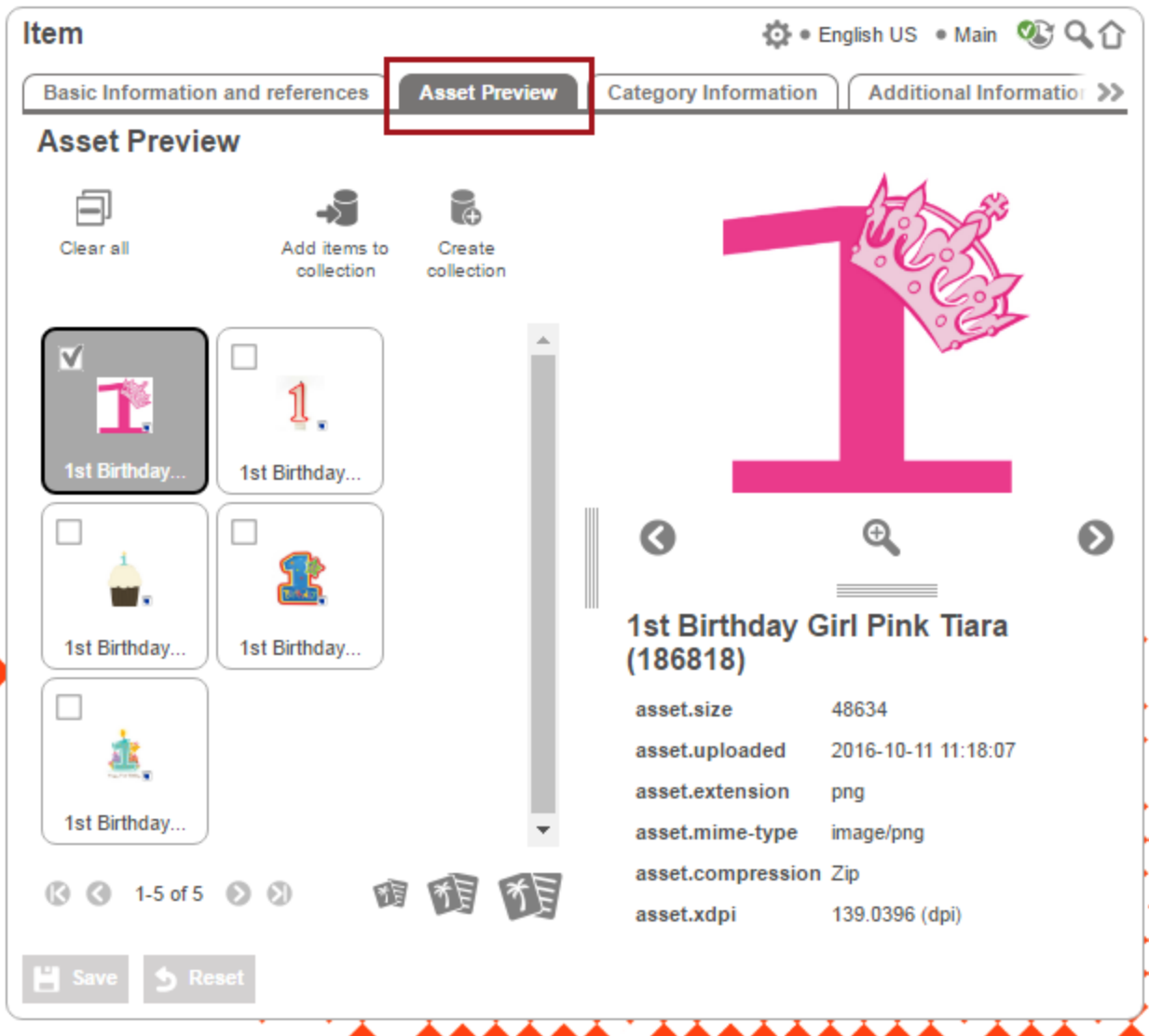
Asset Previews in Web UI

Full-screen previews of image assets, PDFs, Microsoft Office documents, and video files are available in three locations in Web UI: the **Asset Preview Screen**, the **Asset Mid Sized** component, and the **Asset Image Value** component. The Asset Preview Screen and Asset Mid Sized components are used to view previews of referenced assets linked to product object nodes. The Asset Image Value component provides these previews when viewing assets themselves.

Asset Preview Screen

The Asset Preview Screen supports configurable and enhanced asset previewing capabilities such as full-screen image previews and scrollable previews of Office and PDF documents, as well as viewable previews of video files. The types of references displayed on this screen are configurable in the designer by admin users. It is typically configured as a Sub Screen Tab Page on Node Details pages for product objects.

The below screenshot shows a sample Asset Preview Screen and the preview displayed when viewing image assets. Linked assets are displayed as thumbnails in the left-hand panel. The sizing of these thumbnails is controlled by selecting one of the three thumbnail size selector icons that appear below the thumbnails. When a thumbnail is selected, a larger preview of the asset appears in the right-hand panel. Below the asset preview, a configurable selection of description attributes that are valid for the selected asset object type can be added.



Using the Asset Preview Screen

To navigate between assets, click on the left and right arrow icons directly beneath the asset preview in the right panel. Alternately, you may use the left and right arrow keys on your keyboard.

To resize the preview, move the horizontal drag handle below the preview up or down, and/or move the vertical drag handle left or right. To view a full-screen preview (pictured below), click on the magnifier icon below the preview.



Previews of PDF, Microsoft Office, and Video Files

Previews of PDFs, Microsoft Office documents (Word, PowerPoint, and Excel), and video files (such as MP4s) work in the same fashion on the Asset Preview Screen as previews of standard image assets, though with additional dynamic functionality.

First-page thumbnails for **MS Office** and **PDF** documents display in the thumbnail gallery in the left-hand panel. For **Excel**, the thumbnail representation is of the first sheet of the workbook. Selecting a thumbnail will generate a larger preview of the first page / first sheet in the right panel. Pictured below is a preview of a Microsoft Word document.

Item
English US
Main

Basic Information and references
Asset Preview
Category Information
Additional Information
Packaging

Asset Preview

Clear all
Add items to collection

☐

1st Birthday...

☐

1st Birthday...

☐

1st Birthday...

☐

1st Birthday...

☐

1st Birthday...

☐

Fall Inventory...

☐

Specification...

☒

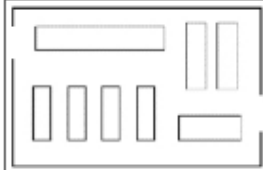
Merchandising...

Merchandising Guide

None vercia dionserem incit exum harum quamus modi con pedis adicitur aut erios non ne quaspiol endempe porio dolunet lique pedi ne volum neptatinta volor am et et aboris ea nullibus erspelerem.

Floor Plan

Um iust qui ipauris ium fuga. Num quatemporum que proneris pedicinta nubem vidique aut placus e come aut iant aperferum nisque nonsecis mo tam quiae neri omisit elolupta que volorehendae.



Shelving

Porro vel exum fugiam aut volonitiae nata eaquis aut. Ulo tempore cvidabit assectem aut accebi omient aliquid enimusdam. consect oreperum conse nis ne lolo ipsumet la pia vero voluptatur aut enesto emmodi coreoro modipsantus. quibus essimus iminus ni vollice abbus int.

Merchandising Guide_Word (193438)

asset.size 123636
asset.uploaded 2016-11-04 09:41:32
asset.extension docx

1-12 of 12

Save
Reset

When the magnifier icon below the preview is clicked, a full-screen readable and scrollable preview of the entire document displays.

Item
English US
Main

Basic Information and references
Asset Preview
Category Information
Additional Information
Packaging

Asset Preview
Merchandising Guide_Word (193438)

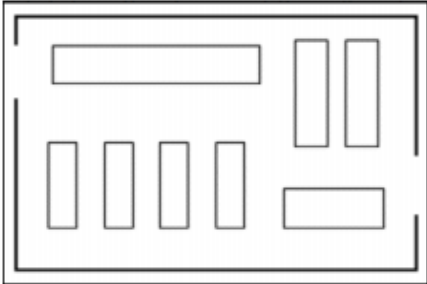
asset
1 / 2

Merchandising Guide

None vercia dionsenem incit earum harum quamus modi con pedis adicatur aut erios non re quaspid endempe porro dolutet lique pedi re volum reptatinita dolor am et et aboris ea nullibus erspelenem.

Floor Plan

Um iust qui ipsunte ium fuga. Rum quatemporum que proreris peditinte natem vidisquas aut placcus a cone aut lant aperferum nisque nonsectis mo tem quiae reri omnisit dolupta que volorehendae.

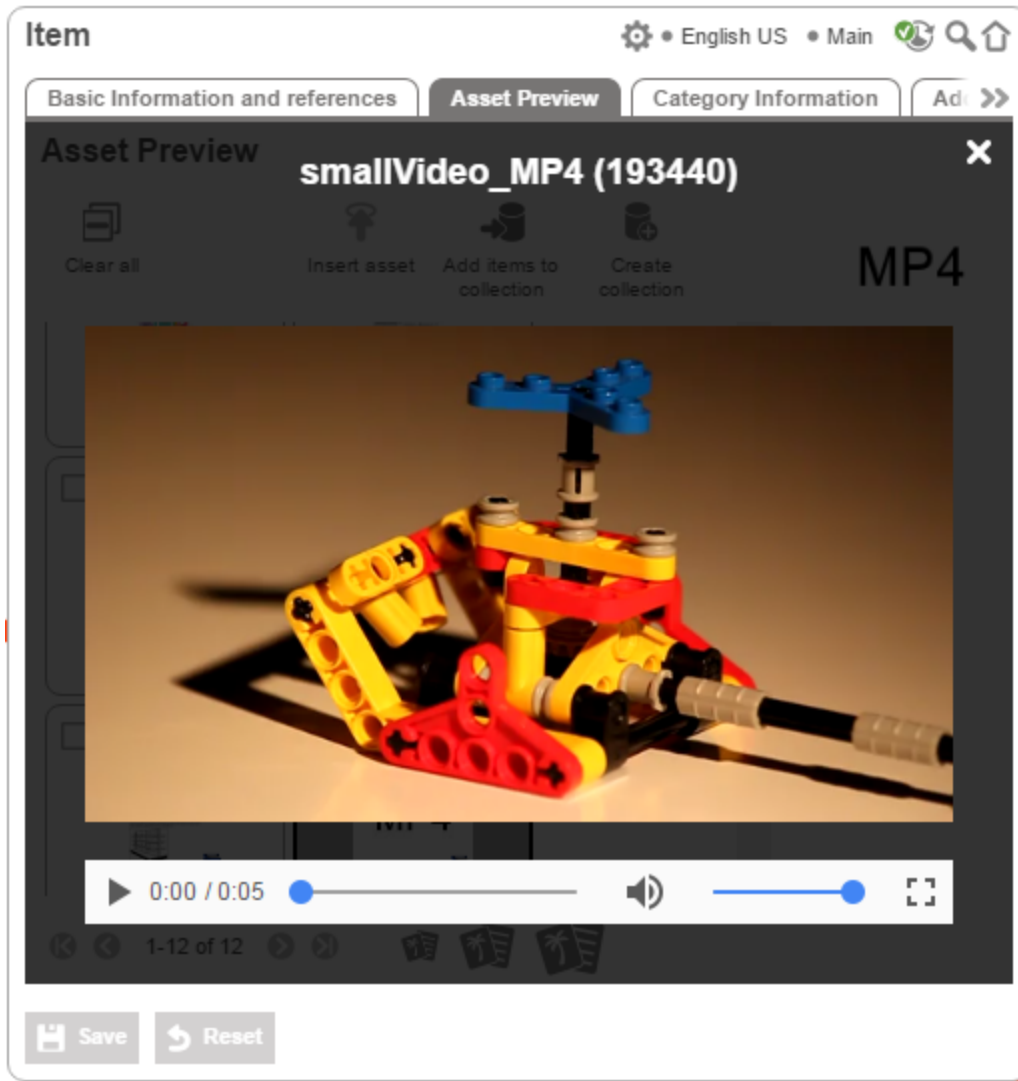


Shelving

Porro vel erum fugitiam aut volioriorae nata eaquis asit, ullo temporr ovidebit assectem aut acesti omnient aliquid enimusdam, consect oreperum conse nis re lab ipsumet la pa vero voluptatur aut erioisto ommodi corepro modipsantus, quibus essimus iminus ni vollace atibus int.

Save
Reset

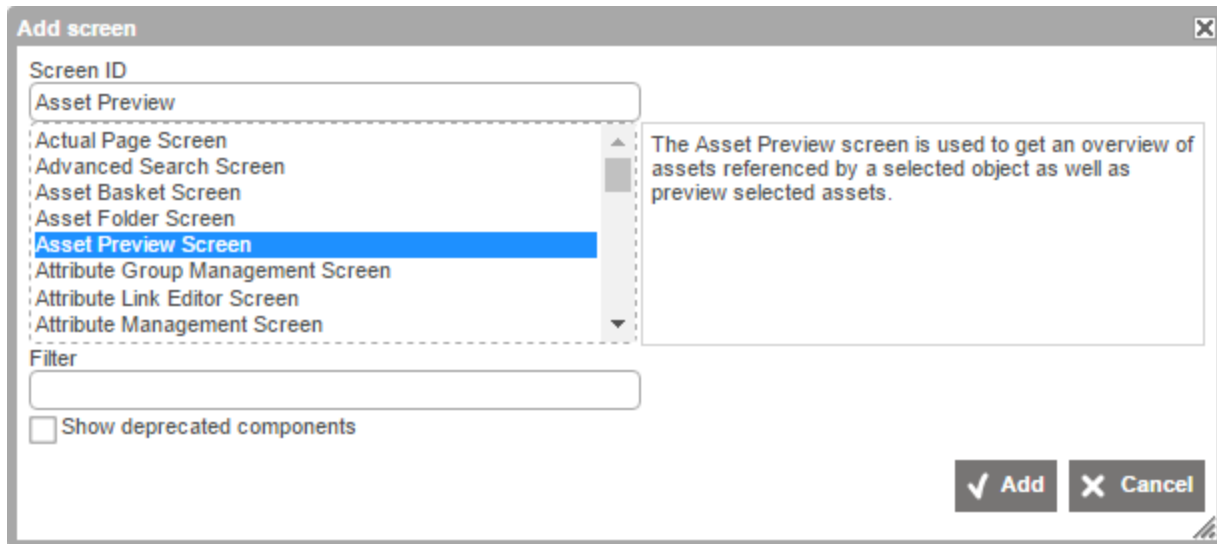
Video files display a generic thumbnail and right-panel preview, but once the magnifier icon is clicked, the video displays in a full-screen, playable preview.



Creating an Asset Preview Screen

In order to create an Asset Preview Screen, a new screen must be created using the Asset Preview screen type.

1. Open the Designer and click on **New**. An **Add screen** dialog displays.
2. Select **Asset Preview Screen** from the list, then enter an ID for the new screen in the **Screen ID** field. (In this example, the ID provided for the screen is Asset Preview.)



3. The **Asset Preview Screen Properties** dialog displays.

Properties

Configuration

Web UI style

Asset Preview

Save

Close

New...

Delete

Rename

Save as...

Asset Preview Screen Properties

Component Description

The Asset Preview screen is used to get an overview of assets referenced by a selected object as well as preview selected assets.

Asset Details

Add...

Remove

Up

Down

Reference Types*

Add...

Remove

Up

Down

Title

Child Components

Actions

Add..

Remove

Up

Down

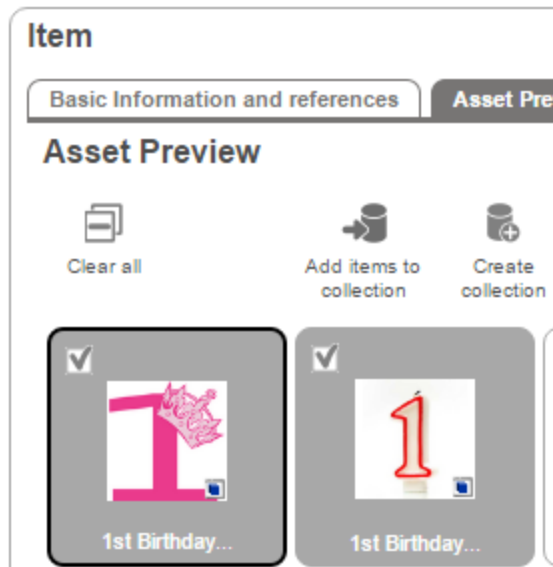
- In the **Asset Details** field, click **Add...** to launch the Select Node(s) dialog for attributes and attribute groups.
- Browse to or search for the metadata attributes or attribute groups that you would like to display beneath the asset preview in the right-hand panel. (Typically, these will be system attributes such as asset.size, asset.extension, and asset.filename, as shown in the following screenshot.) Hold Shift or Ctrl to multi-select while making your choices.
- Click **OK** to complete and close the Select Node(s) dialog.



1st Birthday Girl Pink Tiara (186818)

asset.size	48634
asset.uploaded	2016-10-11 11:18:07
asset.extension	png
asset.mime-type	image/png
asset.compression	Zip
asset.xdpi	139.0396 (dpi)
asset.class	True color
asset.pixel-width	570 (pixels)
asset.colorspace	RGB
asset.ydpi	139.0396 (dpi)
asset.format	PNG (Portable Network Graphics image)
asset.pixel-height	595 (pixels)
asset.width	104.1286079649251 (mm)
asset.height	108.69565217391303 (mm)
asset.depth	8 (bits/sample)
asset.samples	3 (samples/pixel)
asset.filename	1st-birthday-pink-tiara.png

7. In the **References Types** field, click **Add...** to launch the Select Node(s) dialog for reference types.
8. Browse to or search for the asset reference types that you would like to display on the Asset Preview screen. Hold Shift or Ctrl to multiselect while making your choices.
9. Click **OK** to complete and close the Select Node(s) dialog.
10. In the **Title** field, add a title that you would like to display in the upper-left corner of your Asset Preview screen.
11. Under **Child Components**, select the actions to display above the gallery of asset thumbnails (left panel of the Asset Preview screen) when assets are selected. Typical selections are 'Add Selected Items To Collection' and 'Create Collection Action.'



12. In the designer, click **Save** to save all configurations, then click **Close** to exit the designer.

Previews Using the Asset Image Value and Asset Mid Sized Components

Two Web UI components—'Asset Image Value' and 'Asset Mid Sized'—can also be configured to view large and scrollable previews of referenced assets, PDF, and Microsoft Office documents, as well as playable previews of video assets.

Asset Image Value

The Asset Image Value component can be configured to view large, scrollable previews of assets by setting the **Pop Up Representation** parameter to FULL.

Properties (edited)

Configuration

Web UI style

Asset detail

Save

Close

New...

Delete

Rename

Save as...

Asset Image Value Properties

go to parent

Component Description

A component capable of showing an image representing the current asset.

Allow Create Local Content

☒

Allow Create Local Content Label

Allow Delete Local Content Label

Allow Replace Content

☒

Allow Replace Content Label

Context Help

Graphical representation of image

Direct Download

☐

Label

Image

Pop Up Representation

Thumbnail Info

Edit...

Edit component

Thumbnail Info Properties

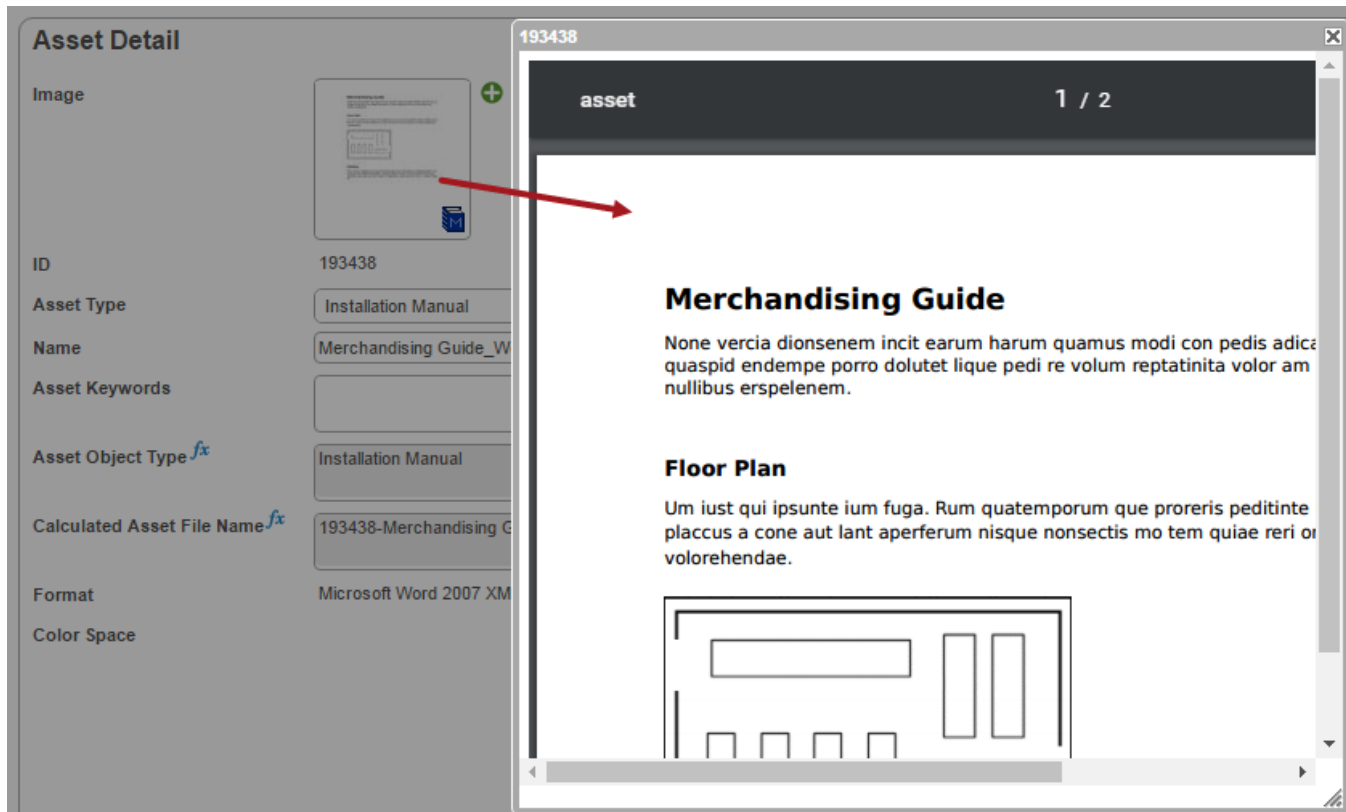
Component Description

A component thumbnail image recommended by default is s

Size*

FULL

When the asset thumbnail is clicked, the full-size popup representation displays a scrollable preview (or, in the case of a video asset, a playable preview).



Asset Mid Sized

The Asset Mid Sized component is configured identically to the Asset Image Value component to view large, scrollable previews of referenced assets—the **Pop Up Representation** parameter is set to FULL.

For more detailed information on these components, see the **Asset Mid Sized** and **Asset Image Value** online help topics.

Considerations and Limitations for Asset Previews in Web UI

- The Asset Preview Screen can only be used on product object nodes; it cannot be configured to view referenced assets on classification or entity nodes.
- A PDF reader plugin must be activated in your browser in order to display previews of PDFs, MS Office documents, and video files.
- Document previews (regardless of Web UI component) may not always be accurate down to fonts, image placement, etc., but they provide users the option to review the contents of the documents to ensure that they are the correct assets for the product in question.
- Though not strictly required for image previews to function, it is highly recommended to enable asset caching functionality in order to optimize performance when loading screens with large numbers of images. This ensures that the various image sizes used by the preview components are cached and available on-demand. For more information on asset caching, see the **Event Processors** section of the **System Setup / STEP Super User Guide** documentation.

- Enhanced and scrollable Office document and PDF previews are only available on systems in which a portable version of LibreOffice, the third-party library that STEP uses to generate the previews, has been installed.

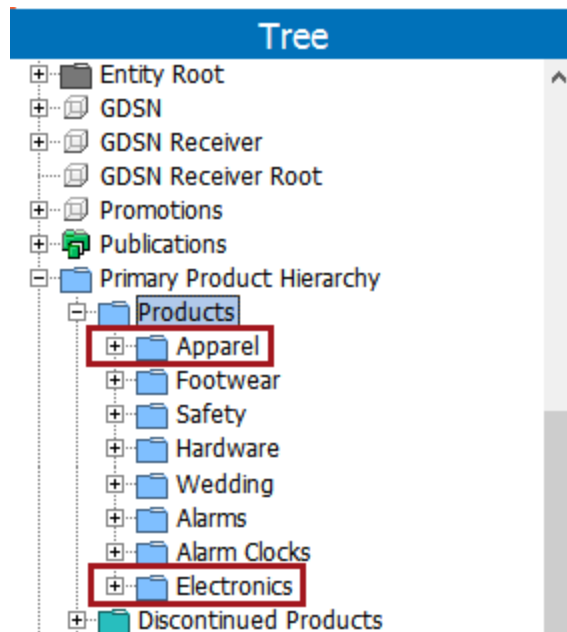
Note that the LibreOffice distribution is approximately 700 MB on Linux and 500 MB on Windows. Because this installation takes up such a large amount of disk space, it is optional. Without the installation, asset previews of Office and PDF documents will function as follows: a plain DOCX thumbnail will display for Word documents and a generic 'image' thumbnail will display for PDFs. Limited popup preview functionality will be available for the first page of PDF documents, and configurations can be applied to open PDFs in a new browser tab, but Office documents can still only be download to the users' local computer.

- MS Office, PDF, and video assets uploaded to the STEP system before the installation of the LibreOffice patch will not present enhanced previews. Only documents uploaded to the STEP system after the LibreOffice installation will have the appropriate document preview / thumbnail.

Attribute Link Editor Screen

The Attribute Link Editor screen provides users with a centralized view of information about attributes linked to a given object. One of the screen's primary uses is that it provides a view of all attributes under a parent object so that users may easily determine which are correctly linked into that position in the hierarchy, and which might be better linked elsewhere.

For example, looking at the Tree, let us say the attribute 'Battery size' is linked in the hierarchy to a parent object called Products, and made valid for the Sales Item object type. There are two child objects beneath Products called **Apparel** and **Electronics**.



Because the attribute 'Battery Size' is linked to Products, it will show on all Sales Items nested under Products. This means that 'Battery Size' will appear not only on all Sales Items under **Electronics**, but also on all Sales Items under **Apparel**, which would result in t-shirt products, for example, having 'Battery Size' listed among its attributes. Because it is not useful to have 'Battery Size' on Apparel Sales Items, a user may elect to use the functionality available in the Attribute Link Editor screen to unlink 'Battery Size' from **Products** and then link it directly to **Electronics**.

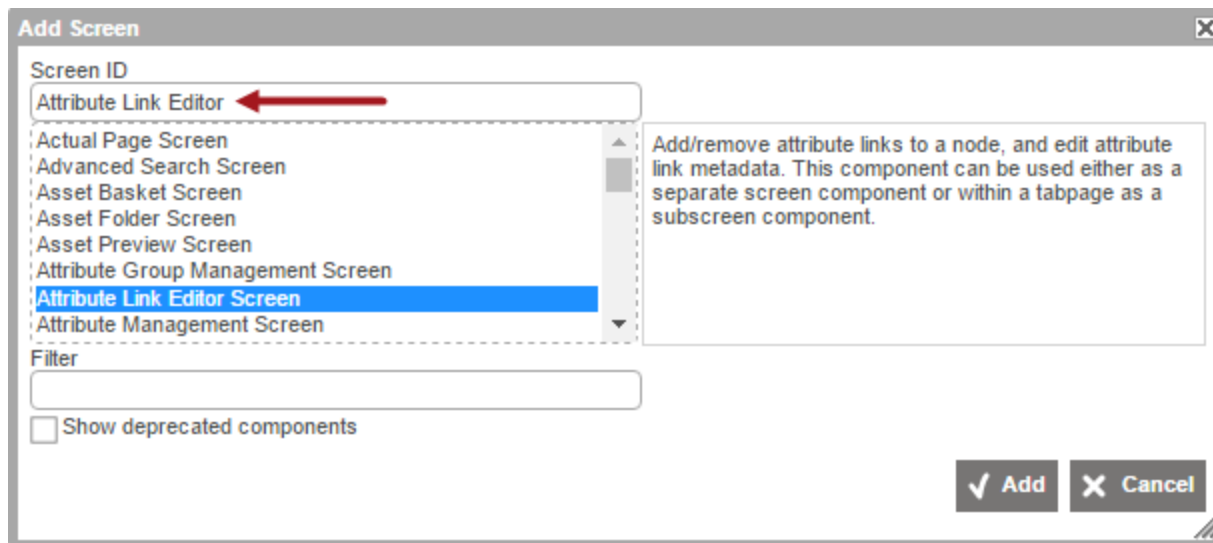
Topics on how best to configure this screen in Web UI and how an end user might use this screen are located in the **Configuring the Attribute Link Editor Screen** documentation and the **Editing Attribute Links in Web UI** documentation.

Configuring the Attribute Link Editor Screen

The Attribute Link Editor screen allows users to view, add, edit, and delete attribute links in Web UI. Configuration of this screen enables users to determine which metadata attributes are linked to the attributes on a given object, which buttons should display on the screen, and whether the screen should be read only for end users. The steps required to configure this screen are described in detail below.

Creating a New Attribute Link Editor Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Select 'Attribute Link Editor Screen' as the screen type (shown in the screenshot below).



At this point, either close the designer and configure the screen at a later time, or continue on with the steps in the next section.

Adding the Attribute Link Editor as a Sub Screen Tab

As with any screen, the Attribute Link Editor screen must be mapped appropriately in Main Properties > Mappings to enable end users to access the screen. As an alternative to mapping, the Attribute Link Editor screen can be added as a Sub Screen Tab Page on a Node Details screen. The Attribute Link Editor screen is particularly useful when linked to parent nodes in the blue (Product) hierarchy, as shown in the examples within this topic.

For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about sub screen tab pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

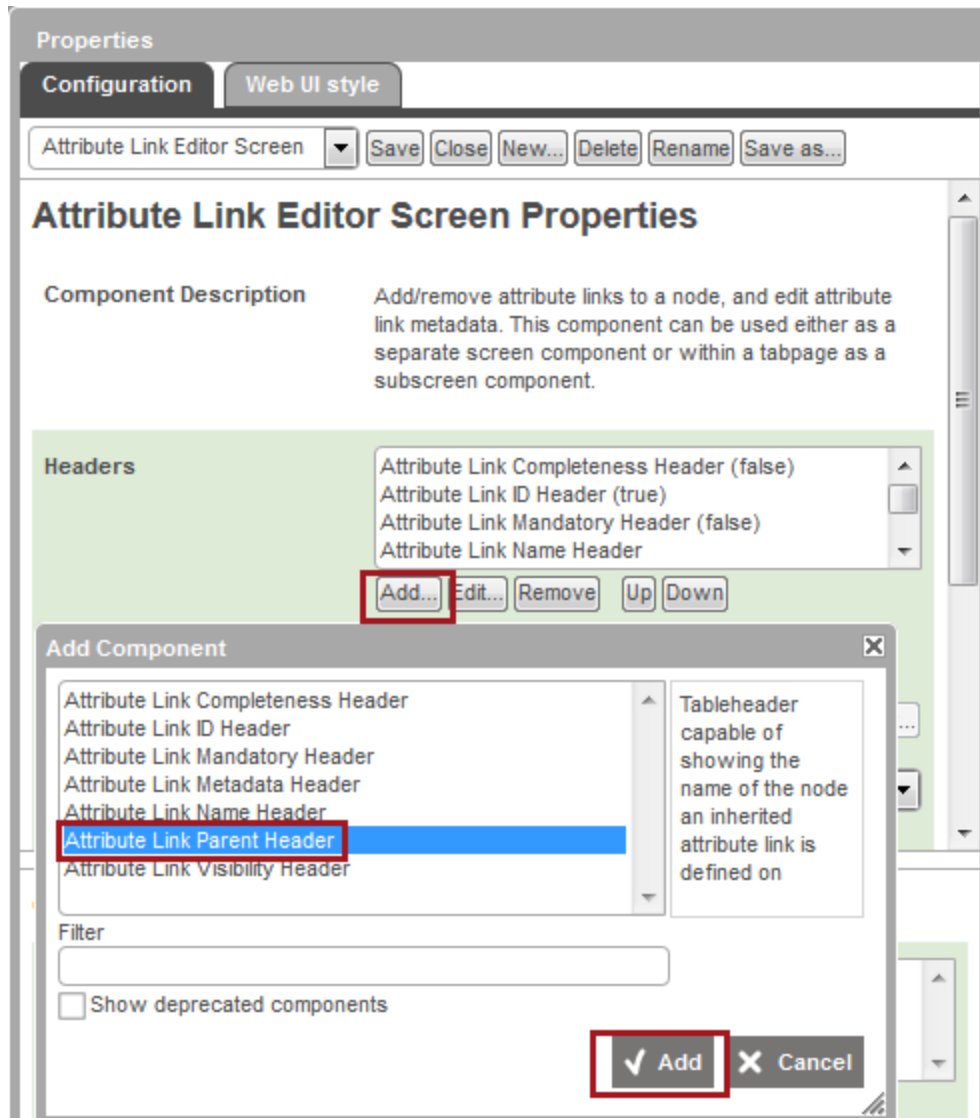
Configuring the Attribute Link Editor screen

After adding the Attribute Link Editor as a sub screen tab page, the user can configure the Attribute Link Editor screen so that it will display according to the administrator's preferences. In this section of the guidance, we will touch on each configuration option available for this screen in the order they appear in the designer.

Determining the Metadata Attribute Columns

In the **Headers** field, users can determine which metadata attributes should appear alongside the attributes on an object.

Clicking the **Add...** button displays the Add Component dialog, which includes all the description attribute columns users can add to an Attribute Link Editor screen. Adding these columns can show users specific information about the attributes linked to the selected object.



Each description attribute that displays in the table is, to a variable degree, configurable. For instance, all table headers can be changed to suit the administrator's preference. To configure the table headers, double click the relevant header listed in the Header field, and replace the default text in the Label field with the preferred text.

These are the description attributes (referred to below as headers) that you can add to the table in the Attribute Link Editor screen:

- Attribute Link Completeness Header – if the attributes linked to an object have been weighted, then a completeness score will appear for that attribute in the table.
- Attribute Link ID Header – will display the STEP ID for the linked attribute.
- Attribute Link Mandatory Header – will display whether the linked attribute has been set to Mandatory. This header can be configured so that data appearing under this header can be set as Read Only, or it can be set so that users may adjust whether an attribute is mandatory or not.
- Attribute Link Metadata Header – enables the user to select any suitable description attribute to link to the object. In the Attribute Link Metadata Header Properties window that displays when you edit this column, the user can either search or browse the available attributes to identify the attribute to be linked. Some users may find it useful to create a series of customized metadata headers, each linking a specific attribute.
- Attribute Link Name Header – will display the name of the attribute linked to the selected object.
- Attribute Link Parent Header – will display the node in the hierarchy to which the attribute has been linked. If this cell has content, that means the attribute has been linked through inheritance into the selected object. If the cell is blank, that means that the attribute is linked directly to the selected object.
- Attribute Link Visibility Header – will display which contexts that attribute has been made visible for.

If the user elects to add these columns, then the Attribute Link Editor screen might appear like this:

Apparel

Level 1 List

Attribute Link Editor

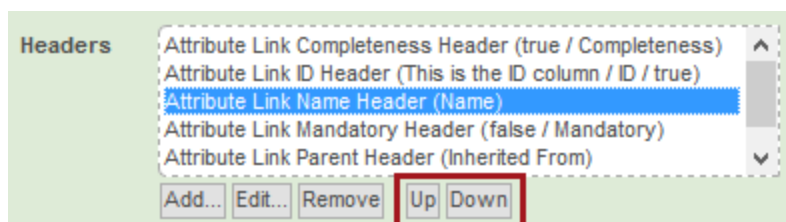
Clear all

Clear filter

Create attribute link

	Completeness	ID	Name	Mandatory	Inherited From	Visibility
☐ Air Transportation Restrictions		AirTransportationRestrictions	Air Transportation Restrictions	☐	Products	
☐ Annual Sales Forecast, Minimum		AnnualSalesForecast,Minimum	Annual Sales Forecast, Minimum	☐	Products	
☐ Annual Sales Forecast, Maximum		AnnualSalesForecastMaximum	Annual Sales Forecast, Maximum	☐	Products	
☐ AttWithLangDepLOV		AttWithLangDepLOV2	AttWithLangDepLOV	☐		
☐ Revisions List		AttributeW	Revisions List	☐		
☐ Attribute N		Attribute N	Attribute N	☐		
☐ Attribute Q		Attribute Q	Attribute Q	☒	Primary Product Hierarchy	
☒ Attribute Z		Attribute Z	Attribute Z	☐		
☐ Attribute C		Attribute1	Attribute C	☐		

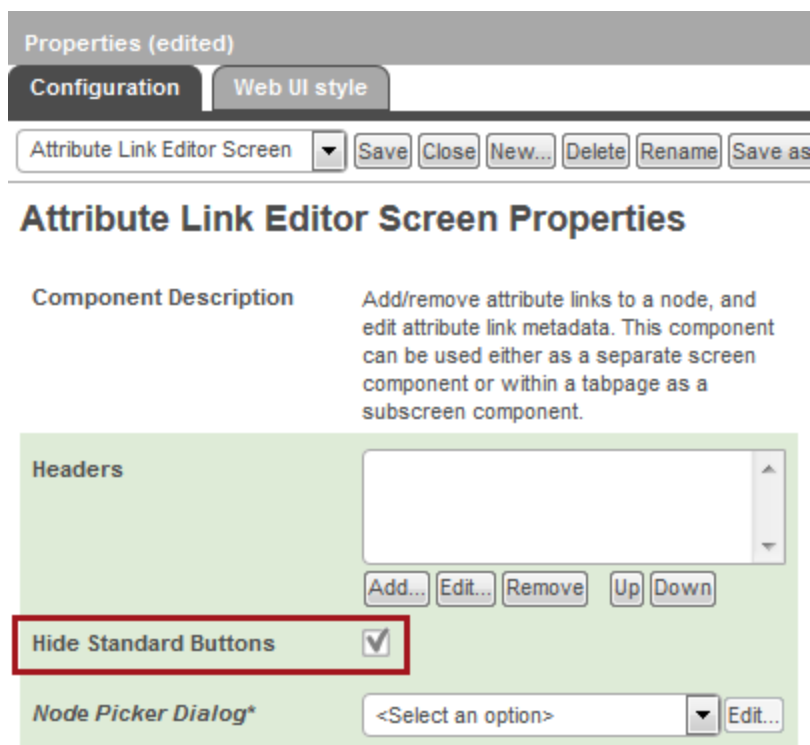
The columns will appear in the order in which the user adds them. The user may change the ordering by selecting the header in the designer and then moving the header up or down in the list using the **Up** and **Down** buttons.



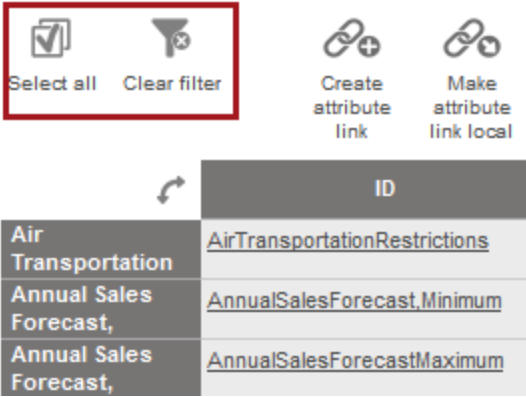
Important: Default properties for this screen, like toolbar actions and preset columns, will be applied to this screen to achieve two goals: one, to closely align the functionality with previous versions to aid backwards compatibility, and two, to provide a starter configuration that can be easily adjusted to suit the customer's needs.

Configuring display of standard buttons

Checking the **Hide Standard Buttons** box will hide the Select all / Clear all button and the Clear filter / Apply filter buttons.



Leaving this box unchecked, as it is by default, means that the standard buttons will display to the upper left of the table.

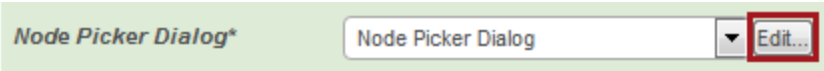


Configuration of Node Picker

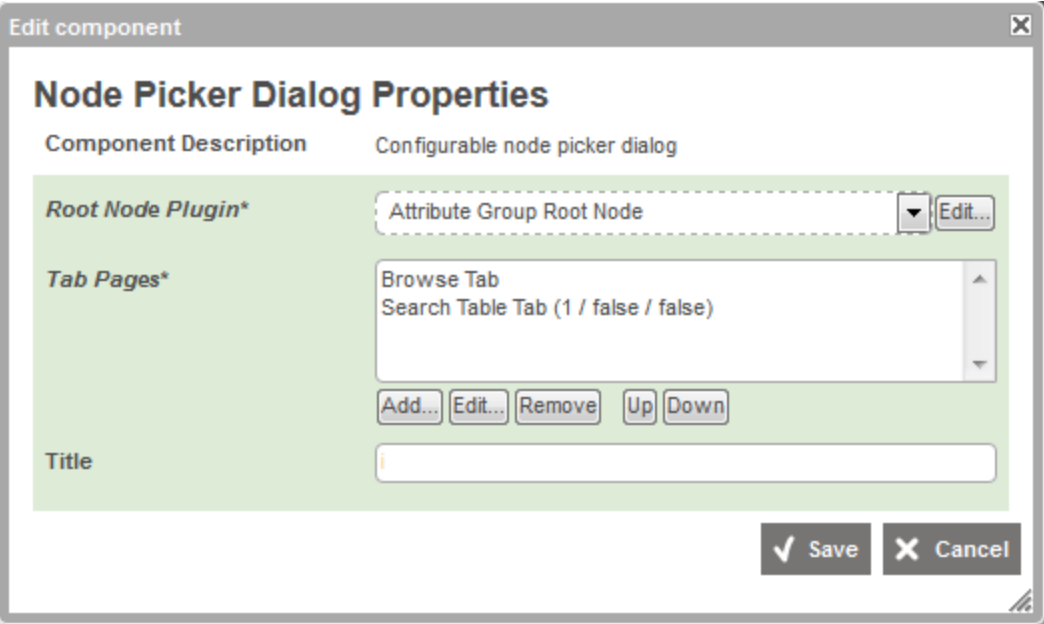
The Attribute Link Editor screen allows users to create a new attribute link on an object. For instance, it may be useful to link the attribute 'Battery Size' to the object Electronics. Doing so will cause the attribute to appear not only on Electronics, but on all objects that are children to Electronics.

The Node Picker Dialog field in the designer allows the user to configure the window that displays when a user working in the Attribute Link Editor screen clicks the **Create attribute link** button. Clicking this button allows the user to locate, either through a browse or search function, the attribute to which they want to link.

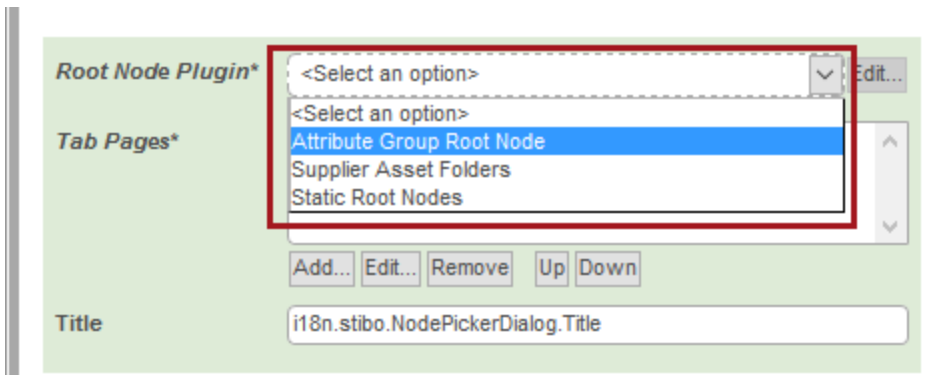
The Node Picker comes pre-configured but allows for additional changes. To configure the Node Picker, click the **Edit...** button beside the **Node Picker Dialog** field.



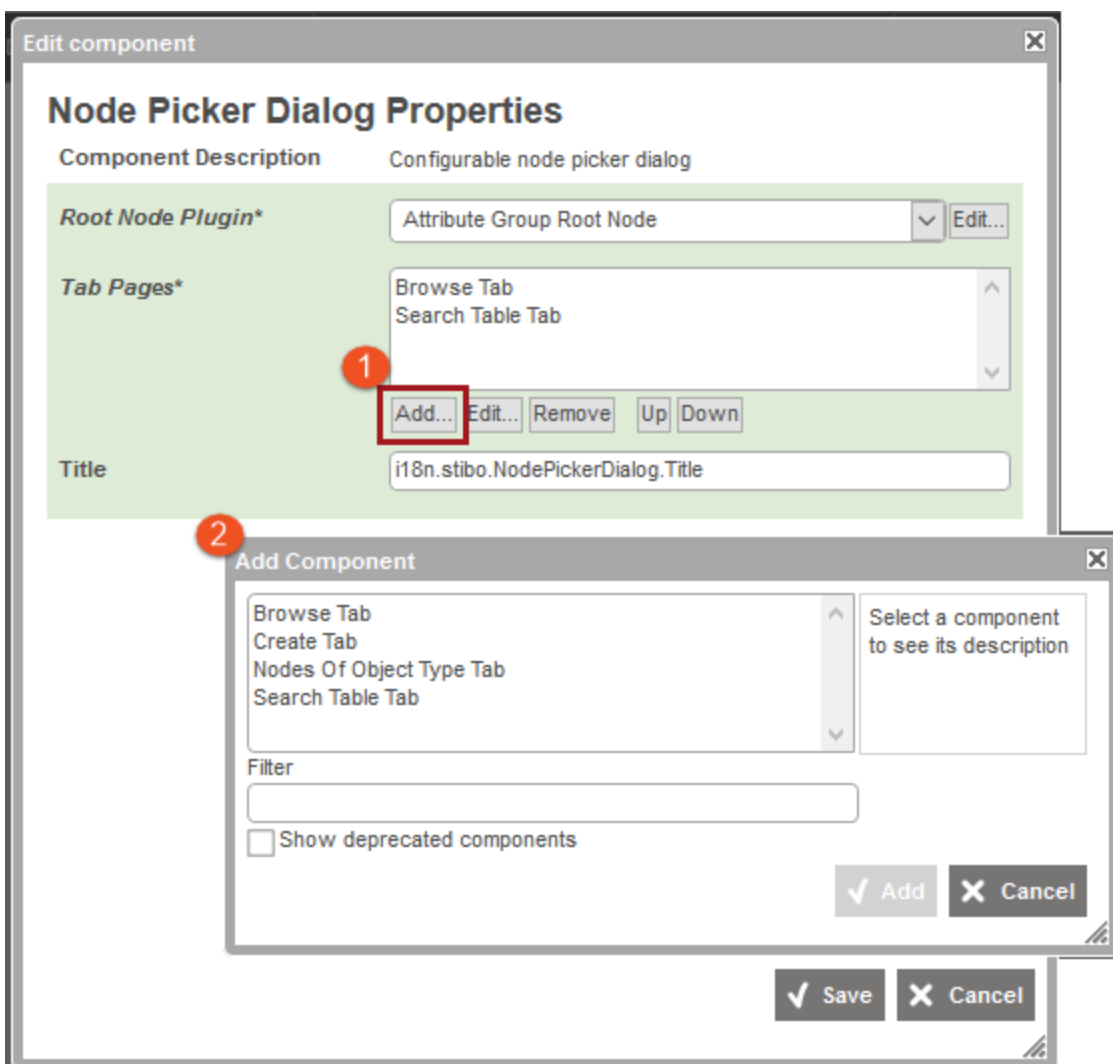
The Node Picker Dialog Properties window allows users to configure where the attributes can be selected (**Root Node Plugin**), and which methods the user may use to locate those attributes (**Tab Pages**).



1. Root Node Plugin – allows users to select where in the hierarchy users of the Attribute Link Editor screen may select attributes when creating a new attribute link.



2. Tab Pages – allows users to configure the method of locating the attributes to link. It is recommended that users select the Browse Tab and Search Table Tab options. These allows users to search attributes by name (Search Table Tab), or to browse the existing attributes through manual navigation (Browse Tab).



Title – Add the text that will display at the top of the Node Picker window.

The screenshot shows the 'Edit component' dialog box for 'Node Picker Dialog Properties'. The 'Component Description' is 'Configurable node picker dialog'. The 'Root Node Plugin*' is 'Attribute Group Root Node'. The 'Tab Pages*' list contains 'Search Table Tab (1 / false / false)' and 'Browse Tab'. The 'Title' field is highlighted with a red box and contains the text 'Create an Attribute Link'. At the bottom right are 'Save' and 'Cancel' buttons.

That text will display at the top of the Node Picker window when a user clicks the **Create Attribute Link** toolbar action. If no text is selected, the default title is **Select Node(s)**.

The screenshot shows the 'Create an Attribute Link' dialog box. The title bar contains the text 'Create an Attribute Link'. Inside, there are 'Search' and 'Browse' tabs. Below the tabs, there is a tree view showing 'Attribute Groups (Attribute group root)'. At the bottom right are 'OK' and 'Cancel' buttons.

Configuring default orientation of table

Clicking the dropdown for the Property Direction field enables the user to determine how the table in the Attribute Link Editor screen will be oriented when they first open the Web UI.

The screenshot shows the 'Node Picker Dialog' configuration panel. The 'Node Picker Dialog*' is 'Node Picker Dialog'. The 'Property Direction' field is highlighted with a red box and has a dropdown menu open showing 'HORIZONTAL', '<Select a value>', 'VERTICAL', and 'HORIZONTAL'. The 'Use Immediate Save' checkbox is checked.

Selecting VERTICAL will show the table with the description attributes (name, ID, mandatory, etc.) appearing along the left side of the table. Selecting HORIZONTAL will display the metadata attributes along the top of the table.

Note the metadata attributes running along the top of the table in this example of a screen with the orientation set to HORIZONTAL:

Apparel

Level 1 List

Attribute Link Editor

Select all

Clear filter

Create attribute link

	↺	Completeness •	ID •	Name •
☐	Air Transportation Restrictions		AirTransportationRestrict	Air Transportation Restrictions
☐	Annual Sales Forecast, Minimum		AnnualSalesForecast,Mir	Annual Sales Forecast, Minimum
☐	Annual Sales Forecast, Maximum		AnnualSalesForecastMax	Annual Sales Forecast, Maximum
☐	AttWithLangDepLOV		AttWithLangDepLOV2	AttWithLangDepLOV
☐	Revisions List		AttrirbuteW	Revisions List
☐	Attribute N		Attribute N	Attribute N

Note the metadata attributes running along the left side of the table in this example of a screen with the orientation set to VERTICAL:

Apparel

Level 1 List

Attribute Link Editor

Select all

Clear filter

Create attribute link

	↺	☐	☐	☐
		Air Transportat...	Annual Sales F...	Annual Sales F...
Completeness •				
ID •		AirTransportationRe	AnnualSalesForecas	AnnualSalesForecas
Name •		Air Transportation Restrictions	Annual Sales Forecast, Minimum	Annual Sales Forecast, Maximum
Mandatory •		☐	☐	☐
Inherited From •		Products	Products	Products
Visibility				

Making the screen read only

If the administrator determines that the Attribute Link Editor screen should be configured as read only for end users, they may check the box for **Read Only**. Checking this box prevents editing of all attribute links displaying on the Attribute Link Editor screen.

Note: Even if the Attribute Link Editor screen is set to Read Only, the attribute link buttons (Create, Make Local, Remove), if unhidden, are active and useable for any end user. To make the screen truly read only, the administrator should also hide the attribute link buttons. Information on how to do this is covered in the Configuring Display of the Attribute Link Buttons section of this topic.

Applying the auto-save feature

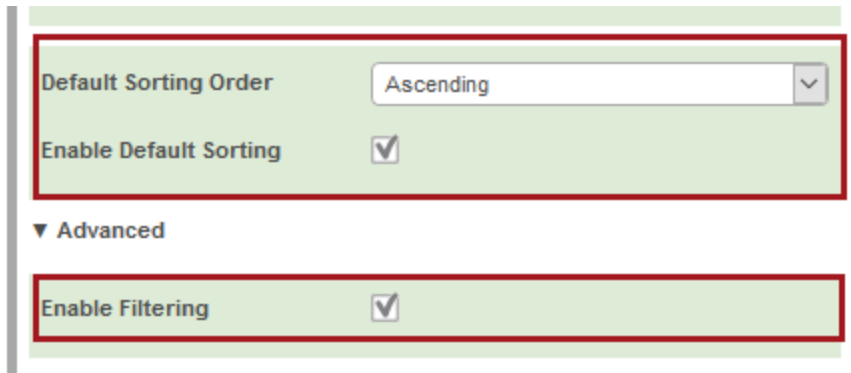
Checking the box for **Use Immediate Save** saves any value that has been added or modified the instant the user clicks out of the data field. This feature makes it less likely users will lose unsaved data when navigating away from the screen. Additionally, because users will no longer need to manually click a save button to save their data if the **Use Immediate Save** parameter is enabled, the Save button does not display on the screen.

The screenshot shows the 'Attribute Link Editor Screen Properties' configuration window. The 'Configuration' tab is selected. The 'Attribute Link Editor Screen' is chosen from the dropdown menu. The 'Component Description' section explains the screen's purpose. The 'Headers' section lists four headers: 'Attribute Link Completeness Header (false)', 'Attribute Link ID Header (true)', 'Attribute Link Mandatory Header (false)', and 'Attribute Link Name Header'. The 'Hide Standard Buttons' checkbox is checked. The 'Node Picker Dialog*' dropdown is set to '<Select an option>'. The 'Property Direction' dropdown is set to 'HORIZONTAL'. The 'Read Only' checkbox is unchecked. The 'Use Immediate Save' checkbox is checked and highlighted with a red box.

Important: It is useful to note that if the user adds or modifies data and then either logs out of the Web UI or closes their browser without first clicking out of that field, that data will not be saved. Switching from one data field to another within the Attribute Link Editor screen is the sole trigger for the auto-save feature.

Configuring the default sorting and filtering

The Attribute Link Editor screen enables users to filter and sort the data appearing in the attribute link table.



The screenshot shows a configuration interface for the Attribute Link Editor. It features two main sections, each highlighted with a red border. The top section contains a 'Default Sorting Order' dropdown menu set to 'Ascending' and an 'Enable Default Sorting' checkbox that is checked. Below this is a collapsible section titled 'Advanced' with a downward arrow. The bottom section, also highlighted with a red border, contains an 'Enable Filtering' checkbox that is checked.

When the Enable Default Sorting checkbox is checked, **Default Sorting Order** enables the user to determine whether the attributes in the attribute link table are sorted in ascending alphanumeric order (A - Z), or descending alphanumeric order (Z - A).

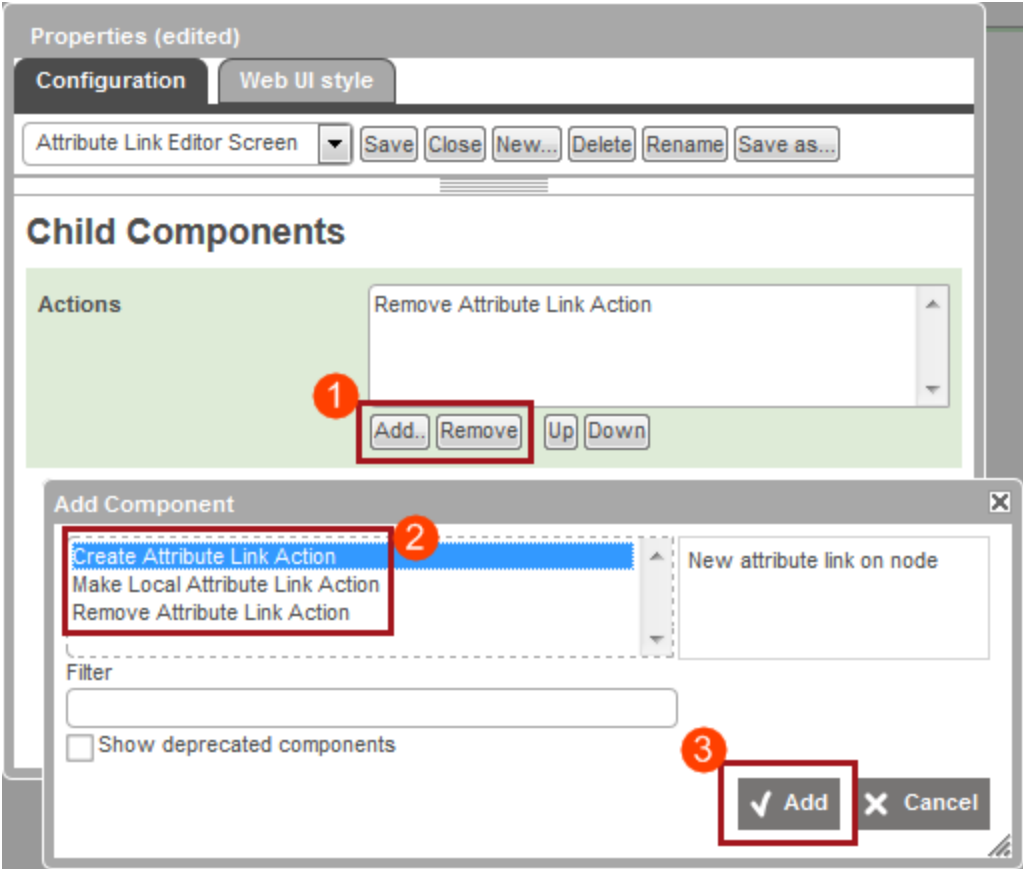
Note: Selecting (none) or no order, defaults to ascending alphabetical order.

When the **Enable Default Sorting** is unchecked, any selection the user makes in **Default Sorting Order** will not be implemented.

Under the collapsible **Advanced** title, the user may opt to **Enable Filtering**. Checking this box activates the headers in the attribute link table so that, when clicked, a filtering menu displays that allows the user to adjust the display of data in a more granular way.

Configuring display of the attribute link buttons

Under Child Components is the **Actions** field. This field determines which toolbar actions display above the attribute link table on the Attribute Link Editor screen. Click the **Add..** button, and select Create Attribute Link Action, Make Local Attribute Link Action, or Remove Attribute Link Action. Multi-select is not an option here, so to add all three, repeat the process for each.



For example, the following Attribute Link Editor screen displays all three buttons.

ID	
Air Transportation	AirTransportationRestrictions
Annual Sales Forecast,	AnnualSalesForecast.Minimum
Annual Sales Forecast,	AnnualSalesForecastMaximum
AttWithLangDepL	AttWithLangDepLOV2

For information on using the Attribute Link Editor screen, see the **Editing Attribute Links in Web UI** documentation.

Editing Attribute Links in Web UI

This topic describes how users can best use the Attribute Link Editor screen in Web UI. For more information, see an overview of this screen's purpose by referencing the **Attribute Link Editor Screen** documentation, and for a detailed description of how to configure this screen, see the **Configuring the Attribute Link Editor Screen** documentation.

The Attribute Link Editor screen allows Web UI users to view information related to attributes linked to the object being viewed. In this topic, the various features available on the screen are described.

For reference, this is an example of one way to configure an Attribute Link Editor screen. The screen in the example has been added as a sub screen tab page on a Node Details screen.:

Tree

- > eClass_9_1_0
- > ETIM 5 Article Groups
- > UNSPSC17
- > UNSPSC14C
- > Assets
- > ETIM 6 Article Groups
- > Merchandising Hierarchy
- > eClass 8.0
- > Entity Root
- > GDSN
- > GDSN Receiver
- > Promotions
- > GDSN Receiver Root
- > Publications
- > Primary Product Hierarchy
 - > Products
 - > Apparel
 - > Footwear
 - > Safety
 - > Hardware
 - > Displays
 - > Furniture
 - > Automotive
 - > Building Products
 - > Electrical and Electronics
 - > Food and Beverage
 - > Kitchen
 - > Party Supplies

System Setup

Apparel

Level 1 List | Attribute Link Editor

Select all | Clear filter | Create attribute link

	ID	Completeness Score	Mandatory	Inherited From	Visibility	Table Sort Order
Width (range)	Width (mm)		☐	Products		
width	width		☐	Products		
Width	Width		☐	Products		
T-shirt Size	TshirtSize		☐			
Tax Classification	TaxClassification		☐	Products		
Supplier Part Number	SupplierPartNumber		☐	Products		
Supplier Name	SupplierName		☐	Products		
Status	Status		☐	Products		
Stacked Height	StackedHeight		☐	Products		
Stackable?	Stackable		☐	Products		
Shipping Pack Height	ShippingPackHeight		☐	Products		
Short Item	ShortItemDescription		☐	Products		

Number of Items: 115

Select all / Clear all

The Select all / Clear all button displays dependent on whether the user has selected any of the object's listed attributes. They will not display at the same time.

- The Clear all button displays if one or more attributes are selected.
- The Select all button will only display if no attributes are selected.

The primary use of this button is to easily establish a selection of attributes that can either be made local using the Make Attribute Link Local button, or removed using the Remove Attribute Link button.

Apparel

Level 1 List

Attribute Link Editor



Clear all



Clear filter


Create
attribute link

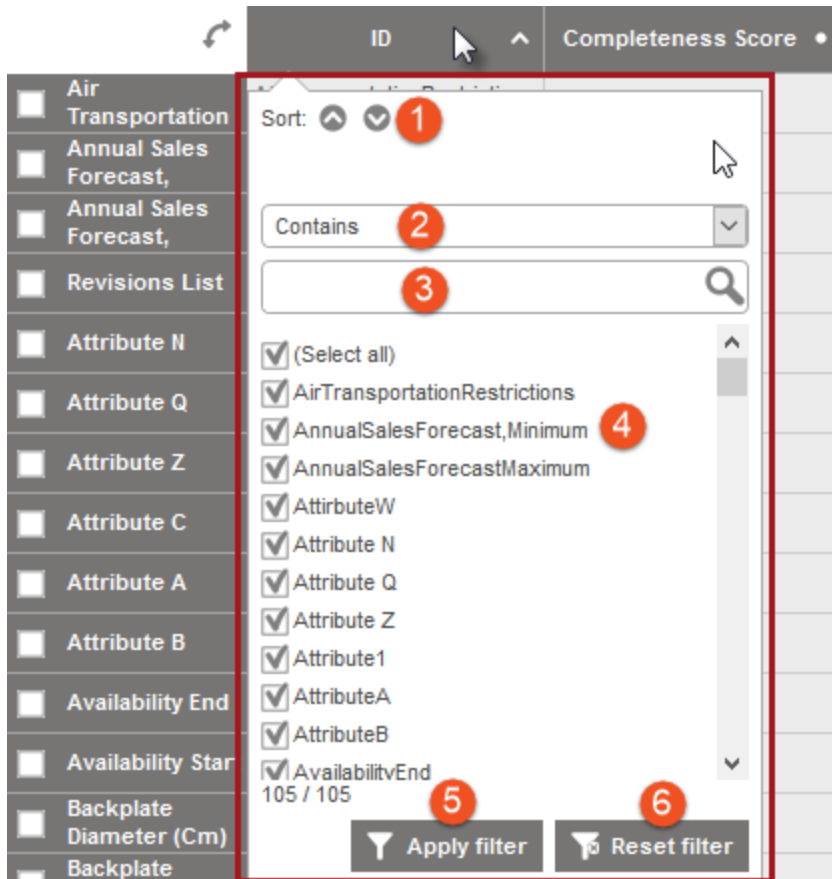
Make
attribute link
local

Remove
attribute link

	Completeness	ID	Mandatory	Inherited From	Visibility
☐ Air Transportation Restrictions		AirTransportationRestrictions	☐	Products	
☐ Annual Sales Forecast, Minimum		AnnualSalesForecast.Minimum	☐	Products	
☒ Annual Sales Forecast, Maximum		AnnualSalesForecastMaximum	☐	Products	
☐ AttWithLangDepLOV		AttWithLangDepLOV2	☐		
☐ Revisions List		AttributeW	☐		
☐ Attribute N		Attribute N	☐		
☒ Attribute Q		Attribute Q	☒	Primary Product Hierarchy	
☒ Attribute Z		Attribute Z	☐		

Filtering

To apply a filter, click anywhere in a column's header. This brings up the sorting and filtering window highlighted in the screenshot below:



Referencing the numbered elements in the above screenshot to the corresponding numbers in the list below, functionality in the filtering window enables users to:

1. Sort the attributes in either ascending () or descending () alphabetic order.
2. Filter the linked attributes to show only attributes that:
 - Begin with a certain character
 - Contain one or a specific sequence of characters
 - Do *not* contain one or a sequence of characters
 - Equal a precise set of characters
 - Display attributes containing a repeated set of characters that includes known variable characters that can be substituted with a symbol (wildcard)
3. With any of the above filtering criteria in place, users may enter their search terms into the **Search** field. As characters are typed into this field, STEP returns a filtered result of attributes culled from the object's full list of attributes. From these, users may select only those attributes they want to display by adding a check beside each.
4. Users may also forgo the filtering and manually select from the full attribute list only those attributes they want to display by adding a check beside each.
5. Apply the configured filter to the attribute link table by clicking the Apply filter button.

- Quickly clear any work you have done in the filtering window by clicking the Reset filter button. It is useful to note that whatever configuration you have applied will remain in this filtering window, even if you clear the filter on the actual attribute link table. To clear all filtering, first clear the filter from the table, and then in the filtering window, click the Reset filter button.

Clear Filter

The Clear Filter button is only active if a filter has been applied to the attribute link table.

If, in the designer, the configuration for the screen has been checked yes for Enable Filtering, then the attribute link table can be filtered column-by-column by clicking that column's header. This allows the user a wide array of ways to view their attribute link data. If the user has applied a filter to the data in this way, then the Clear Filter button is active and clickable.

Apparel English US

Level 1 List **Attribute Link Editor**

Select all **Clear filter** Create attribute link

	ID	Name	Mandatory	Inherited From
☐ Air Transportation Restrictions	AirTransportationRestrict	Air Transportation Restrictions	☐	Products
☐ Annual Sales Forecast, Minimum	AnnualSalesForecast,Min	Annual Sales Forecast, Minimum	☐	Products
☐ Annual Sales Forecast, Maximum	AnnualSalesForecastMax	Annual Sales Forecast, Maximum	☐	Products
☐ Revisions List	AttributeW	Revisions List	☐	
☐ Attribute N	Attribute N	Attribute N	☐	
☐ Attribute Q	Attribute Q	Attribute Q	☒	Primary Product Hierarchy
☐ Attribute Z	Attribute Z	Attribute Z	☐	

Number of items : 112

Configuring the Attribute Link Toolbar Actions

Toolbar actions are available that enables users to create new attribute links, make inherited attribute links local and, thus, editable, or remove attribute links from an object. Below is a list of those toolbar actions and the functions they perform. Users may see something different since the actions are set up by the administrator within the Attribute Editor Link Screen Properties.

Create Attribute Link

Clicking this toolbar action allows the user to link an attribute to the selected object. Dependent on how the Node Picker dialog is configured, a user may either search or browse the hierarchy to find the desired attribute. Information related to configuration of the Node Picker can be found in the Configuring the Attribute Link Editor Screen documentation.

Apparel

English US

Level 1 List

Attribute Link Editor

Select all

Clear filter

Create attribute link

	ID	Name	Mandatory	Inherited From
☐ Air Transportation Restrictions	AirTransportationRestrict	Air Transportation Restrictions	☐	Products
☐ Annual Sales Forecast, Minimum	AnnualSalesForecast,Min	Annual Sales Forecast, Minimum	☐	Products
☐ Annual Sales Forecast, Maximum	AnnualSalesForecastMax	Annual Sales Forecast, Maximum	☐	Products
☐ Revisions List	AttributeW	Revisions List	☐	
☐ Attribute N	Attribute N	Attribute N	☐	
☐ Attribute Q	Attribute Q	Attribute Q	☒	Primary Product Hierarchy
☐ Attribute Z	Attribute Z	Attribute Z	☐	

Number of items : 112

Make Attribute Link Local

When a user selects an attribute link, and the linked object is inheriting from a higher level, the Make Attribute Link Local toolbar action displays. Clicking this toolbar action allows the user to make the attribute link local and edit the link specific to the selected attribute.

 Clear all

 Clear filter

 Create attribute link

 Make attribute link local

	ID	Name	Mandatory	Inherited From
☐ Air Transportation Restrictions	AirTransportationRestricti	Air Transportation Restrictions	☐	Products
☐ Annual Sales Forecast, Minimum	AnnualSalesForecast,Min	Annual Sales Forecast, Minimum	☐	Products
☒ Annual Sales Forecast, Maximum	AnnualSalesForecastMax	Annual Sales Forecast, Maximum	☐	Products
☐ Revisions List	AttirbuteW	Revisions List	☐	
☐ Attribute N	Attribute N	Attribute N	☐	
☐ Attribute Q	Attribute Q	Attribute Q	☒	Primary Product Hierarchy
☐ Attribute Z	Attribute Z	Attribute Z	☐	

Number of items : 112

Remove Attribute Link

When a user selects an attribute link and the selected attribute is linked directly to the object being worked on, the Remove Attribute Link toolbar action displays. Clicking the Remove Attribute Link toolbar action un-links the attribute from the selected object and all its child objects.

Apparel

English US • Me

Level 1 List
Attribute Link Editor

Clear all
Clear filter
Create attribute link
Remove attribute link

	ID	Name	Mandatory	Inherited From
☐ Air Transportation Restrictions	AirTransportationRestrictions	Air Transportation Restrictions	☐	Products
☐ Annual Sales Forecast, Minimum	AnnualSalesForecast,Minimum	Annual Sales Forecast, Minimum	☐	Products
☐ Annual Sales Forecast, Maximum	AnnualSalesForecastMaximum	Annual Sales Forecast, Maximum	☐	Products
☒ Revisions List	AttributeW	Revisions List	☐	
☐ Attribute N	Attribute N	Attribute N	☐	
☐ Attribute Q	Attribute Q	Attribute Q	☒	Primary Product Hierarchy
☐ Attribute Z	Attribute Z	Attribute Z	☐	

Number of items : 112

Columns

There are a series of description attributes administrators can add to this screen and configure. When using the screen, you may see any of the headers displayed in the screenshot below, dependent on the configuration of your screen:

Apparel

English US • Main

Level 1 List
Attribute Link Editor

Select all
Clear filter
Create attribute link

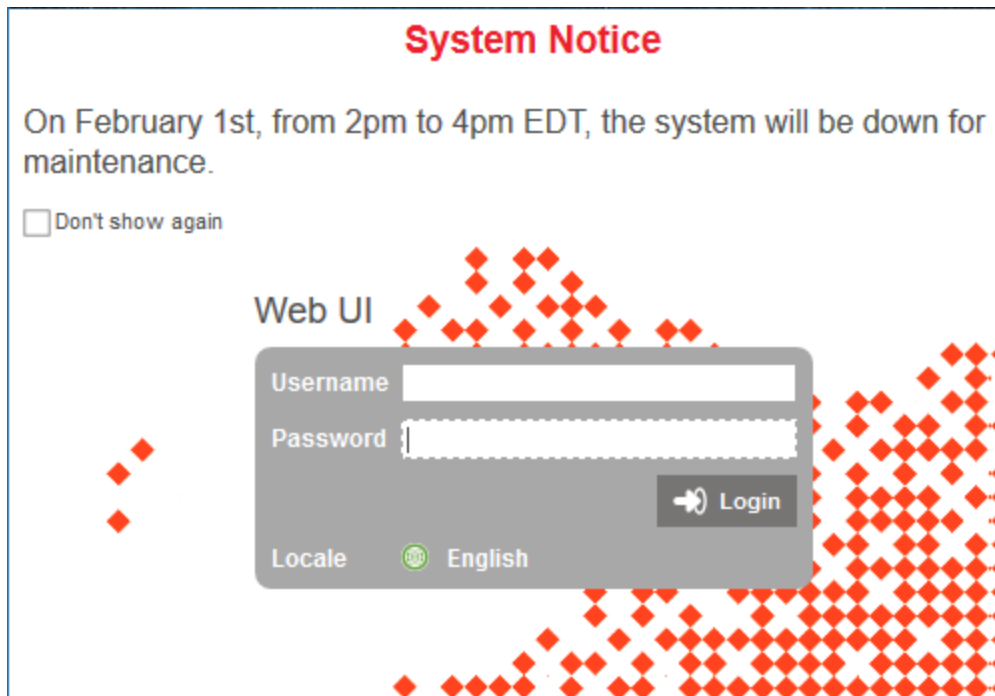
	Completeness	ID	Name	Mandatory	Inherited From	Visibility
☐ Air Transportation Restrictions		AirTransportationRestrictions	Air Transportation Restrictions	☐	Products	
☐ Annual Sales Forecast, Minimum		AnnualSalesForecast,Minimum	Annual Sales Forecast, Minimum	☐	Products	
☐ Annual Sales Forecast, Maximum		AnnualSalesForecastMaximum	Annual Sales Forecast, Maximum	☐	Products	
☐ AttWithLangDepLOV		AttWithLangDepLOV2	AttWithLangDepLOV	☐		
☐ Revisions List		AttributeW	Revisions List	☐		
☐ Attribute N		Attribute N	Attribute N	☐		
☐ Attribute Q		Attribute Q	Attribute Q	☒	Primary Product Hierarchy	
☐ Attribute Z		Attribute Z	Attribute Z	☐		
☐ Attribute C		Attribute1	Attribute C	☐		
☐ Attribute A		AttributeA	Attribute A	☐		

For more information on configuring these metadata attributes, see the [Configuring the Attribute Link Editor Screen](#) documentation.

Adding Announcements to the Login Page

STEP enables users to add announcement messages to the login screens of their Web UIs. For instance, if an administrator wants to inform all Web UI users that the system will be down for maintenance, the administrator can create a message, either plain text or HTML, that will appear on that Web UI's login screen above the login dialog.

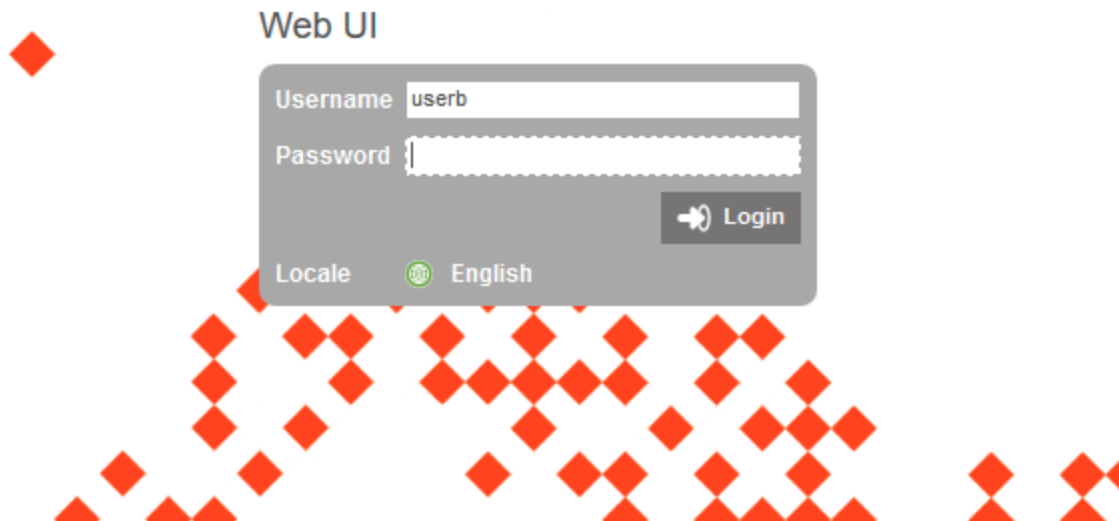
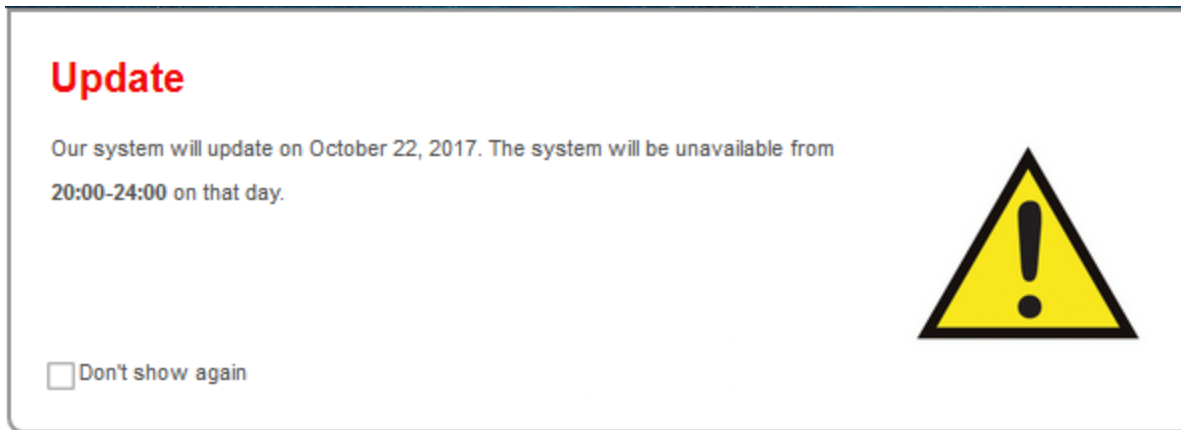
A sample plain text announcement message might appear like this:



The screenshot shows a login interface for a Web UI. At the top, there is a red heading "System Notice". Below it, a message states: "On February 1st, from 2pm to 4pm EDT, the system will be down for maintenance." Underneath the message is a checkbox labeled "Don't show again". The login form itself is a grey box with fields for "Username" and "Password", a "Login" button with a right-pointing arrow, and a "Locale" dropdown menu currently set to "English". The background of the login screen features a decorative pattern of red and white diamonds.

STEP also supports the use of HTML files to display an announcement message on the login screen. Plain text messages are automatically styled by the announcement feature, but HTML files can be styled based on the preferences of the announcement message's designer.

A sample HTML-fed announcement message might appear like this:



As shown in the screenshot above, aspects of the announcement's appearance like font, font size, color, and image, are all customizable using HTML. If an announcement's length exceeds the space between the top of the browser's screen and the top of the login dialog, the announcement message will push the login dialog down the page. If the message is longer than this allowed distance, a scroll bar will display beside the announcement message allowing users to scroll through the entirety of the message.

One additional feature of the announcement component is a 'Don't show again' checkbox that appears in the lower left-hand corner of all announcement messages.



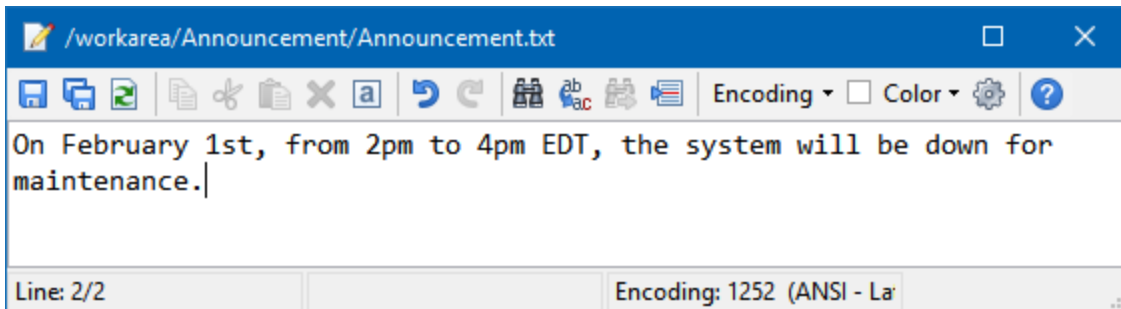
Users who have read the announcement message appearing on their Web UI login page can check this box, ensuring the message does not appear on their login screen again, at least in its current form. If the announcement is amended in any way, the announcement message displays again on the Web UI users' screens, and they can again check the 'Don't show again' checkbox.

Announcement messages can be added to as many Web UIs as are configured on a given STEP system. This gives the administrators the ability to be targeted in their messaging to users. For instance, administrators can post one message to a Web UI used by suppliers and a different message to a Web UI used by marketers.

Configuring the announcement feature

The announcement message can be added to a Web UI's login page by adding properties to the sharedconfig.properties file located on the application server.

1. Create your announcement file. STEP will display a message created as either a plain text message in a .txt file, or a more designed message in an HTML file. The text file can be as simple as this example:



2. Add your .txt file to the application server. If you are creating many announcements for a series of Web UIs, you may want to create a folder structure strictly for announcements.
3. Edit the configuration file. In the sharedconfig.properties file, administrators will need to add two properties for each Web UI getting an announcement.

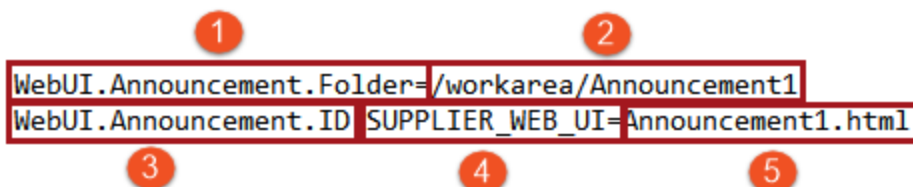
Adding the properties to the configuration file

Below is an example of how the properties are written:

```
WebUI.Announcement.Folder=/workarea/Announcement
WebUI.Announcement.ID.SUPPLIER_WEB_UI=Announcement.txt
```

The first line indicates where on the application server the Web UI should find the announcement message. The second line stipulates which Web UI should receive the message, as well as the name of the announcement file.

Below are the two sample properties divided into the components required to enable the announcement message.



1. Required text to enable the property.
2. The name of the area and folder on the application server where the announcement file is posted.
3. Required text to enable the property.

4. The name of the Web UI for which the announcement message is intended. The best practice is to locate the relevant Web UI in the System Setup tab, copy the Web UI STEP ID exactly as it appears in STEP, and then paste it into the property.
5. Do not use the Name of the Web UI, only the ID. Using the Name may cause the announcement to error.
6. The name of the text or HTML file posted to the application server. It is important that the file extension is included.

Once the properties are properly added to the sharedconfig.properties file, the user should save the file and then execute a stop / start of the STEP system. Following this (allow for a few minutes) the announcement message will appear on the designated Web UI.

For every Web UI the administrator intends to display an announcement, these two properties must be added to the sharedconfig.properties file. Even if a single announcement file must display on four Web UIs, for each of the four Web UIs, the announcement file must be referenced. For example, in the below screenshot there are three Web UIs that will all display the same announcement. Each of the three Web UI STEP IDs are highlighted. Because each Web UI will display the same announcement, the announcement file for all three is the same.

```
WebUI.Announcement.Folder=/workarea/Announcement
WebUI.Announcement.ID MARKETING_WEB_UI=Announcement.txt
```

```
WebUI.Announcement.Folder=/workarea/Announcement
WebUI.Announcement.ID SUPPLIER_WEB_UI=Announcement.txt
```

```
WebUI.Announcement.Folder=/workarea/Announcement
WebUI.Announcement.ID CUSTOMER_WEB_UI=Announcement.txt
```

Note: Once the announcement message is displaying on the Web UI's login page, saved changes made to the announcement file itself will display on its Web UI instantaneously.

Attribute Help Text in Web UI

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

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

Item

The screenshot displays the 'Item' editor in the Stiibo Systems Web UI. At the top, there are tabs for 'Basic Information and references', 'Revisions', 'Category Information', and 'Additions'. The 'Air gauge included' attribute is shown with a value of 'Yes'. A help text tooltip is visible, stating 'Is the product equipped with an air guage? Y/N'. Below this, the 'Selected Items' section shows a table with columns for ID, Name, Air gauge included, and ATTGroup. The first row shows 'Tire Care Items' with ID 'ItemFolder 6805'. A help text tooltip for the 'Air gauge included' column in the table also displays 'Is the product equipped with an air guage? Y/N'.

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

Prerequisites

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

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

Identify the metadata attribute used for help texts in System Settings

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

System Setup

- Multiplayer
- Number of Cups
- Plate Material
- Pressure Relief Valve
- Primary Color
- Product Variant Priority
- Programmable
- Promotional Inserts
- PSN Trial Insert
- PvP
- Rated Strength (lb.)
- Seasonal
- Shoe Size (Europe)
- Shoe Size (US)
- Stranded or Solid
- Cable/Wire Type
- T-shirt Size
- Temper
- Total Carbs
- UL Listed
- URL
- Diameter (mil)

Seasonal - Attribute

- Attribute
- References
- Attribute Transformation
- Validity
- Profile
- Log
- State Log
- Tasks

Name	Value
ID	Seasonal
Name	Seasonal
Last edited by	2016-03-04 11:42:43 by USER2
Full Text Indexable	No
Externally Maintained	No
Hierarchical Filtering	Product Hierarchy
Calculated	No
Type	Description
Dimension Dependencies	
Mandatory	No
Cryptographic Key	<No Encryption>
Attribute Description	abc
Attribute Help Text	abc Select Yes if the product is sold seasonally; Select No if the product is sold in stores year-round.
Completeness Score	1.0

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

System Setup

- Gateway Endpoint
- GDSN WF and BR
- Global Business Rules
- Inbound Integration Endpc
- Match Codes and Matching
- Outbound Integration End
- Web UIs
- Web UIs
- Workflow Profiles
- Workflows
- Derived Events
- Object Types & Structures
- Tags
- Units
- Users & Groups
- Reference Types
- Workspaces
- Table
- Keys
- Event Queues
- Component Models
- Recycle Bin

System Settings

- Log

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

Set Component Properties in Web UI

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

Header, Variants Header).

Properties

Configuration

Web UI style

Item detail

Save

Close

New...

Delete

Rename

Save as...

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

Component Description

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

Attribute*

AirGaugeIncluded

▼ Advanced

Columns

1

Context Help

Display Context Help

✓

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

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

Properties (edited)

ConfigurationWeb UI style

Item detail SaveCloseNew...DeleteRenameSave as...

Attribute Value Component Propertiesgo to parent

Component Description

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

Attribute*

AirGaugeIncluded

▼ Advanced

Columns

1

Context Help

Overriding the workbench value.

Display Context Help

☒

Air gauge included ⓘ ⓘ Yes

Overriding the workbench value.

Attribute Value Components

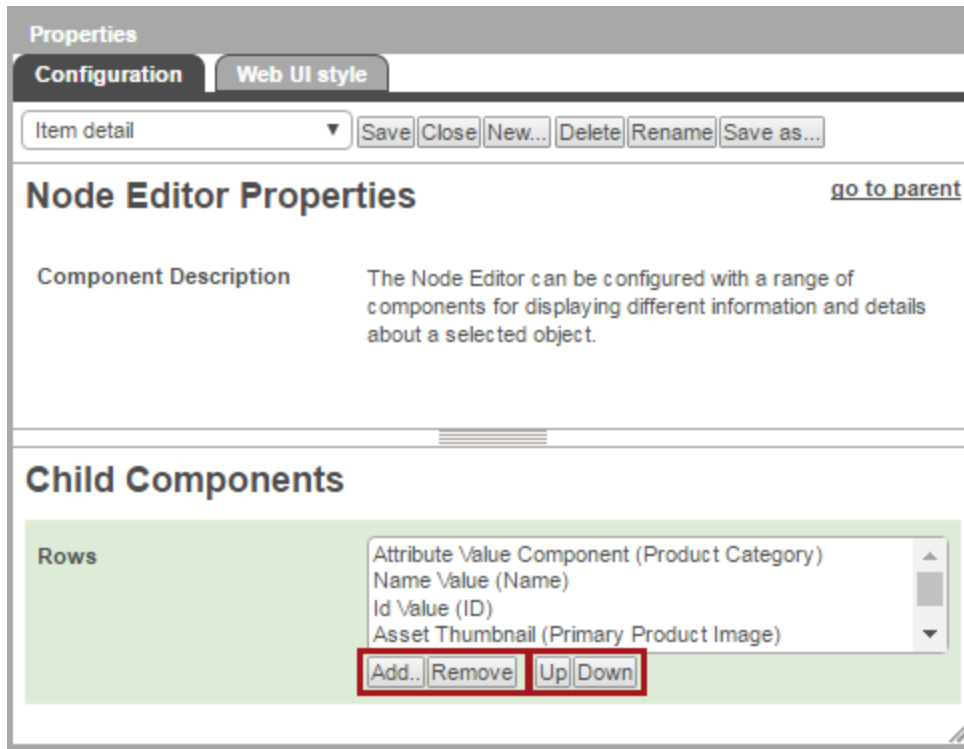
An Attribute Value component can be added to a Node Editor to display the value for a single attribute.

Item

Basic Information and references		Revisions	Category Information
Product Category ^{fx}	Products Apparel Upper Body Wear T-shirts T-shirts		
Name	12-GGK79		
ID	100703		
Primary Product Image			
Approved	Last approved 2/8/16 4:38 PM		
Base Unit of Measure	CASE		
Product Name	The Blue Shirt		
Short Item Description	This is a blue shirt.		
Long Item Description	This is a dazzling blue shirt.		

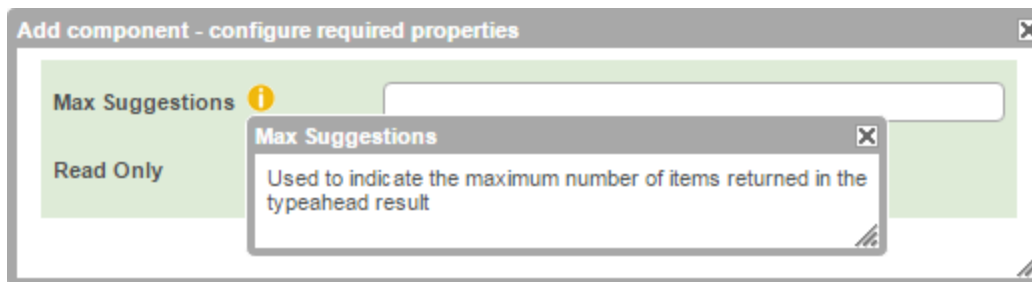
The attributes shown above (e.g., Name, ID, Product Name) are displayed within a Node Editor on a Node Details screen.

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



Component Properties Configuration

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



Follow these steps to configure the component:

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

Add component - configure required properties

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

Attribute Value Component Properties

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

Attribute*

Enable STEP Tags ☐

Enable Tag Conversion ☒

Label

Label Css Class

Mandatory ☐

Max Suggestions

Read Only ☐

► LOV Options

► Advanced

2. **Enable Tag Conversion** is enabled by default when adding new Attribute Value components. This makes it easier to use < and > symbols in attribute values without having to do additional configuring. Additionally, the Rich Text Editor ('Edit formatted value' icon ⓘ) will be present for attributes with text and numeric text validation base types. Note that when working with tags, it requires setup in workbench. Please see the Tags topic in the Super User Guide / System Setup documentation.

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

3. An admin user may also choose to enable additional main parameter settings. For example:
 - Label - override the attribute name by adding new text that will display in its place
 - Max Suggestions - determine the number of suggestions returned when an LOV is set to (or automatically

uses) type-ahead functionality

- Read Only - lock the attribute on the screen so end users cannot edit the value
4. Click the arrowheads next to the **LOV Options** and **Advanced** headings to see the parameters available under each. Configure the parameters as needed.

Add component - configure required properties

▼ **LOV Options**

Reverse LOV Value ID ☐

Presentation

Show LOV IDs ☐

Sort LOV By ID ☐

▼ **Advanced**

Columns

Context Help

Css Class

Enable Locale Formatting ☐

External Validator [Edit...](#)

Override Control Type

Rows

Display Context Help ☒

Display Value History ☒

☒ Add ☐ Cancel

Enable Tag Conversion

- If Enable Tag Conversion is disabled / unchecked and a style is applied to a value (e.g., bold or italic), the field locks and Rich Text Editor is the only way to edit the values.

- If adding an Attribute Value Component as a child component within an Address Detail parent component, disable the Enable Tag Conversion parameter. Using the Address Detail Search component to auto-populate companion address attribute values based on the search results is only possible upon disabling this parameter.
- If you experience issues while using the Rich Text Editor in Internet Explorer, use an alternate browser such as Chrome, Firefox, or Safari.

Attribute Value Group Components

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

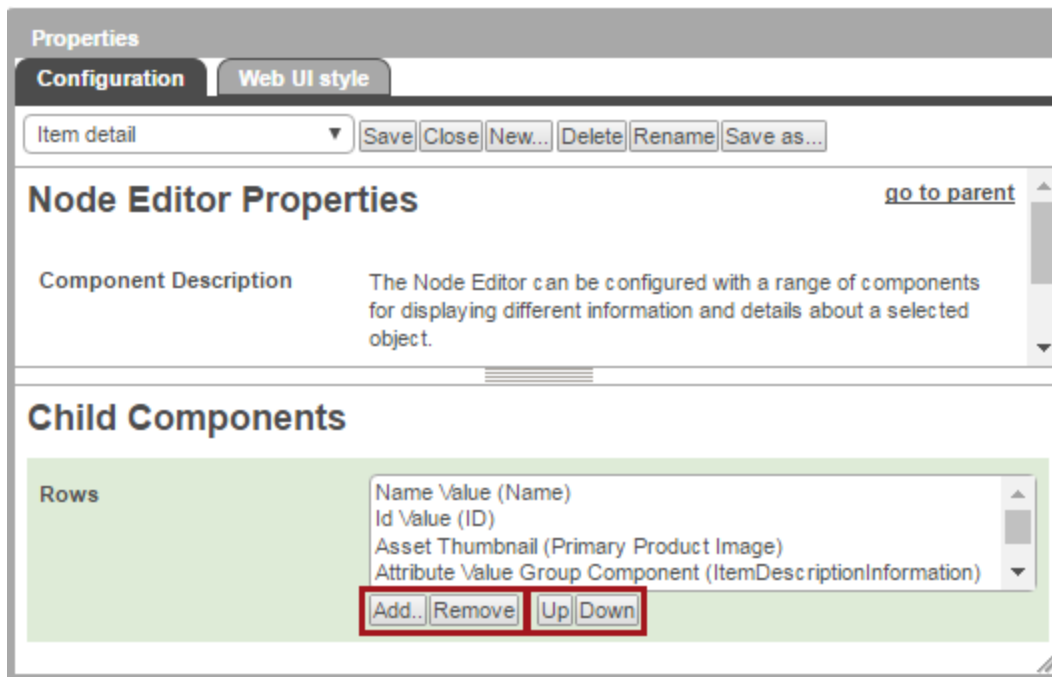
One major benefit to using an Attribute Value Group component (versus multiple Attribute Value components) is that when new attributes are created in the attribute group displayed, then the new attribute values automatically appear on the screen without additional Web UI configuration.

Item

Basic Information and references		Revisions	Category Information
Name	12-GGK79		
ID	100703		
Primary Product Image			
Base Unit of Measure	CASE		
Product Name	The Blue Shirt		
Short Item Description	This is a blue shirt.		
Long Item Description	This is a dazzling blue shirt.		

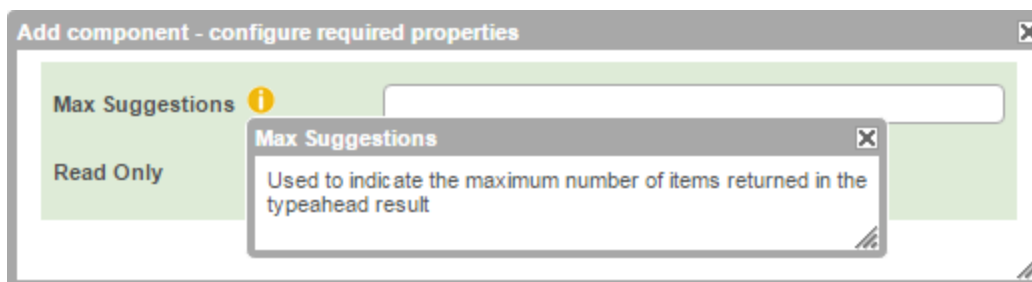
The attributes shown above (e.g., Name, ID, Product Name) are displayed within a Node Editor on a Node Details screen.

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



Component Properties Configuration

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



Follow these steps to configure the component:

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

Add component - configure required properties

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

Attribute Value Group Component Properties

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

Attribute Group* ...

Blacklisted Attribute Group ... Clear

Context Help

Display Mode <Select a value> ▼

Enable STEP Tags ☐

Enable Tag Conversion ☒

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

Excluding
Add... Remove Up Down

Filter Attribute Type <Select a value> ▼

Include References ☒

2. If desired, make a **Display Mode** selection using the dropdown.
 - **Merged** - attributes below the selected attribute group and sub groups are displayed together alphabetically
 - **Partitioned** - attributes are displayed alphabetically within their attribute groups
 - **Hierarchical** - attribute group titles shown with attribute titles indented below, according to the attribute group structure

ISODate

ISO Date Time

Category Specific Attributes

Primary Color

URL

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

ISODate

ISO Date Time

▼ Category Specific Attributes

Primary Color

URL

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

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

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

Add component - configure required properties

Mandatory

Max Suggestions

Read Only ☐

Reference Parameters

Rich Text Editing

Show LOV IDs ☐

Sort LOV By ID ☐

▼ **Advanced**

Enable Locale Formatting ☐

Display Context Help ☒

Display Value History ☒

Enable Tag Conversion

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

Attribute Value Group LOV Type-Ahead Functionality

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

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

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

Property Settings

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

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

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

Excluding Attributes

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

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

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

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

Attribute Value History

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

Air gauge included

Yes

Hose length

16 in

Pressure

Value history:

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

Primary C

Seasonal

URL

www

fx

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

Configuring Attribute Value History

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

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

The screenshot shows a web application window titled 'Properties'. It has two tabs: 'Configuration' (selected) and 'Web UI style'. Below the tabs is a dropdown menu showing 'Item detail' and a row of buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main content area is titled 'Attribute Value Group Component Properties' with a 'go to parent' link. It contains a 'Sort LOV By ID' checkbox which is unchecked. Below this is a section titled 'Advanced' with a downward arrow. Inside the 'Advanced' section are three checkboxes: 'Enable Locale Formatting' (unchecked), 'Display Context Help' (unchecked), and 'Display Value History' (checked). The 'Display Value History' checkbox and its label are enclosed in a red rectangular box.

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

Background Process List Screens

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

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

Setting up the Background Process Screen

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

Properties

Configuration

Web UI style

Background process list

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

Background Processes Screen Properties

Component Description

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

Title

Background Processes List

Advanced

Child Components

Node List

Node List

go to component

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

Properties

Configuration Web UI style

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

Node List Properties [go to parent](#)

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

Hide Standard Buttons ☐

ID* processesList

Lookup Screen Type For Navigation ☒

Page Size 25

Use Details Overlay ☐

Child Components

Display Modes Table Display Mode

Add... Remove Up Down

Actions Excel Export Action

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

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

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

Table Display Mode Properties

[go to parent](#)

Context Help
List View

Headers

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

Add... Edit... Remove Up Down

Show Details
☐

▼ Sizing and filtering

Columns Resizable
☐

Display Mode Height
200

Enable Filtering
☒

Min Columns Width
0

Child Components

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

Background Process Messaging and Identification

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

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

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

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

To create more detailed background process descriptions:

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

Properties

Configuration Web UI style

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

Node List Properties

[go to parent](#)

Hide Standard Buttons ☐

ID* UTL

Child Components

Display Modes

- Table Display Mode
- Film Strip Display Mode
- Gallery Display Mode
- Multi Edit Display Mode

Add... Remove Up Down

Actions

- Submit From Grid Action

Add... Remove Up Down

Add component

- Delete From Grid Action
- Download Assets Action
- Duplicate From Grid Action
- Edit Collection Search Criteria Action
- Excel Export Action**
- Excel Export All Action
- Export Action
- GDSN Import Subscriptions Action
- Filter

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

☐ Show deprecated components

✓ Add ✗ Cancel

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

Properties (edited)

Configuration

Web UI style

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

Excel Export Action Properties

go to parent

Component Description

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

Attribute Groups

Add... Remove Up Down

Label

Download as excel spreadsheet

No Selection Message

No nodes selected

Process Description

Show Only Read Access

☐

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

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

Placeholder	Returned Value	Notes on Availability
{Action}	Type of action taking place	Available on ALL actions.
{Configuration}	Import / Export / Bulk configuration	Available ONLY for: - Bulk Update Action - Bulk Update List Action - Smart Sheet Export Action - Smart Sheet Import Widget - Simple Importer Widget - Simple Exporter Action

Placeholder	Returned Value	Notes on Availability
{ImportFile}	Name of import file	Available ONLY for: • Bulk Update Action • Bulk Update List Action • Smart Sheet Export Action • Smart Sheet Import • Simple Importer Widget
{WorkflowName}	Name of the workflow in which the items are currently located in	NOT Available for: • Create Publication from Existing • Smart Sheet Import Widget • Simple Importer Widget • Print on Demand Action
{WorkflowState}	Workflow state in which the items are currently located in	NOT Available for: • Create Publication from Existing Action • Smart Sheet Import Widget • Simple Importer Widget • Print on Demand Action
{ItemCount}	Returns the number of selected objects to be processed by the action	NOT Available for: • Create Publication from Existing Action • Smart Sheet Import Widget • Simple Importer Widget • Simple Exporter Action • Reflow from next column action • Print on Demand Action
{StatusFlag}	Return the name of the status flag	Available ONLY for: • Create Collection Action • Download Asset Action

Placeholder	Returned Value	Notes on Availability
		• Generate PDF Action • Smart Sheet Export Action • Simple Exporter Action • Reflow from next Column Action

For example, if the following was written in the Process Description field of an export from a workflow:

Exported item {ItemCount} from {WorkflowName} to {WorkflowState} state with the Error status flag, it would return the message shown below to the user when the BGP is initiated.

Order Process

Creation of background process initiated BGP_177679
(Exported item 1 from Order Process to Review data state with the Error status flag)

Parent	Thumbnail	Assigned	ID	Workflow	Title	Object Type	State	Status Flag
Beds Items		☐	132500	undefined	sheets	Item	132500	Normal
Beds Items		☐	134892	undefined	Comfy Bed tu	Item	134892	Error
Beds Items		☒	134894	undefined	Comfy Bed d	Item	134894	Error
Beds Sales Items		☐	22163	undefined	Bed Frame S	SalesItem	22163	Normal

1-5 of 5

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

Table Display Mode Properties

[go to parent](#)

Component Description

Shows the nodes from a Node List in a table.

Context Help

List View

Headers

Progress Header

Started Date Header

Finished Date Header

Result Header

1

Add...

Edit...

Remove

Up

Down

Show Details

☐

Add component

Child Count Header

Deduplication Header

2

Description header

Finished Date Header

ID Header

ID Shared Target Header

Name Header

Object Type Header

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

Filter

☐ Show deprecated components

3

✓ Add

✕ Cancel

Background Processes List

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

Calculated Attributes in Web UI

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

The foundation for a calculated attribute is a functional programming language very similar to the language used for defining functions in Excel. Calculated attributes are a special type of attributes whose values are not written in the database, but are calculated on the fly, based on other data in the system.

Both description attributes and specification attributes can be set as calculated attributes, and calculated attribute values can be used in Business Rules as any other attribute values.

When in workbench, calculated attributes are created by going to System Setup and clicking on the desired attribute. Then on the Attribute tab, click into the **Calculated** field, and select 'Yes' or 'No'. In Web UI this can be set on the Attribute Management screen. For information about Web UI, see the **Calculated Attributes in Web UI** section of the **Web User Interfaces** documentation.

When an attribute is set as calculated, a Value template field displays. Functions added to the value template perform predefined actions on the argument(s) that are supplied. Arguments are placeholders for data (like an attribute ID or text that should be appended to a value).

For example, the following functions and arguments are included in the workbench image below:

- The 'concatenate' function takes a comma-delimited list of arguments. In this example, the three arguments are: prodval('Domestic Distribution ID'), "-", and prodval('International Distribution ID').
- The 'prodval' function takes an argument of an attribute ID and retrieves the value of the attribute identified. In this example, the two attribute IDs are: 'Domestic Distribution ID' and 'International Distribution ID'.

Note: The functions 'prodval' and 'value' act the same in fetching the attribute values in STEP.

- Assuming that the 'Domestic Distribution ID' value is 1234 and the 'International Distribution ID' value is 5678, the result of this Value template would be 1234-5678.

The screenshot shows the 'System Setup' web UI. On the left is a tree view of 'Attribute Groups' with 'Attribute Group' expanded, showing various attributes including 'Calculated Attribute'. The main panel is titled 'Calculated Attribute' and contains a table with the following data:

Name	Value
ID	CalcAttr
Name	Calculated Attribute
Last edited by	2015-11-05 15:29:33 by USER2
Full Text Indexable	No
Externally Maintained	No
Hierarchical Filtering	None
Calculated	Yes
Type	Description
Dimension Dependencies	
Value template	concatenate(prodval('Domestic Distribution ID'), '-', prodval('International Distribution ID'))
Mandatory	No

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

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

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

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

Identifying Calculated Attributes

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

-  indicates a calculated attribute displaying the calculated value

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

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

www*fx*

Editing Calculated Attributes

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

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

Edit Calculated Attribute Value

☒ Enter overwrite value

×

☐ Revert to calculated value

✓ OK

✗ Cancel

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

Company Hierarchy Visualization and Maintenance

Customer data users can browse and edit a visual representation of company hierarchy data using a Company Data Hierarchy Screen. When using the hierarchy functionality, company hierarchy data is saved as STEP entities, and references are used to connect the entities to each other. The visualization of entities and their references may help users better understand company hierarchies, and relationships between aggregates (e.g., companies, franchises, and branches). Users may also be able to identify patterns, better organize objects, and ultimately build better data relationships.

This topic addresses:

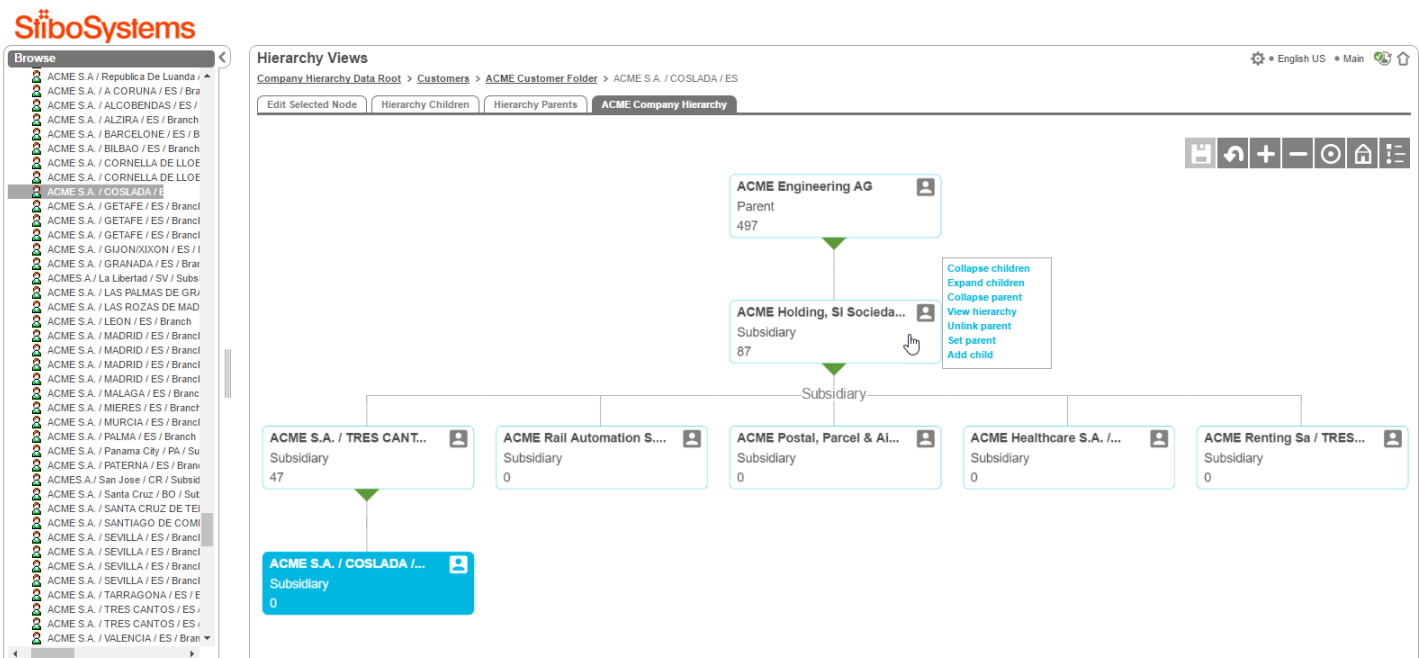
- Prerequisites
- Overview of a Company Data Hierarchy Screen
- Using a Company Data Hierarchy Screen
- Editing a Company Hierarchy
- Optional Tools for 'Set parent' and 'Add child' Actions

Prerequisites

It is very important to note that users with access to the Web UI designer will need to configure the Company Data Hierarchy Screen component before it can be used. For more information, see the **Configuring a Company Data Hierarchy Screen** topic.

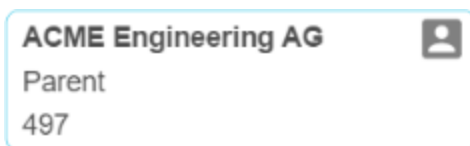
Overview of a Company Data Hierarchy Screen

The below screenshot shows a sample of a Company Data Hierarchy Screen that is configured to display via a Sub Screen Tab page when a user clicks on an entity object within a Tree Navigator panel.



Using this example:

- An entity can be selected using the navigation panel on the left.
 - If the panel on the left is expanded, then the selected entity node will appear shaded.
 - Selecting a different entity within the panel will render the respective company hierarchy.
 - Selecting a different hierarchy to view within the Company Data Hierarchy Screen will update the selected entity node in the navigation panel.
- The initial view responsively adapts based upon screen size, so that the hierarchy view appropriately fills the screen.
- Each linked entity is displayed within individual graphical nodes.
 - Each graphical node displays up to three configured attribute values, and a customizable icon representing the object type.



- A blue filled box represents the selected node within the hierarchy.
- A toolbar in the top right offers the following options for better viewing and editing:



- Save
- Undo
- Zoom in
- Zoom out
- Recenter hierarchy view
- Default hierarchy view
- Symbol Legend
- Green arrowheads display at the bottom of a graphical node (and top, when applicable) to indicate when additional data is available but not displayed.
 - When a parent is not displayed, the green arrowhead will appear at the top of the graphical node.
 - When a child is not displayed, the green arrowhead will appear at the bottom of the graphical node.
- A hand shaped cursor and the following interactive options appear when a user hovers over any of the entity boxes.

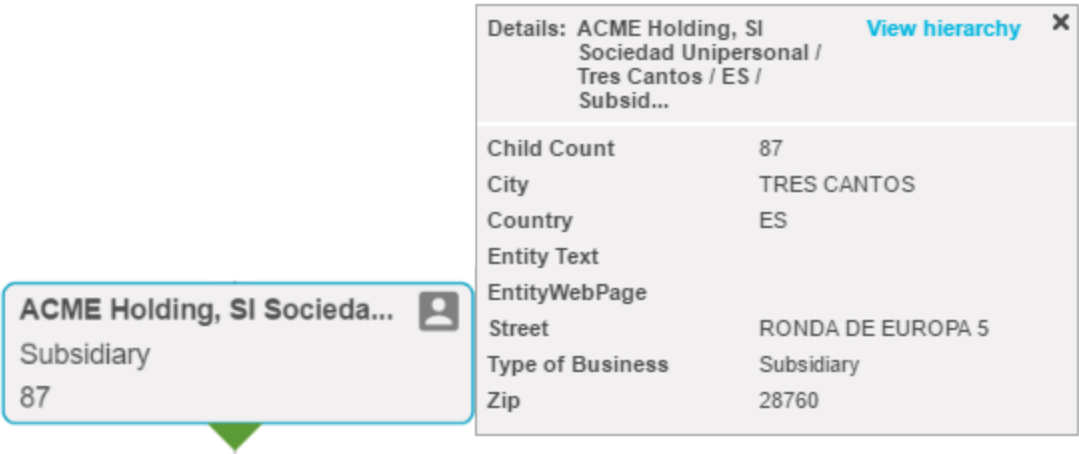


- Expand parent*
- Collapse parent
- Expand children
- Collapse children
- View hierarchy
- Unlink parent
- Set parent
- Add child

*Because the options are interactive, only those that are applicable appear.

Users can view more information by selecting an individual node. The attributes that appear are configurable in the designer by the admin users. Users also have the option to select the 'View hierarchy' link to render the hierarchy for the selected node. When this happens, the Tree Navigation (if applicable) will move to the newly selected entity object.

The below screenshot shows a sample of information that appears when a user selects any of the entity nodes within a Company Data Hierarchy Screen.



Using a Company Data Hierarchy Screen

Characteristics of many customer data models lend themselves to a hierarchical layout, even though the data model is referential. Many times the creation of customer hierarchy data does not occur in STEP but is created in surrounding applications (ERP, CRM, and eCommerce). Until now, this resulted in company hierarchy content and structure being maintained outside STEP. Orphaned hierarchies that do not naturally reside in the surrounding applications can also be created and maintained in the STEP Web UI Company Data Hierarchy Screen.

Using the Company Data Hierarchy Screen, users will be able to:

- View and maintain organizational hierarchies by making use of organic corporate data
- Make ad-hoc changes as needed
- Associate account and other organizational data (e.g., revenue to date, credit score, etc.) to nodes within an organizational hierarchy
- Associate account and other organizational data received from third party data providers to nodes within an organizational hierarchy
- Construct and manage differing perspectives of a singular hierarchy so as to accurately model the differing views stakeholders within an organization (e.g., Sales, Marketing, Finance / Legal) have for a given corporate customer organization
- Map and manage relationships between nodes across different hierarchies

A node can be a member of multiple hierarchies, but only one hierarchy can be viewed at a time. Though only one hierarchy can be displayed at the same time, more than one hierarchy can be defined and displayed using multiple Company Data Hierarchy screens within the same Web UI.

Editing a Company Hierarchy

Users have many options to help them edit a company hierarchy. When using a company hierarchy screen, a user can hover over a graphical node and see the relative options for editing the company hierarchy. However, when working in an 'Approved' workspace, the hover menu options 'Unlink parent,' 'Set parent,' and 'Add child' are not available. Edits to the company hierarchy structure can only be done in the 'Main' workspace.

The screenshot below is an example of options displayed when hovering over a graphical node in a 'Main' workspace.



Each of these options is described below.

Collapse children

If the graphical node has any visible children, then the 'Collapse children' action will appear. When selected, the children and underlying descendants will collapse into the node above.

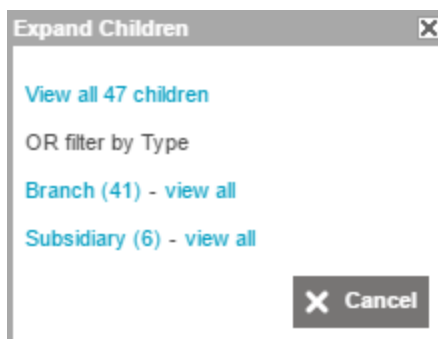
Expand children

If the graphical node has a green indicator on the bottom, upon hover, the 'Expand children' action will appear. If there is enough available space to fit all children on the screen, then the children will expand under the graphical node. If there is not enough available space and the Expand Plugin has not been configured, then all children will be displayed, but potentially outside the visible area.

Using the zoom in, zoom out, and panning tools is helpful when this occurs.

If there is not enough available space and the Expand Plugin has been configured, then an Expand Children dialog will display.

In the screenshot example below, the Expand Plugin has been configured to use a filter type of Branch and Subsidiary. The user can select to view all children, view all children within the Branch filter type, view all children within the Subsidiary filter type, or drill down into the Branch or Subsidiary filter types.



In the screenshot example below, the user selected the Branch filter type, and the dialog now displays the available additional filter types. In this example all the Branch children are located in the same country, 'ES.'



The user can select the Back button to return to the previous dialog, or the Cancel button to return to the Company Data Hierarchy Screen.

Note: If a user selects 'Expand children' on a node with more than 1,000 children, then an error message will display informing the user that there are too many nodes to display. The user will not be able to display the nodes. If somehow 1,000 nodes are displayed on the screen, then a warning will display informing the user that browser performance may be impacted.

Collapse parent

If the graphical node has a visible parent, then the 'Collapse parent' action will appear. When selected, the parent and all siblings will collapse into the node.

Expand parent

If the graphical node has a green indicator on the top, upon hover, the 'Expand parent' action will appear. When selected, all direct ancestors are expanded, potentially outside the visible area. Using the zoom in, zoom out, and panning tools is helpful when this occurs.

View hierarchy

If a Hierarchy screen is defined for the target node, then the 'View hierarchy' link will be available. Selecting 'View hierarchy' will navigate away from the originally rendered node hierarchy to the selected node hierarchy. The once white graphical node will appear filled with blue, indicating it is the selected node. If the left panel is enabled, the panel will display the newly selected node.

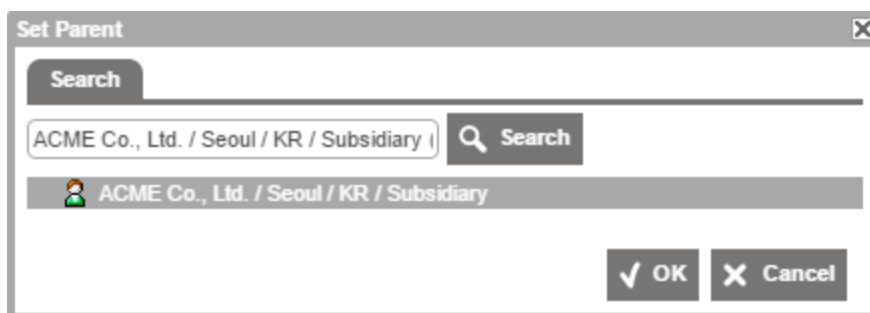
Unlink parent

Selecting 'Unlink parent' will remove the reference link between the node and its parent. However, the user must click the Save button for the changes to formally take affect. When selected, the graphical reference link (the line connecting the two graphical nodes) will no longer display, but the graphical node itself will remain displayed on the screen. This allows a user to edit the graphical node in other ways, or view the existing hierarchy prior to saving.

Set parent

'Set parent' can be used to change the parent to either an existing object or a new object that is created within the 'Set parent' dialog. When selected, the 'Set parent' dialog will appear with at least a Search tab; however, if STEP has been configured with the optional 'Set parent' and 'Add child' settings, then a 'Find Similar Search' tab and/or a 'Create' tab will display. More information on these tabs can be found in the **Optional Tools for 'Set parent' and 'Add child' Actions** section below.

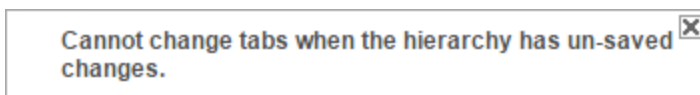
The screenshot below is an example of the default Search option displayed when using **Set parent**.



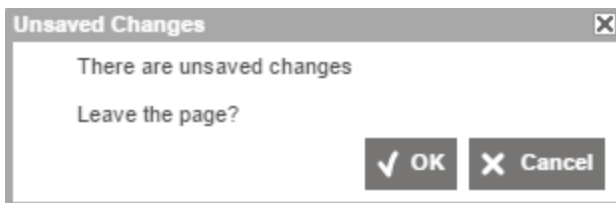
1. Using the Search tab, find the desired entity.
2. Select the new parent entity.
3. Click **OK**.
 - The link between the node and its original parent are removed, and the parent link is added to the newly selected node.
 - The 'Set parent' dialog will close and the hierarchy will display with the original remaining graphical nodes disconnected from the newly linked graphical node and its parent.
4. Click **Save** in the Company Data Hierarchy Screen toolbar.

Important: Changes will not take affect until the **Save** button is clicked.

If a user tries to navigate away from the Company Data Hierarchy tab, then the following warning will appear.



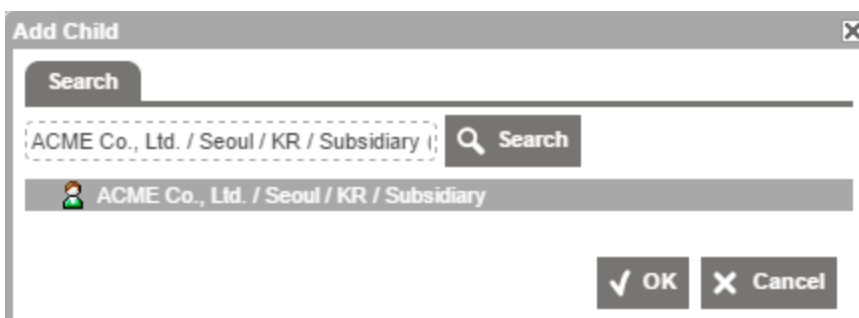
If a user selects a different entity from the left panel (if enabled) then the following dialog will appear, and if the user clicks **OK** then the changes will be lost.



Add child

'Add child' can be used to add a child to the selected node. When selected, the 'Add child' dialog will appear with at least a Search tab; however, if STEP has been configured with the optional 'Set parent' and 'Add child' settings, then a 'Find Similar Search' tab and/or a 'Create' tab will display. More information on these tabs can be found in the **Optional Tools for 'Set parent' and 'Add child' Actions** section below.

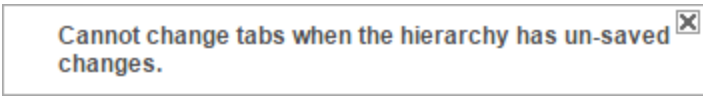
The screenshot below is an example of options displayed when using **Add child**.



1. Using the Search tab, find the desired entity.
2. Select the new child.
3. Click **OK**.
 - The child link is added to the newly selected node.
 - The 'Add Child' dialog will close and the hierarchy will display the graphical node with its newly linked child.
4. Click **Save** in the Company Data Hierarchy Screen toolbar.

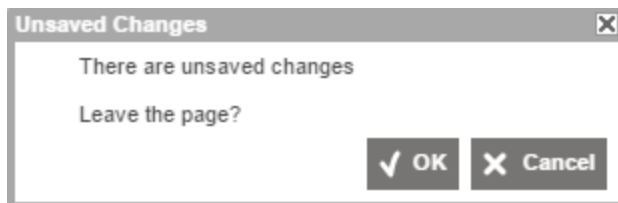
Important: Changes will not take affect until the **Save** button is clicked.

If a user tries to navigate away from the Company Data Hierarchy tab, then the following warning will appear.

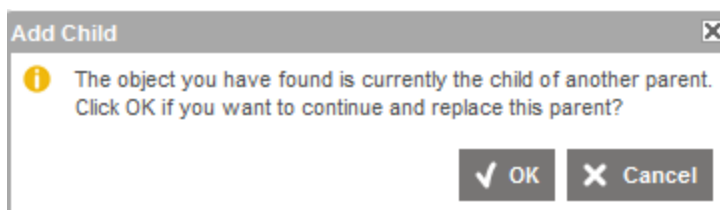


Cannot change tabs when the hierarchy has un-saved changes.

If a user selects a different entity from the left panel (if enabled) then the following dialog will appear, and if the user clicks **OK** then the changes will be lost.



If the user selects an object that is currently the child of another parent, the user must confirm that they want to replace the parent.



Optional Tools for 'Set parent' and 'Add child' Actions

The 'Set parent' and 'Add child' actions offer optional functionality to assist users in properly editing a company hierarchy. The 'Create' tab and 'Find Similar Search' tab functionality are described below.

Create Tab

The Create tab will only appear when a user selects the 'Set parent' and/or 'Add child' action, if a designer has set up the optional configurations. More information can be found in the **Optional Configurations for the Hierarchy Representation Component** topic.

Using the Create tab allows users to create new objects. Optionally, the user can also enter values into the attribute fields that have been configured in the designer to be applied to the new object. The attributes that display will depend on the selected Object Type.

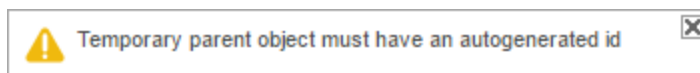
The screenshot below is an example of a Create tab configured with attributes to populate.

Clicking the **Clear All Fields** button will remove all values from the visible fields.

When a user clicks **Cancel**, the actions are canceled and the dialog closes.

1. Select the Object Type from the dropdown list (if more than one is configured).
2. Complete any additional value fields, if displayed.
3. Click **OK**.

If the following warning displays, the Web UI designer should update the temporary parent object selection to an object with an autogenerated id, or contact your system administrator to have the current temporary parent object configured with an autogenerated id.



When a user clicks **OK**, the new object and relevant reference are created based on the choice of the user. (The reference type is specified in the hierarchy screen for the object type in question.) A message displays notifying the user of the success of the new object creation back on the hierarchy screen.

Find Similar Search Tab

The Find Similar Search tab will only appear when a user selects the 'Set parent' and/or 'Add child' action, if a designer has set up the optional configurations. More information can be found in the **Optional Configurations for Hierarchy Representation Component** topic.

In an effort to prevent users from creating duplicate objects in the STEP system, users can use the Find Similar Tab to identify similar objects prior to creating new ones when working in Company Data Hierarchy screens in Web UI. This functionality can be accessed through the 'Set parent' and/or 'Add child' actions while editing a company hierarchy. Using Find Similar allows users to search for potential duplicates on a more granular level.

The key to Find Similar functionality is the matching setup that the customer creates and uses for duplicate handling. Every time a user enters data into the search fields and clicks OK, the Find Similar search checks the match code values involved, executes the relevant matching algorithm, and provides a set of results, if any are found.

If a user is not getting the results they expect, then the first place to check is the algorithm configured in the Duplicate Handler parameter in Object Type Specific Find Similar Properties. A relevant Match Code and Matching Algorithm needs to be set up before attempting to use the Find Similar Search tab. For more information about setting up and using matching algorithms, see the **Configuring Matching Algorithms** section of the **Matching and Linking** documentation.

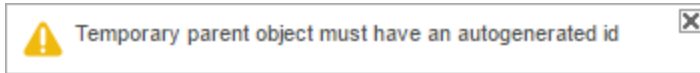
The screenshot below is an example of a configured **Find Similar Search** tab.

Clicking the **Clear All Fields** button will remove all values from the visible fields.

When a user clicks **Cancel**, the actions are canceled and the dialog closes.

1. Select the Object Type from the dropdown list (if more than one is configured).
2. Enter searchable values for the attributes.
3. Click **OK**.

If the following warning displays, the Web UI designer should update the temporary parent object selection to an object with an autogenerated id, or contact your system administrator to have the current temporary parent object configured with an autogenerated id.



Important: The attributes being searched must be part of the list of attributes that Match Codes are generated for. If not, the search will not work as expected.

If similar objects are found after running the action / algorithm, the user is provided with the results in a admin user-configured detailed dialog list.

If a similar object cannot be found, then click Cancel to return to the 'Set parent' or 'Add child' dialog.

4. Select an object.
5. Click **OK**.

The system creates the reference to the similar object selected by the user, and the reference type is specified in the hierarchy screen for the Object Type in question. The dialog closes and the Company Data Hierarchy Screen displays.

Configuring a Company Data Hierarchy Screen

The purpose of the Company Data Hierarchy Screen is to allow users to graphically explore company structures. Any number of Company Data Hierarchy screens can be added to a Web UI. Once added, as with any screen, an admin user must configure how users access a Company Data Hierarchy Screen.

To use the Company Data Hierarchy functionality, an admin user will need to do the following:

1. Define the entity object type and reference type pair(s).
2. Configure a way for users to access the Company Hierarchy Screen.
3. Determine the visual representation of an object type.

This topic addresses:

- Prerequisites
- Creating a Company Data Hierarchy Screen
- Configuring access to a Company Data Hierarchy Screen
- Configuring Hierarchy Representation Properties
- Optional Configurations for the Hierarchy Representation Component

Prerequisites

It is expected that anyone configuring the Company Data Hierarchy Screen and the Hierarchy Representation component is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

To use this functionality:

- The data must form a hierarchy before the Company Data Hierarchy Screen can be configured.
- A hierarchy must be defined by a list of valid Object Type and Reference Type combinations.
- The Reference Type to be used, must have the 'Allow multiple references' equal to 'No.'
- The Reference Type cannot be dimension dependent.
- An object type can only belong to a given hierarchy via one reference type, however it may belong to multiple hierarchies via the same or other reference types.

Creating a Company Data Hierarchy Screen

A Company Data Hierarchy Screen powers the visualization of company hierarchies. When using this screen, configuration must be done to define a hierarchy via a list of valid object type and reference type pairings.

Though only one hierarchy can be displayed in a Web UI screen, more than one hierarchy can be defined and displayed using multiple Company Data Hierarchy screens within the same Web UI.

The steps below cover how to add a new Company Data Hierarchy Screen. Additional details for creating new screens are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic.

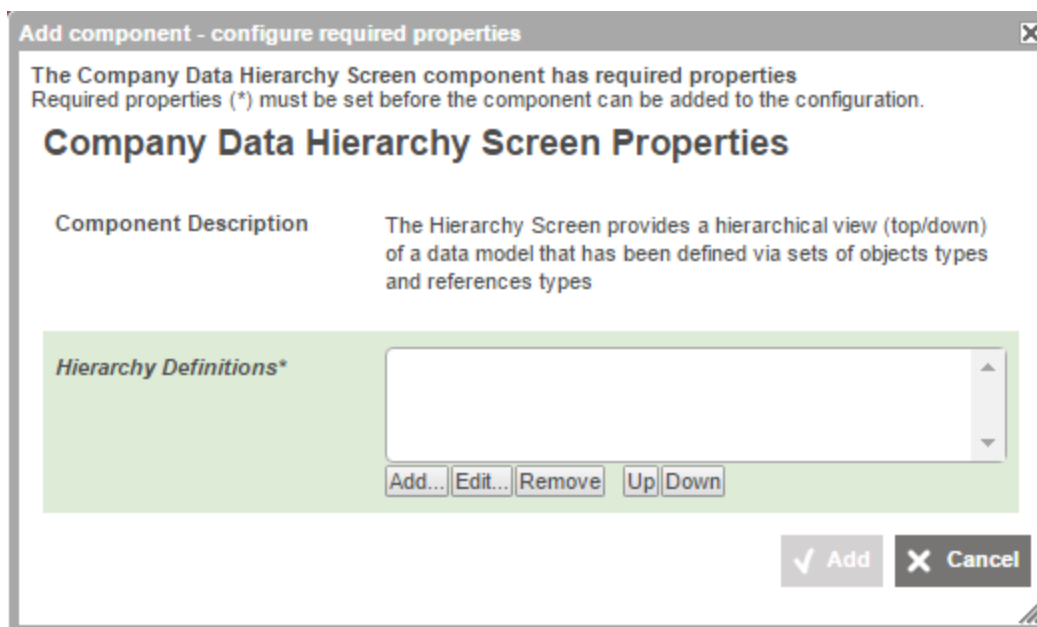
To create and configure a new Company Data Hierarchy Screen:

1. With the designer window open, click the **New** button to create a new screen.



2. Choose **Company Data Hierarchy Screen** from the screen list.
3. Type in a descriptive Screen ID.
4. Click **Add**.

The Company Data Hierarchy Screen Properties dialog will appear.



5. Click **Add** to define an Object Type and parent Reference Type pair that are allowed in the hierarchy visualization.

The Object Type - Reference Properties dialog will appear.

Add component - configure required properties

The Object Type - Reference component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Object Type - Reference Properties

Component Description Defines the pairs of Object Types and parent Reference Types that are allowed in the hierarchy visualization.

Object Type* [Ellipsis Button]

Reference Type [Ellipsis Button] [Clear]

Expand Plugin [<Select an option>] [Edit...]

[Add] [Cancel]

6. Click the ellipsis button (...) and select one **Object Type** to be shown in the hierarchy screen.
7. Optionally, select one **Reference Type** to be shown in the hierarchy screen.
 - The Reference Type will be used to identify the parent object.
 - If no Reference Type selection is made, objects of the designated Object Type will not have parents in the hierarchy.
8. Optionally, enable the Expand Plugin parameter by selecting **Expand By Attributes** from the dropdown.
 - This parameter is suggested for larger hierarchies where users will benefit from selecting specific data dimensions (preconfigured filters) to properly navigate a large hierarchy.
 - Once enabled, click **Edit** to add specific attributes for users to select from while expanding children within a large hierarchy.
9. Click **Add**.

Note: Multiple Hierarchy Definitions can be added, if necessary, repeat steps 5 - 9 to add the desired additional parings.

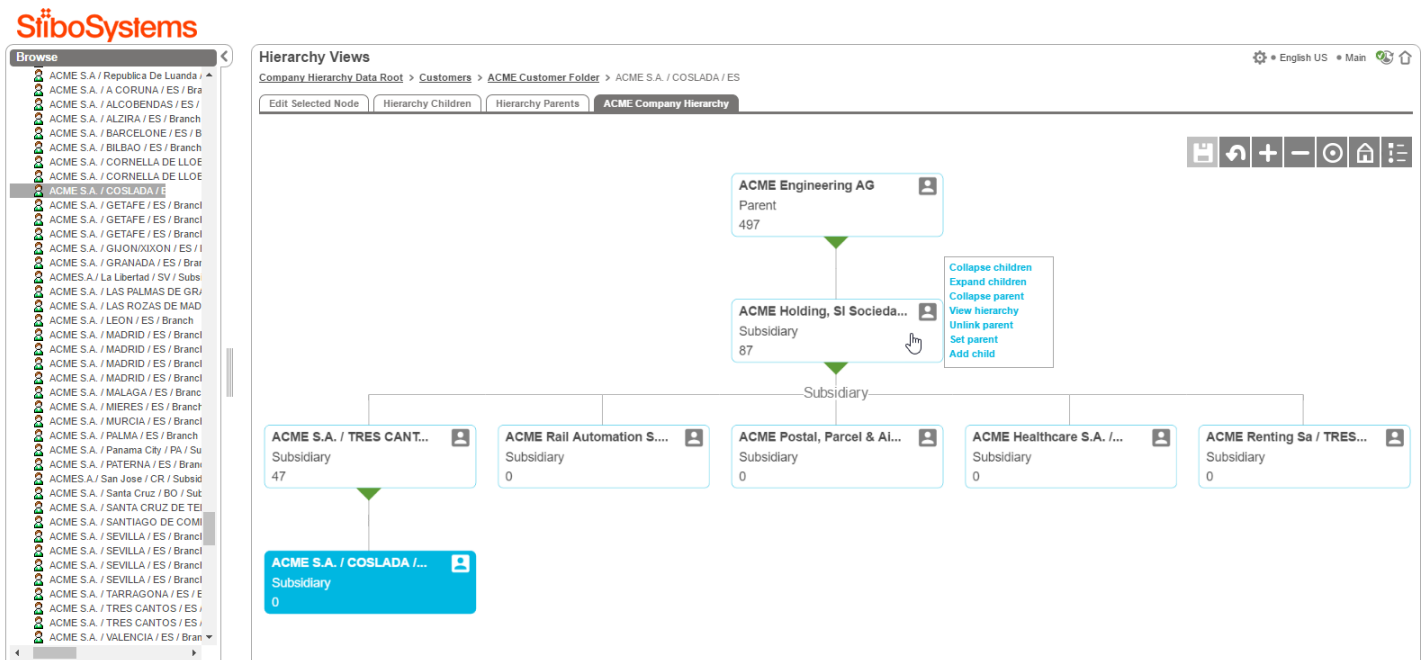
10. Click **Add** on the Company Data Hierarchy Screen Properties once the Hierarchy Definitions are complete.
11. Click **Save**.
12. Click **Close**.

Configuring Access to a Company Data Hierarchy Screen

An admin user must configure how an end user will access a Company Data Hierarchy Screen. The Company Data Hierarchy Screen can be either mapped using Main Properties or added as a Sub Screen Tab Page on a Node Details Screen.

For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about Sub Screen Tab Pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

The example below shows the Company Data Hierarchy Screen displayed via a Sub Screen Tab Page on a Node Details screen and is displayed when an entity is selected.



Configuring Hierarchy Representation Properties

The Hierarchy Representation Properties determine the overall look of the graphical interface. Styling needs to only be set up one time and is applied throughout a specific Web UI, regardless of how many Company Data Hierarchy screens are configured.

To configure the Hierarchy Representation Properties:

1. In Web UI designer, go to the MAIN (Screen) Properties > Representation List > Click **Add**.

The 'Add Component' dialog will display.

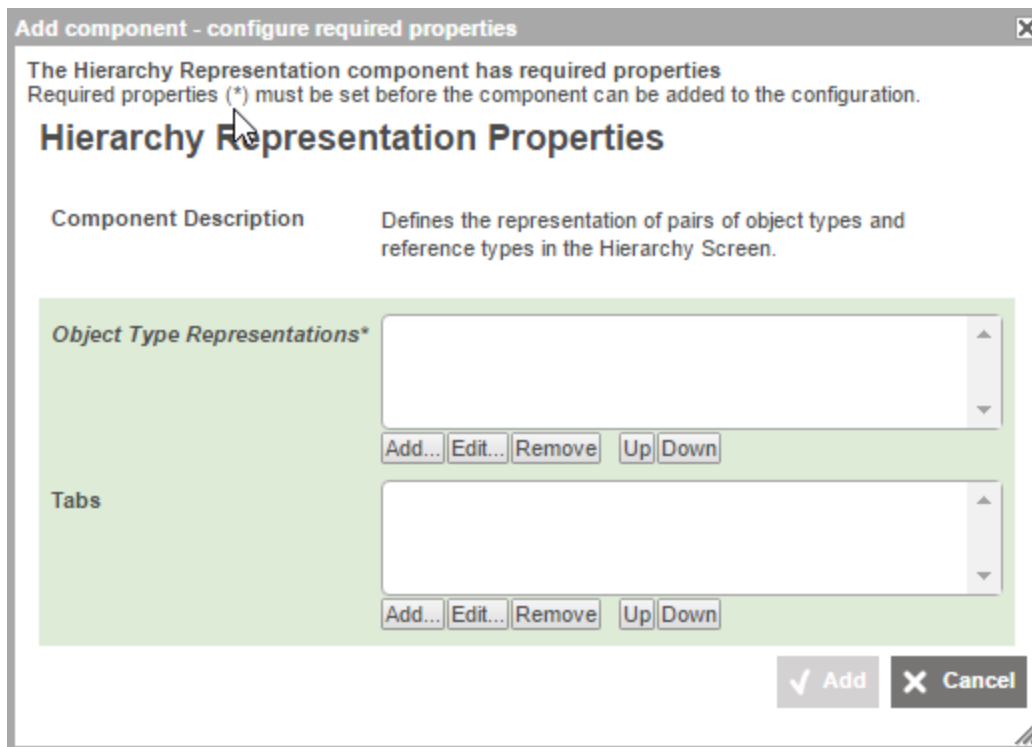


The 'Add Component' dialog box has a title bar with a close button. It contains a list box with 'Data Visualization Representation' and 'Hierarchy Representation'. To the right is a text area with the placeholder 'Select a component to see its description'. Below the list box is a 'Filter' text field and a checkbox labeled 'Show deprecated components'. At the bottom right are 'Add' and 'Cancel' buttons.

2. Select **Hierarchy Representation**.

3. Click **Add**.

The Hierarchy Representation Properties will display.



The 'Add component - configure required properties' dialog box has a title bar with a close button. It contains a message: 'The Hierarchy Representation component has required properties. Required properties (*) must be set before the component can be added to the configuration.' Below this is the title 'Hierarchy Representation Properties'. There are two sections: 'Component Description' with the text 'Defines the representation of pairs of object types and reference types in the Hierarchy Screen.', and 'Object Type Representations*' with a list box and buttons 'Add...', 'Edit...', 'Remove', 'Up', and 'Down'. Below that is a 'Tabs' section with another list box and the same set of buttons. At the bottom right are 'Add' and 'Cancel' buttons.

4. For the Object Type Representations parameter, at least one object type representation must be added. If more than one is added, then the order listed within the parameter field determines the order for horizontal sorting in the Hierarchy screen. Click **Add**.

The Object Type Properties dialog will display.

Add component - configure required properties

The Object Type component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Object Type Properties

Component Description Defines the visual representation of an Object Type.

Object Type*

Label

Icon

View Fields

Popup Fields

5. Click the ellipsis button (...) to select the **Object Type** to be defined and displayed in the hierarchy.
6. Optionally, enter an alternate label for the Object Type used in the Company Data Hierarchy Screen. If no Label is entered, the Object Type is used.
7. Optionally, select an icon to represent the Object Type. Each value on the list represents a different icon to be used within the hierarchy.

The following icon options are available for selection:

- Account
- Aggregate
- Branch
- Classification
- Customer
- Division
- Employee
- Folder

- Legal
 - Location
 - Parent
 - Region
 - Sales-manager
 - Subsidiary
 - Territory
 - Top-flag
8. Optionally, select up to three View Fields to display on the graphical node when the hierarchy renders. If making an Attribute Value Field selection, then the attribute must be specified and an additional dialog will appear.
 9. Popup Fields is also an optional parameter. Click **Add** to select attributes and/or attribute groups to display in the popup when a user selects a graphical node. Selecting 'Attribute Group Value Field' and/or 'Attribute Value Field' brings up additional dialogs for property selection.
 10. Click **Add** on Object Type Properties, and the Hierarchy Representation Properties will display.
 11. Click **Add** to return to the Main (Screen) Properties.
 12. Click **Save**.
 13. Click **Close**.

Optionally, when a user is adding or creating new objects in the hierarchy screen (Set parent, Add child), tabs can be configured to display, to help the user find or create an appropriate object. This can be done by clicking **Add** for the Tabs parameter within the Hierarchy Representation Properties.

Configuring options for 'Set parent' and 'Add child' are described in the **Optional Configurations for the Hierarchy Representation Component** documentation.

For an example regarding how to use the screen once configured, see the **Company Hierarchy Visualization and Maintenance** topic.

Optional Configurations for the Hierarchy Representation Component

A Web UI designer can customize how a user searches, looks for similar objects, and/or creates an entity when using the 'Set parent' and/or 'Add child' actions.

When using the Company Data Hierarchy Screen to edit a company hierarchy, a user can edit the parent and/or child for a selected entity by using the default search tab component that is always visible, even if no search tab configuration has been added. However, a Web UI designer has the option to configure settings so that the standard search results are limited and/or additional tabs are visible in the dialog when a user is editing the parent and/or child in a hierarchy screen.

This topic addresses adding and configuring the Search Tab, Create Tab, and Find Similar Search Tab.

Important: Each tab can only appear once.

Prerequisites

The required configuration of the Company Data Hierarchy Screen must be completed before the optional configurations found within this topic can be applied. See the **Configuring a Company Data Hierarchy Screen** topic.

The Find Similar Search Tab relies on the configured matching algorithm configuration. Only after a well established matching algorithm has been configured, does it make sense for the Find Similar Search tab to be configured. For more information about setting up and using matching algorithms, see the **Configuring Matching Algorithms** section of the **Matching and Linking** documentation.

The Find Similar Search functionality for company hierarchies is very similar to the Find Similar functionality used when adding a reference via the Multi Reference Editor. More info regarding this setup is described in the **Find Similar** topic. The Find Similar topic also goes in to more details on how to configure the Dialog List used to display Find Similar search results.

Search Tab

The Search Tab is visible in the dialog used by the 'Set parent' and 'Add child' actions that can be used when editing a company hierarchy within the company hierarchy screens. By default, the Search Tab will always be visible, and users will be able to search by entity name and/or ID. However, the Search Tab can be configured, by a Web UI designer, to limit the Object Types users will find in a search and/or to allow users to search not only by Name and/or ID but also by specific attribute(s).

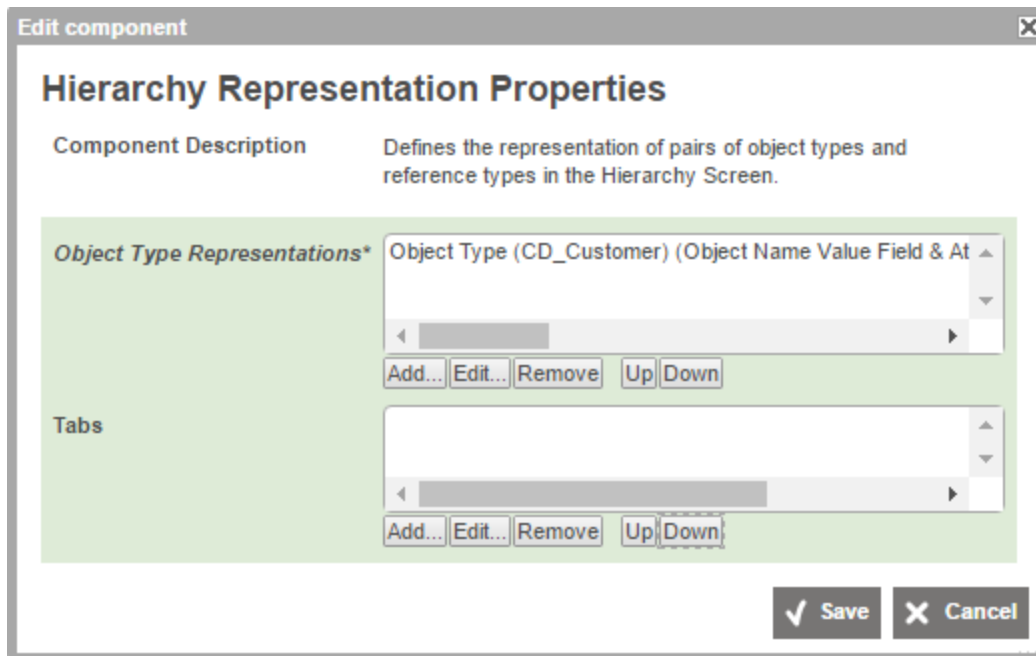
Once the Search Tab has been added to the Hierarchy Representation Properties, the Object Type Limitations and Search Plugins can be added and configured.

Add the Search Tab

Steps for adding the Search Tab so that it can be optionally customized are below:

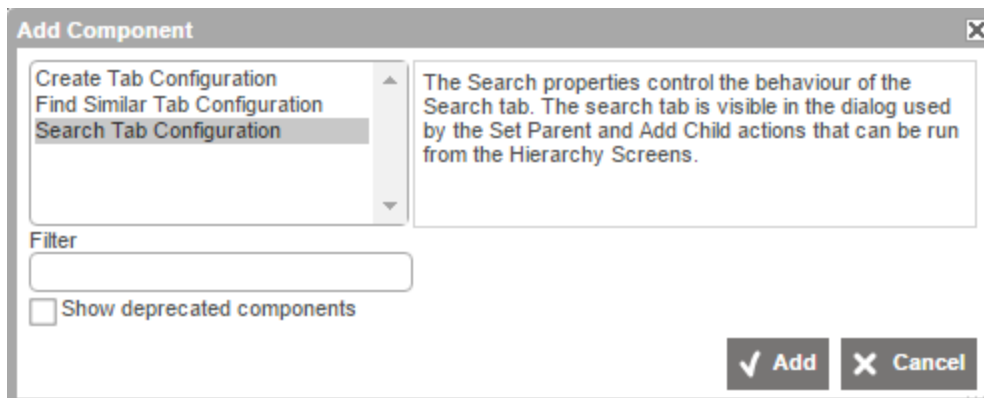
1. Go to the MAIN (Screen) Properties > Representation List and double click **Hierarchy Representation**.

The Hierarchy Representation Properties will display with at least one configured Object Type Representation.



2. Go to the Tabs parameter > Click **Add**.

The Add Component dialog will display.



3. Select **Search Tab Configuration**.

4. Click **Add**.

The Hierarchy Representation Properties Tabs parameter will list the Search Tab configuration.

Edit component

Hierarchy Representation Properties

Component Description Defines the representation of pairs of object types and reference types in the Hierarchy Screen.

Object Type Representations* Object Type (CD_Customer)

Add... Edit... Remove Up Down

Tabs Search Tab Configuration

Add... Edit... Remove Up Down

✓ Save ✕ Cancel

5. Click **Save**.

Limit Object Type Search Results (Optional)

To limit the Object Types(s) a user can find in the customized search:

1. From the Hierarchy Representation Properties Tabs parameter, double click **Search Tab Configuration**.

The Search Tab Configuration Properties will display.

Edit component

Search Tab Configuration Properties

Component Description The Search properties control the behaviour of the Search tab. The search tab is visible in the dialog used by the Set Parent and Add Child actions that can be run from the Hierarchy Screens.

Object Type Limitations

Add... Remove Up Down

Search Plugins

Add... Edit... Remove Up Down

✓ Save ✕ Cancel

2. Within the Object Type Limitations parameter, click **Add**, and select the desired Object Type.

Repeat these steps to add additional Object Types, if desired.

3. Click **Save**.

Add Search Plugins (Optional)

The 'Name Or Id or Attributes' search plugin allows users to not only search by name and ID, but also to search values for specific attribute(s).

Adding the 'Name Or Id Or Attributes' component:

1. From the Hierarchy Representation Properties Tabs parameter, double click **Search Tab Configuration**.

The Search Tab Configuration Properties will display.

The dialog box is titled "Edit component" and "Search Tab Configuration Properties". It contains a "Component Description" section with the text: "The Search properties control the behaviour of the Search tab. The search tab is visible in the dialog used by the Set Parent and Add Child actions that can be run from the Hierarchy Screens." Below this are two sections: "Object Type Limitations" and "Search Plugins", both with list boxes and "Add...", "Remove", "Up", and "Down" buttons. At the bottom right are "Save" and "Cancel" buttons.

2. Within the Search Plugins parameter, click **Add**.

The Add Component dialog will display two choices.

The dialog box is titled "Add Component". It has a list box on the left with two options: "Name Or Id Or Attributes" and "Name Or Id Or Specific Attribute". To the right is a text area with the placeholder "Select a component to see its description". Below the list box is a "Filter" input field and a checkbox labeled "Show deprecated components". At the bottom right are "Add" and "Cancel" buttons.

3. Select '**Name Or Id Or Attributes**'.

4. Click **Add**.

The Search Tab Configuration Properties > Search Plugins parameter will display the 'Name Or Id Or Attributes' component.

Configure Attributes to Include in the Search Tab:

1. Double click '**Name Or Id Or Attributes.**'

The 'Name or Id Or Attributes Properties' will display.

2. Click **Add**.
3. Select a desired attribute.
4. Click **OK**.

Optionally, repeat these steps to add multiple attributes.

5. Optionally, enable the 'Search in Data Containers' parameter if the user needs to search for attribute values on attributes also associated with data containers.
6. Click **Save** to return to the Hierarchy Representation Properties.
7. Click **Save** to return to the MAIN (Screen) Properties.
8. Click **Save**.
9. Click **Close** to exit the designer.

Create Tab

The Create Tab is visible in the dialog used by the 'Set parent' and 'Add child' actions that can be used when editing a company hierarchy within the company hierarchy screens.

It is possible to create new objects using this tab. The object type must first be established, then configured attribute fields can be populated by the user.

Once the Create Tab has been added to the Hierarchy Representation Properties, then the Attribute Values At Create can be added and configured.

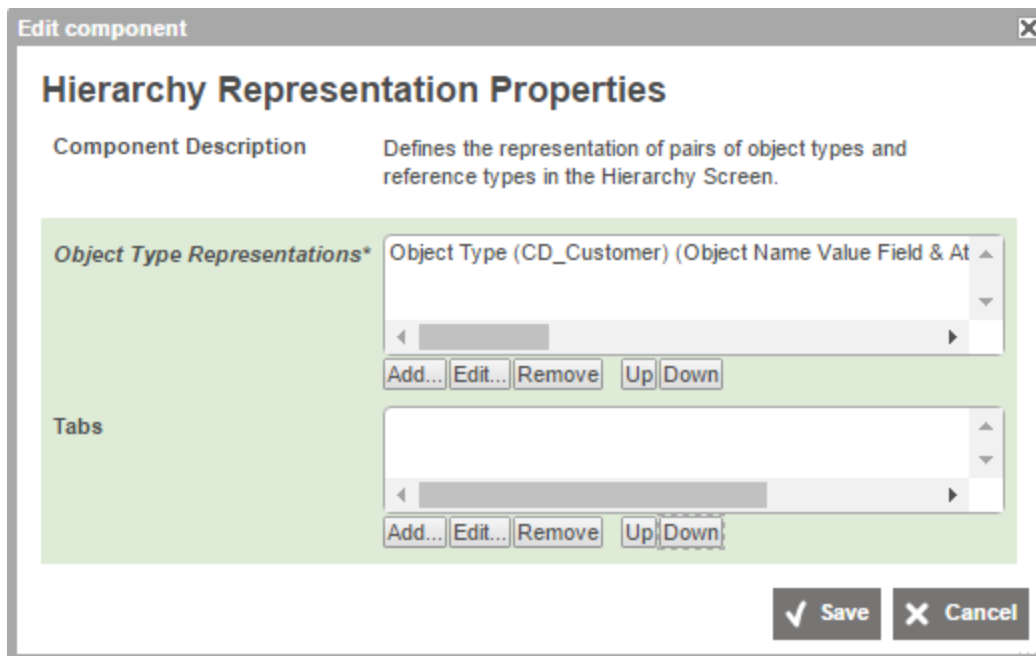
Add and Configure the Create Tab

Only one Create Tab can be added to the Hierarchy Representation Properties. Object Type Specific Setup is required when adding the Create Tab.

To add and configure the Create Tab:

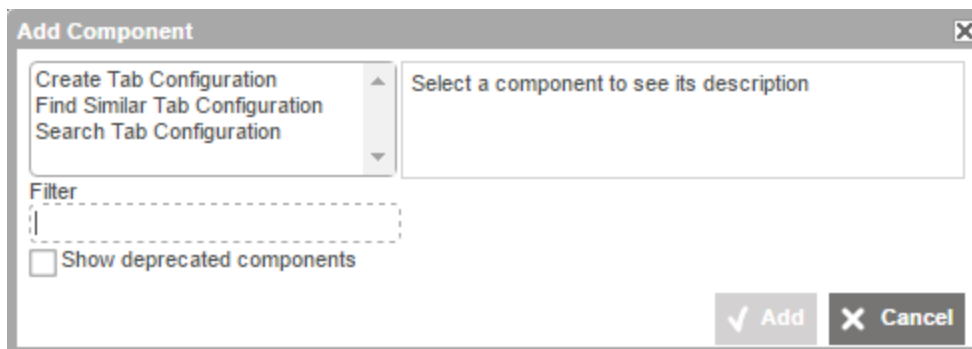
1. Go to the MAIN (Screen) Properties > Representation List and double click **Hierarchy Representation**.

The Hierarchy Representation Properties will display.



2. Go to the Tabs parameter > Click **Add**.

The Add Component dialog will display.



3. Select **Create Tab Configuration**.
4. Click **Add**.

The Create Tab Configuration Properties will display.

Add component - configure required properties

The Create Tab Configuration component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Create Tab Configuration Properties

Component Description The create properties control Object Type specific behaviour of the Create tab. The Create tab is visible in the dialog used by the Set Parent and Add Child actions that can be run from the Hierarchy Screens.

Object Type Specific Setup*

Add... Edit... Remove Up Down

✓ Add ✕ Cancel

The Create Tab Configuration Properties control the Object Types a user can select from when creating a new object, the automatic STEP parent to be assigned to the new object, and attribute values a user can populate (optional). Also, the Web UI designer can configure mandatory attribute values upon creation.

More than one Object Type Specific Setup can be configured, allowing users to choose the Object Type from a dropdown list when creating a new object.

5. Click **Add**.

The Object Type Create Properties will display.

Add component - configure required properties

The Object Type Create component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Object Type Create Properties

Component Description The create properties control Object Type specific behaviour of the Create tab. The Create tab is visible in the dialog used by the Set Parent and Add Children actions that can be run from the Hierarchy Screens.

Object Type* [Ellipsis]

Parent* [Ellipsis]

Attribute Values At Create

[Add...] [Edit...] [Remove] [Up] [Down]

[Add] [Cancel]

6. Click the ellipsis button (...) and select the Object Type these parameters are valid for.
7. Click the ellipsis button (...) and select the Parent object to be used when objects are created in the Create Tab.

Note: The Parent object selected must be set up with auto-generated IDs, otherwise users will receive an error message and will not be able to create the object.

8. Optionally, add attributes to appear when the user creates a new object. The user will need to fill in the attribute values before creating a new object. Steps can be found in the **Add Attributes for Users to Populate When Creating a New Object** section below.

9. Click **Add**.

The Create Tab Configurations Properties dialog will display. Optionally, add additional Object Type Specific setups.

10. Click **Add**.

The Hierarchy Representation Properties will display with the Create Tab Configuration.

Edit component

Hierarchy Representation Properties

Component Description Defines the representation of pairs of object types and reference types in the Hierarchy Screen.

Object Type Representations* Object Type (CD_Customer)

Add... Edit... Remove Up Down

Tabs Create Tab Configuration (Object Type create (CD_Custom...

Add... Edit... Remove Up Down

✓ Save ✗ Cancel

11. Click **Save**.

The MAIN (Screen) Properties will display.

12. Click **Save**.

13. Click **Close** to exit the Web UI designer.

Attribute Values At Create

Steps to add and configure attributes to display on a Create Tab for users to populate when creating new objects are below:

1. From the Object Type Create Properties > Attribute Values At Create parameter > Click **Add**.

The Hierarchy Create Attribute Properties will display.

Add component - configure required properties

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

Hierarchy Create Attribute Properties

Component Description Create object attribute field properties.

Attribute* [Text Field]

Label [Text Field]

Mandatory ☐

✓ Add ✗ Cancel

2. Click the ellipsis button (...) to find and select the desired attribute.
3. Optionally, enter a label to display to the user when they are creating the new object. If left blank then the attribute name will display.
4. If the attribute value should be mandatory during create, then enable the Mandatory parameter.
5. Click **Add**.

The Object Type Create Properties dialog will display with the added attribute values.

6. Click **Save**.

The Create Tab Configurations Properties dialog will display. Add additional Object Type Specific setups, if desired.

7. Click **Add**.

The Hierarchy Representation Properties will display with the Create Tab Configuration.

8. Click **Save**.

The MAIN (Screen) Properties will display.

9. Click **Save**.
10. Click **Close** to exit the Web UI designer.

Find Similar Search Tab

In an effort to prevent users from creating duplicate objects in the STEP system, users can use the Find Similar Search Tab to identify similar objects prior to creating new ones when working in Company Data Hierarchy screens in Web UI. When configured to display (optional), the Find Similar Search Tab is visible in the dialog used

by the 'Set parent' and 'Add child' actions that can be used when editing a company hierarchy within the Company Hierarchy screens.

The key to Find Similar Search functionality is the matching setup created and used for duplicate handling. Every time a user enters data into the search fields and clicks **OK**, the Find Similar Search checks the match code values involved, executes the relevant matching algorithm, and provides a set of results, if any are found.

If a user is not getting the results set they expect, then the first place to check is the algorithm configured in the Duplicate Handler parameter in the Object Type Specific Find Similar Properties.

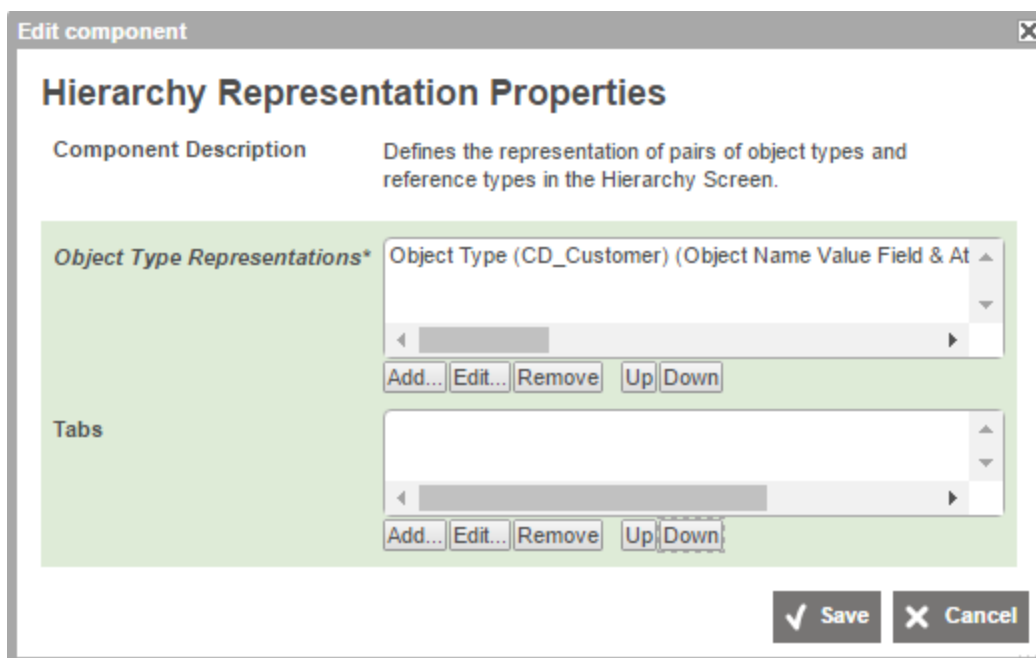
Once the Find Similar Search Tab has been added to the Hierarchy Representation Properties, then the Object Type Specific Setup can be added and configured. Within the Object Type Specific Setup, the Duplicate Handler, Find Similar Search Fields, Temp Parent For Find Similar, and List Dialog are all required.

Add the Find Similar Search Tab

To add the Find Similar Search Tab:

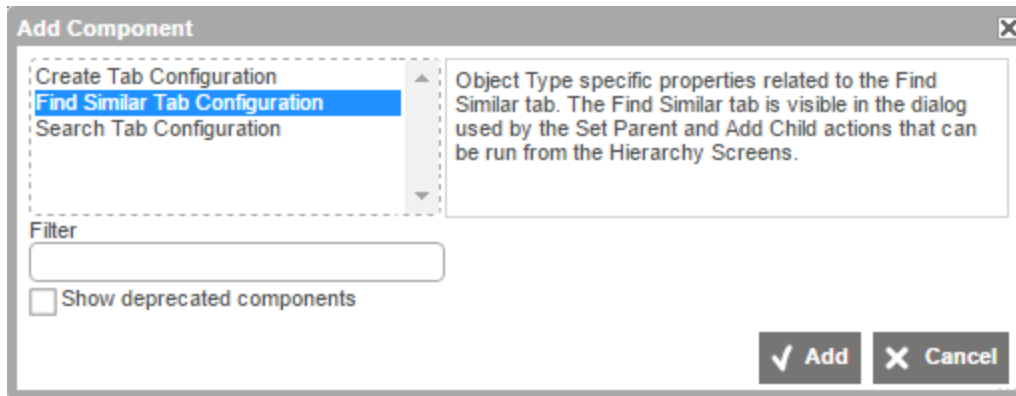
1. Go to the MAIN (Screen) Properties > Representation List and double click **Hierarchy Representation**.

The Hierarchy Representation Properties will display with at least one Object Type Representation.



2. Go to the Tabs parameter > Click **Add**.

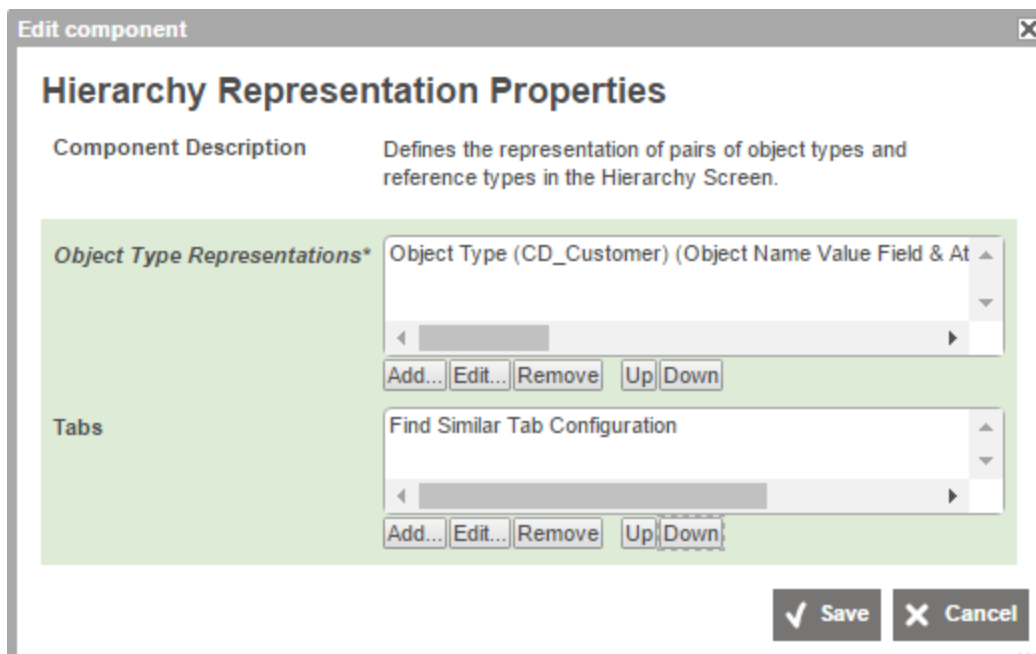
The Add Component dialog will display.



3. Select **Find Similar Tab Configuration**.

4. Click **Add**.

The Hierarchy Representation Properties Tabs parameter will list the Find Similar Tab Configuration.



5. Click **Save**.

The Main (Screen) Properties will display.

6. Click **Save**.

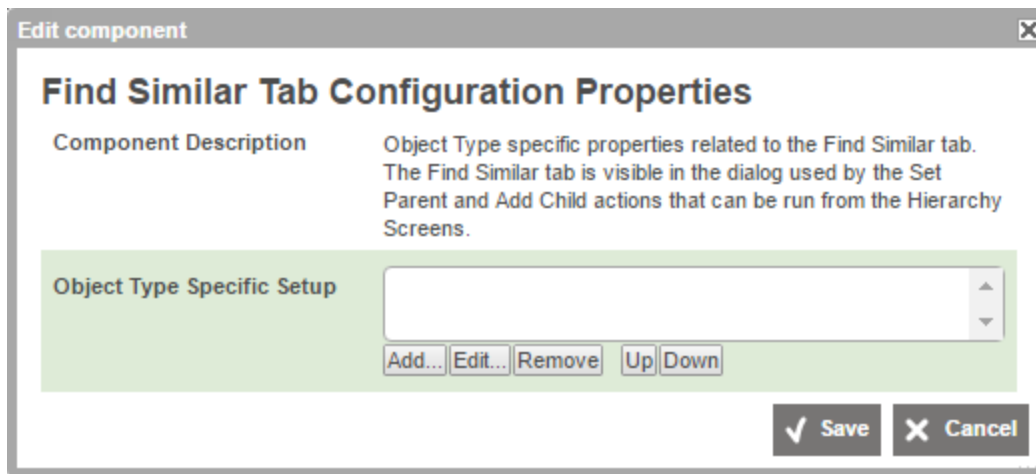
7. Click **Close** to exit the designer.

Configure the Find Similar Search Tab

To configure the Find Similar Search Tab:

1. From the Hierarchy Representation Properties Tabs parameter, double click **Find Similar Tab Configuration**.

The Find Similar Tab Configuration Properties will display.



This is where the Web UI designer configures what Object Types a user can add to a hierarchy via the Find Similar Search Tab.

2. Within the Object Type Specific Setup parameter, click **Add**.

The Object type Specific Find Similar Properties will display.

Add component - configure required properties

The Object Type Specific Find Similar component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Object Type Specific Find Similar Properties

Component Description

Object Type specific properties related to the Find Similar tab.
The Find Similar tab is visible in the dialog used by the Set Parent and Add Child actions that can be run from the Hierarchy Screens.

Object Type*

Duplicate Handler*

<Select an option>
Edit...

Find Similar Search Fields*

Add...
Edit...
Remove
Up
Down

Temp Parent For Find Similar*

List Dialog*

<Select an option>
Edit...

✓ Add

✗ Cancel

3. Select the desired 'Object Type.'
4. Select 'Duplicate Handler' from the drop down.

The Duplicate Handler Properties will display.

Edit component

Duplicate Handler Properties

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

Detail Screen* homepage ▼ Add

Editor Screen* homepage ▼ Add

Matching Algorithm* ...

Threshold

Window Size

✓ Save X Cancel

5. 'homepage' is the default selection for the **Detail Screen** parameter. Make another selection, if desired.
6. 'homepage' is the default selection for the **Editor Screen** parameter. Again, make another selection; changing this is optional.
7. Within the 'Matching Algorithm' parameter, click the ellipsis button (...) and a list of available matching algorithms will display.
8. Select the desired algorithm and click **OK**.

The Duplicate Handler Properties dialog will display with the Matching Algorithm populated.

Edit component

Duplicate Handler Properties

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

Detail Screen*	homepage ▼ Add
Editor Screen*	homepage ▼ Add
Matching Algorithm*	FindSimilarCHMatchingAlgorithm ...
Threshold	40
Window Size	11

✓ Save
X Cancel

9. Optionally enter a threshold rate to apply to the selected matching algorithm. The threshold specifies how equal two objects must be to be considered possible duplicates / similar objects. The lower the threshold number, the less strict the matching algorithm will be. In the example shown above, duplicates / similar objects will only be reported if the Matching Algorithm rate is higher than a threshold value of 40.
10. Optionally enter the number of objects within a window to run the matching algorithm against. The number must be uneven and represents the number of comparisons an individual object can make. Window Size is described in detail within the **Matching and Linking Components** topic.
11. Click **Save**.

The Object Type Specific Find Similar Properties dialog will appear with the Duplicate Handlers parameter populated.

Add component - configure required properties

The Object Type Specific Find Similar component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Object Type Specific Find Similar Properties

Component Description Object Type specific properties related to the Find Similar tab.
The Find Similar tab is visible in the dialog used by the Set Parent and Add Child actions that can be run from the Hierarchy Screens.

Object Type* CD_Customer

Duplicate Handler* Duplicate Handler

Find Similar Search Fields*

Add... Edit... Remove Up Down

Temp Parent For Find Similar*

List Dialog* <Select an option>

✓ Add ✗ Cancel

12. Click **Add** for Find Similar Search Fields to indicate which attribute or attributes end users can search by, remembering that the attributes must match those used by the matching algorithm.

Important: The attributes being searched must be part of the list of attributes that Match Codes are generated for. If not, the search will not work as expected.

13. Click the ellipsis button (...) to select a Temp Parent for Find Similar.

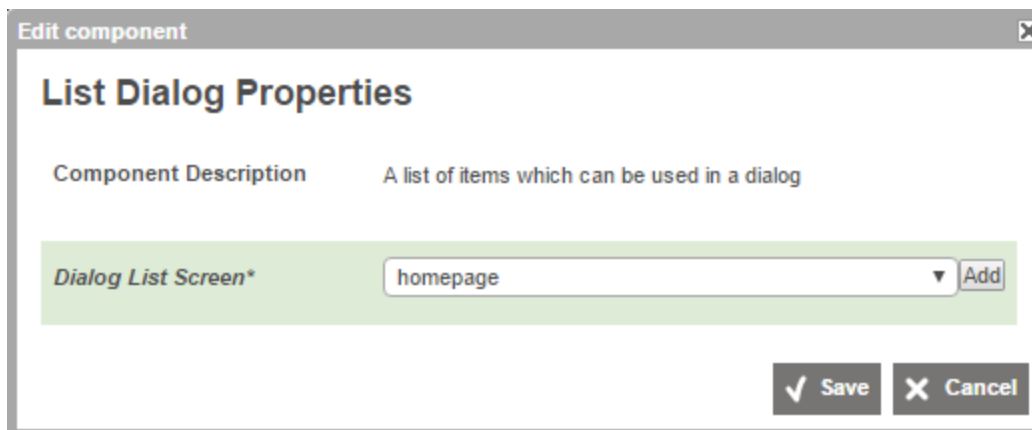
When the matching algorithm is run, it creates temporary objects based on the input in the search fields. These objects are then used in the algorithm to compare and find similar objects. The temporary objects need a parent and object type to be created. After the user finishes the operation, the temporary objects are deleted by the system. These parameters have to be configured for the functionality to work. The object types of both the direct objects and the referenced objects need to be made valid under the location used for the Temp Parent For Find Similar parameter.

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

Note: The Parent object selected must be set up with auto-generated IDs, otherwise users will receive an error message and will not be able to create the object.

14. Select List Dialog from the List Dialog dropdown.

The List Dialog Properties will display.



15. Create / set up a Dialog List Screen specific to company hierarchies or use an existing list.

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

16. Click **Save**.

The Object Type Specific Find Similar Properties dialog will appear with the List Dialog parameter populated.

17. Click **Add** to close the Object Type Specific Find Similar Properties dialog and return to the Find Similar Tab Configuration Properties.
18. Click **Save** for all the properties dialogs until they all close.
19. Click **Save** in the Web UI designer window.
20. Click **Close**.

Comparing Data Using Hide Equal and Mark Different

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

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

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

Properties

Configuration | **Web UI style**

Multi Revisions ▼ Save Close New... Delete Rename Save as...

Multi Revision Screen Properties

Component Description Screen component for displaying (and editing in current revision) a node in different revisions

Show Hide Equals Button ☒

Show Mark Different Button ☒

Title

Child Components

*Editor Table** Multi Revision Editor ▼ [go to component](#)

3. Click **Save**.

Example

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

Sales Item

Basic Information and References Cost and Prices Status Profile Translation Screen **Revisions** Multi Workspace View

ID 131530
Name Cosmic Horror Game

 Filter revisions

 Hide equal

 Mark different

	ID	Co-op	PvP	Multiplayer	Disc Dimensions
0.13 (CURRENT)	131530	4	Y	Yes	6.7 x 5.3 x 0.6 in
0.12	131530	4	Y	Yes	6.7 x 5.3 x 0.6 in
0.11	131530	4	Y	No	6.7 x 5.3 x 0.6 in
0.10	131530	4	Y	Yes	6.7 x 5.3 x 0.5 in
0.9	131530	4	Y	Yes	

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

Sales Item

Basic Information and References Cost and Prices Status Profile Translation Screen **Revisions** Multi Workspace View

ID 131530
Name Cosmic Horror Game

 Filter revisions

 Hide equal

 Mark different

	ID	Multiplayer	Disc Dimensions
0.13 (CURRENT)	131530	Yes	6.7 x 5.3 x 0.6 in
0.12	131530	Yes	6.7 x 5.3 x 0.6 in
0.11	131530	No	6.7 x 5.3 x 0.6 in
0.10	131530	Yes	6.7 x 5.3 x 0.5 in
0.9	131530	Yes	

Conditional Attribute Handling

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

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

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

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

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

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

Conditional attributes handling in Web UI

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

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

Product attributes	References and Classifications	Referenced By	Ir
Primary Image			
ID	L7219		
Name*	Flex Mount		
Object Type	Onboarding SKU		
Approval status	✖ Not approved.		
Description	Quality wall mount that can be easily adjusted to fit most televisions.		
Selling Points			
Has Lead	Yes		
Hazmat			

Product attributes	References and Classifications	Referenced By	Ir
Primary Image			
ID	L7219		
Name*	Flex Mount		
Object Type	Onboarding SKU		
Approval status	✔ Context approved on 6/8/15 4:40 PM		
Description	Quality wall mount that can be easily adjusted to fit most televisions.		
Selling Points			
Has Lead			

Conditional attribute functionality can be used with Web UI elements:

- ParentValue
- TargetAttributeColumn

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

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

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

Configuring a Deduplication Clerical Review

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

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

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

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

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

Create and Configure the Deduplication List

You must place the deduplication list inside a tab page.

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

Properties - Configuration Saved!

Configuration
Portal style

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

Deduplication

DeduplicationList properties
go to parent

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

AutoSubmit
☒

Dimensions
<Select an option>
Edit...

Event

IDHeader (true)
NameHeader
ValueGroupHeader (false / false)

Add... Edit... Remove
Up Down

Hide Selection Buttons
☐

Property Direction
HORIZONTAL

Show Group Headers
☐

Use Immediate Save
☐

Child components

ConfirmDuplicateFromGridAction
RejectDuplicateFromGridAction

Add... Remove Up Down

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

To Specify Node Details Buttons

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

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

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

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

To Create a Task List

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

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

For information about individual table properties, see 'Tables and Lists' in the 'Web UI component configuration reference' available at [\[system\]/webui/docs](#) for more information.

To Specify Mappings

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

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

Note: You now have to create another mapping.

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

Confirmed Matches Component

From the Confirmed Matches component screen, users can view all objects that have been confirmed as matches for the currently selected object, and may choose to either merge the selected object with one of the listed matches, or reject an object(s) as a viable match.

Important: The option to merge is not applicable to Golden Record configurations.

Subscriber Details

English US
Main

Basic Information and References
Potential Duplicates List
Confirmed Matches
Confirmed Non Matches

Select all

Clear filter

Navigate to merge nodes...

Remove confirmed match fro...

	ID	Object Type	Phone	Email
☐ Ima Gargonzola	I-Subscriber_0051b	Subscriber	2242669815	vestibulum.Mary@dapibusgr

Matches listed on this screen must be confirmed via the Potential Duplicates List or Deduplication List screens before they can appear.

For more information on the Potential Duplicates List component, see the **Potential Duplicates List** section of the **Web User Interfaces** documentation.

For more information on the Deduplication List component, see the **Configuring a Deduplication Clerical Review** section of the **Web User Interfaces** documentation.

If applicable to the configuration, a merge nodes button can be added to the screen. To merge two matching nodes, select the relevant object from the list and click the 'Merge' () icon. For more information, see the

Merging Confirmed Matches section of the **Web User Interfaces** documentation.

To reject a confirmed match, select the relevant object from the list and click the 'remove' () icon. Doing so will send the selected object back to the Potential Duplicates List / Deduplication List screen.

Prerequisites

It is expected that anyone configuring the Confirmed Matches component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring the Confirmed Matches component

A number of configuration options are available for this component that allow users to customize how the table is formatted. Additionally, a matching algorithm and corresponding action button(s) must be configured.

1. **Headers:** In this parameter, specify which headers will appear on the table by clicking **Add...** and selecting the desired header. Depending on the header selected, additional configuration steps may be required. Ideally, attributes most relevant to matching should be specified here.
2. **Matching Algorithm:** In this parameter, click the ellipsis button (...) and select the relevant matching algorithm.
3. **Property Direction:** For this parameter, determine whether to display the data in a horizontally or vertically aligned list via the dropdown.
4. **Show Group Headers:** Check the box for this parameter if attribute group headers should be displayed.

5. **Actions:** In this parameter, click the **Add...** button and select 'Delete Confirmed Match From Grid Action'. This will add the remove node button to the screen. If applicable, you can also add the 'Merge Confirmed Match from Grid Action' button.

Confirmed Non Matches Component

From the Confirmed Non Matches component screen, users can view all objects that have been rejected as matches for the currently selected object, and send them back to the Potential Duplicates List / Deduplication List screen to be reevaluated, if necessary.

Subscriber Details

English US • Main

Basic Information and References

Potential Duplicates List

Confirmed Matches

Confirmed Non Matches

Select all

Clear filter

Remove confirmed match fro...

	Name	ID	Phone	Email
☐ Aline Holmes	Aline Holmes	Aline Holmes	3958128390	Quisque@ipsum.edu

Matches listed on this screen must be rejected via the Potential Duplicates List or Deduplication List screens before they can appear.

For more information on the Potential Duplicates List component, see the **Potential Duplicates List** section of the **Web User Interfaces** documentation.

For more information on the Deduplication List component, see the **Configuring a Deduplication Clerical Review** section of the **Web User Interfaces** documentation.

To send a rejected match back to the Potential Duplicates List / Deduplication List screen, select the relevant object from the list and click the 'Remove' () icon.

Prerequisites

It is expected that anyone configuring the Confirmed Non Matches component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring the Confirmed Non Matches component

A number of configuration options are available for this component that allow users to customize how the table is formatted. Additionally, a matching algorithm and corresponding action button(s) must be configured.

Properties

Configuration

Web UI style

Subscriber Details

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

Confirmed Non Matches Properties

go to parent

Component Description

A component for displaying confirmed non-matches

Headers

Name Header

ID Header (true)

Attribute Value Header (false / false / false / S

Attribute Value Header (false / false / false / S

Add...

Edit...

Remove

Up

Down

Matching Algorithm*

I-CaseBMatchingAlgorithmDT

Property Direction

HORIZONTAL

Show Group Headers

☐

Child Components

Actions

Delete Confirmed Match From Grid Action

Add...

Remove

Up

Down

- Headers:** In this parameter, specify which headers will appear on the table by clicking **Add...** and selecting the desired header. Depending on the header selected, additional configuration steps may be required. Ideally, attributes most relevant to matching should be specified here.
- Matching Algorithm:** In this parameter, click the ellipsis button (...) and select the relevant matching algorithm.
- Property Direction:** For this parameter, determine whether to display the data in a horizontally or vertically aligned list via the dropdown.
- Show Group Headers:** Check the box for this parameter if attribute group headers should be displayed.
- Actions:** In this parameter, click the **Add...** button and select the 'Delete Confirmed Match From Grid Action'. This will add the remove node button to the screen.

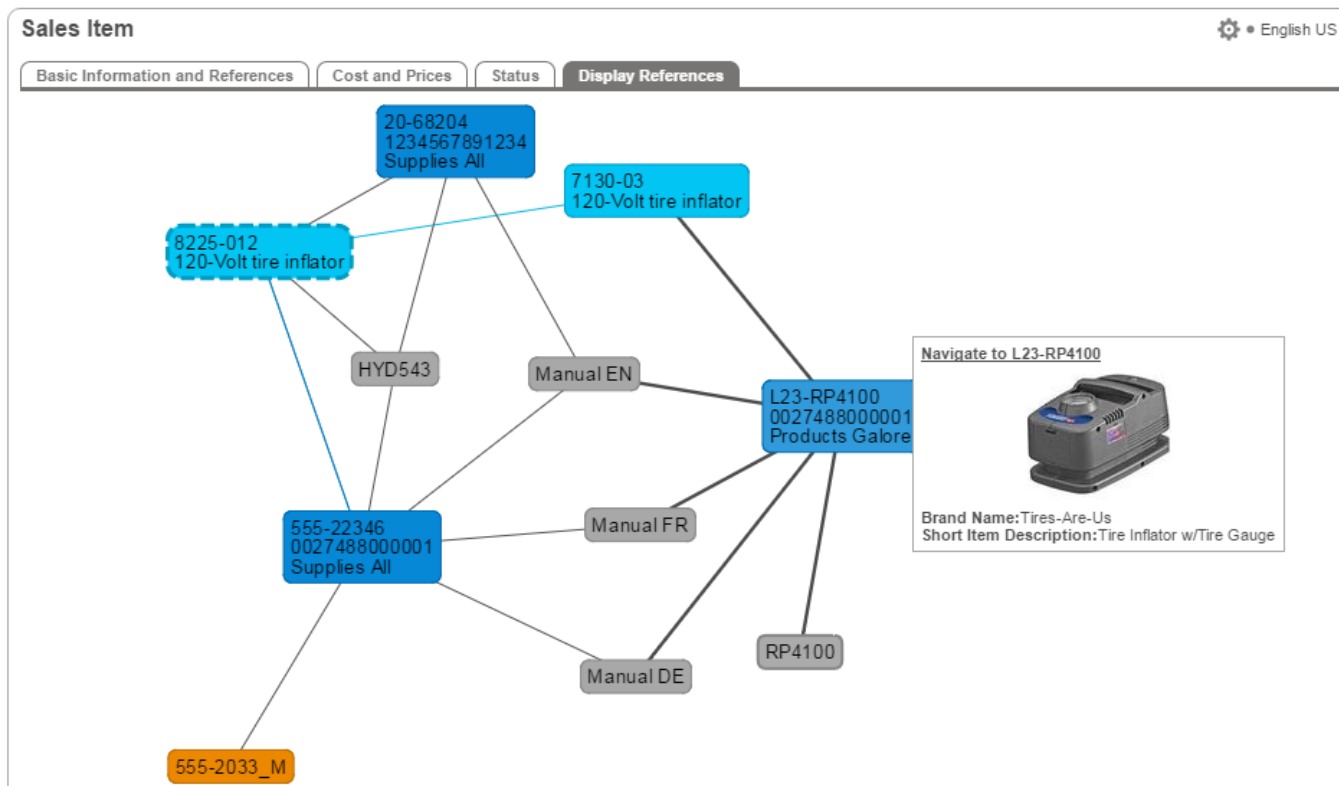
© Stibo Systems - Confidential - STEP Trailblazer 8.1

294

Data Visualization

Data visualization functionality in Web UI allows users to see a visual representation of objects in STEP and how they relate to each other. The visualization of object types and their reference objects can help users better understand data and identify patterns, find better ways to organize objects, and ultimately build better data relationships.

The highly customizable interface is interactive, allowing users to click on and mouse over graphical objects on the screen to get more information on an object, expand outward from it to display additional references, or navigate directly to it.



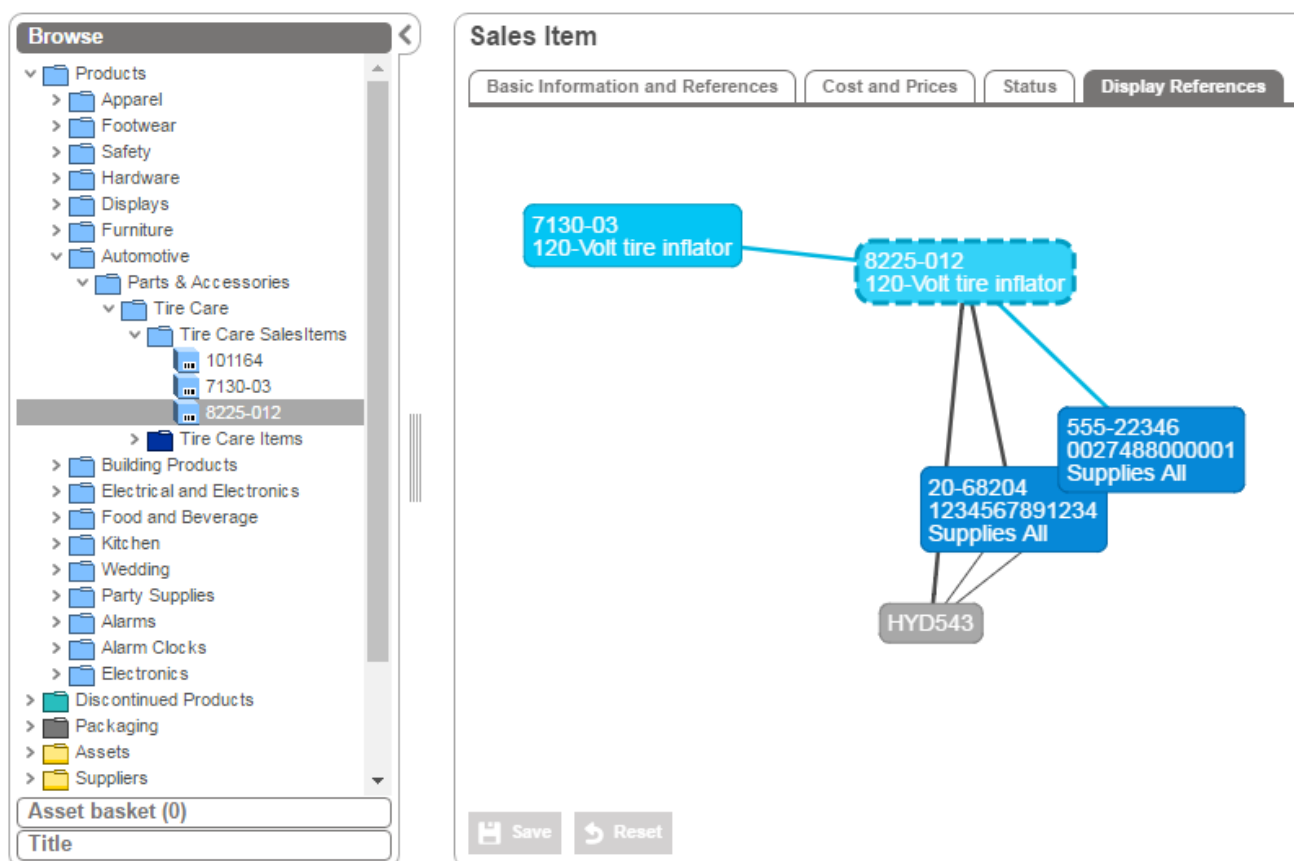
Using Data Visualization

When a user clicks on an object, the interface displays the object and related objects. If the user clicks on a related object node, then the interface updates based on the new selection.

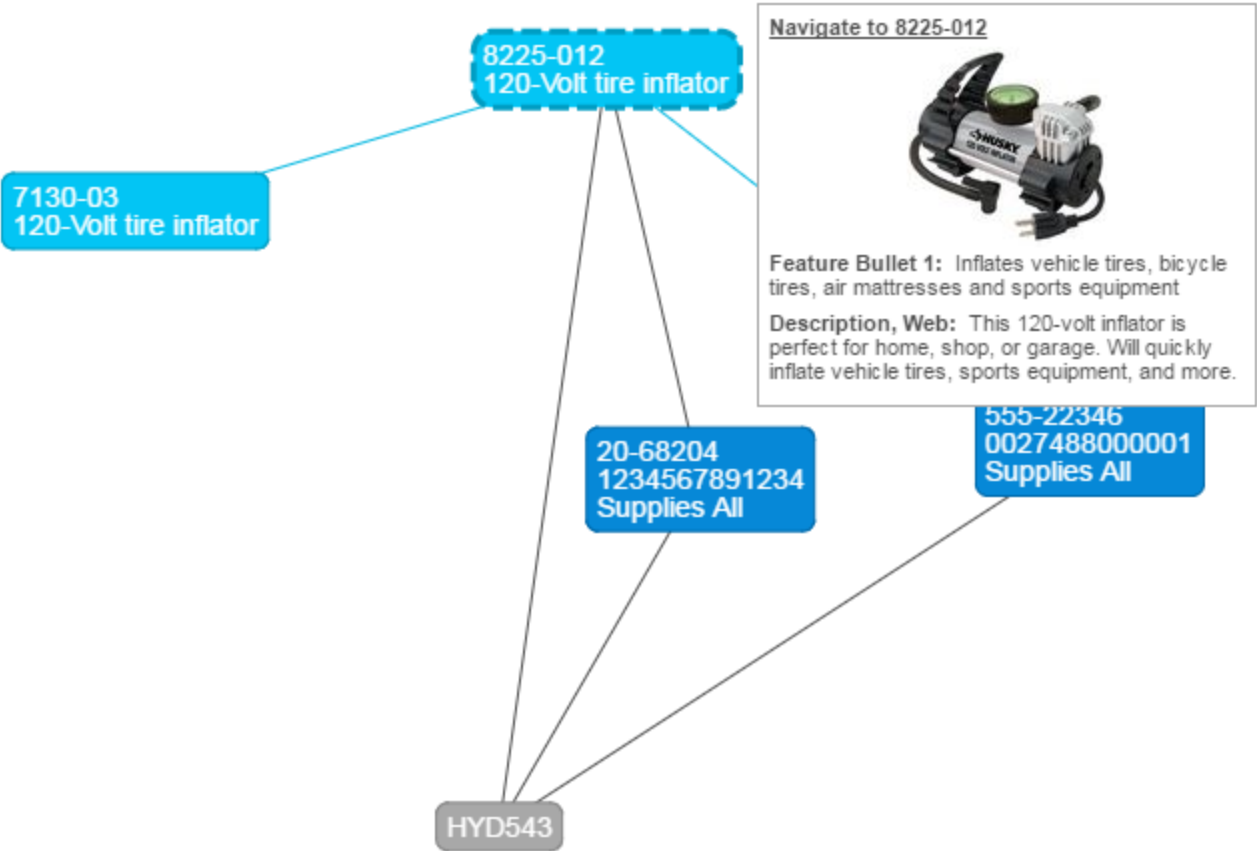
By default, when an object is selected the system displays one (1) 'step' (the object and a single level of references). If the user wants to see more expanded data, then the Expansion Distance parameter can be changed to show more steps.

Below is an example:

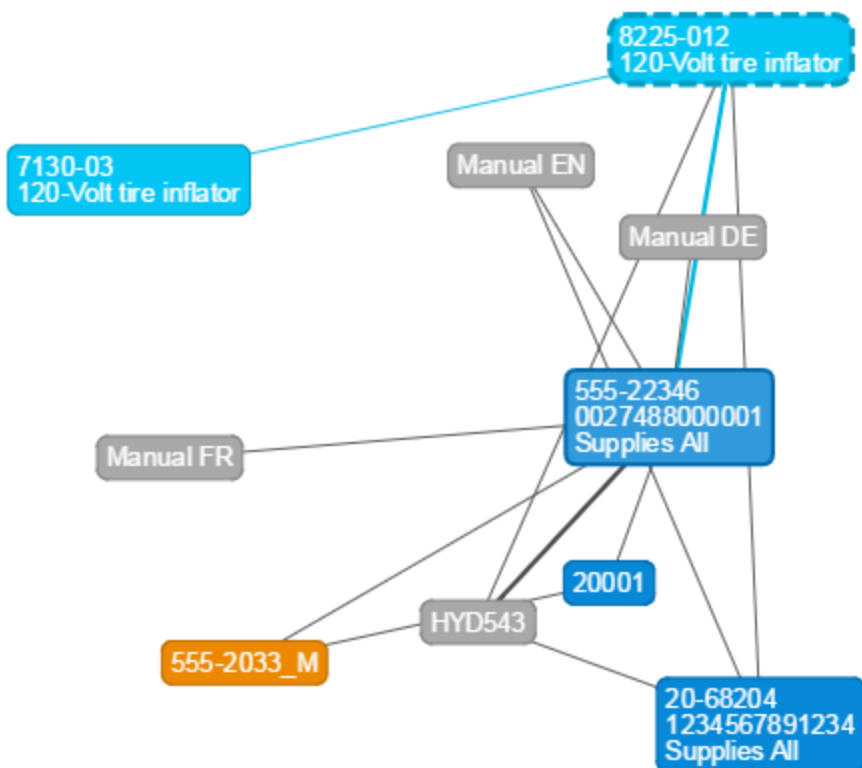
The end user clicks on a Sales Item named 8225-012 and views the graphical interface on a Display Relations screen configured as a Sub Screen Tab Page on a Node Details screen (Sales Item). The object the user is on is identified by the dotted line around the node.



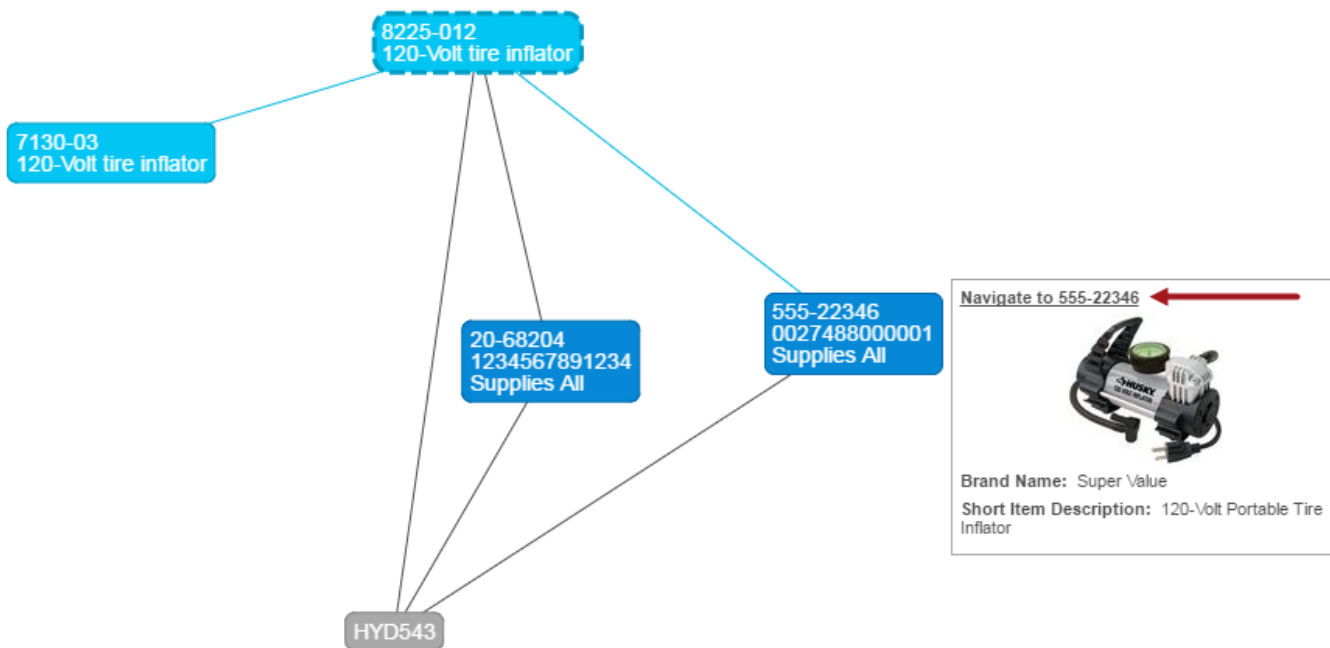
Mousing over the object node displays a hover popup showing the primary product image and configured attributes.

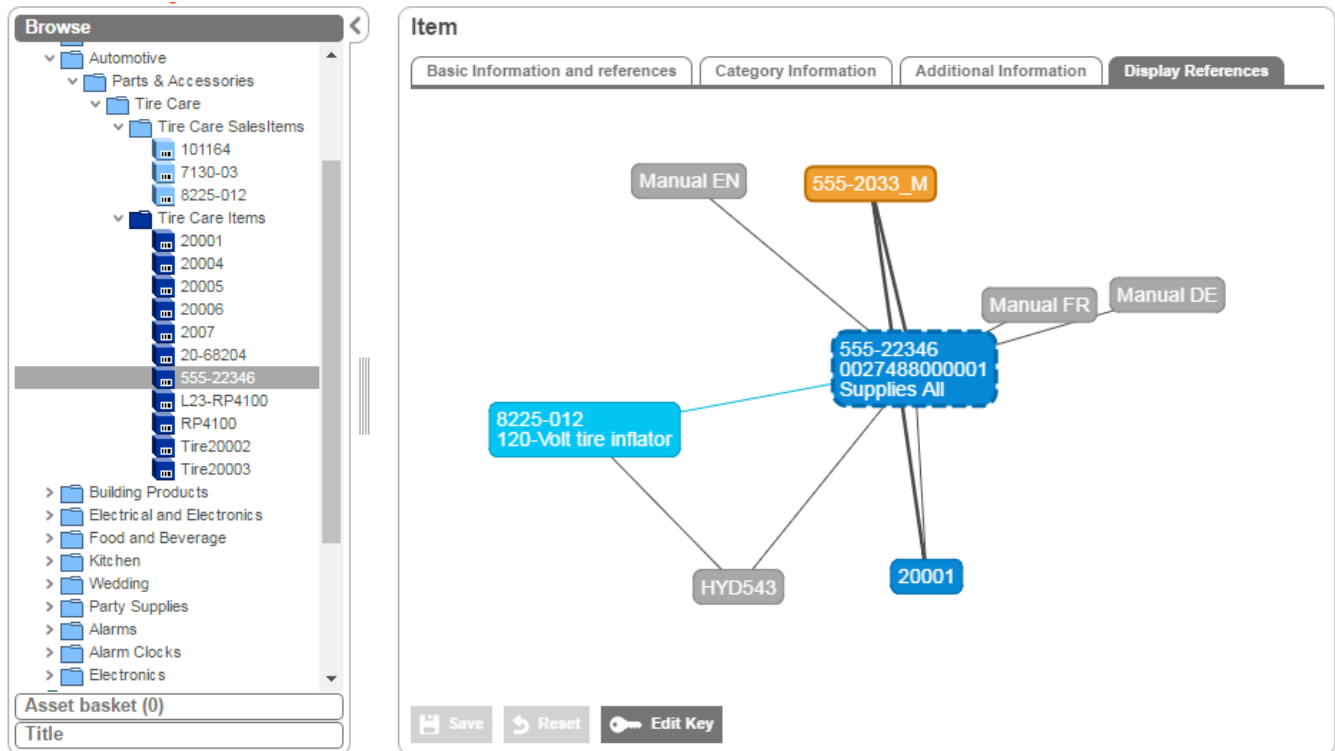


Clicking on a reference node (555-22346) adjusts the visual representation accordingly.



Alternatively, mousing over a reference node and then clicking on the 'Navigate to 555-22346' link will take the user to object 555-22346. 555-22436 becomes the new selected object.





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

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

Exporting Web UI Definitions as Comments

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

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

On the Select Format step of the outbound tool, choose the Advanced STEPXML format, then copy and paste the following text into the Template field:

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

An example of the output for a Web UI definition as comments is shown below:

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

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

For more information, see the **STEP-ProductInformation Tag in STEPXML** section of the **Data Exchange** documentation.

Find Existing

In an effort to avoid the creation of duplicate addresses in STEP, Find Similar functionality can be added to two Web UI components, the Address Detail component and the Store Single Referenced Target component, via the **Find Existing** action.

The Find Existing action searches objects to identify similar objects using a matching setup that the customer creates and uses for duplicate handling. If similar objects are found after running the action / algorithm, the user is provided with the results in a user-configured detailed list.

The key to Find Existing functionality is the **matching setup** that the customer creates and uses for duplicate handling. Every time a user enters data into the search fields and clicks OK, the Find Existing search checks the match code values involved, executes the relevant matching algorithm, and provides a set of results, if any are found. If a user is not getting the results set they expect, then the first place to check is the algorithm selected for the Duplicate Handler parameter in the component properties. Bind types are not required for Find Existing functionality since a simple comparator expression, written to compare attributes of the same object type, is used.

Prerequisites

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

A relevant Match Code and Matching Algorithm needs to be set up before attempting to use the Find Existing action. For more information about setting up and using matching algorithms, see the **Configuring Matching Algorithms** section of the **Matching and Linking** documentation.

Using Find Existing on Store Single Referenced Target

Here is a very basic example of how the Find Existing action can be used within a Store Single Referenced Target component on an Initiate Item screen. Configuration instructions are after this section.

The end user begins the object (Contact) initiation process by clicking Initiate Contact on the Status Selector Homepage Widget. On the Initiate Screen, the user may enter data into the referenced object attribute value fields. If the user will be doing a Find Similar search after checking for duplicate references, then the user should also enter data for the direct object attribute values.

Before doing an overall Find Similar search on both the direct object and its referenced object, the user clicks the Find Existing button within the Store Single Referenced Target framework to first search for similar objects within that object type. In the example below, the Find Existing action is comparing address objects against address objects to see if a similar address exists in STEP.

Contact Workflow

Initiate Contact

State-1	0
State-2	0
State-3	0
End State	0

Initiate Item

Name

Address

Street

City

Zip

Find Existing
 Reset

Initiate Item

Name

Address

Street

City

Zip

Find Existing
 Reset

Find Existing

Select the wanted choice and click OK

Street	City	Zip
116 Spadina Ave	Toronto	M5V 2K6

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

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

A maximum of fifty (50) objects are shown at one time on the results list. The user can select one of the objects shown in the results list. Once a selection is made, the OK button is engaged. Clicking OK indicates that you want to use the selected referenced object and use it with creating the direct object.



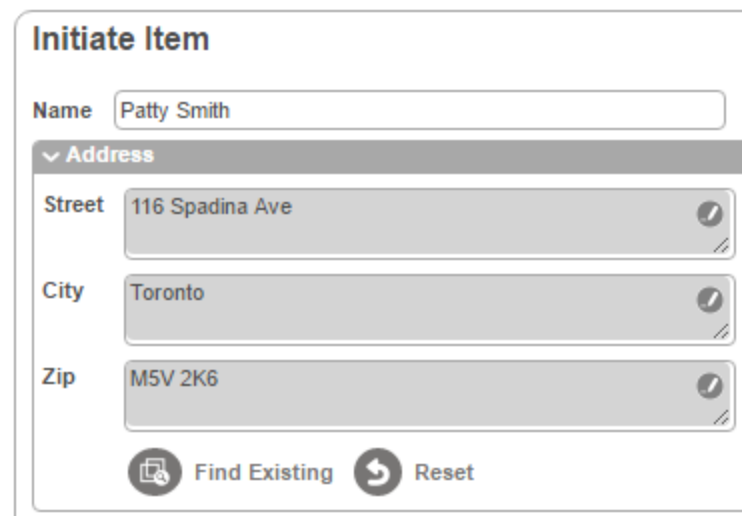
Find Existing

Select the wanted choice and click OK

Street	City	Zip
116 Spadina Ave	Toronto	M5V 2K6

✓ OK ✗ Cancel

The attribute value fields within the Store Single Referenced Target component become read only. If the user wants to create a new reference object with the attribute values entered instead of using one from the results list, the user clicks Cancel to exit the results list.



Initiate Item

Name

▼ Address

Street

City

Zip

 Find Existing  Reset

From here, the user can run a Find Similar search, to see if there is a similar contact object that has an address reference that exactly matches the attribute values within the Store Single Referenced Target. See the **Find Similar** topic for more information on using that functionality after running a Find Existing action.

Configuring Find Existing on Store Single Referenced Target

Following the configuration steps below allows end users to search on referenced objects to identify matches within a single object type. If a similar address is found and used, then the direct object will be initiated and linked to selected existing referenced object rather than creating a new referenced object.

1. Create a new **Initiate Item** screen (or use an existing one) and complete configuration, making sure to add and configure the **Store Single Referenced Target** component. Complete details on configuration can be found in the **Initiate Item Screen** topic and within the **Find Similar** topic.
2. While in Web UI designer, navigate to where the Store Single Referenced Target component is located (within a Node Editor on an Initiate Item screen). Double click on **Store Single Referenced Target** in Child Components > Rows to configure the component.

Properties

Configuration

Web UI style

Initiate Item

Save

Close

New...

Delete

Rename

Save as...

Store Single Referenced Target Properties

go to parent

Component Description

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

Object Type*

CD_Address

...

Parent*

step://entity?id=AddressRoot

...

Reference Type*

Address

...

Duplicate Handler

Duplicate Handler

▼

Edit...

Hide Section If Empty

☐

Section Default Open

☒

Section Title

Child Components

Rows*

Attribute Value Component

Attribute Value Component

Attribute Value Component

Add..

Remove

Up

Down

Action Buttons

Find Existing Action

Reset Action

Add..

Remove

Up

Down

3. Click the ellipsis button (...) to make selections for each of the required parameters. Determine the:
 - **Object Type** of the objects being searched and that will be initiated in to STEP as a reference to the direct object being created.

- **Parent** to be used for the object type when object is created on save.
 - **Reference Type** to be used when object is created on save.
4. Select **Duplicate Handler** in the dropdown for the Duplicate Handler parameter.
 5. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis button (...) to the right of the value field and select a matching algorithm. Click **Save**.

The screenshot shows a window titled "Edit component" with a close button (X) in the top right corner. Inside the window, the title "Duplicate Handler Properties" is displayed. Below the title, there is a "Component Description" section with the text: "This parameter component can be used to configure a Duplicate Handler for the Initiate Item component. It cannot be used as a stand-alone component." Below this, there are five rows of configuration fields, each with a label on the left and a value field on the right. The first two rows, "Detail Screen*" and "Editor Screen*", have dropdown menus with "homepage" selected and an "Add" button to the right. The third row, "Matching Algorithm*", has a text field containing "FindExistingMatchingAlgorithm" and an ellipsis button (...) to its right. The fourth row, "Threshold", has a text field with the value "60". The fifth row, "Window Size", has a text field with the value "10". At the bottom right of the window, there are two buttons: "Save" with a checkmark icon and "Cancel" with an X icon.

6. For Child Components > Rows, click the **Add** button.
7. Next, select the applicable component (Attribute Value or Attribute Value Group) and choose attributes to be used on the Initiate Item screen (within the Store Single Referenced Target framework) and that are also used within the algorithm. Click **Add** within the 'Add Component' dialog and you will be returned to the Store Single Referenced Target Properties.
8. Under Child Components > Action Buttons, click **Add**.
 - Select **Find Existing Action** and click Add.
 - Repeat this step and add the **Reset Action**.
9. Double click the **Find Existing Action** title and open the **Find Existing Action Properties**.

Properties

Configuration | **Web UI style**

Initiate Item ▼ Save Close New... Delete Rename Save as...

Find Existing Action Properties [go to parent](#)

Component Description Invokes the Duplicate Handler. Can be placed in the buttons panel of an Address Detail or Store Single Reference Target component.

Button Label Find Existing

Child Components

List Dialog List Dialog ▼ [go to component](#)

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

Properties

Configuration **Web UI style**

Initiate Item

List Dialog Properties [go to parent](#)

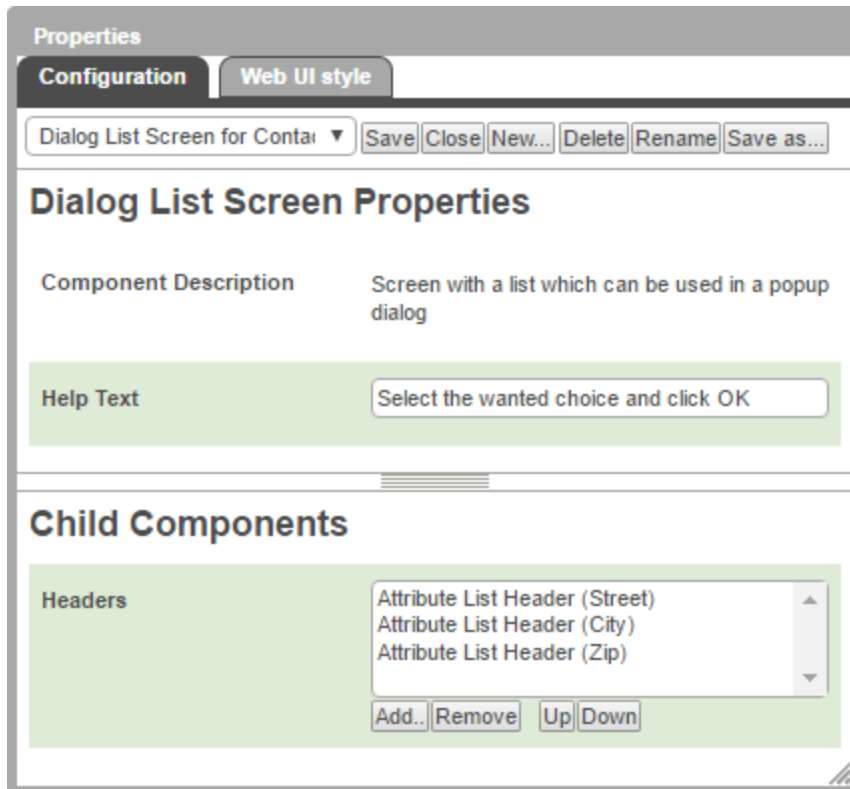
Component Description A list of items which can be used in a dialog

Dialog List Screen*

Child Components

Buttons

14. Also on the **List Dialog Properties** screen, in the **Child Components** > **Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the designer window.
15. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
16. Configure the **Child Components** > **Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the search results list.



17. Add different Dialog List Screen **Help Text**, if desired. It will display at the top of the template results list.
18. Click **Save** and **Close** the designer.

Using Find Existing on Address Detail

In an effort to avoid the creation of duplicate addresses in STEP, the Find Existing action can be used on the Address Detail component. Users can input an address and then run a Find Existing action that searches objects for a similar match using the matching setup that the customer creates and uses for duplicate handling. If similar objects are found after running the action / algorithm, the user is provided with the results in a user-configured detailed list.

Please note that the Find Existing action will only be active in Web UI if using Address Detail in 'reference mode.' More details can be found in the Configuring Find Existing on Address Detail section.

Here is a very basic example of how the Find Existing action can be used on an Address Detail component for a Customer object. Configuration instructions are after this section.

You can enter data into the address fields manually, or start entering an address into the Address Search component. Make a selection from the choices returned from Google. You can also move the pin map to a desired location, if using the Address Map component.

Once the address fields are completed, click on Find Existing.

Node Details
English US • Main

Address Details Search

116 Spadina Ave, Toronto, ON M5V 2K6, Canada

Map Satellite

Street 116 Spadina Ave

City Toronto

State ON

Country Canada

Country ISO Code CA

Zip M5V 2K6

Find Existing Reset

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

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

A maximum of fifty (50) objects are shown at one time on the results list. The user can select one of the objects shown in the results list. Once a selection is made, the OK button is engaged. Clicking OK indicates that you want to use the selected reference object and link it to the direct object (e.g., the Customer, as shown in the example screenshots).

Find Existing

Select the wanted choice and click OK

Street	City	Zip
116 Spadina Ave	Toronto	M5V 2K6

✓ OK

✗ Cancel

If an address is found and selected within the Dialog List, then the address becomes uneditable on the screen and a reference to that existing address object is made upon save. Alternatively, if no similar objects are identified or if the user decides none are suitable and a new object must be created, they may cancel out of the dialog and proceed with creation of the new address reference object.

Address Details Search

116 Spadina Ave, Toronto, ON M5V 2K6, Canada

Map

Satellite

Street

116 Spadina Ave

City

Toronto

State

ON

Country

Canada

Country ISO Code

CA

Zip

M5V 2K6

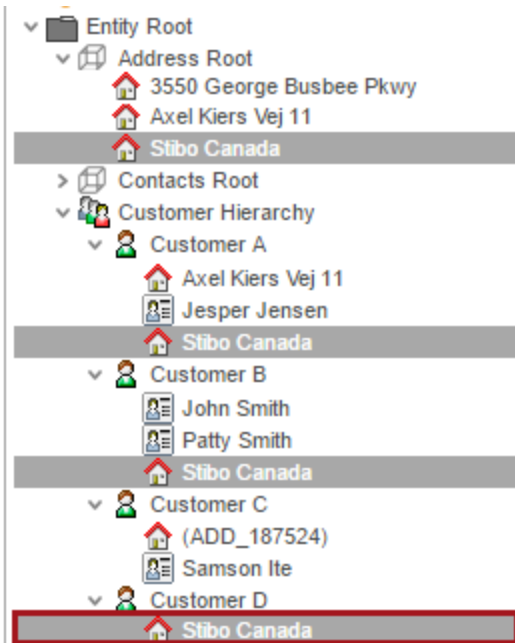
Find Existing

Reset

Save

Reset

From here, the user can click Save and the existing address object is linked as a reference to the Customer object.



The screenshot shows a visual confirmation that all the 'Stibo Canada' references are actually the same object.

Configuring Find Existing on Address Detail

In an effort to avoid duplicate address objects in STEP, following the configuration steps below allows end users to search on referenced objects to identify potential matches. If a similar address object is found and used, then the direct object will be linked to the selected existing referenced object rather than creating a new one.

Important: The Find Existing action will only be active in Web UI if using Address Detail in 'reference mode.' This means that the data model being used, for example, has an object (e.g., customer) that references an address object containing address attributes.

1. Create a new **Address Detail** screen (or use an existing one) and complete configuration, making sure to add and configure the Address Detail component with the attributes / attribute group that you will be searching (and is used in your Match Code setup). Complete details on configuration can be found in the **Address Detail** section of the **Web User Interfaces** documentation.
2. While in Web UI designer, navigate to the screen with the Address Detail component that you will be configuring. Double click on **Address Detail** in Child Components > Rows section of the Node Editor to begin configuration.

Properties - Configuration Saved!

Configuration

Web UI style

Address Detail Screen

Save

Close

New...

Delete

Rename

Save as...

Address Detail Properties

go to parent

Component Description

Address detail

Css Class

stibo-managed-node

Data Container Type

... Clear

Duplicate Handler

Duplicate Handler

▼ Edit...

Label

Address Details

Object Type

CD_Address

... Clear

Parameter Mapping

Add...

Edit...

Remove

Up

Down

Parent

Configured Address Detail Parent Handle

▼ Edit...

Reference Type

CustomerToAddress

... Clear

Temp Parent For Find Existing

Configured Address Detail Parent Handle

▼ Edit...

Child Components

Actions

Find Existing Action

Reset Action

Add..

Remove

Up

Down

Rows

Address Detail Search (Search)

Address Detail Map

Attribute Value Group Component

Add..

Remove

Up

Down

3. Select **Duplicate Handler** in the dropdown for the Duplicate Handler parameter.
4. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis button (...) to the right of the value field and select a matching algorithm. Click **Save**.

Edit component

Duplicate Handler Properties

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

Detail Screen* homepage Add

Editor Screen* homepage Add

Matching Algorithm* FindExistingMatchingAlgorithm ...

Threshold 60

Window Size 10

✓ Save X Cancel

5. Click the ellipsis button (...) to make an **Object Type** selection for the objects being searched and that will be saved as a reference to the direct object.
6. For **Parent**, select Configured Address Detail Parent Handler from the dropdown and set the Parent parameter within the Configured Address Detail Parent Handler Properties. This should be the parent node where address objects will be saved.
7. Click the ellipsis button (...) next to **Reference Type** and select the type of reference to be created between the direct object and the address reference object. Click Save.
8. For **Temp Parent For Find Existing**, select Configured Address Detail Parent Handler from the dropdown and set the Parent parameter within the Configured Address Detail Parent Handler Properties. This should be the parent node where temporary address objects will be saved, as part of the results set / Dialog list process. You can select the same parent node used in step 6 or create a node specific to temporary objects. Click Save.
9. For Address Detail Properties > Child Components > Rows, click the **Add** button.
 - Select **Find Existing Action** and click Add.
 - Repeat this step and add the **Reset Action**.
10. Double click the **Find Existing Action** title and open the **Find Existing Action Properties**.

Properties

Configuration

Web UI style

Address Detail Screen ▼

Save

Close

New...

Delete

Rename

Save as...

Find Existing Action Properties

go to parent

Component Description

Invokes the Duplicate Handler. Can be placed in the buttons panel of an Address Detail or Store Single Reference Target component.

Button Label

Find Existing

Child Components

List Dialog

List Dialog ▼

go to component

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

Properties

Configuration | **Web UI style**

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

List Dialog Properties

[go to parent](#)

Component Description A list of items which can be used in a dialog

Dialog List Screen* Dialog List Screen - Address Detail ▼ Add

Child Components

Buttons Use Selected Item Action

Add.. Remove Up Down

15. Also on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the designer window.
16. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
17. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the search results list.

Properties

Configuration Web UI style

Dialog List Screen - Address Save Close New... Delete Rename Save as...

Dialog List Screen Properties

Component Description Screen with a list which can be used in a popup dialog

Help Text Select a choice and click OK to use

Child Components

Headers

- Attribute List Header (Street)
- Attribute List Header (City)
- Attribute List Header (Zip)

Add... Remove Up Down

18. Add different Dialog List Screen **Help Text**, if desired. It will display at the top of the template results list.
19. Click **Save** and **Close** the designer.

Note: The Find Existing action works with the referenced address objects and is not applicable, and should not be configured to display, when viewing the screen for an address node itself. Also, if Find Existing is configured when using the Address Detail in any other way or mode (embedded / data container), the Find Existing action button will not be visible since the action is not intended for use in other situations.

Find Similar

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

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

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

Configuring Find Similar on an Initiate Item Screen

Properties

Configuration | **Web UI style**

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

Initiate Item Properties

Component Description Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow

Duplicate Handler Duplicate Handler ▼ Edit...

Object Type ID* CD_Contact ...

Root step://entity?id=ContactsRoot ... Clear

Root Product ID

▼ **Screen configurations**

Forwarding Screen CD_SimpleMatching ▼ Add

► **Business Conditions**

► **Styling**

Child Components

Main Columns Control ▼ go to component

Buttons Buttons ▼ go to component

Breadcrumb <Select a child compo ▼ go to component

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

Edit component

Duplicate Handler Properties

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

Detail Screen* homepage Add

Editor Screen* homepage Add

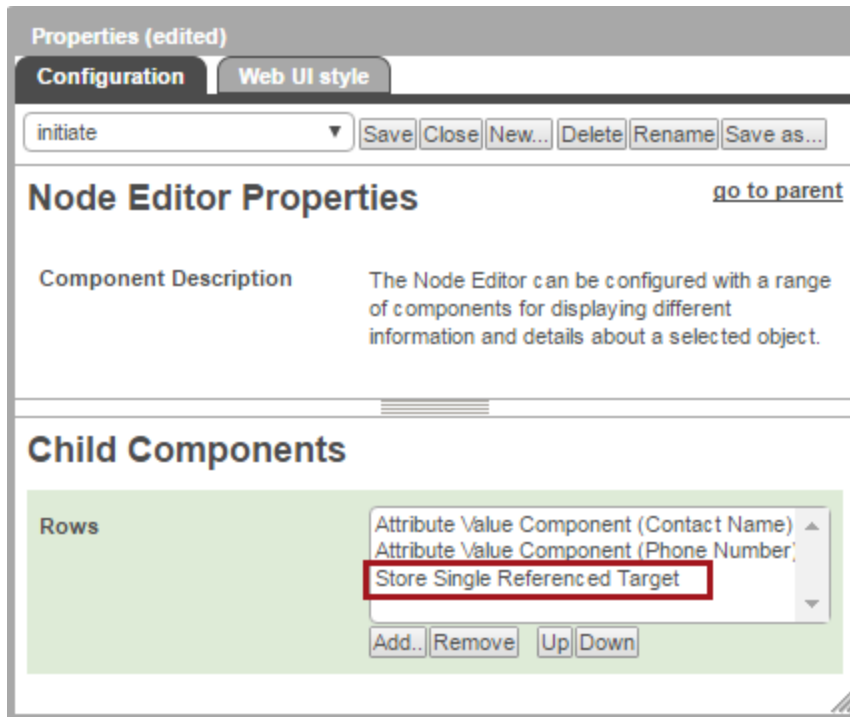
Matching Algorithm* FindSimilarMatchingAlgorithm ...

Threshold 80

Window Size 10

✓ Save ✕ Cancel

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



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

Properties (edited)

Configuration

Web UI style

initiate

Save

Close

New...

Delete

Rename

Save as...

Store Single Referenced Target Properties

go to parent

Component Description

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

Object Type*

CD_Contact

Parent*

step://entity?id=ContactsRoot

Reference Type*

ContactToContact

Hide Section If Empty

☐

Section Default Open

☒

Section Title

Contact Search

Child Components

Rows*

Attribute Value Component (Contact Name)

Attribute Value Component (Phone Number)

Add..

Remove

Up

Down

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

Child Components

Main

Columns Control

go to component

Buttons

Buttons

go to component

Breadcrumb

<Select a child compo

go to component

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

Properties (edited)

Configuration Web UI style

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

Find Similar Action Properties [go to parent](#)

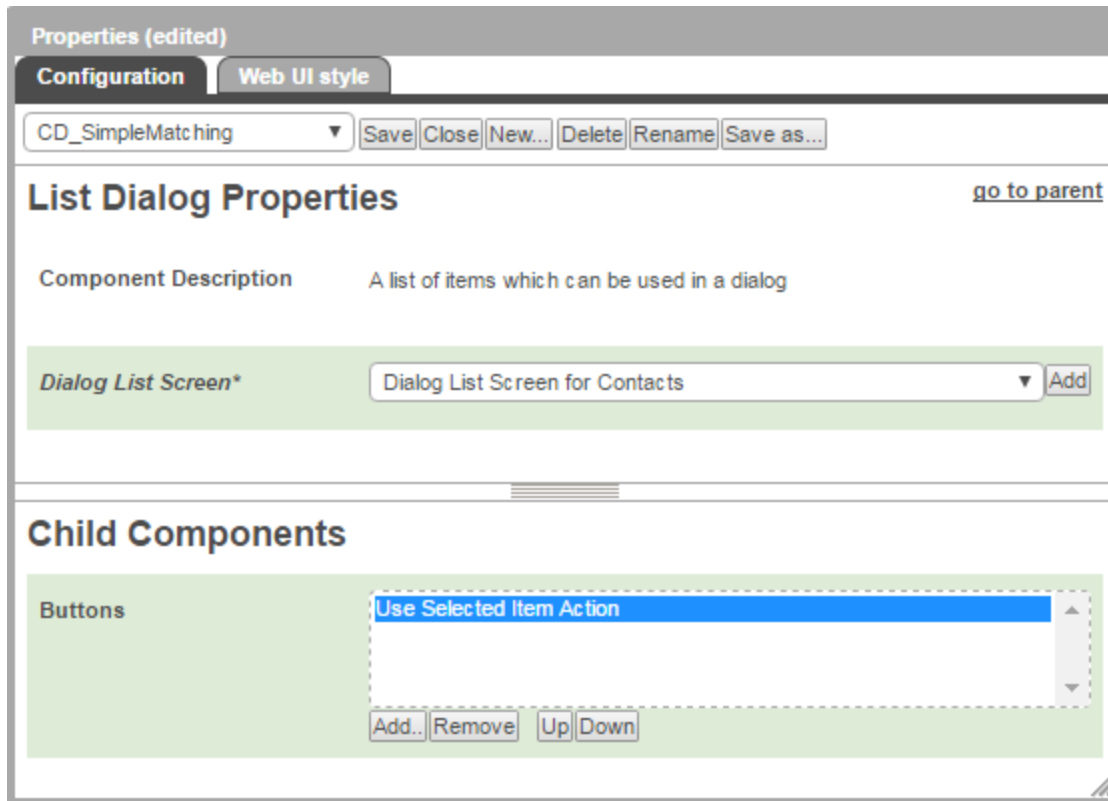
Component Description Invokes the Duplicate Handler. Can be placed in the buttons panel of an Initiate Item component. See also the Duplicate Handler option which should be added to the Initiate Item component.

Button Label Find Similar

Child Components

List Dialog List Dialog [go to component](#)

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



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

Using Find Similar on an Initiate Item Screen

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

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

Contact Workflow

Initiate Contact

State-1	0
State-2	0
State-3	0
End State	0

Initiate

Contact Name

Phone Number

Contact to Contact

Contact Name

Phone Number

Save

Find Similar

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

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

Initiate

Contact Name

Phone Number

▼ Contact to Contact

Contact Name

Phone Number

Find Similar

Select the wanted choice and click OK

ID	Contact Name	Phone Number
CON_107842	John Smith	770 555 9317
CON_111252	John Smith	770 555 9876
CON_167041	John Smith	770 555 1212

✓ OK

✗ Cancel

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

Initiate

Contact Name

Phone Number

▼ Contact to Contact

Contact Name

Phone Number

Save

Find Similar

The screenshot shows the 'Contact Information' form with fields for Contact Name (John Smith), Data Source, Fax Number, and Phone Number (770 555). To the right is a table with the following data:

ID	Contact Name	Object Type	Reference type
(CON_168574)	CON_168574	Patty Smith	Contact
		Contact to Contact	

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

Configuring Find Similar on an Add Reference Action

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

The screenshot shows the 'Add Reference Action Properties' configuration window. The 'Configuration' tab is active. The 'Duplicate Handler' is set to '<Select an option>'. The 'Find Similar Search Fields' section is highlighted with a red box and contains a list of search fields with 'Add...', 'Edit...', 'Remove', 'Up', and 'Down' buttons. The 'Show Find Similar Tab' checkbox is unchecked. The 'Temp Object Type For Find Similar' and 'Temp Parent For Find Similar' fields are also highlighted with red boxes. The 'Child Components' section at the bottom is also highlighted with a red box and contains a 'Find Similar List Dialog' with a dropdown menu set to '<Select a child component>' and a 'go to component' link.

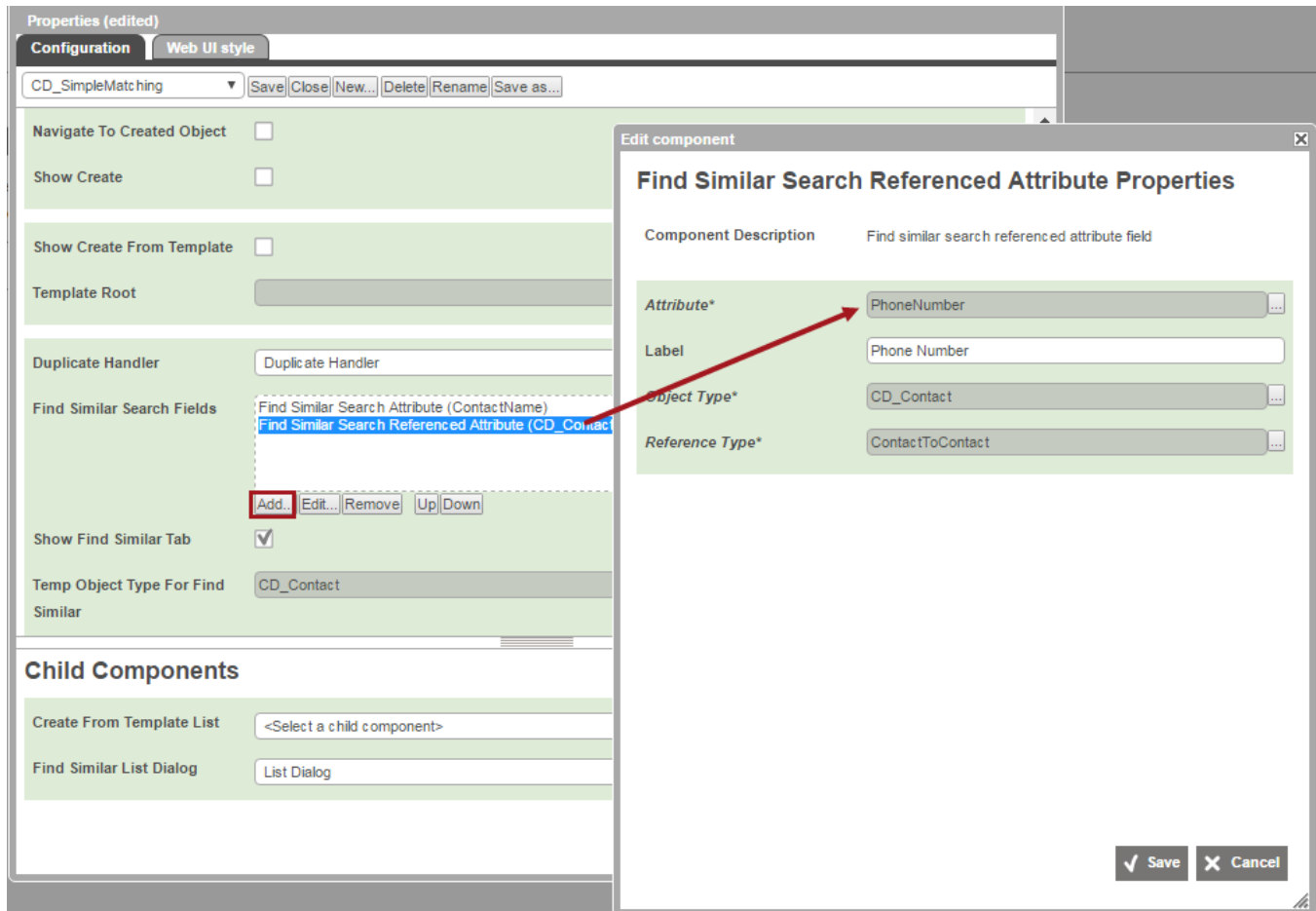
1. Edit the properties for an existing **Add Reference Action** configured for a **Multi-Reference Editor**, or add an Add Reference Action and complete the configuration.
2. In the **Add Reference Action Properties**, select **Duplicate Handler** in the dropdown for the **Duplicate Handler** parameter.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

The screenshot shows a window titled "Edit component" with a close button in the top right corner. Inside the window is a section titled "Duplicate Handler Properties". Below the title is a "Component Description" field with the text: "This parameter component can be used to configure a Duplicate Handler for the Initiate Item component. It cannot be used as a stand-alone component." Below this is a green-shaded area containing several configuration fields:

- Detail Screen***: A dropdown menu showing "homepage" and an "Add" button.
- Editor Screen***: A dropdown menu showing "homepage" and an "Add" button.
- Matching Algorithm***: A text field containing "FindSimilarMatchingAlgorithm" and an ellipsis button "...". This row is highlighted with a red border.
- Threshold**: A text field containing "80".
- Window Size**: A text field containing "10".

At the bottom right of the dialog are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an 'X' icon).

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

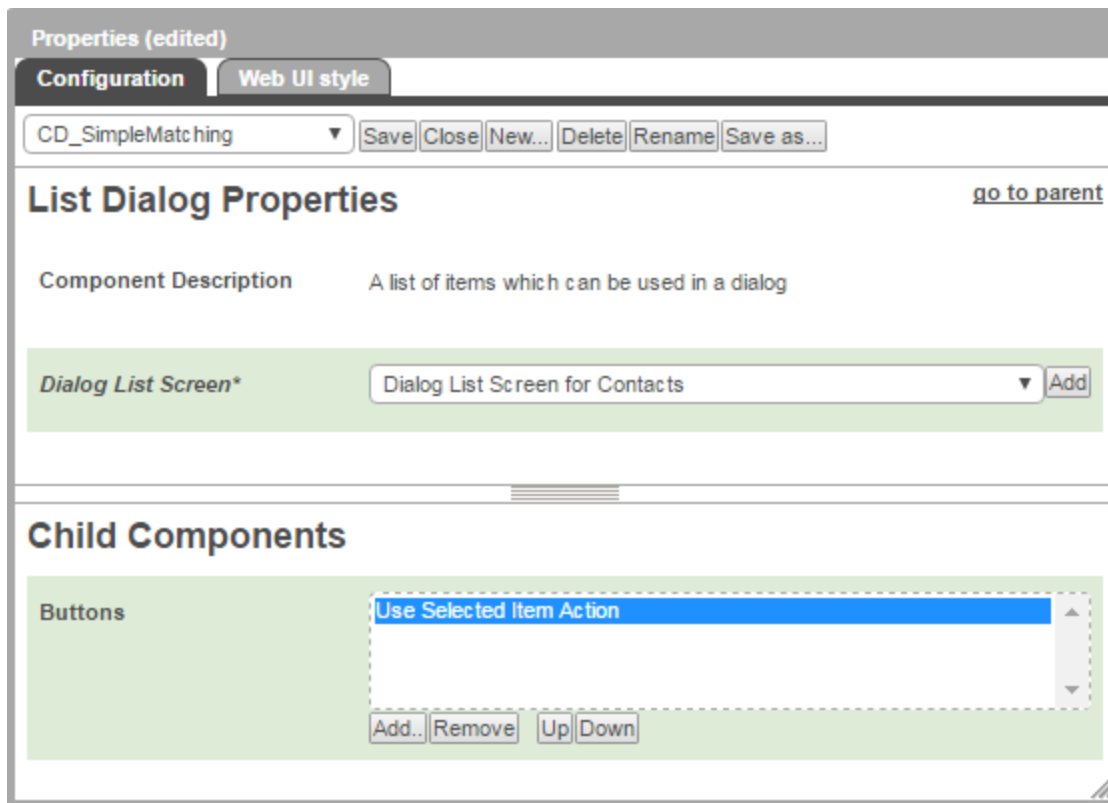


6. Enable the **Show Find Similar Tab** setting back on the **Add Reference Action Properties**.
7. Using the ellipsis buttons, make a selection for the **Temp Object Type For Find Similar** parameter and the **Temp Parent For Find Similar** parameter. (When the matching algorithm is run, it creates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

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

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

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



13. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
14. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Find Similar Search tab for the results list. The **Help Text** is editable and will display at the top of the results list.
15. Click **Save** and **Close** design mode to return to normal Web UI mode.

Using Find Similar on an Add Reference Action

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

The screenshot displays two overlapping dialog boxes in the Stibo Systems interface. The top dialog, titled 'Add reference', has a red arrow pointing to its title bar from a toolbar icon (a square with a plus and arrows). It contains a 'Reference type' dropdown set to 'Contact to Contact' and a 'Reference target' field with a red box around its selection icon. The bottom dialog, titled 'Select Node(s)', has a red box around the 'Find Similar Search' tab. It includes input fields for 'Contact Name', 'Phone Number', and 'Reference Contact Name' under the heading 'Enter values to assist in finding similar'. Both dialogs have 'OK' and 'Cancel' buttons.

Add reference

Reference type: Contact to Contact

Reference target: [Selection Icon]

✓ OK X Cancel

Select Node(s)

Browse Search **Find Similar Search**

Enter values to assist in finding similar

Contact Name: [Text Field]

Phone Number: [Text Field]

Reference Contact Name: [Text Field]

✓ OK X Cancel

Select Node(s)

Browse

Search

Find Similar Search

Enter values to assist in finding similar

Contact Name

1

John Smith

Phone Number

770 555 9876

Reference Contact Name

Patty Smith

Find Similar

3

Select the wanted choice and click OK

ID	Contact Name	Phone Number
CON_129729		
CON_129731		
CON_129755		
CON_129773		
CON_149939	Harry Potter	
CON_149940	Patty Smith	
CON_149944	Jimmy Smith	
CON_149961	Greg Dunmovin	
CON_149962	Jimmy Smith	
CON_149964	Harry Potter	
CON_149968	Alex Smith	
CON_168112		

2

✓ OK

✗ Cancel

4

✓ OK

✗ Cancel

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

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

Add reference

Reference type

Contact to Contact

Reference target

Patty Smith (CON_149940) ✗

✓ OK

✗ Cancel

Success

1 reference was created!

English US

Main

Revisions

Data Visualization

	ID		Contact Name		Object Type		Reference type	
Patty Smith	CON_149940		Patty Smith		Contact		Contact to Contact	

Note: Find Similar functionality is also available when working with company data hierarchies via the Hierarchy Representations component (found in Main (Screen) Properties). For more information on the setup, which is similar to Add Reference, see the **Optional Configurations for the Hierarchy Representation Component** topic.

Follow Single Reference

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

Preconditions and Considerations

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

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

Item Details

Basic Overview

Approved

 Last approved 10/27/15 9:34 AM

Name

1112121-1

Object Type

SalesItem

Multi Supplier

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

Replacement Item

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

Item Details

Basic Overview

Approved

Last approved 10/9/15 12:57 PM

Name

1112121

Object Type

SalesItem

Multi Supplier

This target is shared by other objects.

Material

Cotton

Color

Black

Hat Size

7

Primary Color

T-shirt Size

URL

http://www.stibosystems.com

wwwfx

http://www.stibosystems.com

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

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

Follow Single Reference Configuration

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

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

Properties

Configuration

Portal style

productdetails ▼ Save Close New... Delete Rename Save as...

Node Editor Properties

go to parent

Component Description

A panel for building editors for nodes. Contains a row of fields to be edited.

Label Layout

LEFT ▼

Child Components

Rows

Approval Status (Approved)

Name Value (Name)

Object Type

Follow Single Reference

Add..

Remove

Up

Down

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

Follow Single Reference Properties

[go to parent](#)

Component Description

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

Reference Type*

AccessoryOptional

...

Hide Section If Empty

☐

Section Default Open

☒

Section Title

Child Components

Rows*

Attribute Value Group Component

Add..

Remove

Up

Down

GDSN in Web UI Overview

Handling GDSN in Web UI starts with creating a Web UI that shows information about GDSN registrations, publications, and the package hierarchy. For details, see **Create a GDSN Web UI**.

In addition to typical Web UI elements, additional tabs and buttons are available to perform GDSN functions.

Details about configuring the tabs that are available for Product Details are included in these sections:

- GDSN Registration Tab
- GDSN Hierarchy Tab

An overview of the buttons that are available to handle required GDSN actions can be found in the GDSN Web UI Buttons section.

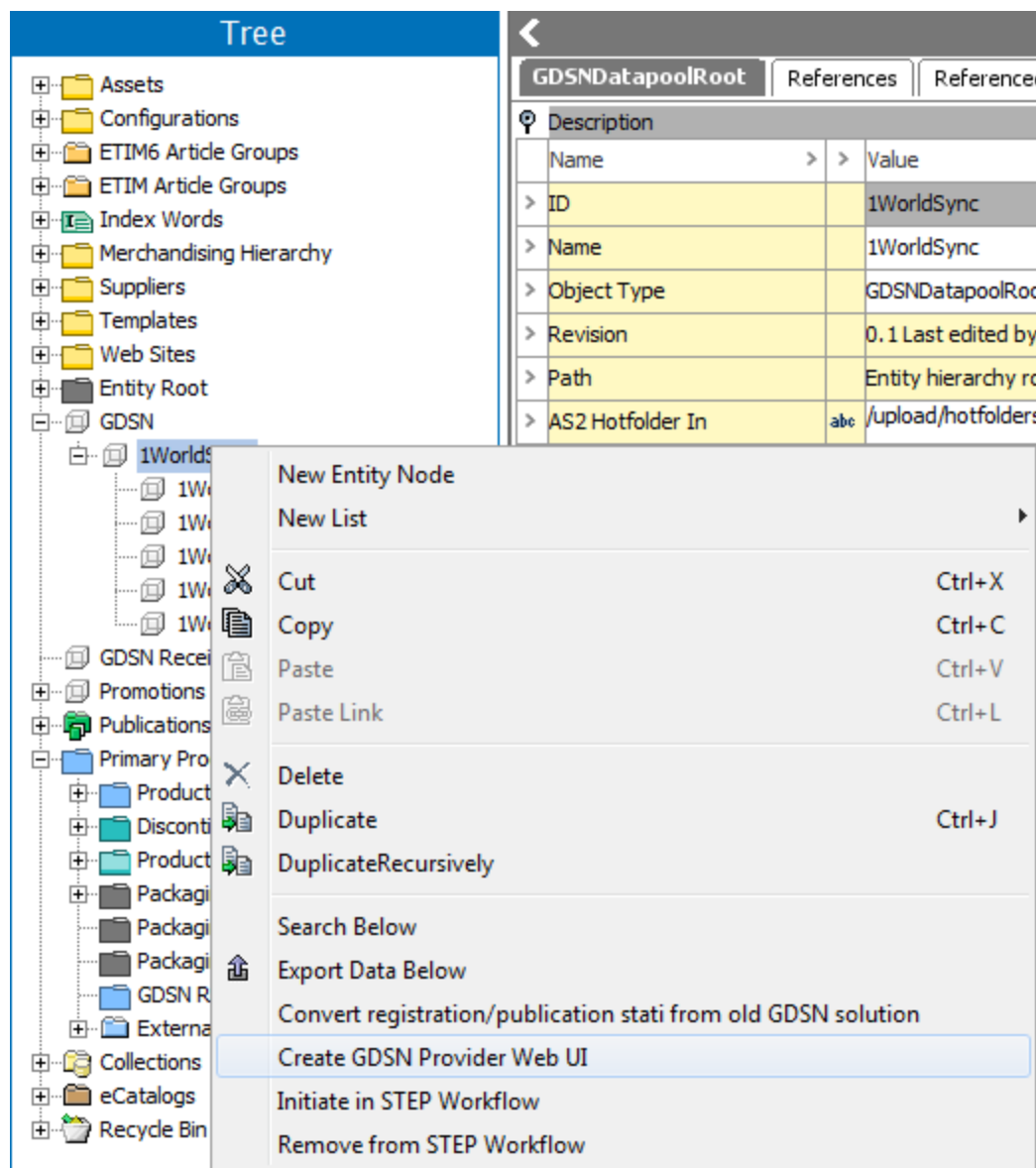
Details about configuring the GDSN buttons are included in these sections:

- GDSN Register Action Button
- GDSN Publish Action Button
- GDSN Hierarchy Withdrawal Action Button

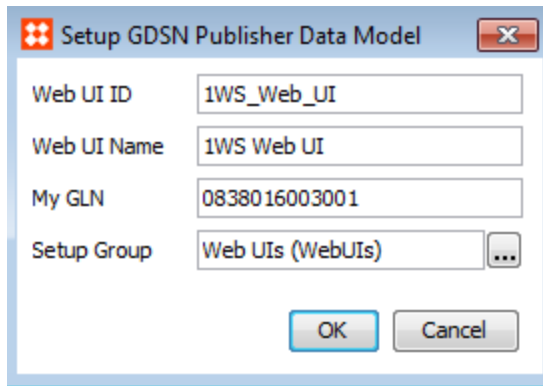
Create a GDSN Web UI

Use STEP Workbench to create a Web UI that is based on the 'User Web UI'. The Web UI illustrates how you can create a GDSN Web UI, but it is not production-ready. Additional customization is required to address your company's needs.

- 1. In the Tree expand GDSN and right-click the relevant data pool entity.
- 2. Click **Create GDSN Provider Web UI**.



- 3. In the **Setup GDSN Publisher Data Model** dialog, specify the following:



Setup GDSN Publisher Data Model

Web UI ID: 1WS_Web_UI

Web UI Name: 1WS Web UI

My GLN: 0838016003001

Setup Group: Web UIs (WebUIs) ...

OK Cancel

- **Web UI ID:** The ID of the Web UI. Is also used as part of the URL for the Web UI. The Web UI ID must not contain spaces.
- **Web UI Name:** The name of the Web UI.
- **My GLN:** The Global Location Number of your company or the company that is publishing.
- **Setup Group:** Select the setup group where the Web UI configuration is stored. The setup group field is populated with any setup group that allows Web UIs. If there are no setup groups that allow the creation of a Web UI, a warning is displayed before the dialog is displayed.

GDSN Registration Tab

The GDSN registration tab contains a master table at the top that shows information about registrations. The table lists all the GDSN registrations made for the selected product.

For each registration the following information is displayed:

- **Target Market:** Lists the target market the registration is made for.
- **Registration Status:** Lists the status of the registration. For example, Registration Completed.
- **GLN:** Lists the Global Location Number of your company or the company you are publishing for.

Once a product is registered with the GDSN it can be published to multiple GDSN data pool recipients.

Product Details

US-engMain

Primary Product Hierarchy > GDSN > Buzz Pallet

Product attributes

References and Classifications

Referenced By

Images and Documents

Language view

GDSN Registrations

GDSN F

My Title

Target Market Name	Registration Status	GLN
US	Registration Completed	1111456789123

1-1 of 1

ID101998

GDSNRegistration To Recipient

Title	GLN	CIC Status	Publication Status
Big Brother	9999456789123	REVIEW	

Save

Reset

Approve

Delete

Proof View

Move

Select a registration in the master table, and the details area shows a list of publications registered in the target market of the selected registration.

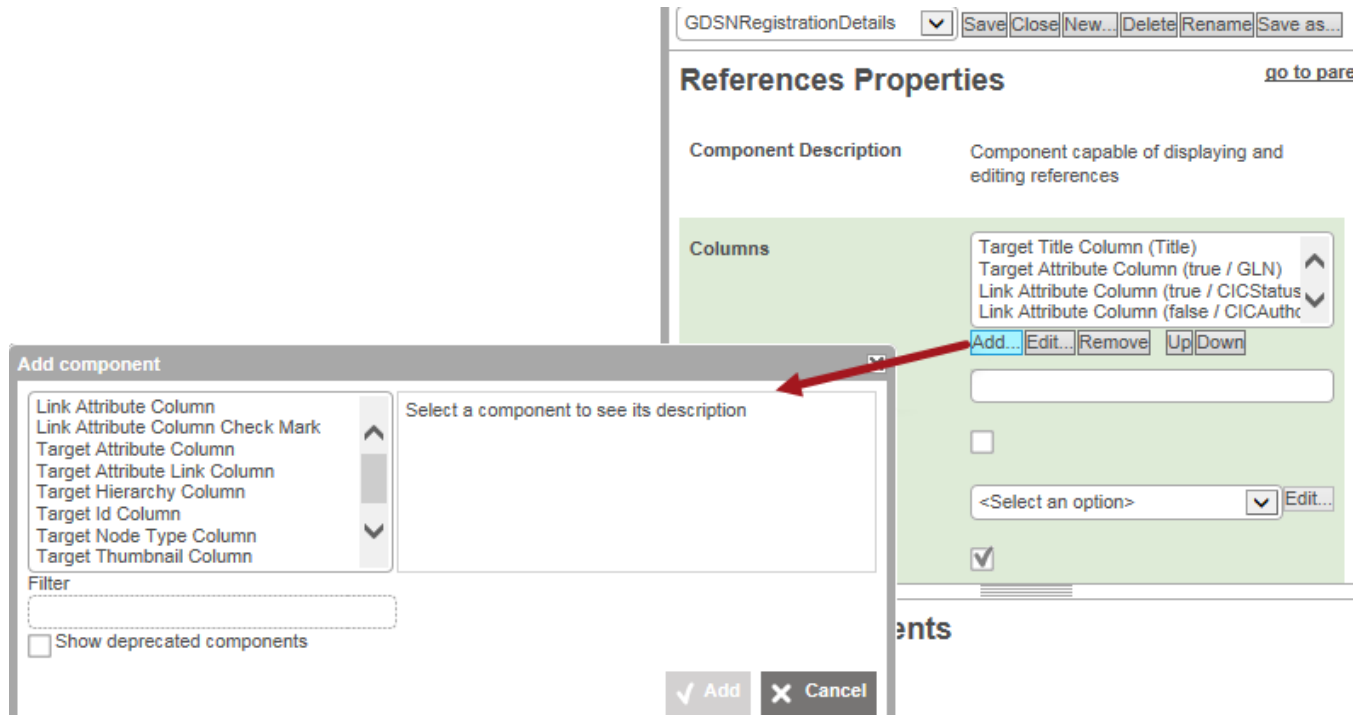
For each publication the following information is displayed:

- **Title:** Lists the name of the recipient.
- **GLN:** Lists the Global Location Number of the recipient.
- **GDSN CIC Status:** Lists information about whether the recipient has accepted the published data.
- **GDSN publication status:** Lists whether the recipient has received the product.

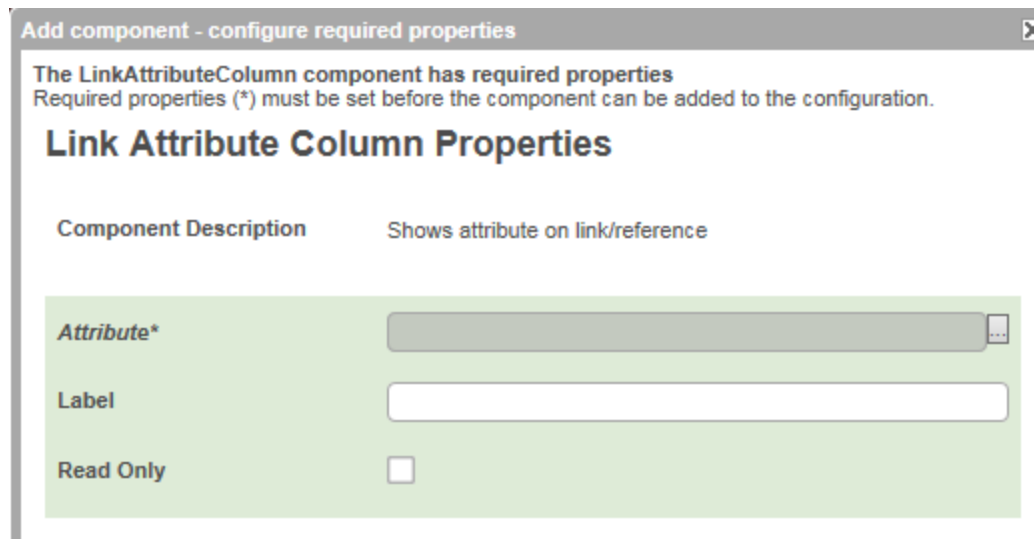
Display an attribute value in the publication table

Additional columns can be configured to both the master table (registrations) and the details table (publications). This could be a column for the publication table that displays additional comments for the CIC999 code.

1. In the Web UI, enter Design mode.
2. Select the screen **GDSNRegistrationDetails**.
3. In the Designer, navigate to the **References** component placed within the Node Editor.
4. Click the Add button for the Columns property and the **Add component** dialog displays.



5. Select the **Link Attribute Column** component in the list, click the **Add** button, and a configuration dialog appears.



6. Specify the attribute for the new column and click the **Add** button. A label is optional. If not specified, the column title will be the same as the attribute's name.
7. In the **Add component** dialog, click the **Add** button.
8. Click **Save** for the configuration.
9. Click **Close** for the Designer.

GDSN Hierarchy Tab

The GDSN Hierarchy tab displays information about the package hierarchy. It shows two tables for each GDSN package hierarchy link type defined for the GDSN model. The first table shows the relation to the parent product in the GDSN package hierarchy. The second table shows information about the children in the GDSN package hierarchy.



Product Details

Primary Product Hierarchy > GDSN > Buzz Case

Product attributes

References and Classifications

Referenced By

Images and Documents

Language view

GDSN Registrations

GDSN Hierarchy

Parents: GDSN Pallet to Case

Product

Target

Buzz Pallet

Children: GDSN Pallet to Case

ID	Title	Count	Registration Status

Parents: GDSN Case to Each

Product

Children: GDSN Case to Each

ID	Title	Count	Registration Status
Buzz Lightyear	Buzz Lightyear	5	Registration Completed

Save

Reset

Approve

Delete

Proof View

Move

For each link to a child GDSN product, the following information is displayed:

- **ID:** Lists the ID of the child GDSN product.
- **Title:** Lists the title of the child GDSN products
- **Count:** Lists the amount of child products that this product contains.
- **Registration Status:** lists whether the package hierarchy link has been registered with the data pool or not.

Configuring Multiple IPGLNs in Web UI

Users with multiple IPGLNs can configure their IPGLNs in the workbench for use in the GDSN Provider Web UI. The attribute and LOV can be configured automatically via the 'Easy setup of GDSN Component Model' or it can be created manually. The GDSN Provider IPGLN attribute must be configured in the workbench with the following characteristics:

- Type: Specification or Description
- Validation Base Type: List Of Values
- Aspects: Attribute must be added to the GDSN model component model

The screenshot displays the 'System Setup' interface. On the left, a tree view shows the hierarchy of system attributes, with 'GDSN Provider IPGLN' selected under 'GDSN System Attributes'. The main panel on the right is titled 'GDSN Provider IPGLN - Attribute' and contains several tabs: 'Attribute', 'References', 'Attribute Transformation', 'Validity', 'Profile', 'Log', 'State Log', and 'Tasks'. The 'Attribute' tab is active, showing a table of attribute details.

Description	
Name	Value
ID	GDSN_Provider_IPGLN
Name	GDSN Provider IPGLN
Last edited by	2016-09-07 12:56:08 by USERA
Full Text Indexable	No
Externally Maintained	Yes
Hierarchical Filtering	None
Calculated	No
Type	Specification
Dimension Dependencies	
Mandatory	No

Attribute Validation	
Name	Value
Validation Base Type	List Of Values
List Of Values	GDSN Information Provider GLN LOV
Multi Valued	No
Minimum Value	N/A
Maximum Value	N/A
Maximum Length	N/A

[Edit Validation Rule](#)

Aspects		
Component	Name	Description
GDSN model	Information Provider GLN	Attribute containing Information Provider GLN of the product

The List of Values must contain the Value ID in association with the values. The Value ID of the LOV should be used to hold the IPGLN and the Value should be used to apply a meaningful name to the IPGLN, as shown in the example below.

GDSN Information Provider GLN LOV - List of Values		
Values		
Values	Value ID	
> Acme Canada	225648139754	
> Acme Headquarters	599886647215	
> Acme US	586741394872	
Add Value		

From the 'GDSN model' component model, right click and select 'Easy setup of GDSN Component Model'. Using the ellipsis for the 'Information Provider GLN attribute', select the attribute that was created for the IPGLN.

Once configured in the workbench, the GDSN Provider IPGLN attribute must be configured as an Attribute Value Component in the GDSN Publisher Web UI. If configured properly, users will have the option of selecting the IPGLN as shown in the example below. There is a validation check on the Register and Publish actions to ensure the same IPGLN values are consistent throughout the packaging hierarchy.

Product Details
⚙️ 🌐 English US • Main

[Primary Product Hierarchy](#) > [Packaging](#) > [Sell Side Packaging](#) > Acme Hot Dogs cs

Product attributes | References and Classifications | Referenced By | Images and Documents

ID: 184433

Name*: Acme Hot Dogs cs

Object Type: Case

Approval status: ✖ Not approved.

GTIN: 10558000000016

GDSN Provider IPGLN: Acme Headquarters (599886647215)

Target Market Name:
 Acme Canada (225648139754)
Acme Headquarters (599886647215)
 Acme US (586741394872)

Receiver Product GLN: 0922361520107

Note: For users of the GDSN Provider solution prior to 8.1, the IPGLN was maintained in the configuration of the GDSN Register and GDSN Publish action buttons in the label, 'Data Source GLN'. In order to use the IPGLN attribute value component, this value will need to be removed. Once removed, the 'Data Source GLN' will disappear.

Configuration | Web UI style

productdetails ▼ Save Close New... Delete Rename Save as...

GDSN Register Action Properties [go to parent](#)

Component Description Can be used to register a product with GDSN.

Button Label Register

Button Type ICON ▼

Command* register

Data Source GLN* 2958765415478

Expand package hierarchy ☒

Failure business action ... Clear

Outbound Integration step://OutBoundIntegrationEndpoint?id=GDSN Provi ...

Selecting Multiple Target Markets in Web UI

Adding multiple Target Markets to the GDSN data pool assumes that the 'GDSN model' component model has been configured and the Target Market object type already exists in the workbench as shown in the image below. For more information about the GDSN Component Model, please see the 'GDSN Component Model Overview'.

Tree

- 1WS 7.0 Provider
 - 1WS 7.0 Provider CICs
 - 1WS 7.0 Provider Format
 - 1WS 7.0 Provider Recipients
 - 1WS 7.0 Provider Registrations
 - 1WS 7.0 Provider Target Markets**
 - Brazil
 - Canada
 - Germany
 - Japan
 - Mexico
 - United Kingdom
 - United States

<1WS 7.0 Provider Target Markets rev.0.1 - GDSN Target Markets

GDSN Target Markets | References | Referenced By | Status | State Log | Tasks

Description	
Name	Value
ID	1WS 7.0 ProviderTargetMarkets
Name	1WS 7.0 Provider Target Markets
Object Type	GDSN Target Markets
Revision	0.1 Last edited by USERA on Wed Jun 22 08:37:46 EDT 2016
Path	Entity hierarchy root/GDSN/1WS 7.0 Provider/1WS 7.0 Provider Target...

Continue adding the desired Target Markets by right clicking the Target Market root object type and creating a new GDSN Target Market entity. In these examples, the ISO Alpha-2 country codes are used as the ID's for the Target Market and the name of the market in the name field. Creating the Target Markets concludes the configuration that needs to be completed in the workbench.

Tree

- 1WS 7.0 Provider Recipients
- 1WS 7.0 Provider Registrations
- 1WS 7.0 Provider Target Markets
 - Brazil
 - Canada
 - Germany
 - Mexico
 - United Kingdom
 - United States
- GDSN Receiver
- GDSN Receiver Root
- Promotions

<1WS 7.0 Provider Target Markets rev.0.1 - GDSN Target Markets

GDSN Target Markets | References | Referenced By | Status | State Log | Tasks

Create Entity

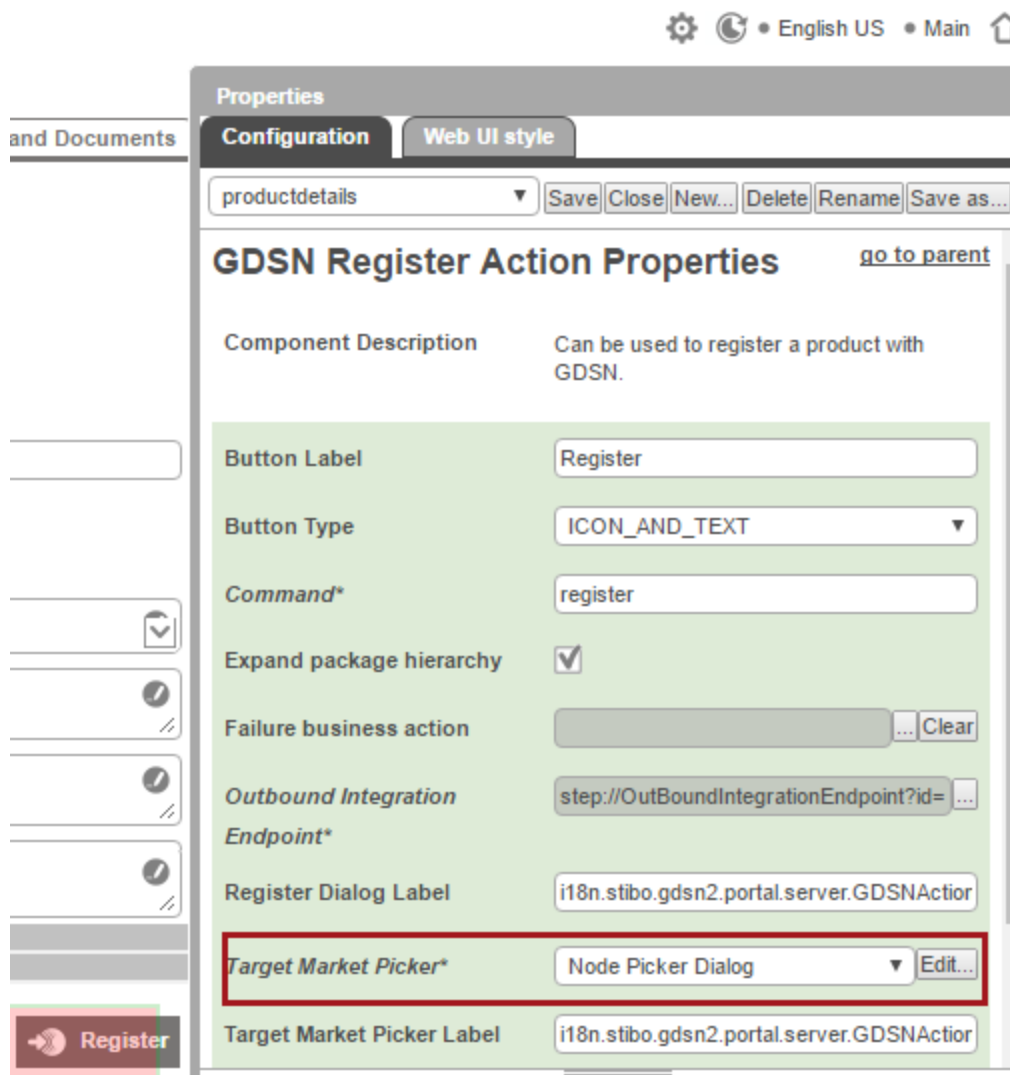
Object Type: ☒ GDSN Target Market

ID: JP

Name: Japan

Create Cancel

In the GDSN Provider Web UI, ensure that the GDSN Register Action Properties and the GDSN Publish Action Properties have the 'Node Picker Dialog' selected. This is preconfigured during the setup of the component model, however it is customizable. If the GDSN Register and Publish action buttons have not been configured for the GDSN Provider Web UI, please see the GDSN Publish Action Button and the GDSN Register Action Button sections of the GDSN Web UI Buttons.



Selecting the Register or Publish action buttons in the Web UI will bring up the Target Market selector. Selecting the node picker within the Target Market selector will bring up the Register or Publish dialog depending upon which action button was selected.



Once in the Register or Publish dialog, multiple target markets can be selected by holding down the Ctrl key and selecting the desired target markets. The selected target markets will be highlighted as shown in the image below. Once all of the desired target markets have been selected, click 'OK'.



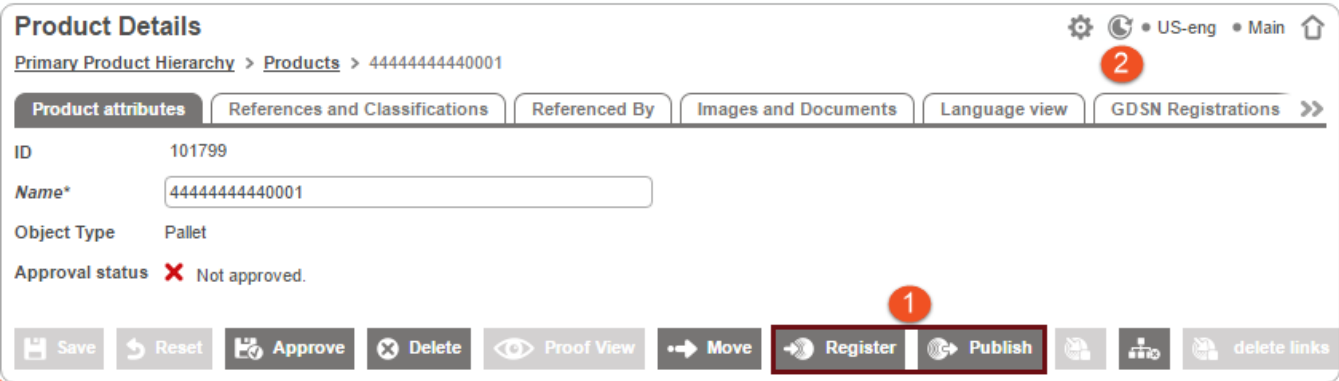
The target markets will be listed, separated by commas in the Register or Publish product(s) to GDSN dialog. Selecting the 'OK' button at this point will send the GTIN(s) to the GDSN in multiple target markets in separate target market-specific messages.



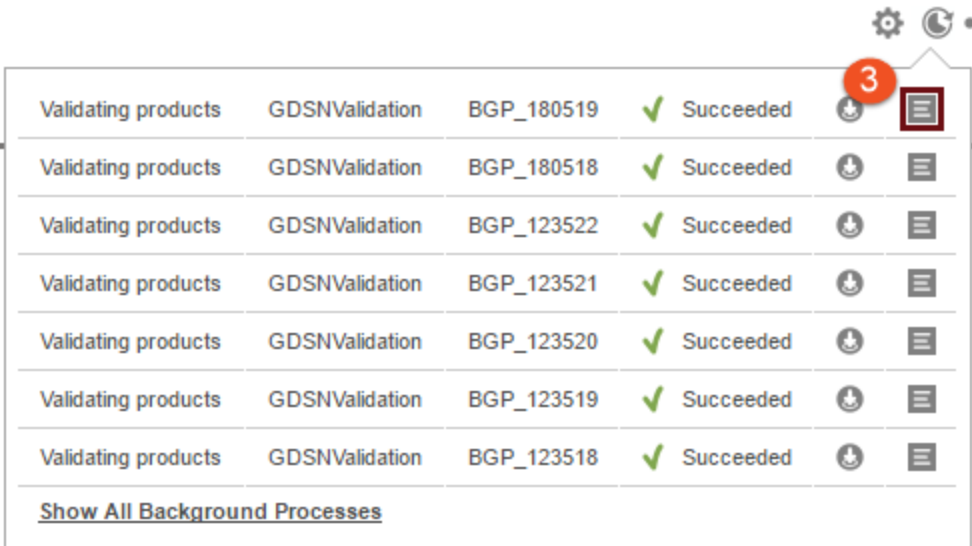
GDSN Error Messaging

When registering or publishing hierarchies for GDSN, many validation checks can occur and there may be many errors on various levels of the packaging hierarchy. While it is possible to see the validation results in a background process screen, navigating back and forth from the validation result to each product to address all of the errors could be cumbersome. It is now possible to view the validation results directly from the product details screen.

- 1. From the 'Product Details' screen, select the product or products to be registered or published and click the corresponding button.
- 2. Select the 'Background Processes' icon.



- 3. A 'Background Process' dialog box will pop up, and the GDSN Validation background processes will be clearly defined. Click on the validation report icon to the right of the background process list to bring up the validation report.



- 4. From the validation report, the user can see the error message associated with the product validation and a link directly to the product is provided.

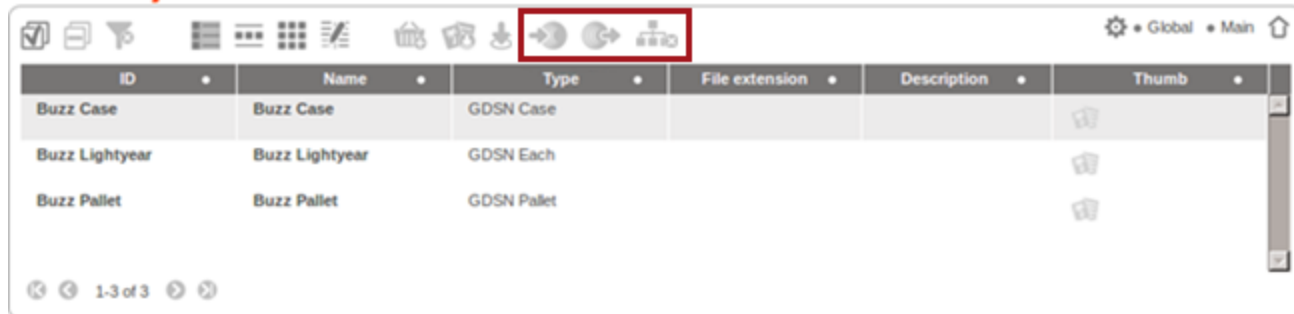


Note: The validation report dialog will stay on top of the Web UI screens. This means that it is possible to navigate to different screens and still see the validation report dialog.

GDSN Web UI Buttons

The following button components are available for use in a GDSN Web UI:

StiiboSystems



- The Register button, , button registers the selected products with a GDSN datapool. For configuration details, see the **GDSN Register Action Button** section of the **GDSN Provider** documentation.
- The Publish button, , publishes the selected products to a GDSN recipient. For configuration details, see the **GDSN Publish Action Button** section of the **GDSN Provider** documentation.
- The Hierarchy Withdrawal button, , sends a hierarchy withdrawal command for the selected packaging hierarchy. For configuration details, see the **GDSN Hierarchy Withdrawal Action Button** section of the **GDSN Provider** documentation.

The GDSN Action buttons can be used on both NodeDetail and NodeList screens in either the Toolbar or ButtonPanel. The same set of configuration properties exist regardless of the location of the buttons.

The buttons are pre-configured in the following locations:

- Generic Search result screen
- Power Search result screen
- Product Details screen

Adding a GDSN button to a Node Details page

1. Open Designer for a Node Details page. The Node Details Properties configuration dialog is displayed.
2. In the Child Components section, click the **go to component** link for the Buttons field.

Node Details Properties

Component Description Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title	Item
Css Class	

► Validation

► Multiple Target References

Child Components

Main	Tab Control ▼	go to component
Buttons	Buttons ▼	go to component
Breadcrumb	Select a child compc ▼	go to component

- On the Buttons Properties configuration dialog, in the Child Components section, click the **Add** button for the Actions field.

Properties

Configuration Web UI style

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

Buttons Properties

[go to parent](#)

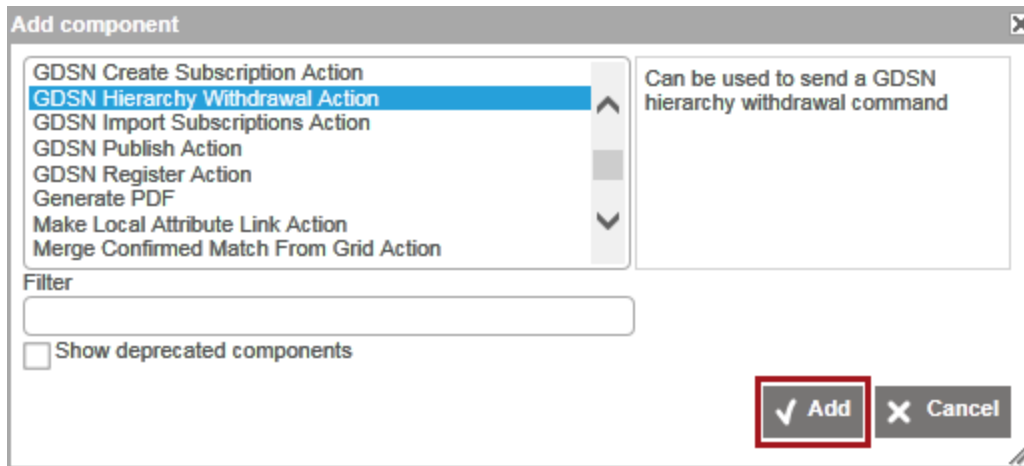
Component Description Contains a number of buttons to display

Child Components

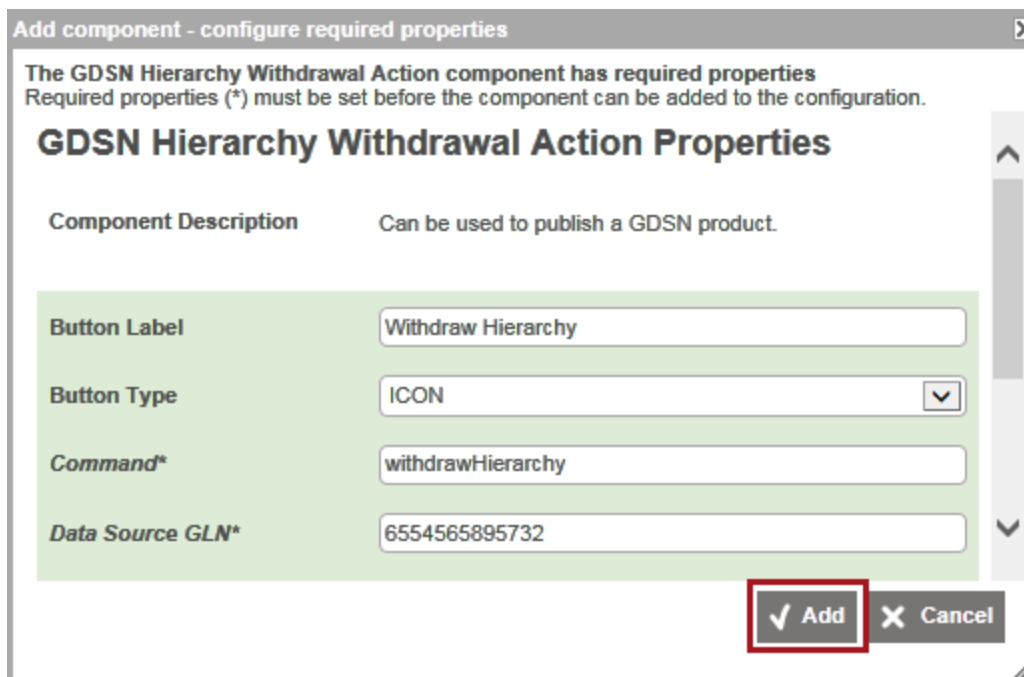
Actions	Save Action Reset Action Submit Action GDSN Hierarchy Withdrawal Action

Add... Remove Up Down

- On the Add component dialog, select a GDSN component and click the **Add** button.



5. On the Add component - configure required properties dialog, add all necessary data and click the **Add** button.



6. The button displays on the Node Details page Button Panel.

Product Details ⚙️ • US-eng • Main

Primary Product Hierarchy > **GDSN** > GDSN CPG-610

Product attributes | References and Classifications | Referenced By | Images and Documents >>

ID: 101799

Name*: GDSN CPG-610

Object Type: Pack

Approval status: ✖ Never been approved.

Save
Reset
Approve
Delete
Proof View
Move
↺
↻
Add

Adding a GDSN button to a Node List page

1. Open Designer for a Node List page. The Node List Properties configuration dialog is displayed.
2. In the Child Components section, click the **Add** button for the Actions field.

Node List Properties [go to parent](#)

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

Hide Standard Buttons ☐

ID*: processesList

Child Components

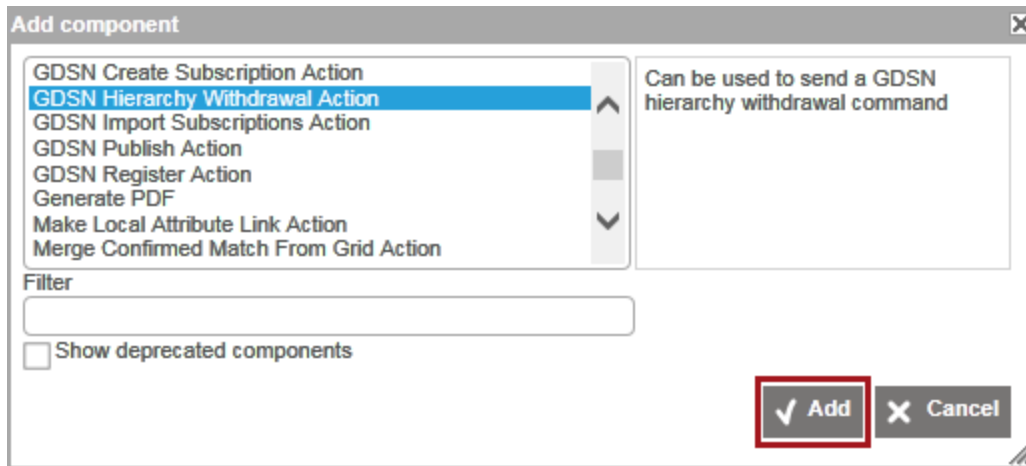
Display Modes Table Display Mode

Add.. Remove Up Down

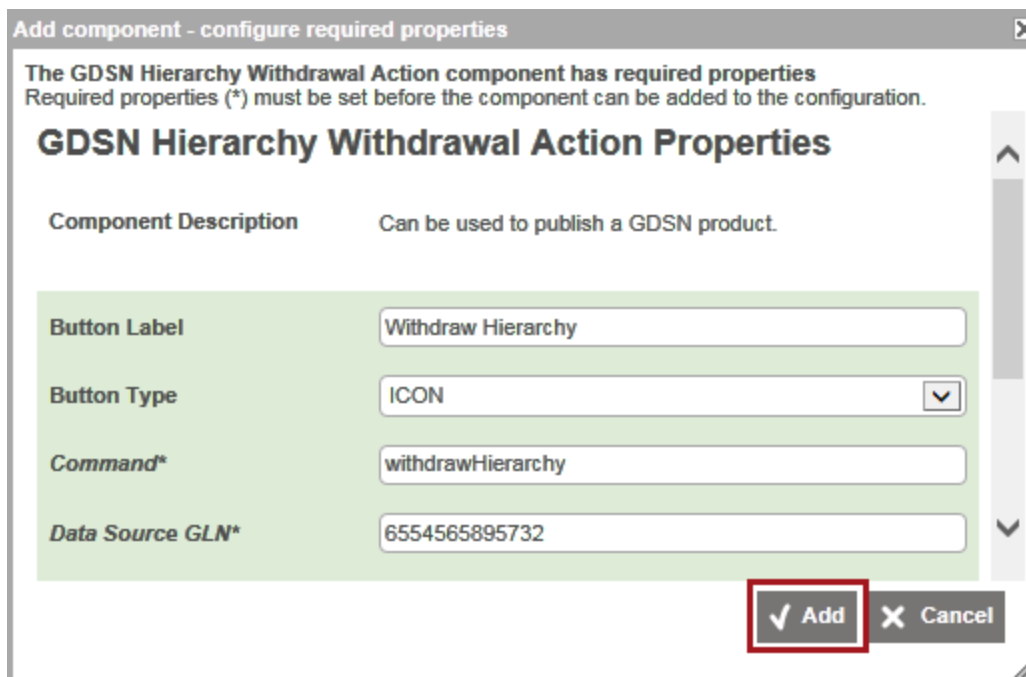
Actions

Add.. Remove Up Down

3. In the Add component dialog, select a GDSN component and click the **Add** button.



4. In the Add component - configure required properties dialog, add all necessary data and click the **Add** button.



5. The button displays on the Node List page Toolbar.

GDSN Register Action Button

In the Designer, the Web UI component for the Register button is called 'GDSN Register Action'. Each parameter is described in the following table.

GDSN Register Action Properties
[go to parent](#)

Component Description Can be used to register a product with GDSN.

Button Label	Register
Button Type	ICON
Command*	register
Data Source GLN*	5889666654523
Expand package hierarchy	☒
Failure business action	GDSN Registration Validation Failure
Outbound Integration Endpoint*	step://OutBoundIntegrationEndpoint?id=1WS_Publish
Pre-action business action	
Register Dialog Label	Register product(s) to GDSN
Success business action	GDSN Registration Validation Success
Target Market Picker*	Node Picker Dialog
Target Market Picker Label	Target Market
Validation condition	GDSN Publish Validation Condition

Parameter	Description
Button Label	Optional Add a label for the Register button, displayed when the Button Type is Text or Both

Parameter	Description
Button Type	Optional Specify if the button should appear with an icon, text (the button label) or both.
Command	Mandatory Specify which GDSN command should be executed when a user clicks the Register button. In the default GDSN configuration, the command is 'register'.
Data Source GLN	Mandatory Enter your Global Location Number (GLN). This is the GLN that the registrations are sent from.
Expand package hierarchy	When checked, the registration also includes lower level objects in the packaging hierarchy. When unchecked, the registration will only include the selected product.
Failure business action	Optional Specify which business action to run if the Validation condition fails.
Outbound Integration Endpoint	Mandatory Specify the Outbound Integration Endpoint that should be used to send the command to the data pool.
Pre-action business action	Optional Specify the Business Action that runs first (before any other Business Rules) when clicking the Register button. This could be used to determine which GDSN command should be sent (Change_By_Refresh or Modify).
Register Dialog Label	Optional Apply the label of the Register dialog that appears when clicking the Register button.
Success business action	Optional Specify which business action to run if the Validation condition is successful.
Target	Mandatory

Parameter	Description
Market Picker	Configure the pop-up dialog that enables the end user to pick the target markets for the registration.
Target Market Picker Label	Mandatory Apply the label of the pop-up dialog used by end users to pick the target markets for the registration.
Validation condition	Optional Specify which business condition should be validated before the product is processed further. Depending on the outcome of the validation, the 'Success business action' or the 'Failure business action' is called. If no condition is configured, no validation is executed and the Success / Failure business actions are not used. If a condition is configured, a Preflight option is presented in the Register dialog, enabling the user to run the Validation conditions and the Success / Failure business actions without actually registering to the GDSN.

GDSN Publish Action Button

In the Designer, the Web UI component for the Register button is called 'GDSN Register Action'. Each parameter is described in the following table.

GDSN Publish Action Properties		go to parent
Component Description	Can be used to publish a GDSN product.	
Button Label	Publish	
Button Type	ICON v	
Command*	publish	
Data Source GLN*	5889666654523	
Expand package hierarchy	☐	
Failure business action	GDSN Publish Validation Failure ... Clear	
Outbound Integration Endpoint*	step://OutBoundIntegrationEndpoint?id=1WS_Publish ...	
Pre-action business action	... Clear	
Pre Command	Register	
Publish Dialog Label	Publish product(s) to GDSN	
Recipient Picker*	Node Picker Dialog v Edit...	
Recipient Picker Label	Recipient	
Success business action	GDSN Publish Validation Success ... Clear	
Target Market Picker*	Node Picker Dialog v Edit...	
Target Market Picker Label	Target Market	
Validation condition	GDSN Publish Validation Condition ... Clear	

Parameter	Description
Button Label	Optional Add a label for the Publish button, displayed when the Button Type is Text or Both
Button Type	Optional Specify if the button should appear with an icon, text (the button label) or both.
Command	Mandatory Specify which GDSN command that should be executed when a user clicks the Publish button. In the default GDSN configuration, the command is 'publish'.
Data Source GLN	Mandatory Enter your Global Location Number (GLN). This is the GLN that the publications are sent from.
Expand package hierarchy	When checked, the publication also includes lower level objects in the packaging hierarchy. When unchecked, the publication will only include the selected product.
Failure business action	Optional Specify which business action to run if the Validation condition fails.
Outbound Integration Endpoint	Mandatory Specify the Outbound Integration Endpoint that should be used to send the command to the data pool.
Pre-action business action	Optional Specify the Business Action that runs first (before any other Business Rules) when clicking the Publish button. This could be used to determine which GDSN command should be sent (Change_By_Refresh or Modify).
Pre Command	Optional Specify the GDSN command that runs prior to the publishing of the product. This could be a register command that is configured to send an update document type to GDSN in order to ensure that the current attribute values in STEP are synched with the values that are stored in GDSN.

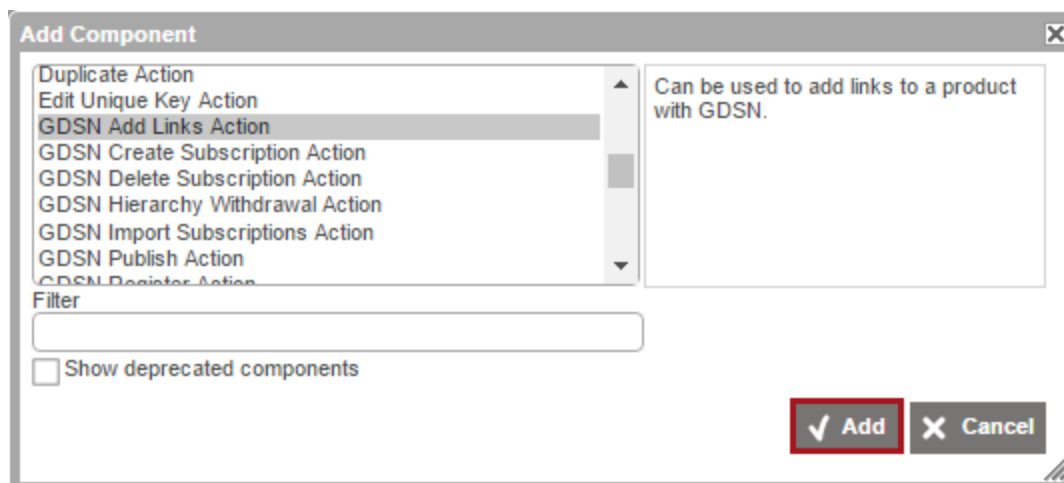
Parameter	Description
Publish Dialog Label	Optional Apply the label of the publish dialog that appears when clicking the Publish button.
Recipient Picker	Mandatory Configure the pop-up dialog that enables the end user to pick recipients for the publication.
Recipient Picker Label	Mandatory Apply the label of the pop-up dialog used by end users to pick recipients for the publication.
Success business action	Optional Specify which business action to run if the Validation condition is successful.
Target Market Picker	Mandatory Configure the pop-up dialog that enables the end user to pick the target markets for the publication.
Target Market Picker Label	Mandatory Apply the label of the pop-up dialog used by end users to pick the target markets for the publication.
Validation condition	Optional Specify which business condition is validated before the product is processed further. Depending on the outcome of the validation, the 'Success business action' or the 'Failure business action' is called. If no condition is configured, no validation is executed and the Success / Failure business actions are not used. If a condition is configured, a Preflight option is presented in the Publish dialog, enabling the user to run the Validation conditions and the Success / Failure business actions without actually publishing to the GDSN.

GDSN Hierarchy Link Action Buttons

To add or delete hierarchy links to registered product objects in the GDSN, separate components need to be configured within the GDSN Data Provider Web UI. The addLink and deleteLink action commands can be configured in the following way within the Web UI. This section assumes a basic knowledge of configuring Web User Interfaces. For more information regarding Web User Interfaces, please see the 'Design Mode Basics' section in the Web UI Getting Started/ STEP Web UI Setup and User Guide documentation.

In Design Mode, select the **GDSN Add Links Action** and Add.

Note: The 'GDSN Add Links Action' component is used for adding links **and** deleting links. The commands that determine what the component will be used for is described below.



The configuration dialog will appear as shown in the example below. Note that there are two properties that are required to configure the Add Links action to send the messages to the GDSN as determined by the asterisks; the Command action and the Outbound Integration Endpoint. In this example, the configuration is for adding links so the action command must be **addLink**. If this component was being configured to delete links from the product hierarchy, the command that should be entered would be **deleteLink**. In the event that both the Add Links and Delete Links action buttons are going to be configured, it is highly recommended that the 'Button Label' field is populated, and that the 'Button Type' is set to ICON_AND_TEXT so that the buttons can be differentiated.

Add component - configure required properties

The GDSN Add Links Action component has required properties
Required properties (*) must be set before the component can be added to the configuration.

GDSN Add Links Action Properties

Component Description
Can be used to add links to a product with GDSN.

Add Link Dialog Label

Button Label

Button Type

Command*

Custom Icon

Expand package hierarchy
☐

Failure business action

Outbound Integration Endpoint*

Pre-action business action

Success business action

Context Help

Validation condition

More information regarding the other options in this dialog can be found in the 'GDSN Provider' topic in this documentation.

The following image shows an example of the 'Add Links' component that was configured in this example.

Product Details

US-eng • Main

Primary Product Hierarchy > Products > 44444444440001

Product attributes	References and Classifications	Referenced By	Images and Documents	Language view
ID	101799			
Name*	44444444440001			
Object Type	Pallet			
Approval status	✖ Not approved.			
GDSN Information Provider GLN	TRW Asiatic Co Ltd (1231231231231)			
GDSN Publish Validation Condition	Include			
GDSN Publish Validation Status				

This button is inactive in any of the following situations:

- If there is no reference to a lower level GDSN item.
- If the selected item is not registered yet.
- If the referenced lower level item is not registered yet.

If using the Add Links button, set the Registration Status on the items for which you want to add links for to 'Not Registered' as shown in the image below.

Product attributes	References and Classifications	Referenced By	Images and Documents	Language view	GDSN Registrations	GDSN Hierarchy						
Parents: GDSN Hierarchy Link Product +												
Children: GDSN Hierarchy Link												
Parents: GDSNPalletToCase Product +												
<table border="1"> <thead> <tr> <th>Target</th> <th>Qty Of Next Lower Package</th> <th>Registration Status</th> </tr> </thead> <tbody> <tr> <td> Acme Hot Dogs cs</td> <td>48</td> <td>Not Registered</td> </tr> </tbody> </table>							Target	Qty Of Next Lower Package	Registration Status	Acme Hot Dogs cs	48	Not Registered
Target	Qty Of Next Lower Package	Registration Status										
Acme Hot Dogs cs	48	Not Registered										

If using the Delete Links button, the Registration Status should be set to 'To be Unregistered'.

Product attributes	References and Classifications	Referenced By	Images and Documents	Language view	GDSN Registrations	GDSN Hierarchy						
Parents: GDSN Hierarchy Link Product +												
Children: GDSN Hierarchy Link												
Parents: GDSNPalletToCase Product +												
<table border="1"> <thead> <tr> <th>Target</th> <th>Qty Of Next Lower Package</th> <th>Registration Status</th> </tr> </thead> <tbody> <tr> <td> Acme Hot Dogs cs</td> <td>48</td> <td>To be Unregistered</td> </tr> </tbody> </table>							Target	Qty Of Next Lower Package	Registration Status	Acme Hot Dogs cs	48	To be Unregistered
Target	Qty Of Next Lower Package	Registration Status										
Acme Hot Dogs cs	48	To be Unregistered										

GDSN Hierarchy Withdrawal Action Button

In the Designer, the Web UI component for the Hierarchy Withdrawal button is called GDSN Hierarchy Withdrawal Action. Each parameter is described in the following table.

GDSN Hierarchy Withdrawal Action Properties
[go to parent](#)

Component Description
Can be used to send a GDSN hierarchy withdrawal command

Button Label

Button Type

Command*

Data Source GLN*

Hierarchy Withdrawal Dialog Label

Outbound Integration Endpoint*

Recipient Picker*

Recipient Picker Label

Target Market Picker*

Target Market Picker Label

Parameter	Description
Button Label	Optional Add a label for the Hierarchy Withdrawal button, displayed when the Button Type is Text or Both

Parameter	Description
Button Type	Optional Specify if the button should appear with an icon, text (the button label) or both.
Command	Mandatory Specify which GDSN command that should be executed when a user clicks the Hierarchy Withdrawal button. In the default GDSN configuration, the command is 'hierarchyWithdrawal'.
Data Source GLN	Mandatory Enter your Global Location Number (GLN). This is the GLN that the publications are sent from.
Outbound Integration Endpoint	Mandatory Specify the Outbound Integration Endpoint that should be used to send the command to the data pool.
Hierarchy Withdrawal Dialog Label	Optional Add the Hierarchy Withdrawal Dialog Label to the dialog that appears when clicking the Hierarchy Withdrawal button.
Recipient Picker	Mandatory Configure the pop-up dialog that enables the end user to pick recipients for the hierarchy withdrawal.
Recipient Picker Label	Mandatory Apply the label of the pop-up dialog used by end users to pick recipients for the hierarchy withdrawal.
Target Market Picker	Mandatory Configure the pop-up dialog that enables the end user to pick target markets for the hierarchy withdrawal.
Target Market Picker Label	Mandatory Apply the label of the pop-up dialog used by end users to pick target markets for the hierarchy withdrawal.

Using Business Rules with GDSN

Business rules can be used in a variety of ways in combination with the GDSN component. They can, for example, be used to send out messages, update status, and start workflows. The following describes how to use GDSN specific business actions and how to run business actions when receiving messages from GDSN.

Business action on inbound messages

In the inbound format configuration you can configure which business actions should be run when different message types are received. You can use this to update status, transition workflows or send out notification e-mails.

In the inbound format configuration, you can configure a map from strings to XPaths. When a message is received, the XPaths are evaluated and a map is created from the string keys to the evaluated values. This map can be bound into a JavaScript business action so that the business action can access parts of the incoming message.

For general information about how to set up business actions, see **Business Actions** in the **Business Rules** documentation.

Business Actions for GDSN

1. In **System Setup**, expand **Business Rules**, and then select the relevant action.
2. On the **Business Rule** tab, in the lower left corner, click **Add New Business Action**.
3. Click the **Edit Operation**  icon.
4. In the **Edit Operation** dialog, from the drop-down list, select GDSN.

The following actions are available:

Execute command

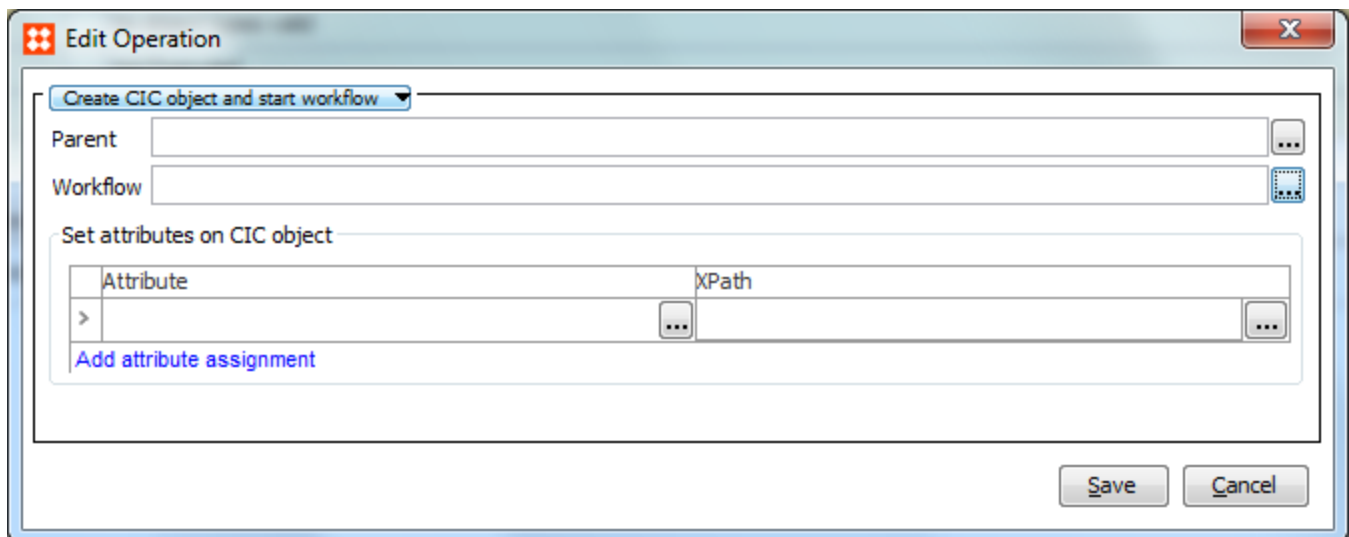
This action sends out a message to a data pool.

Field	Description
Command	Enter the command parameter that matches the command from the outbound configuration of the message type to be sent out.
Endpoint	Specify the outbound endpoint to be used to send out the message. A list of available endpoints displays when you click the ellipsis button (...).
Expand package	When checked, selecting a hierarchy top node exports the entire hierarchy below the node.

Field	Description
hierarchy	
GLN	Specify the GLN the products must be sent from. This is the GLN the MyGLN parameter tag resolves to.
Recipient	Optional For a publish template, specify the recipient you want to publish the products to. The Recipient parameter tag will contain the GLN of the recipient.
Target Market	Specify the target market the message should be sent in. The target market parameter tag will contain the target market attribute value of the selected target market.

Create CIC Object and Start Workflow

This plug-in creates a CIC entity and starts it in a workflow. It is connected with the product the CIC applies to and with the recipient that sends the CIC. Furthermore, using XPaths, it is possible to place parts of the CIC message in an attribute on the CIC object.



The screenshot shows the 'Edit Operation' dialog box with the title 'Create CIC object and start workflow'. It contains the following fields and controls:

- Parent:** A text input field with a browse button (three dots) to its right.
- Workflow:** A text input field with a browse button (three dots) to its right.
- Set attributes on CIC object:** A section containing a table with two columns: 'Attribute' and 'XPath'.

Attribute	XPath
>	

 Below the table is a blue link labeled 'Add attribute assignment'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Field	Description
Parent	The CIC entity is created below the entity specified.

Field	Description
Workflow	The CIC entity is started in the workflow specified.
Set attributes on CIC object	Click the Add attribute assignment link. Select the attributes to be set on the CIC object and the XPath's to be evaluated to find the values from the inbound message.

Set CIC Status for Publication

Sets the CIC status for a publication to a recipient.

The screenshot shows the 'Edit Operation' dialog box with the title 'Set CIC status for publication'. It contains a text field for 'XPath to extract CIC status' with the value '//itemAuthorizationResponse/documentNotification/authorizationState'. Below this is a section titled 'Additional CIC status' which contains a table with two columns: 'Attribute' and 'XPath'. The table has three rows of data, each with a plus icon to the left of the attribute name and a plus icon to the right of the XPath. At the bottom of the table is a link labeled 'Add attribute assignment'. At the bottom right of the dialog box are 'Save' and 'Cancel' buttons.

Attribute	XPath
> CICDetail (CICDetail)	... //itemAuthorizationResponse/documentNotification/confirmationS ...
> CICDetailAdditional (CICDetailsAdditional)	... //itemAuthorizationResponse/documentNotification/additionalInfr ...
> CICAuthorizationDate (CICAuthorizationDate)	... //itemAuthorizationResponse/documentNotification/authorization ...

[Add attribute assignment](#)

Save Cancel

Field	Description
XPath to extract CIC status	Mandatory Specify an XPath that points out the CIC status in the inbound message.
Additional CIC status	Optional Specify an XPath to additional CIC information and point the attribute that should be used to store this information. For example, the additional CIC information could be text values that go along with the CIC999 status or it could be the date CIC status date.

Update Package Hierarchy Status

Sets the registration status of a package hierarchy link.

In the **Child GTIN XPath** field, specify an XPath that points out the GTIN of the child product in the inbound message.

From the **Status after Updating** list, select the status that you want the link to have after the action has been run.

'Evaluate JavaScript' with Binding to 'GDSN Publisher Product Validation'

The 'Evaluate JavaScript' plugin in connection with the 'GDSN Publisher Product Validation' binding provides the option to write JavaScript business rules that can access information about a product instance that is registered for a given data pool.

For example, this could be used to write a script that can validate if all required attributes for a given data receiver have been populated on a given product. For more information about the Validation Condition option, see [GDSN Publish Action Button](#) or [GDSN Register Action Button](#).

Set Pending File

This Business Action is used for the 1WorldSync data pool in conjunction with using the 'Pre command' option in the Web UI ([GDSN Web UI Buttons](#)). When a pre-command is executed, the system will await a response from the data pool and GDSN before the real command is executed.

For the 1WorldSync data pool, these responses are not combined in one file and will thus not be received at the same time. Instead the responses are received asynchronously, one response message will be received from the 1WorldSync data pool and another response message will be received from the GDSN. Only when both responses have been received, is the real command (the pending command) executed.

The 'Set pending command' operation for this business action tracks which command should be executed when the response messages have been received for the pre-command, the pending command will be stored in a description attribute that is valid for the registration object (see [Component Model Elements](#)).

The Set Pending File business action is triggered via the Inbound format configuration with the Type Key 'catalogueRespondedocumentAcknowledgementitemADD'.

Originating Message ID: Specify the XPath for the Originating Message ID. The default value is `//originatingMessageId/text()`.

Execute Pending File

This Business Action will execute the pending command that is stored in a description attribute on the registration object. For further information, see Set Pending File above.

The Execute Pending File business action is triggered via the Inbound format configuration with the Type Key 'gdsnItemRegistryRespondedocumentAcknowledgement'.

Handling Duplicated Attributes in Web UI

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

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

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

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

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

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

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

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

Setting up Blacklisted Attribute Groups in Web UI

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

Edit component

ValueGroupHeader properties

Component Description: Table header that shows the values of attributes in an attribute group. Only usable for CompareDisplayMode.

AttributeGroup*: CA-USE

BlacklistedAttributeGroup: CA-USE-2 [Clear]

Dimensions: <Select an option> [v] [Edit...]

IncludeNestedGroups: ☐

Label:

ShowLOVIDs: ☐

BlacklistedAttributeGroup

All attributes in this attribute group will not be shown even if they are in the attribute group choosen to show attributes for.

[Save] [Cancel]

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

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

Homepage Widgets

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

Below is a list of some of the most commonly used widgets and instructions for adding widgets to a homepage. To add / configure homepage widgets, users must have appropriate privileges to access the Web UI designer and are expected to be familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section.

Asset Importer Widget

The Asset Importer widget allows users to import assets via an asset import configuration. Multiple asset importer configurations can be mapped to the same widget. The widget can also be set up to not specify a configuration at all, allowing users to choose from a full list of all configurations available in the system upon initiating an import.

For more information on the Asset Importer widget, see the **Asset Importer Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

HTML Asset Widget

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

KPI Widget

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

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

Links Widget

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

Mass Creation Widget

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

For more information, see the **Mass Creation Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

Search Widget

The Search Widget allows for a quick (and configurable) search of objects in the STEP system. The Search Widget can be configured to search widely through STEP, or it can be configured to search only a narrow segment of STEP, depending on the needs of the user. The results of a search can be displayed on either a screen of type generic Search or of type Node List Browser. The generic search screen can be configured with one or more display modes to show the results, and the Node List Browser screen will show a detail screen with the first result and the option of paging through the result list.

The Search Widget can also be configured to search within data containers. Editing the Search Widget Properties in the designer, the user must first add the 'Name Or Id Or Attributes' value in the **Search Plugins** field, and then click on the value to open the **Edit component** window.

Add Component - configure required properties

The Search Widget component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Search Widget Properties

Component Description The Search widget can be displayed on the Home page via the Widget Grid. The widget enables users to run searches on ID, Names, and specific Attribute values. The widget will list the last thirteen searches.

Last Search Label Previous searches:

Node Type Plugin <Select an option> Edit...

Screen* homepage Add

Search Below Plugin <Select an option> Edit...

Search Plugins Name Or Id Or Attributes

Add... Edit... Remove Up Down

Title

✓ Add ✕ Cancel

In the **Edit component** window, add attributes and check the box beside **Search in Data Containers**. Once this configuration is saved, any search initiated in the Search Widget will also search through data containers and return applicable entities within the search results.

Simple Importer Widget

A Simple Importer Widget allows Web UI users to initiate an import on demand from the homepage screen. Users can easily update or create products, entities, classifications, and *attribute values* by dragging and dropping a CSV or Excel format file onto a Simple Importer Widget. If desired, a Simple Importer Widget can also provide more advanced on demand import functionality when configured to utilize saved import configurations.

For more information , see the **Simple Importer** documentation.

Smartsheet Export Widget

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

For more information, see the **Smartsheet Export Widget** section of the **Web User Interfaces** documentation.

Status Selector Homepage Widget

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

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

Text Widget

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

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

User Widget

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

Workflow Profile Historical Data Widget

The Workflow Profile Historical Data widget displays historical data of the specified Workflow Profile as a line chart. This data must be generated on-demand via the Workflow Profile itself (in either workbench or Web UI).

For more information on the Workflow Profile Historical Data widget, see the **Workflow Profile Historical Data Widget** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Workflow Profile Live Data Widget

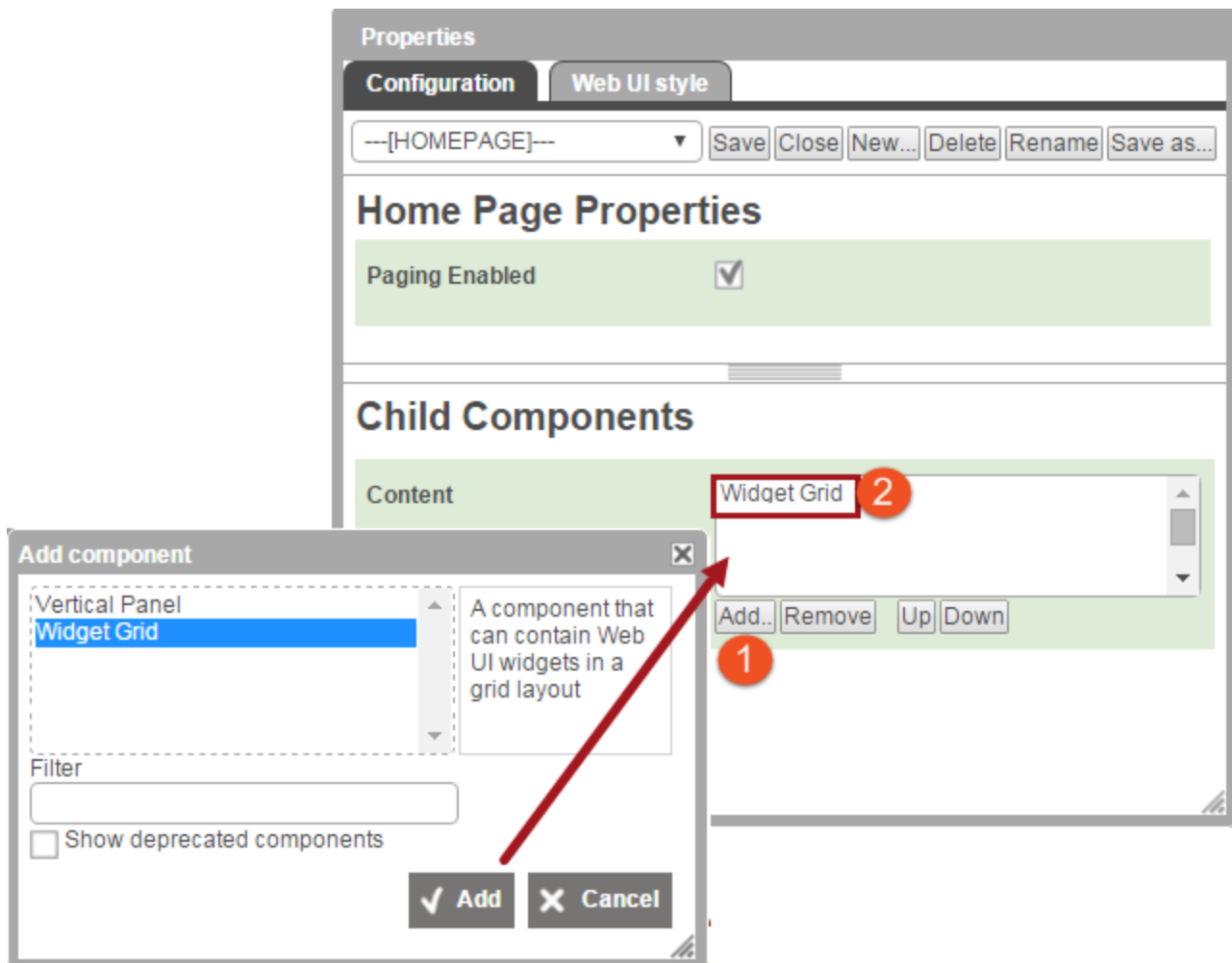
The Workflow Profile Live Data widget displays live data of the specified Workflow Profile as a pie or bar chart.

For more information on the Workflow Profile Live Data widget, see the **Workflow Profile Live Data Widget** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Adding Widgets to a Homepage

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

1. Enter Web UI design mode.
2. On the Home Page Properties, add a **Widget Grid** as a **Child Component** to **Content**.



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

3. Double click on the newly added **Widget Grid** to display its properties.
4. Select **Add** in the Widgets Child Component section to display the Add Component dialog.

Properties (edited)

Configuration Web UI style

---[HOMEPAGE]---

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

Widget Grid Properties

[go to parent](#)

Component Description A component that can contain Web UI widgets in a grid layout

Css Class

Child Components

Widgets

Add.. Remove Up Down

- Choose the widget. In the example, **Status Selector Homepage Widget** is selected. Click **Add** to close the dialog and return to the Widget Grid Properties.

Add Component

Search Widget
Simple Importer Widget
Smart Sheet Export Widget
Status Selector Homepage Widget
Status Selector Widget
Text Widget
User Widget
Video Asset Widget

Homepage widget for showing states and number of items in each state in a particular workflow. By clicking one of the shown states, it is possible to navigate to a screen with a list of tasks in that state. Appropriate screen types to use as the ResultScreen are the "TaskList" and the "AdvancedSearchScreen" showing detailed information about the items in the chosen state.

Filter

☐ Show deprecated components

✓ Add ✕ Cancel

- Configure the Widget Properties based on the parameters shown. Each widget has a different set of properties. See the documentation specific to each widget for additional information.

Properties

Configuration Web UI style

---[HOMEPAGE]---

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

Status Selector Homepage Widget Properties

[go to parent](#)

Component Description

Homepage widget for showing states and number of items in each state in a particular workflow. By clicking one of the shown states, it is possible to navigate to a screen with a list of tasks in that state. Appropriate screen types to use as the ResultScreen are the "TaskList" and the "AdvancedSearchScreen" showing detailed information about the items in the chosen state.

Auto Refresh Interval

Component Title

Initiate Label

Show Collection Filter ☐

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

Properties

Configuration Web UI style

---[HOMEPAGE]---

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

Status Selector Homepage Widget Properties

[go to parent](#)

Auto Refresh Interval

8. The widget should now appear on the Homepage.

→ Quick Links

→ [Advanced Search](#)

→ [Upload Excel Smartsheet](#)

→ [Merchandizing Hierarchy](#)

→ [Browse](#)

→ [Dashboard](#)

→ [Recycle Bin](#)

→ [Background Processes](#)

→ [Packaging Hierarchy - New](#)

→ [Address Details Address Root](#)

→ [Workflow Profile](#)

🔍 Search

Last search:
[20808-013](#)

🔗 Order Process

[Initiate](#)

[Initial](#)

[Review Data](#)

[Confirm Data](#)

[End State](#)

18

0

0

0

Data Profile Widgets in Web UI

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

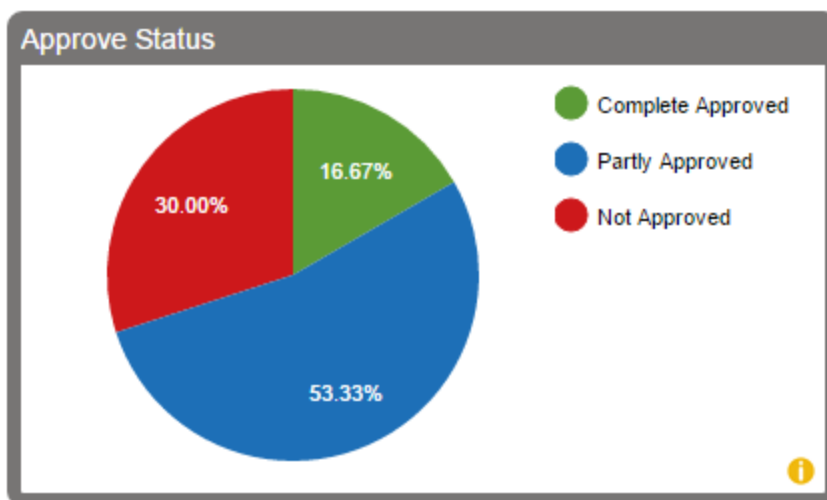
To add widgets to the homepage, add the widget 'KPI Widget' to an applicable page, specify a selection (what node to display profiled data from), and choose the desired child component. To add one to a node in the hierarchy simply add the desired widget as a child component.

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

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

Approve Status

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

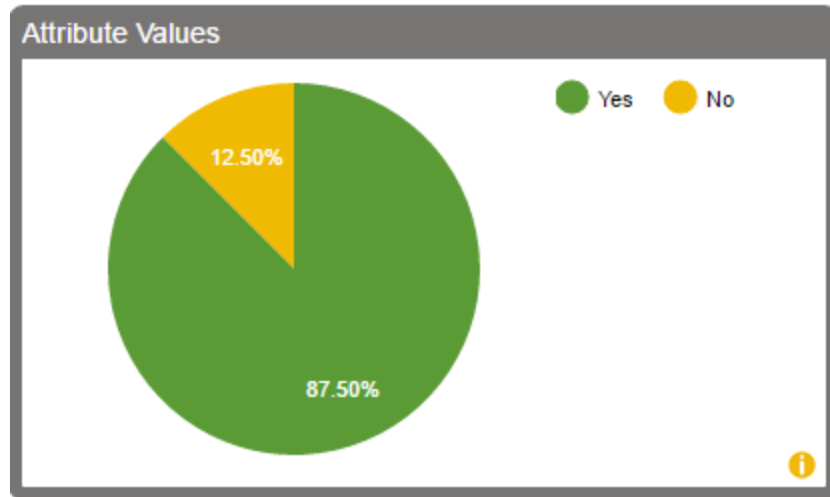


Configuration options include:

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

Attribute Values

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



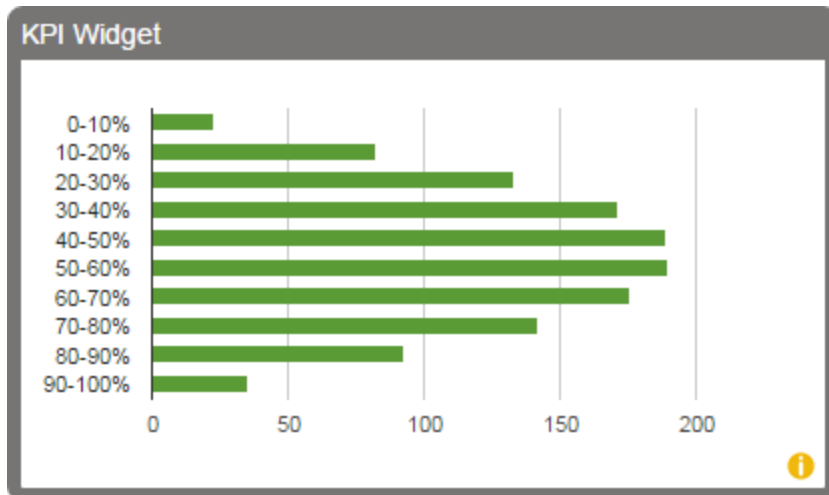
Configuration options include:

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

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

Average Object Completeness

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



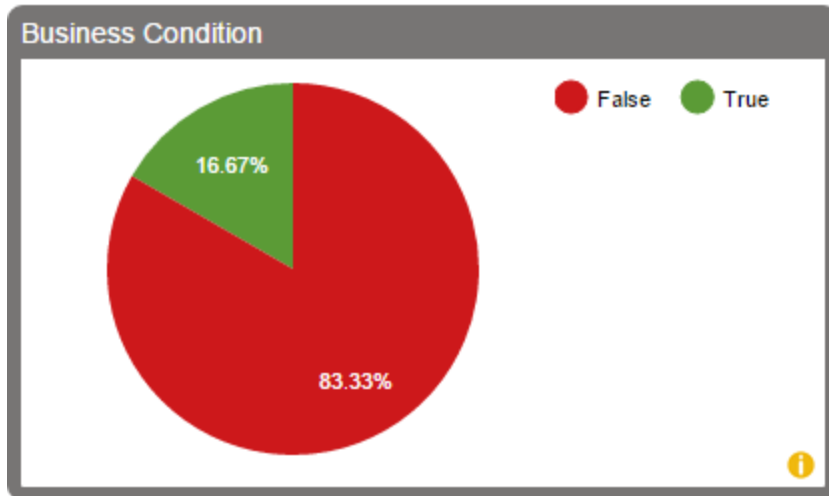
Configuration options include:

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

Condition Status

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

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



Configuration options include:

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

Least Complete Attributes

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

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

Configuration options include:

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

Most Complete Attributes

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

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

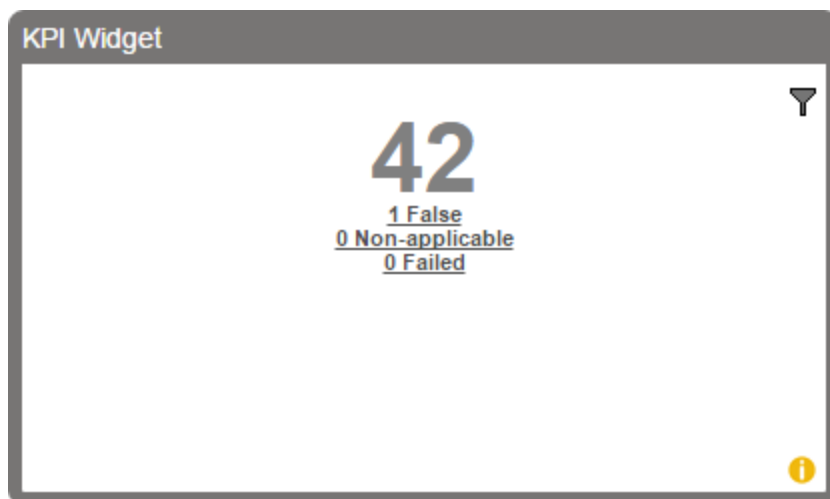
Configuration options include:

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

Object Count

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

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



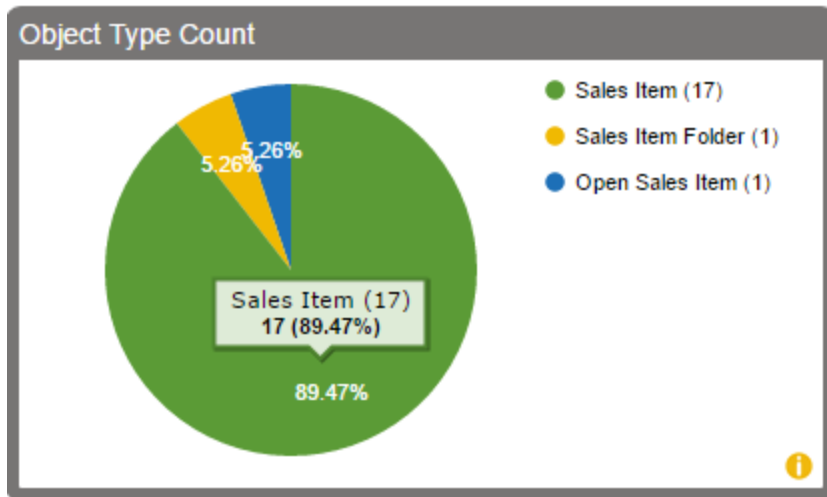
Configuration options include:

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

Object Type Count

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

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

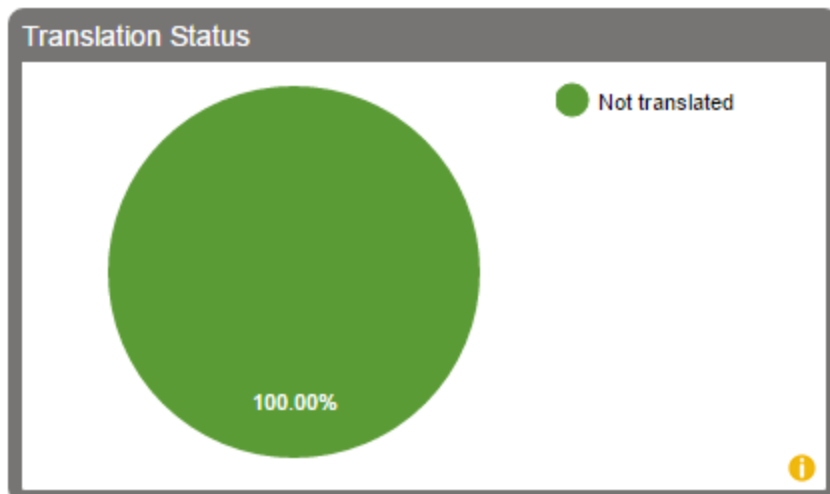


Configuration options include:

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

Translation Status

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



Configuration options include:

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

Note: The KPI Table Widget has been deprecated.

Mass Creation Widget

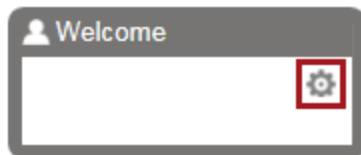
The Mass Creation Widget is a Homepage widget that, once configured, enables users to start the process of creating new objects in Web UI. This widget is used in conjunction with the Mass Creation screen type, which allows users to onboard multiple objects into STEP using Web UI screens instead of using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

Adding a Mass Creation Widget Grid

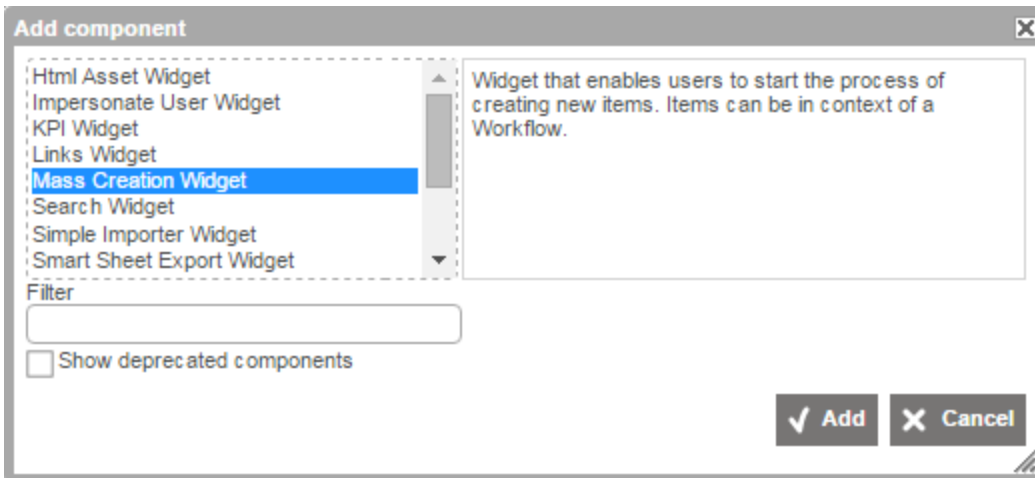
Admin users first need to add the Mass Creation Widget. Once the widget is created, configuration can begin.

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

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



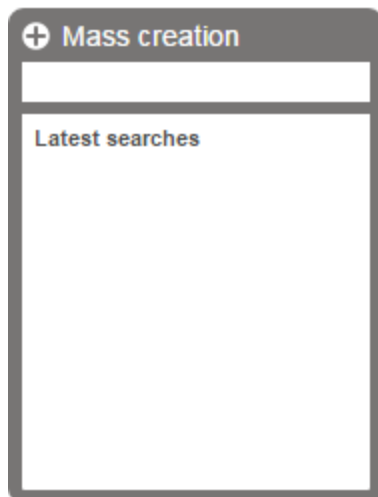
3. If not automatically shown the Home Page Properties, choose **---[HOMEPAGE]---** from the screen dropdown list.
4. Add the Mass Creation Widget to a Widget Grid:
 - If adding it to an existing Widget Grid, double-click the desired Widget Grid listed in the Child Components > Content parameter field.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



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

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

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



Configuring a Mass Creation Widget

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

Properties

Configuration Web UI style

---[HOMEPAGE]---

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

Mass Creation Widget Properties [go to parent](#)

Component Description Widget that enables users to start the process of creating new items. Items can be in context of a Workflow.

Node Picker Dialog i <Select an option> Edit...

Result Screen <Select a screen> Add

Title Mass creation

▼ **Advanced**

Recent History Key f7710c62-b909-459f-ad68-7643bf83d5ff

Node Picker Dialog

1. Select 'Node Picker Dialog' from the dropdown. The **Node Picker Dialog Properties** dialog automatically displays.

Node Picker Dialog <Select an option> Edit...

Result Screen → <Select an option> Node Picker Dialog Add

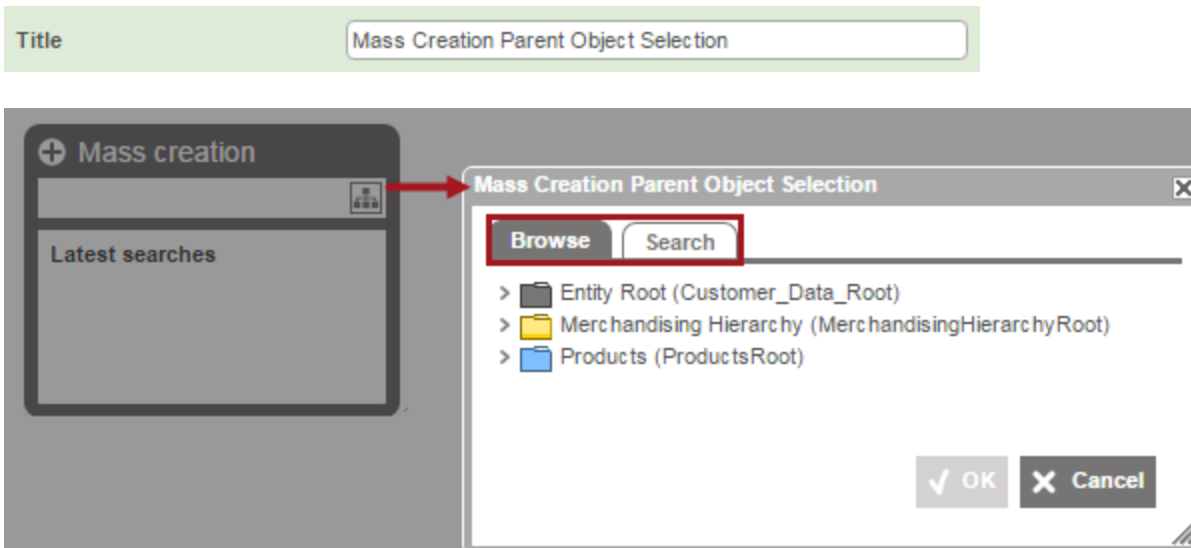
2. On the properties screen, select **Static Root Nodes** within the **Root Node Plugin** dropdown.
3. The **Static Root Nodes Properties** dialog appears. Click **Add**, under the **Root Node URLs** field, to make selections. This selection will determine what nodes are presented to the end user when using the widget and should be limited to **Product**, **Entity**, or **Classification** nodes. Re-order and remove existing root node selections as needed.

Root Node URLs*

step://product?id=Product+hierarchy+root
step://entity?id=Customer_Data_Root
step://classification?id=MerchandisingHierarchyRoot

Add... Remove Up Down

- A selection must be made for the **Tab Pages** parameter. Two valid options work with the Mass Creation functionality: Browse and Search. After adding a Browse tab, double-click the Browse title in the parameter field to set, if needed, any Tree navigation limitations for end users. If adding a Search Table tab, there is additional configuration to be done to the Search Table Tab Properties to maximize the search feature.
- Leave **Title** as-is or type in a meaningful title for end users. This title will display above the tabs (created in the previous step) when users click the node picker icon on the widget.



Note: All the steps above cover setting up the parameters for the first time. Where applicable, click the Edit button to the right of the parameter value field (or beneath it) to edit existing settings.

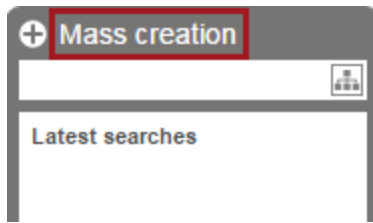
- All the steps above cover setting up the parameters for the first time. Where applicable, click the Edit button to the right of the parameter value field (or beneath it) to edit existing settings.
- Click **Save** and you will be returned to the **Mass Creation Widget Properties**.

Results Screen

- Using the '<Select a screen>' dropdown for the **Result Screen** parameter, choose the screen ID for the Mass Creation screen that will be tied to this widget. End users will click on the widget, select a parent object, and be directed to the Mass Creation screen designated by this parameter.
- If the desired Mass Creation screen does not already exist, click **Add** and create a new screen using the screen type Mass Creation Screen. The screen ID that you give the new screen will automatically populate in the parameter value field. Once all widget settings are made and saved, the Mass Creation screen can be configured following the directions outlined in the **Configuring a Mass Creation Screen** documentation.

Title

The default title displayed at the top of a Mass Creation Widget is 'Mass creation.' Since multiple widgets can be created for different onboarding needs, the title can be renamed to something more descriptive for end users.



Recent History Key

Under **Advanced** there is a **Recent History Key** parameter. The key in the value field may be copied and pasted / used within another widget. The widgets would then share the same **Latest searches** history information.

Below is an example of the **Mass Creation Widget Properties**, fully configured:

After parameter selections have been made, click **Save** at the top of the Designer window. Close the Designer window to exit design mode and return to normal Web UI operation. If a Mass Creation Screen has not been configured yet, instead of exiting design mode, select an existing (or create a new) Mass Creation Screen to continue on with the setup process.

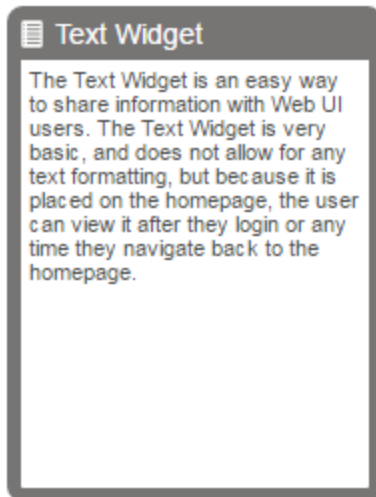
For more information, see the **Configuring a Mass Creation Screen** section of the **Web User Interfaces / Using a Web UI** documentation.

For more information about using the Mass Creation components, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

Text Widget

The purpose of the Text Widget is to provide an easy way to display custom text to all Web UI users. Though the Text Widget does not allow for any text formatting, it is a great way to display a custom message of welcome or next steps after logging in, because it can be displayed on the homepage, where users are directed after login.

The purpose of this section is to describe each of the parameters within the Text Widget Properties.



Prerequisites

It is expected that anyone configuring the Text Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer.

For information on adding a widget to the homepage, please see the **Adding Widgets to a Homepage** section of the **Homepage Widgets** document.

Configuring the Text Widget

When configuring the Text Widget for the Homepage, there are three parameters to consider; Double Width, Text and Title.

Properties

Configuration Web UI style

--[HOMEPAGE]--- Save Close New... Delete Rename Save as...

Text Widget Properties [go to parent](#)

Component Description Shows text content as configured

Double Width ☐

Text* The Text Widget is an easy way to share infor

Title Text Widget

If the **Double Width** parameter is checked, the widget is doubled in size from the standard widget single width.

Text Widget

The Text Widget is an easy way to share information with Web UI users. The Text Widget is very basic, and does not allow for any text formatting, but because it is placed on the homepage, the user can view it after they login or any time they navigate back to the homepage.

The **Text** parameter must be populated for the widget to be added to the homepage. When the Double Width parameter is checked, the widget can display approximately 1300 characters. When the Single Width parameter is checked, the widget can display approximately 600 characters.

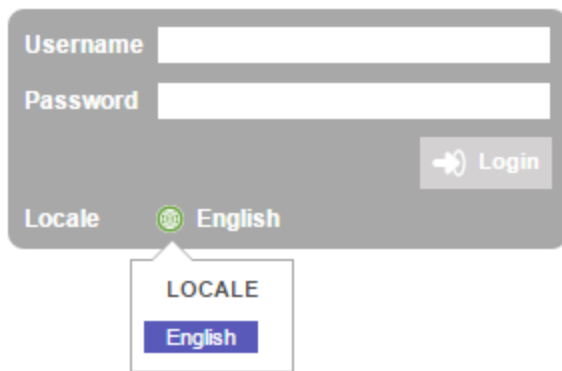
The **Title** parameter is optional. When blank, the default title, 'Text', appears. When the Double Width parameter is checked, the Title can display approximately 50 characters. When the Single Width parameter is checked, the Title can display approximately 25 characters.

Localizable Dates in Web UI

While STEP handles ISO dates better than localized dates when doing search, compare, and order operations, many users want to see localized dates and times displayed when they are in the Web UI.

Attributes with ISO Date and ISO Date and Time validation types can be configured to display in a localized format when set up to display using an Attribute Value, Parent Value, and Attribute Value Group Component within a Node List or while displayed using an Attribute Value and Attribute Value Group Component within a Node Editor.

Just like the Web UI localization of the Date attribute, which is shown localized by default, the locale is defined by the selection made during login.



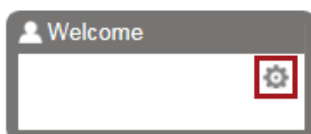
Dates converted to locale will follow the DateFormat.SHORT Java formatting style. Times converted to locale will be the DateFormat.MEDIUM formatting style.

Locale Date and Time (DateFormat) Samples	English (United States)	Danish (Denmark)	French (France)
Date (SHORT)	8/14/15	14-08-15	14/08/15
Time (MEDIUM)	11:25:40 AM	11:25:40	11:25:40

Localization Setup

To localize the ISO Date and ISO Date and Time attributes displayed in Web UI, follow these steps.

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



3. Navigate to the Node Editor or Node List properties screen to edit the date attributes.
4. On the Attribute Value Component, Parent Value, or Attribute Value Group Component properties screens (for Node Editor) or the Attribute Value Header and Attribute Value Group Header properties screens (for Node List), click on the Advanced arrowhead to expand the Advanced options.
5. Click on the box to the right of Enable Locale Formatting.
6. Save and close the properties screen.

The dates will now show as localized on the screen. The values will continue to display localized based on the login locale until the Enable Locale Formatting parameter is disabled.

As an example, here is an attribute with a ISO Date Validation Base Type prior to localization as shown in Web UI designer mode:

Manufacturer Warranty Start Date yyyy-MM-dd

Under Advanced, the properties screen is now configured to localize the selected attribute.

The screenshot shows the 'Properties' window with the 'Configuration' tab selected. The title is 'Attribute Value Component Properties'. Below the title bar, there are buttons: 'Item detail', 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The 'Component Description' is 'Used for displaying and editing attribute values.' The 'Attribute*' field contains 'ManufacturerWarrantyStartDate'. The 'Advanced' section is expanded, showing fields for 'Columns' (1), 'Context Help', 'Css Class', 'Enable Locale Formatting' (checked), and 'External Validator' (<Select an option>). The 'Enable Locale Formatting' checkbox is highlighted with a red box.

Here is the same ISO Date Validation Base Type attribute after being localized (English / US locale):

Manufacturer Warranty Start Date

Also, for example purposes, here is an ISO Date and Time attribute before and after Enable Locale Formatting is selected.

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

Considerations and Limitations

- Date localization only works on attributes with these validation base types: Date (DD-MON-YYYY), ISO Date (YYYY-MM-DD), and ISO Date and Time (YYYY-MM-DD HH24:MI:SS). Changing the way these attributes display in Web UI does not impact the validation base type.
- Web UI ISO Date display settings are configured per component and display mode, meaning that they must be individually set in each instance where the localized display is desired.
- For information regarding converting existing attributes from Date to ISO Date validation type, see the 'Converting Attributes from Date to ISO Date' section of the System Setup / STEP Super User documentation.

Main Properties

The **Main Properties** configuration determines the overall behavior of a Web UI.

All the steps provided in this topic assume the Web UI designer is in design mode and on **Main Properties** prior to starting the configuration process. For more information about getting started using a Web UI and details about design mode access / usage, see the **Web UI Getting Started** documentation.

Properties

Configuration Web UI style

---[MAIN]---

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

Main Properties

Component Description

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

Mappings

Address Root Node Details (ObjectType = AddressRoot)

Mass Creation Test (ObjectType = Product user-type root & Is Product)

Address Detail Screen (ObjectType = CD_Address)

L4 screen (ObjectType = SalesItemFolder)

Add... Edit... Remove Up Down

Bottom Height

80

Left Width

240

Resizable

☒

Right Width

120

Top Height

40

Representation List

Data Visualization Representation

Add... Edit... Remove Up Down

Advanced

Advanced

Child Components

Right

Add... Remove Up Down

Bottom

Add... Remove Up Down

Top

Add... Remove Up Down

Left

Stack Panel

Add... Remove Up Down

Corner Bar

Corner Bar

go to component

Business Conditions

Add... Edit... Remove Up Down

Default Side Panel

SHOWN

Info Alert Close Delay

Preferences

Screen Preference (SHOWN / productfolderdetails)

Screen Preference (SHOWN / Blank)

Screen Preference (SHOWN / productdetails)

Add... Edit... Remove Up Down

Configuring the Parameters

Mappings

Screens display in Web UI based on the Mappings values. When a new screen is created, typically a mapping also needs to be set up. The mappings are shown as 'screen ID (condition)' for the Mappings parameter and are evaluated one-by-one in the order shown. When the first mapping condition is met, the evaluation stops, and the screen configured for that condition is displayed. If no mappings match, then the default target screen is the Homepage.

Add component - configure required properties

The Screen Mapping component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Screen Mapping Properties

Component Description: A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

Conditions*
Add... Edit... Remove Up Down

Screen*
homepage Add

Add component

Advanced Search Selection Condition
Always True Condition
Asset Condition
Background Process Condition
Background Process List Condition
Classification Condition
Collection Condition
Collection Group Condition

Filter
Show deprecated components

Select a component to see its description

Add Cancel

Add Cancel

The mapping order should be evaluated based on your system and all efforts should be made to avoid mapping conflicts (e.g., multiple mappings that use the same condition but different screens).

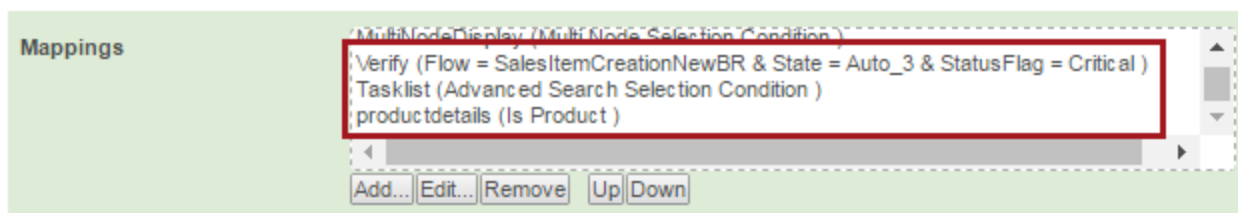
1. Click the **Add...** button for the Mappings parameter.
2. Make a condition selection by clicking the **Add** button under the value field box.
3. Within the 'Add component' dialog, click on a component name to see its description. Make a selection by clicking on a component, and then clicking **Add**.

4. Additional properties screens may display if additional parameters need to be configured for the condition selected (e.g., Object Type, Workflow). As needed, make parameter choices and click Add.
5. Back on Screen Mapping Properties, repeat steps 2, 3, and 4 to add multiple conditions to the value field, if applicable. Note that all the conditions for an individual mapping will need to be met for the mapping to apply.
6. Make a **Screen** selection using the dropdown selector. (If the desired screen does not already exist, click Add to the right of the Screen dropdown and follow the steps to create a new screen. Configure the new screen after saving the Main Properties.)
7. Click **Add**.
8. If needed, edit existing Mappings selections and/or re-order the mappings using the Up and Down buttons.
9. Click **Save** in the designer to save the current settings. Do not close the designer unless you have finished configuring all the other parameters (outlined in the rest of this topic).

Note: When navigating through Web UI, the first condition / screen mapping that applies takes precedence over any other valid mappings applicable to the selected object. If encountering the incorrect screen when navigating Web UI, check the condition / screen combinations and rearrange the mappings as needed.

Example: You are using Advanced Search. After doing a search, you click on an object link in the results list. This object is a product and is currently flagged as critical in state Auto_3 of the SalesItemCreationNewBF workflow.

Although the object is a product and you are making a selection within a set of Advanced Search results, you will navigate to the Verify screen. This is because that is the first condition met from within the mappings list. While three mappings are applicable for this one object, the first mapping takes precedence over the other two.



Height / Width Settings

The height and width settings apply to the components set up to display as Child Components in Main Properties (described in detail later in this topic). The default pixel value for height and width settings varies depending on the template used when originally creating your Web UI.

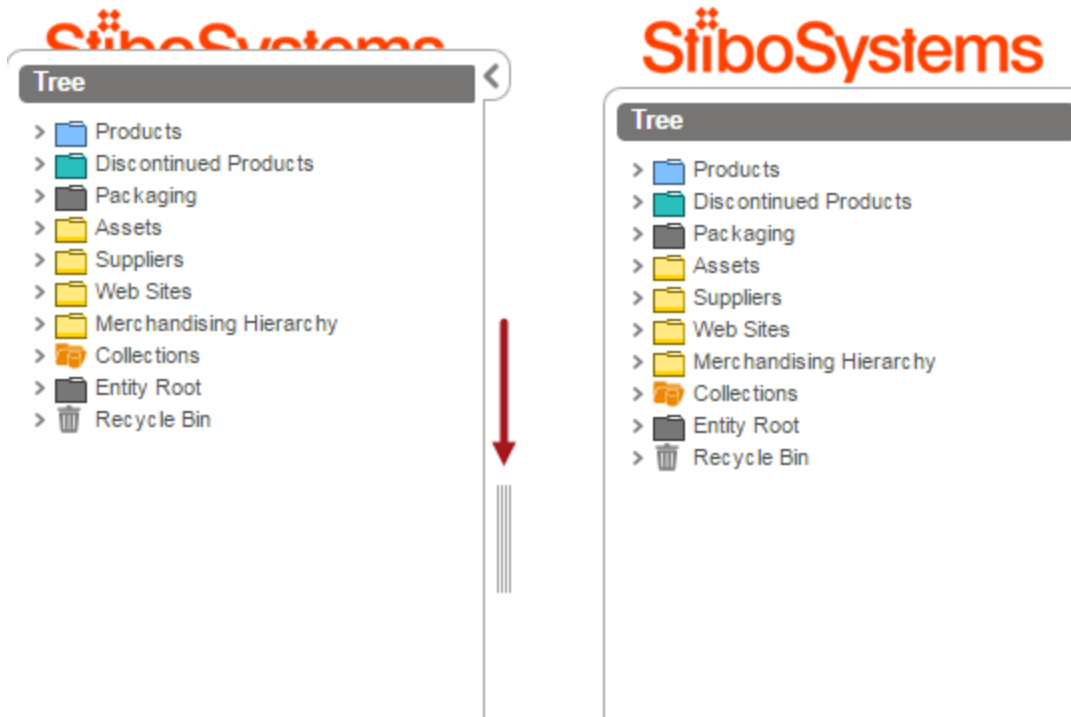
The screenshot below shows the default pixel settings shared by the Web UI templates. The Left Width default may vary slightly (240, 280, 300) depending on the template used. All can be adjusted as needed.

Bottom Height	80
Left Width	300
Resizable	☒
Right Width	120
Top Height	40

- **Bottom Height:** Determines the height of a component added to the Child Component > Bottom. The component is placed on the bottom of the screen and expands up. The greater the number of pixels, the taller the component.
- **Left Width:** Determines the width of the component added to the Child Component > Left. The component is placed on the left side of the screen and expands out to the right.



- **Resizable:** Applies to all child components configured in Main Properties. When enabled, a drag handle (shown in the next screenshot) appears so that the child component can be resized manually; the resizing takes effect for a single screen session and the height / width parameter settings apply again automatically upon the next log in. If disabled, the drag handle does not display on the screen nor does the tab used to expand / collapse the component. *Note that if the Advanced > Default Side Panel parameter is set to COLLAPSED, disabling this setting will create an error when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.*
- **Right Width:** Determines the width of the component added to the Child Component > Right. The component is placed on the right side of the screen and expands out to the left.
- **Top Height:** Determines how far down from the top of the screen the left and right child components are placed; the higher the number, the more space there is from the top of the screen to the top of the components. An example follows.

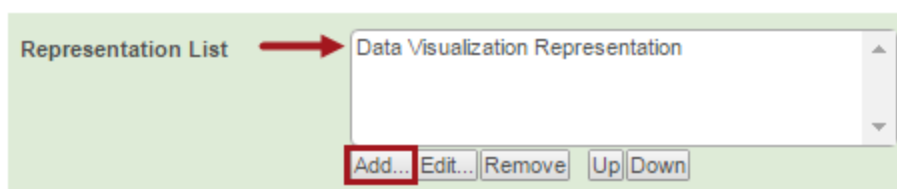


In the screenshot above, the stack panel on the left is shown with a Top Height setting of 20 and Resizable is enabled. The stack panel shown on the right side of the screenshot has a Top Height of 40 and Resizable is disabled, so there is not a drag handle nor a tab visible to the right of the stack panel.

Representation List

The Representation List parameter is part of the Data Visualization functionality within Web UI. The object type and reference settings can be made one time using the Data Visualization Representation component and applied anywhere a Display Relations Screen is used.

If a Display Relations Screen type is not in use anywhere in the Web UI, then skip this parameter.



1. Click the **Add...** button under the value field.
2. Double click the **Data Visualization Representation** title that populates the value field and configure the Data Visualization Representation Properties.
3. Click **Save** in the designer to save the current settings. Do not close the designer unless you have finished configuring all the other parameters (outlined in the rest of this topic).

For full details on how to configure this parameter and the subsequent component, see the **Data Visualization** section in the **Web User Interfaces / Using a Web UI** documentation.

Advanced

Click on **Advanced** to expand the screen to display additional parameters. A description of each parameter follows. Configure each to fit your business needs.

▼ Advanced

Business Conditions

Add... Edit... Remove Up Down

Default Side Panel

SHOWN

Info Alert Close Delay

Preferences

Screen Preference (SHOWN / productfolderdetails)
Screen Preference (SHOWN / Blank)
Screen Preference (SHOWN / productdetails)

Add... Edit... Remove Up Down

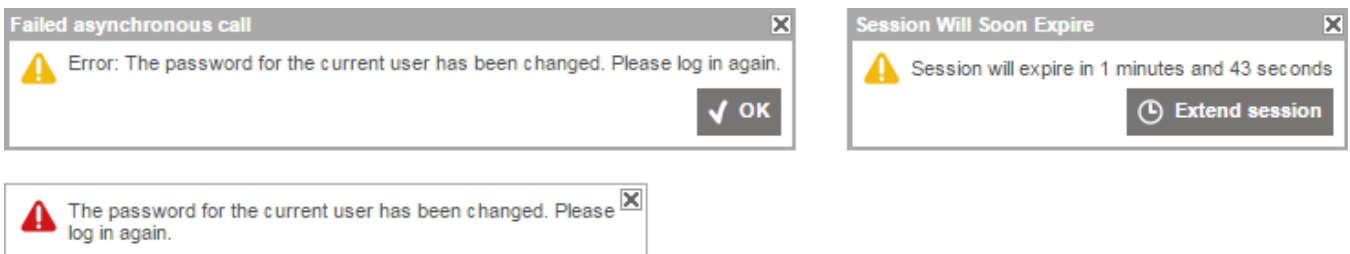
- Business Conditions**- Any business conditions added here become global conditions. This means that the conditions will be evaluated together, as applicable, with any additional business conditions configured for a screen, component, or parameter that you may be working with. For more information about business conditions, see **Business Conditions** in the **Business Rules** documentation. To add a business condition to the value field:
 - Click **Add...** and then configure the Business Condition Properties that display.
 - Click **Add** to apply the condition.
 - Repeat steps 1 and 2 to add multiple conditions.
- Default Side Panel** - This setting determines the behavior of the Left child component on all the pages within Web UI. Make a selection using the dropdown. An explanation of each option follows. *This is an all-or-nothing setting but may be overwritten for certain screens based on the Advanced > Preferences configuration.*
 - HIDDEN**: Default setting; The component will not automatically display on the screen.
 - SHOWN**: The component remains static on the left side of the screen as you navigate through Web UI.
 - COLLAPSED**: The component does not automatically display on the screen but is accessible by clicking on a tab (>) shown on the left side of the screen. *Note that if the Resizable parameter is disabled, choosing COLLAPSED will cause an error message to display when clicking Save in the*

designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

- **Info Alert Close Delay:** When set, info alert boxes, like those show below, will automatically close after the specified time (seconds). If the value field is blank, then info alert boxes will remain on the screen until the user manually clicks the close button on the message box.



If an alert requires a user action such as clicking a button to make a decision or acknowledge a message, or if the alert is a warning requiring action by the end user (e.g., fixing a validation error, re-logging in), then the close delay value does not apply. A few examples of these alert types are:



- **Preferences** - Use the Preferences parameter to overwrite the Default Side Panel settings for specific screens. As an example, you may decide that it is best to display the Left child component on some screens (e.g., Homepage) although the Default Side Panel parameter is set to HIDDEN.
 1. Click **Add...** and make or select a Screen and Side Panel setting on Screen Preference Properties.
 2. Repeat to add additional screen preferences.

Add component - configure required properties

The Screen Preference component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Screen Preference Properties

Component Description	A collection of settings controlling display and behavior of a screen.

Screen*	homepage Add
Side Panel	<Select a value> <Select a value> SHOWN COLLAPSED HIDDEN

✓ Add

✗ Cancel

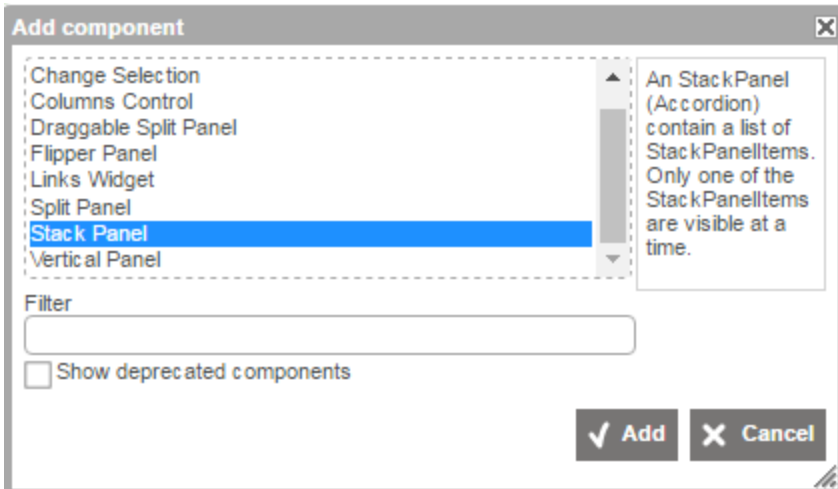
Child Components

Add components to each screen using the Child Components section of Main Properties.

Right	Add.. Remove Up Down
Bottom	Add.. Remove Up Down
Top	Add.. Remove Up Down
Left	Stack Panel Add.. Remove Up Down
Corner Bar	Corner Bar go to component

- **Right, Bottom, and Left:** When using a Web UI created from one of the standard templates, the Left parameter is already configured by default. The default value can be removed or additional selections can be added.

1. Click **Add** under any of the parameter value fields, and an 'Add component' dialog will display with options. Clicking on a component name will display information regarding what that component does.



2. Click **Add** to select a component and set parameters as needed. Configure any other parameters that may display in additional dialogs based on the component selected.
 3. Click **Add** again to add the component.
 4. Repeat steps 1, 2, and 3 to add multiple components under a single child and/or add components to another child.
- **Top:** Use the Corner Bar parameter (described below) in place of using this component.
 - **Corner Bar:** Set up the Corner Bar to get a 'mini menu' of quick navigation options that will display in the top right of the non-Homepage screens. Follow these steps:
 1. Choose **Corner Bar** from the dropdown.
 2. Click on **go to component** and in the 'Add component' dialog, make a selection and click **Add** again.
 3. Configure any additional properties (e.g., Corner Bar Simple Search Properties) that require additional parameter selections.
 4. Repeat steps 2 and 3 as desired.
 5. Click **Save** in the designer and click **Close** to return to normal Web UI operation.

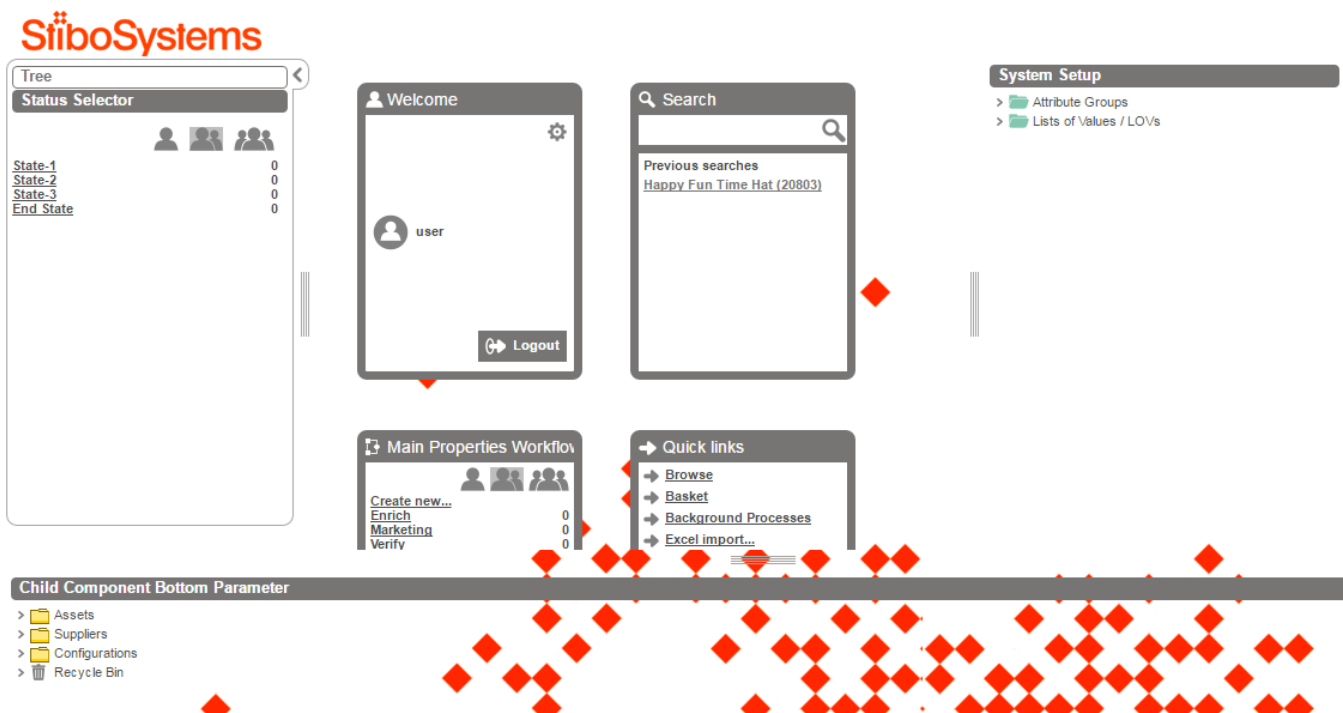
Examples of Component Usage

Child Components Example

Here is an example of what a Stack Panel can look like when added to each relevant child component. Each tree component is set up to display different nodes.

- **Left:** Stack Panel configured to display two Stack Panel Items: a Tree Navigator (user-titled as Tree) and a Status Selector Sidebar Widget (user-titled as Status Selector).
- **Right:** Stack Panel configured to display a Stack Panel Item > Tree Navigator (user-titled as System Setup).
- **Bottom:** Stack Panel configured to display a Stack Panel Item > Tree Navigator (user-titled as Child Component Bottom Parameter).

Configuring the screen like this (see below) may not be ideal since it does not leave much room for working with the data. However, it does provide an example of how the Main Properties > Child Components will be displayed to an end user.



The configuration order for the Right component (System Setup) is shown directly below. The Tree Navigator component is configured as the Stack Panel Item added to Stack Panel Properties. Two root nodes are selected to display. Note that if no node selection is made, then all the nodes will display.

Child Components

Right

Stack Panel **1**

Add... Remove Up Down

Bottom

Stack Panel

Add... Remove Up Down

Top

Add... Remove Up Down

Left

Stack Panel

Add... Remove Up Down

Stack Panel Properties

[go to parent](#)

Component Description An StackPanel (Accordion) contain a list of StackPanelItems. Only one of the StackPanelItems are visible at a time.

Stack Header Height 20

Child Components

Items

Stack Panel Item (System Setup) **2**

Add... Remove Up Down

Stack Panel Item Properties

[go to parent](#)

Component Description Part of a stack panel consisting of a content area and a title

Css Class stb-StackPanelItem

Header Css Class stb-StackPanelHeader

Title System Setup

Child Components

Content Tree Navigator [go to component](#) **3**

Tree Navigator Properties

[go to parent](#)

Component Description Display a tree component for navigating product and classification hierarchies.

Root Node URLs

step://attributegroup?id=Attribute+group+root
step://ListOfValuesGroup?id=List+Of+values+group+root

4 Add... Remove Up Down

Show Leaves ☐

Show Recycle ☐

► Advanced

The Bottom component is configured similarly to the Right one. The only difference is that different nodes are selected to display.

The Left is similar to the Right and Bottom, with different nodes. There is also an additional Stack Panel Item configured to display (Status Selector Sidebar Widget).

For step-by-step instructions on how to add the Tree Navigator Component to display in the Web UI, see the **Tree Navigator Component** document in the **Web User Interfaces / Using a Web UI** documentation.

Corner Bar Example

Here is an example of a configured Corner Bar. The symbols shown in the Corner Bar (left to right) correspond with the Corner Bar Properties > Child Components > Items values (top to bottom). Each icon is easily identifiable to the end user as hover text displays when mousing over each icon.

Properties

Configuration

Web UI style

---[MAIN]---

Save

Close

New...

Delete

Rename

Save as...

Corner Bar Properties

[go to parent](#)

Component Description

A compact menu bar which will position itself in the upper right corner of a screen

Child Components

Items

Corner Bar Design Mode Action

Corner Bar Context Selector

Corner Bar Workspace Selector

Background Process Notification

Add...

Remove

Up

Down

The up arrow icon (shown below) on the far right is a standard icon that will display even if the Corner Bar is not selected / set up in Main Properties. Clicking this icon will take you to the Homepage.

Product Details

⚙️

English US

Main

🔄

🏠

[Primary Product Hierarchy](#)

>

[Packaging](#)

>

[Buy Side Packaging](#)

>

Comfy Bed (pallet of footboards)

Product attributes

References and Classifications

Referenced By

Images and Documents

Language view

ID

22213

Name*

Comfy Bed (pallet of footboards)

Object Type

Pallet

Approval status

✔️

Approved on 10/16/15 9:39 AM

Merging Confirmed Matches

Once two objects have been confirmed as duplicates they can be viewed on a Confirmed Matches component screen. From here, the user can decide whether to merge the duplicates together or reject the confirmation, reverting the objects back into potential duplicates. Opting to merge the matches will invoke a Merge Nodes screen, allowing users to choose which of the two objects will persist following the merge, which will be deleted, and to select the specific attribute values and outgoing references to be applied to the surviving record.

For more information about the Potential Duplicates List component, see the **Potential Duplicates List** section of the **Web UI** documentation.

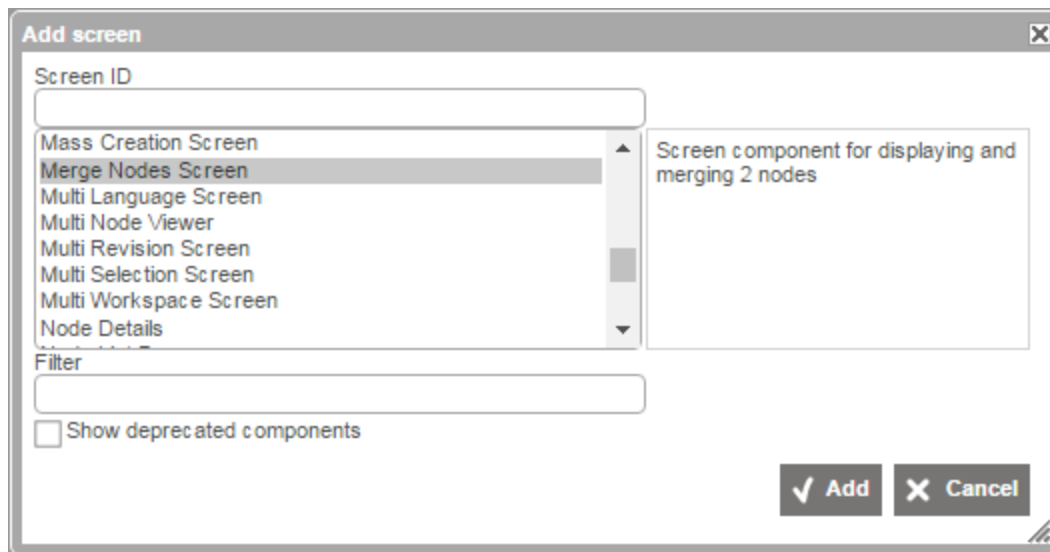
For more information about how to merge confirmed matches via workbench, see the **Handling Potential Duplicates** section of the **Matching and Linking** documentation.

Note: While the Merge Nodes Screen can be used to merge random nodes of the same super type, it is intended for usage with matching algorithms using the Match Action for Identify Duplicates in conjunction with the Merge Confirmed Match From Grid action in the Confirmed Matches component.

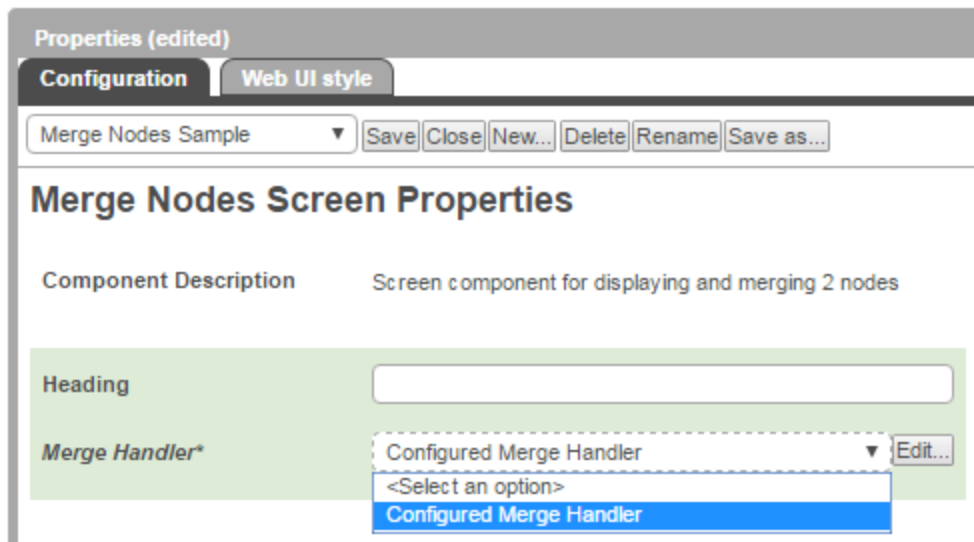
Configuration

Add Merge Nodes Screen

1. In design mode, select **New**.
2. In the 'Add screen' window that appears, select 'Merge Nodes Screen', enter a Screen ID, and then click **Add**.



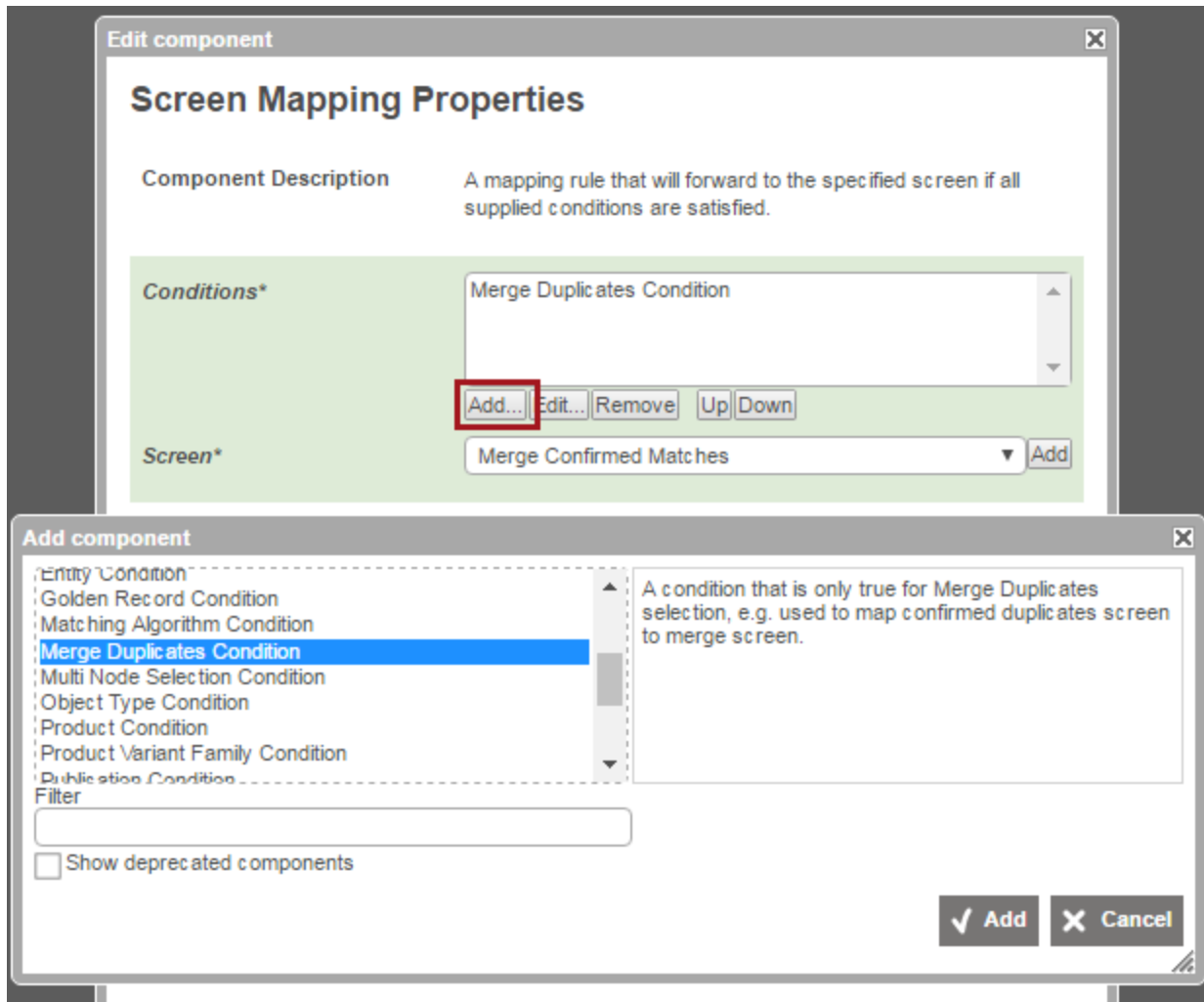
3. In the 'Merge Nodes Screen Properties' select 'Configured Merge Handler' from the 'Merge Handler' dropdown selector.



4. Click **Save**.

Map Merge Node Screen

1. In design mode, navigate to [MAIN].
2. Under 'Mappings', click **Add**.
3. Under 'Conditions', click **Add**, and select 'Merge Duplicate Condition' from the list that appears. Click **Add**.



4. Under the 'Screens' dropdown, select the Merge Nodes screen configured in the previous section.
5. Click **Save**.

Add Merge Confirmed Match From Grid Action

1. In design mode, select a 'Confirmed Matches' component screen. If one does not exist, configure it on any Tab Page or Node Details component.
2. Under 'Child Components', in the 'Actions' field, click **Add**.

Properties

Configuration

Web UI style

Subscriber Details

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

Confirmed Matches Properties

go to parent

Component Description

A component for displaying confirmed matches

Headers

ID Header (true)
Object Type Header
Attribute Value Header (false / false / false / S-Phone / false
Attribute Value Header (false / false / false / S-Email / false /

Add... Edit... Remove Up Down

Matching Algorithm*

I-CaseBMatchingAlgorithmDT

Property Direction

HORIZONTAL

Show Group Headers

☐

Child Components

Actions

Merge Confirmed Match From Grid Action
Delete Confirmed Match From Grid Action

Add... Remove Up Down

3. In the window that appears, select 'Merge Confirmed Match From Grid Action' from the list. Click **Add**.
4. Click **Save**.

Performing a Merge

Before beginning the merge process there are a few caveats to consider. Metadata and inherited attributes, as well as inbound references, cannot be merged. Additionally, if the object that remains after the merge does not contain data for a given attribute or reference in any context, the data is taken from the deleted object and merged into the remaining object.

All attributes and references eligible for merging will appear in the table.

1. While on a 'Potential Duplicates List' screen, choose which object to merge with the currently selected node. Next, click 'Confirm duplicate from grid'.

Subscriber Details

English US • Main

Basic Information and References		Potential Duplicates List	Confirmed Matches
	A Charles	Amos Charles	
Score	-	99.9	
Matching Algorithm	-	I Case B Matching Algorithm DT	
Name	A Charles	Amos Charles	
Object Type	Subscriber	Subscriber	
Phone	9384369429	9384369429	
Email	amet.consectetuer.adipiscing@Aeneaneget.org	amet.consectetuer.adipiscing@Aeneaneget.org	

- In the message that pops up, provide a reason for why they are duplicates, and then click **OK**.

Warning

You are about to confirm 2 objects as duplicates

Reason

- Navigate to the 'Confirmed Matches' component screen and select which match to merge the currently selected node with. Then, click the 'merge confirmed match from grid action' button.

Subscriber Details

English US • Main

Basic Information and References

Potential Duplicates List

Confirmed Matches

✓

📄

↺

➡

✕

	ID	Object Type	Phone	Email
Amos Charles	<u>I-Subscriber_0106</u>	Subscriber	9384369429	amet.consectetuer.a

- On the merge screen that appears, choose which attributes and references will survive the merge by clicking the arrows next to them. Surviving attributes / references are highlighted green and appear in the 'Merge Results' column. Select the surviving node via the radio buttons that appear above the **Merge** button.

Compare and Merge Confirmed Matches

English US Main

	A Charles (A Charles)	>>	Merge Results	<<	Amos Charles (I-Subscriber_0106)
Name	A Charles	>	Amos Charles	<	Amos Charles
City	Roswell	>	Roswell	<	Kearney
Country	United States	>	United States	<	United States
Email	amet.consectetuer.adipiscing@Aeneaneget.org	>	amet.consectetuer.adipiscing@Aeneaneget.org	<	amet.consectetuer.adipiscing@Aeneaneget.org
First Name(s)	A	>	Amos	<	Amos
Last Name	Charles	>	Charles	<	Charles
Phone	9384369429	>	9384369429	<	9384369429
State	GA	>	GA	<	NE
Street	4722 Amber Grove	>	4722 Amber Grove	<	408-4957 Mauris Av.
ZIP	30075	>	30075	<	86536
Subscriber Duplicate		>	A Charles (A Charles)	<	A Charles (A Charles)

Select object to hold merged result

☒ A Charles (A Charles) ☐ Amos Charles (I-Subscriber_0106)

Merge

- Click **Merge** to merge the two objects. The object that was not picked to survive will be deleted. Note that this deletion is not automatically approved.

Multi Context Screen

The Multi Context Screen is a screen type designed to show attribute values and outbound references of an object in multiple contexts on the same screen in Web UI. Working across different contexts, comprised of a variety of dimension points (e.g., language, country), allows customers to specify data valid for each of the contexts. Using a Multi Context screen means that users do not need to switch contexts manually to evaluate attribute values one context at a time.

The Multi Context screen needs to be configured to display attributes and reference types. If configuration allows it, end users can set up their own customizable views, including deciding which attributes and references to display. Plus, there are on-screen data filtering options to hide equal values or highlight differences in the data. This can be especially useful to evaluate data between multiple contexts, quickly identifying which values differ across the displayed contexts.

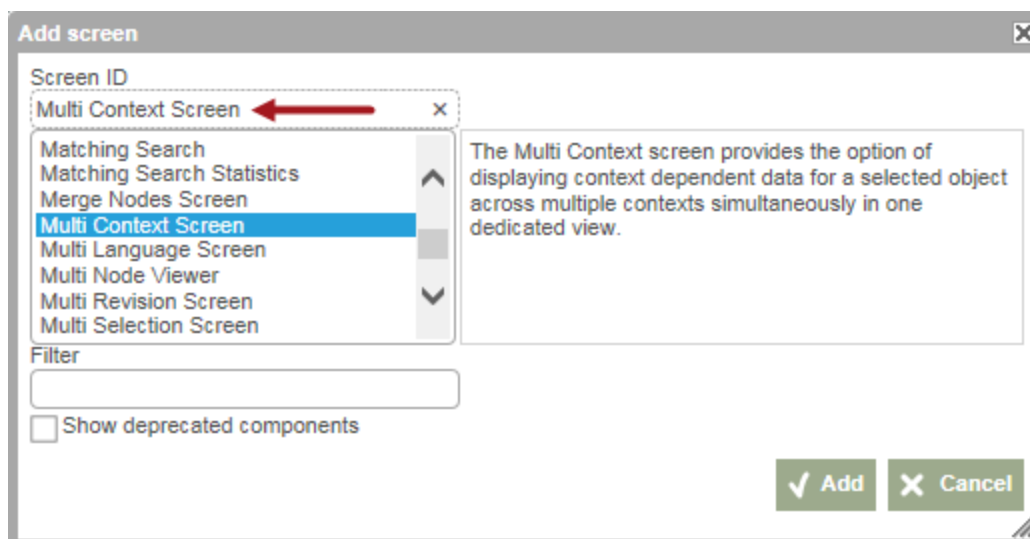
Additionally, users can suppress references and remove suppression of references, when the functionality is enabled. A reference may be suppressed for various reasons. One example is an image—what may be acceptable in one country may not be acceptable in or may not be relevant to another country or there may be licensing restrictions. Another example is product documentation that is translated into various languages but applicable to only certain countries in which a product is sold.

Prerequisites

It is expected that anyone configuring the Multi Context Screen component is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Adding a New Multi Context Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Select 'Multi Context Screen' as the screen type (shown in the screenshot below).



At this point, either close the designer and configure the screen at a later time, or continue on with the steps in the next section.

Configuring a Multi Context Screen

Each parameter should be configured as needed. To guide you in your setup, help text is available for each parameter and is accessible by clicking a yellow info icon to the right of each parameter name (displays upon mouse over).

Properties

Configuration | **Web UI style**

Multi Context Screen ▼ Save Close New... Delete Rename Save as...

Multi Context Screen Properties

Component Description The Multi Context screen provides the option of displaying context dependent data for a selected object across multiple contexts simultaneously in one dedicated view.

Display Suppression ☐

Displayed Attributes

Add... Remove Up Down

Displayed References Types

Add... Remove Up Down

Enable User Configurable Views ☒

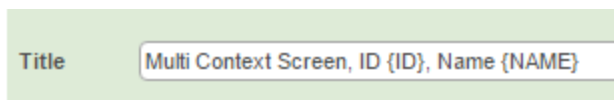
Title Multi context

1. With the designer window open, select the screen ID for the **Multi Context Screen** using the screen dropdown list. If continuing on after creating a new Multi Context screen, Multi Context Screen Properties should already be displayed.
2. Enable **Display Suppression** if users should have the option to suppress dimension-dependent references. When enabled, a Suppression header (for displaying the suppression status) is added to the

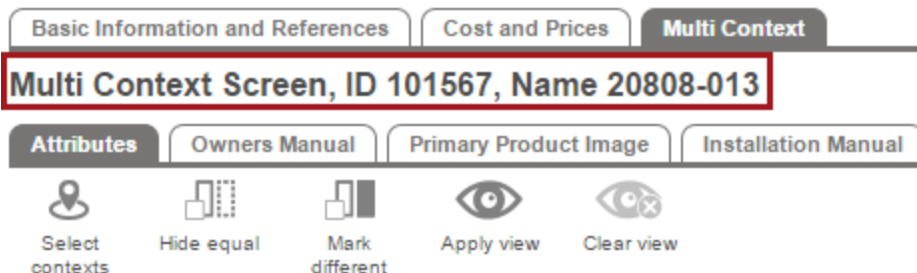
tables within the reference type tabs together with the actions for suppressing and removing a suppression of a reference.

3. Click **Add** under the **Displayed Attributes** value field. Select attributes or attribute groups from the Select Node(s) dialog. These will display in columns on the Attributes tab. Click **OK** when done. In addition to the selected attributes, ID and Name display as columns within the grid.
4. Click **Add** under the **Displayed References Types** value field. Select reference types from the Select Node(s) dialog. Each reference type displays as its own tab on the Multi Context screen. Click **OK** when done. In addition to the metadata attributes valid for each reference type displaying in the grid, Title also displays as a column and displays the referenced object name.
5. **Enable User Configurable Views** gives end users an option to create and save their own customized views by adding and removing attribute columns within the table on the Attributes tab. This parameter is enabled by default. Click the checkbox to disable and users will no longer see the Apply view / Clear view icons.
6. Adding a descriptive **Title** is optional. Static text can be entered and/or placeholders ({ID}, {NAME}) can be used for including the ID and Name of the selected object. If text is entered, the title will be displayed in the upper left corner of the screen.

As an example, here is the text / placeholders entered as part of the configuration:



Here is the resulting title:



7. Click **Save** in the designer window. Close the window or complete the next step before existing design mode.
8. Determine how the user will access the Multi Context Screen. It can either be mapped using Main Properties or added to a sub screen tab page on a Node Details Screen. For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about sub screen tab pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

Here is an example of a Multi Context Screen configured to display as a sub screen tab page on a Node Details screen.

Item

Products > Automotive > Parts & Accessories > Tire Care > Tire Care Items > 555-22346_US

Basic Information and references

Attribute Link Editor

Referenced By

Revisions

Multi Context

Attributes

Owners Manual

Primary Product Image

Installation Manual

Accessory Optional

Select contexts

Hide equal

Mark different

Apply view

Clear view

	ID	Name	Brand Name	List Price	Description, Web
English US	6806	555-22346_US	Super Value	205 \$	Air Compressor
French FR	6806	555-22346_FR	Super Value	187 €	Compresseur d'air analogique
Germany German	6806	555-22346_DE	Super Value	187 €	Luftkompressor

The parameters are set as follows:

Properties

Configuration | **Web UI style**

Multi Context Screen ▼ Save Close New... Delete Rename Save as...

Multi Context Screen Properties

Component Description The Multi Context screen provides the option of displaying context dependent data for a selected object across multiple contexts simultaneously in one dedicated view.

Display Suppression ☒

Displayed Attributes

BrandName
Price
ListPrice
DescriptionWeb

Add... Remove Up Down

Displayed References Types

OwnersManual
PrimaryProductImage
InstallationManual
AccessoryOptional

Add... Remove Up Down

Enable User Configurable Views ☒

Title Multi Context Screen

In this example, the attribute 'Price' is not valid for the object type and therefore does not display in the table.

As with any screen, the Multi Context screen must be mapped appropriately in Main Properties > Mappings for end users to be able to access it. As an alternative to mapping, the Multi Revision screen can be added as a Sub Screen Tab Page on a Node Details screen (as shown in the examples within this topic).

For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about sub screen tab pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

Using a Multi Context Screen

There are a number of reasons that working with data in different contexts is a fundamental part of most business models, such as doing business across international markets. Certain attributes (e.g., price) may be different depending on the context and references also may differ per country / language.

Instead of users manually switching Web UI to different contexts when editing attributes, the Multi Context screen displays attributes in multiple contexts all on the same screen. The screen is designed to also display references for an object, organized by reference type. Users can also edit reference attributes, add / remove references, and suppress / remove suppression on references (if enabled).

Attributes

The attributes displayed and the actions available on the Attributes tab may be different than outlined below depending on how the administrator configured the Multi Context Screen Properties. If disabled by an admin user, end users will not have configurable view options (Apply view / Clear view).

Item

[Products](#) > [Automotive](#) > [Parts & Accessories](#) > [Tire Care](#) > [Tire Care Items](#) > 555-22346_US

Basic Information and references

Attribute Link Editor

Referenced By

Revisions

Multi Context

Attributes

Owners Manual

Primary Product Image

Installation Manual

Accessory Optional

Select contexts

Hide equal

Mark different

Apply view

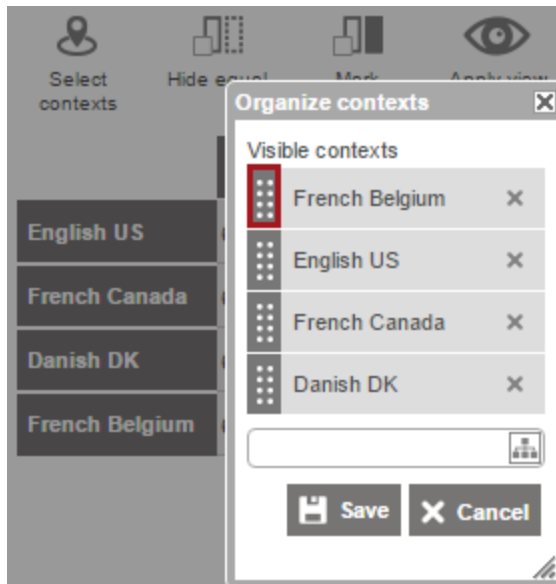
Clear view

	ID	Name	Brand Name	List Price	Description, Web
English US	6806	555-22346_US	Super Value	205 \$	Air Compressor
French FR	6806	555-22346_FR	Super Value	187 €	Compresseur d'air analogique
Germany German	6806	555-22346_DE	Super Value	187 €	Luftkompressor

Using the actions or clicking within the cells of the table, users can:

- **Select Contexts** - Select the contexts to display and determine the display order (via the drag handle for each context); selections apply to all tabs.

The first time a user enters a Multi Context screen only the current context is displayed. The user then selects the desired contexts to display for the attributes / reference types on the screen. On subsequent visits, Web UI displays the user's last applied view within Multi Context..



- **Edit attributes** - Editing is available in unshaded cells in the table on each tab. After making edits, users need to click the Save icon to the right of the table. The reset button allows users to discard any changes they have made. While users must save changes—or lose edits—before moving to another tab / screen outside of Multi Context, users can navigate between the Attributes tab and the Reference Type tabs without losing the edits. Users need to click save before navigating outside of the Multi Context screen to retain edits.

All editable attributes values for the selected object can be edited regardless of the settings for Dimension Dependencies. Values for attributes not configured to be dimension dependent will be updated across all contexts upon save, similar to other screens such as Multi Language. Copying and pasting can be done into a single cell or in multiple cells if the number and order of cells copied from matches the number of cells pasted into.

Note that on attributes not dimension dependent, if the user pastes three new values in three different contexts (a cell per context) for an attribute that is not dimension dependent, it is the value of the last cell that was be paste in with populate all contexts upon save. For example, three cells with the values 98, 99, 100 are copied from Excel and pasted into three cells in the Multi Context grid, then the value 100 is the one that populates all three cells upon save. Similarly, if a user enters three values manually for three different contexts, the third value will be the one that populates all the contexts when saved.

- Compare contexts using the **Hide equal / Mark different** actions - Click these actions to compare the attributes. Aspects (ID, Name) are not used for the comparison.
- Apply and maintain user views - Clicking **Apply view** allows users to create and save their own views and work with only the columns that they need. Chose from a saved view or create a new one. For more details about the functionality, see the **User Configurable Views** topic.
- Clear an applied view - Clear the current view to return to the default configuration by clicking the **Clear view** icon.

Reference Types

Reference types that populate the individual tabs are determined by the administrator configuring the Multi Context Screen Properties. Users only have access to the reference suppression actions (Suppress Reference / Remove Suppression), if enabled by the admin user. Each reference type tab displays the same action toolbar.

Attributes Owners Manual Primary Product Image Installation Manual				
				
Select all	Select contexts	Add Reference	Remove Reference	Suppress Reference
				
				Remove Suppression
	Title	Display Name	Suppression	
☐ English US	Manual ES		Visible	
☐ English US	Manual DE		Suppressed	
☐ English US	Manual FR		Suppressed	
☐ English US	Manual EN		Suppressed	
☐ French FR	Manual FR		Visible	
☐ French FR	Manual EN		Suppressed	
☐ French FR	Manual ES		Suppressed	
☐ French FR	Manual DE		Suppressed	
☐ Germany German	Manual DE		Visible	
☐ Germany German	Manual FR		Suppressed	
☐ Germany German	Manual EN		Suppressed	
☐ Germany German	Manual ES		Suppressed	

Using the actions or clicking within the cells of the table, users can:

- **Select Contexts** - If the contexts were set up on the Attributes tab, those settings apply to all tabs. Editing contexts on a reference type tab applies any changes all Multi Context screen tabs.
- **Edit attributes** - The functionality on the reference type tab matches the functionality on the Attributes tab, as described in the previous section. Again, click the Save icon after making any edits.
- **Suppress and unsuppress references** - If suppression functionality is enabled, then users will have **Suppress Reference** and **Remove Suppression** icons in the action toolbar. Also, the table on the tab will include a **Suppression** column.

To suppress or unsuppress references individually, select a row by clicking the checkbox shown to the left of the context name. To select multiple rows, either click on additional rows or use the **Select all** action. As soon as a row selection is made, the Select all icon switches to a Clear all icon. Use this to clear all selections or just click a checkbox again to deselect a particular row.

When a reference is suppressed, the word 'Suppressed' displays in the Suppression column. The word 'Visible' displays when references are not suppressed. If a reference cannot be suppressed, the applicable Suppression cell is grayed out with the words 'Cannot be suppressed' or 'Inherited' displayed.

'Cannot be suppressed' means that the reference type is not dimension dependent.

	Title	Suppression
☐ English US	HYD543	Cannot be suppressed

'Inherited' means that the reference is inherited from a parent object; therefore, it is not suppressible.

	Title	Suppression
☐ Germany German	RP4100	Inherited

A notification regarding the suppression status will display on the screen. The message displayed to users upon removing a suppression confirms that 'Suppression was removed' and displays similarly to the suppression confirmation shown below.

Info
Manual EN suppressed in Germany German context

Item
[Products](#) > [Automotive](#) > [Parts & Accessories](#) > [Tire Care](#) > [Tire Care items](#) > 555-22346_US

Basic Information and references
Multi Context
Attribute Link Editor
Referenced By
Revisions
Packaging Hierarchy

Multi Context Screen, ID 6806, Name 555-22346_US

Attributes
Owners Manual
Primary Product Image
Installation Manual
Accessory Optional
Affiliate Of

Select all

Select contexts

Add Reference

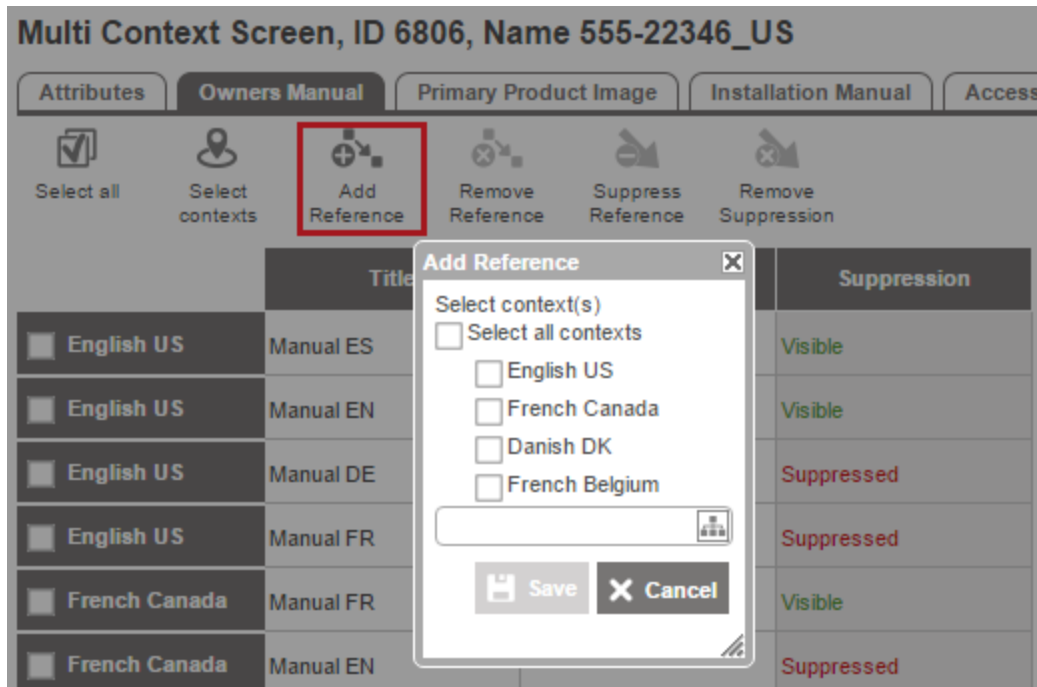
Remove Reference

Suppress Reference

Remove Suppression

	Title	Display Name	Suppression
☐ English US	Manual EN		Visible
☐ English US	Manual ES		Suppressed
☐ English US	Manual FR		Suppressed
☐ English US	Manual DE		Suppressed

- Add a reference - Click the **Add Reference** action and then make a context selection within the 'Add Reference' dialog. Click the Node Picker icon to select a reference, and then click Save.



- Remove a reference - Make a row selection and then click the **Remove Reference** action icon. Confirm you want to remove the reference when the 'Remove References' dialog appears. A message displays at the top of the screen confirming the successful removal of the reference.

Multi Language Screen

The Multi Language Screen is a Web UI screen type designed to display attribute values for more than one language dimension. Users can easily edit attribute values across different language dimensions using the Multi Language Editor. Functionality is similar to workbench, where users can switch to translation mode that allows them to view multiple language dimensions at the same time.

This topic addresses:

- Using a Multi Language Screen
- Configuring a Multi Language Screen

Using a Multi Language Screen

Using a Multi Language Screen allows users to more easily edit attribute values across different languages by displaying each language and the configured attribute values within one table.

There are a variety of ways to configure the Multi Language Screen, for this example the Multi Language Screen is setup to display as a sub-screen tab page on a Node Details screen when a user navigates to an object. The default languages configured (by the admin) to display are English and French, but configuration allows a user to choose other languages to display.

- Navigate to the object (a Sales Item object is used in the examples throughout this topic) and click the **Multi Language Screen** tab.

Because the Property Direction parameter for the Multi Language Editor has been set to vertical instead of horizontal (*default*), the English and French language dimensions display as column headers, and the configured attributes display as rows. In this scenario, to view the language dimensions as rows instead of columns, click the flip table  icon.

Node Details

English US
Main

Basic Overview
Multi Language Screen

ID 101567
Name 20808-013
Select languages

	English	French
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Coton, non structurées, doux Couronne, faible ajustement, 6-revêtir le capuchon, faire une couture panneau avant
Description, Table	100% Cotton	
Description, Web	100% Cotton	100% Coton
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	Bandeau intégré évacue la transpiration pour vous garder frais et sec
Feature Bullet 2	Stretch construction provides a comfortable fit	Ajustement extensible offre un ajustement confortable
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	

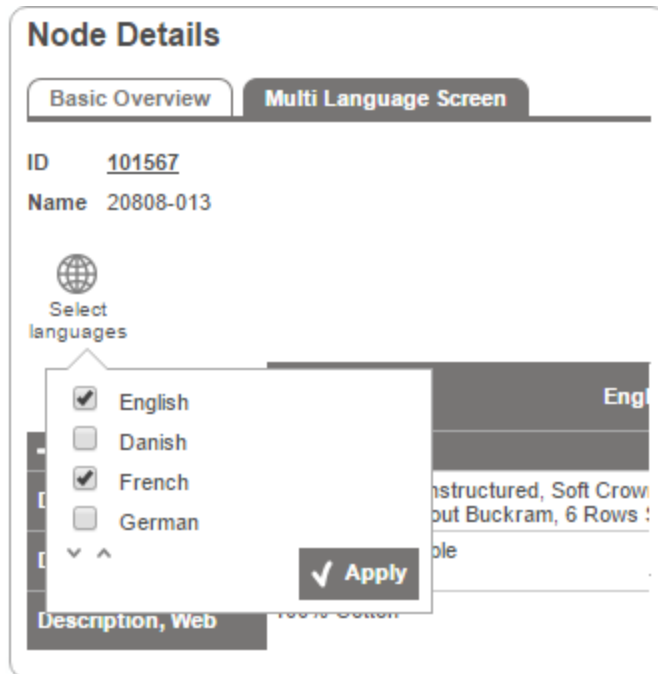
Selecting Languages

A user can select specific language dimensions to display. The language selection lists varies based upon configuration.

- Click the **Select languages** button  and a dialog will list the language dimensions available for a

Select
languages

user to enable or disable. In this example, when the user clicks on the **Select languages** button, the option to enable or disable English, Danish, French, and German have been configured to display.



- Disable French, enable German, and click **Apply** so the English and German language columns will display.

Node Details
English US • Main

Basic Overview
Multi Language Screen

ID 101567
Name 20808-013
Select languages

	English	German
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Baumwolle, Unstrukturierte, Soft- Krone, niedrige fit, 6 die Füllung, Seamed Frontplatte ohne Buckram, 6 die Reihe
Description, Table	100% Cotton	
Description, Web	100% Cotton	
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	genäht Schweißleder abführt Schweiß Sie kühl und trocken zu halten
Feature Bullet 2	Stretch construction provides a comfortable fit	strecken Konstruktion sorgt für eine bequeme Passform
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	Hut , Königsblau , eine Größe, Baumwolle

The next time a user navigates to the Multi Language Screen, the screen default language dimensions (English and French) will display. If saving local settings is enabled in the properties file, then the Multi Language Screen will display with the setting changes made by the user.

Editing Attribute Values

A user can edit configured attribute values by double clicking within any table cell to edit the text, if language dimension dependencies are enabled. The cell being edited will appear with a dotted line border.

In this case, the 'Description, Web' attribute value for the German language dimension needs to display '100% Baumwolle.'

Node Details
English US • Main

Basic Overview
Multi Language Screen

ID 101567
Name 20808-013
Select languages

	English	German
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Baumwolle, Unstrukturierte, Soft- Krone, niedrige fit, 6 die Füllung, Seamed Frontplatte ohne Buckram, 6 die Reihe nähen auf visier, passende
Description, Table	100% Cotton	
Description, Web	100% Cotton	100% Baumwolle
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	genäht Schweißleder abführt Schweiß Sie kühl und trocken zu halten
Feature Bullet 2	Stretch construction provides a comfortable fit	strecken Konstruktion sorgt für eine bequeme Passform
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	Hut , Königsblau , eine Größe, Baumwolle

While the cursor is in the edited cell, the dotted line border remains. However, the Multi Language Screen configuration determines how the changes are saved. If the configuration uses immediate save, then the changes will be saved after the cursor leaves the edited cell. If immediate save is not enabled, then after the cursor leaves the edited cell, the edited cell will display shaded and the save icon will activate. In this case, the changes are not saved until the user selects the save icon.

Node Details
English US • Main

Basic Overview
Multi Language Screen

ID 101567
Name 20808-013
Select languages

	English	German
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Baumwolle, Unstrukturierte, Soft- Krone, niedrige fit, 6 die Füllung, Seamed Frontplatte ohne Buckram, 6 die Reihe nähen auf visier, passende
Description, Table	100% Cotton	
Description, Web	100% Cotton	100% Baumwolle
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	genäht Schweißleder abführt Schweiß Sie kühl und trocken zu halten
Feature Bullet 2	Stretch construction provides a comfortable fit	strecken Konstruktion sorgt für eine bequeme Passform
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	Hut , Königsblau , eine Größe, Baumwolle

Attribute values that do not have language dimension dependencies enabled will display with a lightly shaded background and are not editable. In the example below, the 'Feature Bullet 6' attribute is not configured to allow language dimension dependencies.

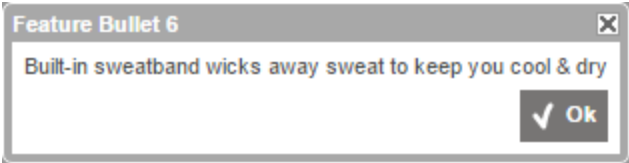
Node Details
English US • Main

Basic Overview
Multi Language Screen

ID 101567
Name 20808-013
Select languages

	English	French
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Coton, non structurées, doux Couronne, faible ajustement, 6-revêtir le capuchon, faire une couture panneau avant
Description, Table	100% Cotton	
Description, Web	100% Cotton	100% Coton
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	Bandeau intégré évacue la transpiration pour vous garder frais et sec
Feature Bullet 2	Stretch construction provides a comfortable fit	Ajustement extensible offre un ajustement confortable
Feature Bullet 6	Built-in sweatband wicks away sweat to keep you cool & dry	Built-in sweatband wicks away sweat to keep you cool & dry
Footnote		
Product Group Description		
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	

If a user double clicks on one of these attribute values, then a dialog will display with the attribute and its value.



Depending upon configuration, attribute values without product-type validity will also display with a lightly shaded background and are not editable. For this example the 'Product Group Description' attribute is not valid for the product type, and the attribute values are lightly shaded. If the Multi Language Editor has been configured to show only valid attributes, then the values without product-type validity will not display.

Node Details

English USMain

Basic OverviewMulti Language Screen

ID101567
Name20808-013

Select languages

	English	French
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Coton, non structurées, doux Couronne, faible ajustement, 6-revêtir le capuchon, faire une couture panneau avant
Description, Table	100% Cotton	
Description, Web	100% Cotton	100% Coton
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	Bandeau intégré évacue la transpiration pour vous garder frais et sec
Feature Bullet 2	Stretch construction provides a comfortable fit	Ajustement extensible offre un ajustement confortable
Feature Bullet 6	Built-in sweatband wicks away sweat to keep you cool & dry	Built-in sweatband wicks away sweat to keep you cool & dry
Footnote		
Product Group Description		
Sales Item Short Description	Cap, Royal Blue, One Size, Cotton	

Information regarding configuration can be found in the **Configuring a Multi Language Screen** topic.

Configuring a Multi Language Screen

Any number of Multi Language Screens can be added to a Web UI. Once added, as with any screen, an admin user must configure how users access a Multi Language Screen. Other configuration options include configuring a default layout, language dimensions available to users, what headers can users view and edit, and how edits are saved.

This topic addresses design Prerequisites, Creating a New Multi Language Screen, and Configuring:

- Access to a Multi Language Screen
- Multi Language Screen Properties
- Multi Language Editor Properties
- Headers for the Multi Language Editor
- Specific Language Dimensions

Prerequisites

It is expected that anyone configuring the Multi Language Screen component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, users must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Also, for configuration of the Multi Language Screen, it is expected to be familiar with the **Dimension Dependent Data** section of the **Contexts** documentation, and know how to use attribute values / attribute value groups, which is explained in the **Attribute Value Components** documentation, and the **Attribute Value Group Components** documentation.

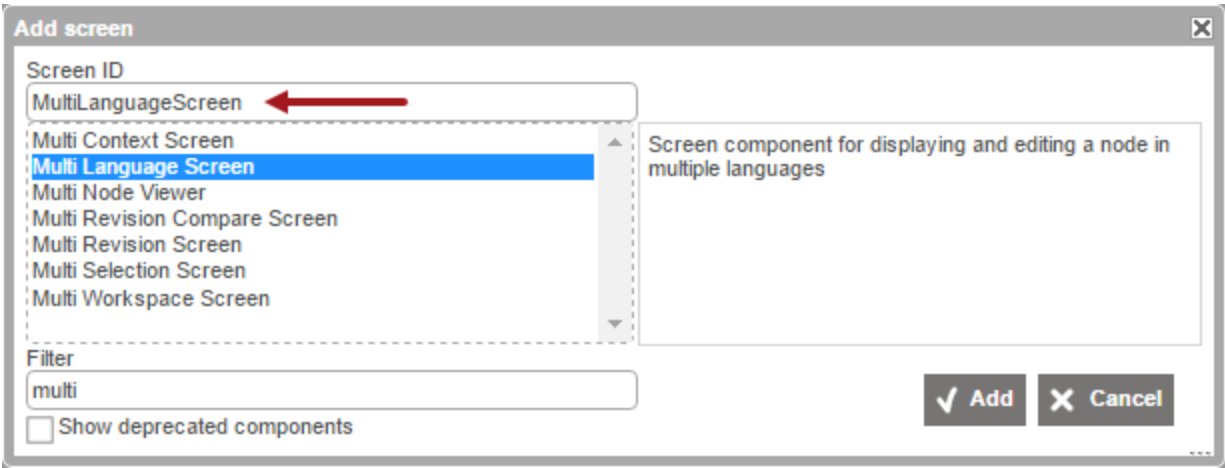
Creating a New Multi Language Screen

Steps for adding a new Multi Language Screen are below. Additional details for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic.

1. With the Designer window open, click the **New** button to create a new screen.



2. Choose **Multi Language Screen** from the screen list.
3. Type in a descriptive Screen ID.
4. Click **Add**.



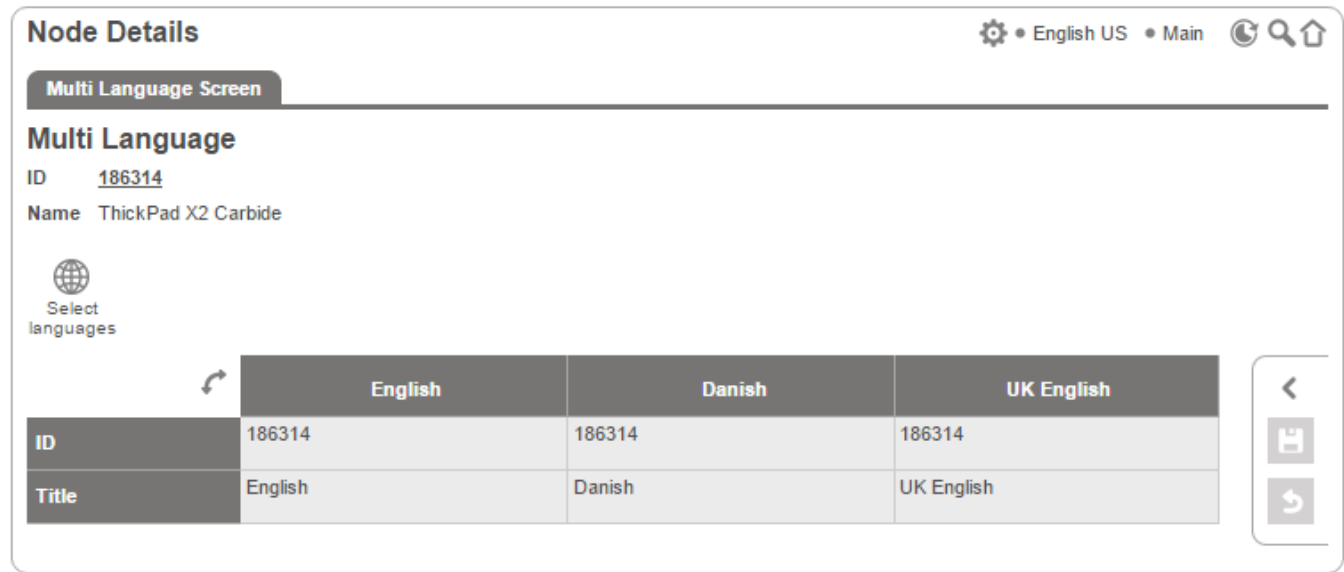
At this point, either close the designer and configure the screen at a later time, or continue on with the steps in the next section.

Configuring Access to a Multi Language Screen

An admin user must configure how a user will access a Multi Language Screen. The Multi Language Screen can be either mapped using Main Properties or added to a Sub Screen Tab Page on a Node Details Screen.

For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about Sub Screen Tab Pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

The example below shows the Multi Language Screen displayed as a sub screen tab page on a Node Details screen and is displayed when an object is selected.



Configuring Multi Language Screen Properties

Steps for configuring the Multi Language Screen Properties are below.

The screenshot shows the 'Properties' window for the 'MultiLanguageScreen' component. The 'Configuration' tab is active. At the top, there's a dropdown menu showing 'MultiLanguageScreen' and buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. Below this is the title 'Multi Language Screen Properties'. A 'Component Description' section states: 'Screen component for displaying and editing a node in multiple languages'. The main configuration area has a green background and contains a 'Language Dimension Points' section with a large text area and buttons 'Add...', 'Edit...', 'Remove', 'Up', and 'Down'. Below this is a 'Save Local Settings' checkbox and a 'Title' text field. At the bottom, the 'Child Components' section shows 'Editor Table*' with a dropdown menu set to 'Multi Language Editor' and a 'go to component' link.

1. With the designer window open, select the screen ID for the **Multi Language Screen** using the screen dropdown list. (If continuing on after creating a new Multi Language Screen, Multi Language Screen Properties should already be displayed.)
2. Optionally, add Language Dimension Points to restrict the languages available to the user. When left blank, all languages available within STEP Workbench are displayed to the Web UI user. Steps for adding Language Dimension Points are found in the **Adding Language Dimension Points** section in the **Configuring a Multi Language Screen** documentation.
3. Determine if you want to enable the Save Local Settings parameter. If enabled, when a user makes changes to the languages shown on the screen, those changes are saved and the screen will display with the users preferred settings instead of the default. If disabled, the default languages will display each time a user accesses the Multi Language screen.
4. Type in a title for the screen, if desired, and the title will display on the screen in the top left corner. When blank, no title appears.

Node Details English US Main 🔍 🏠

Multi Language Screen

Multi Language ←

ID 101567

Name 20808-013

Select languages

	English	Danish	UK English
Sales Item Marketing Descriptions			
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel	100% Bomuld, Ustruktureret, Blød Krone, lav pasform, 6-beklædningsdel, syede foran uden	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel

- The Child Components > Editor Table parameter is pre-populated with the Multi Language Editor value dropdown, since it is mandatory to configure the editor before the Multi Language Screen will render correctly.

Properties

Configuration **Web UI style**

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

Multi Language Screen Properties

Child Components

Editor Table* Multi Language Editor go to component ↓

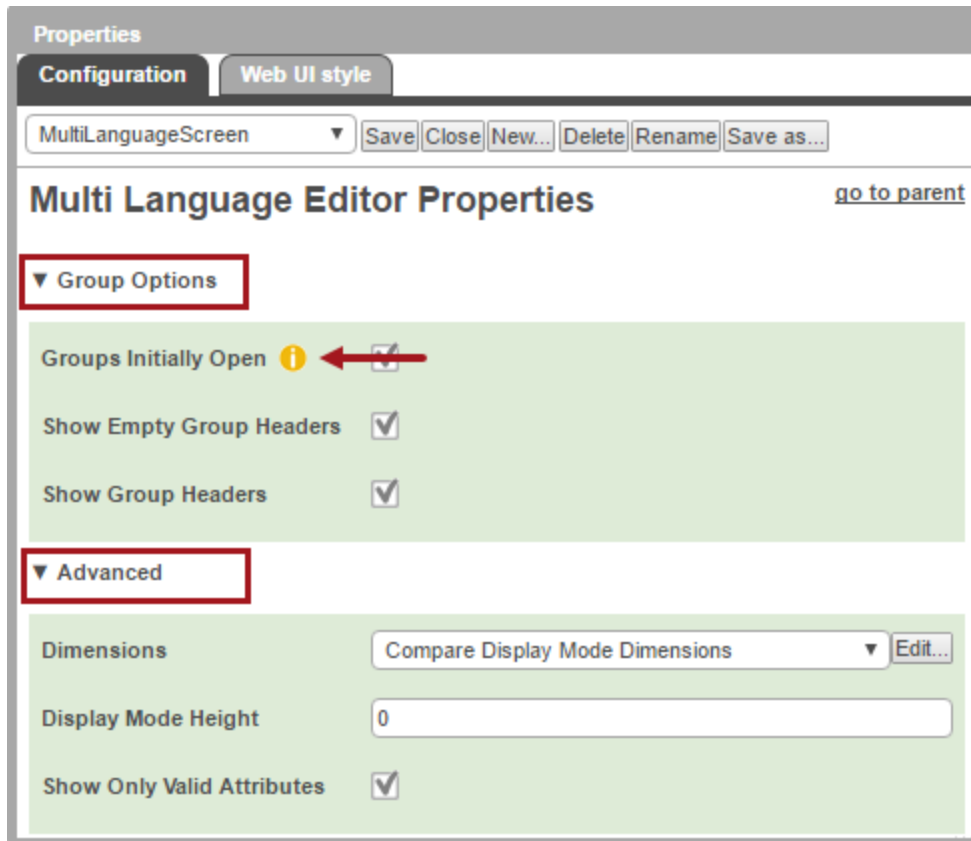
Configuring Multi Language Editor Properties

Steps for configuring the **Multi Language Editor Properties** are below.

- Go to the Multi Language Screen Properties > Child Components > Editor Table > Multi Language Editor > Click **go to component**

The Multi Language Editor Properties will display.

2. Adding components to the **Headers** parameter determines the information that will display on the Multi Language Screen. If left blank then the ID and Title (Language) headers will display. Add, edit, remove, and reorganize table headers, as desired, in the **Headers** value field. Relevant headers to consider including, as needed, are: ID Header, Name Header, Attribute Value Header and Attribute Value Group Header. Steps for adding Headers can be found in the **Adding Headers** section below.
3. Determine the direction of the table using the **Property Direction** parameter. If no selection is made, then HORIZONTAL is the default selection and displays after the properties are saved the first time.
 - **VERTICAL** will display the added Headers as rows.
 - **HORIZONTAL** will display the added headers as columns.
4. Enable **Use Immediate Save** if edits made by a user should be auto-saved as soon as the cursor leaves the cell. If the user should be required to manually Click the save button after editing, then leave this parameter disabled.
5. Display additional optional parameter settings by clicking the **Group Options** heading and / or the **Advanced** heading. Make selections as desired. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.



Properties

Configuration Web UI style

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

Multi Language Editor Properties [go to parent](#)

▼ Group Options

Groups Initially Open i ☒

Show Empty Group Headers ☒

Show Group Headers ☒

▼ Advanced

Dimensions Compare Display Mode Dimensions

Display Mode Height 0

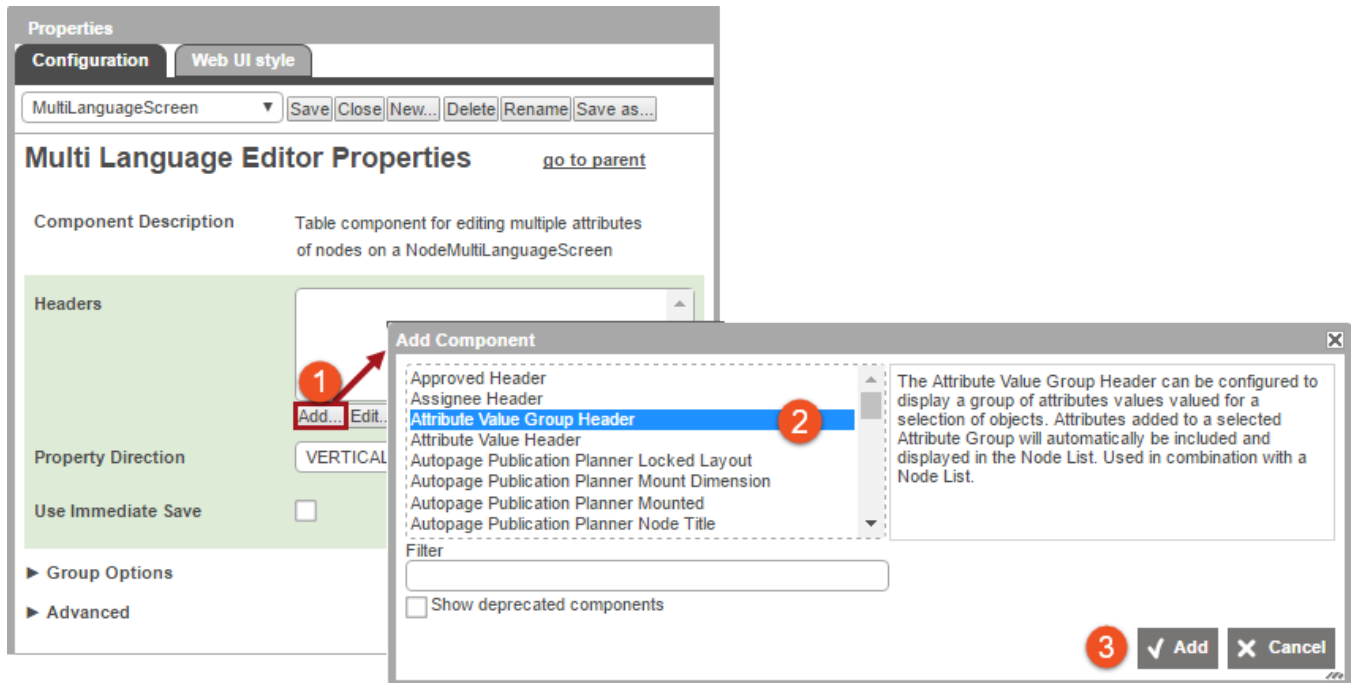
Show Only Valid Attributes ☒

6. Click **Save**.

Note: The Advanced > Show Details parameter is not applicable to the Multi Language Screen and enabling / disabling has no impact.

Configuring Headers for the Multi Language Editor

To display specific attribute values within the Multi language Screen, an admin user must add and configure Headers within the Multi Language Editor Properties. If left blank then ID and Title (Language) headers will display.

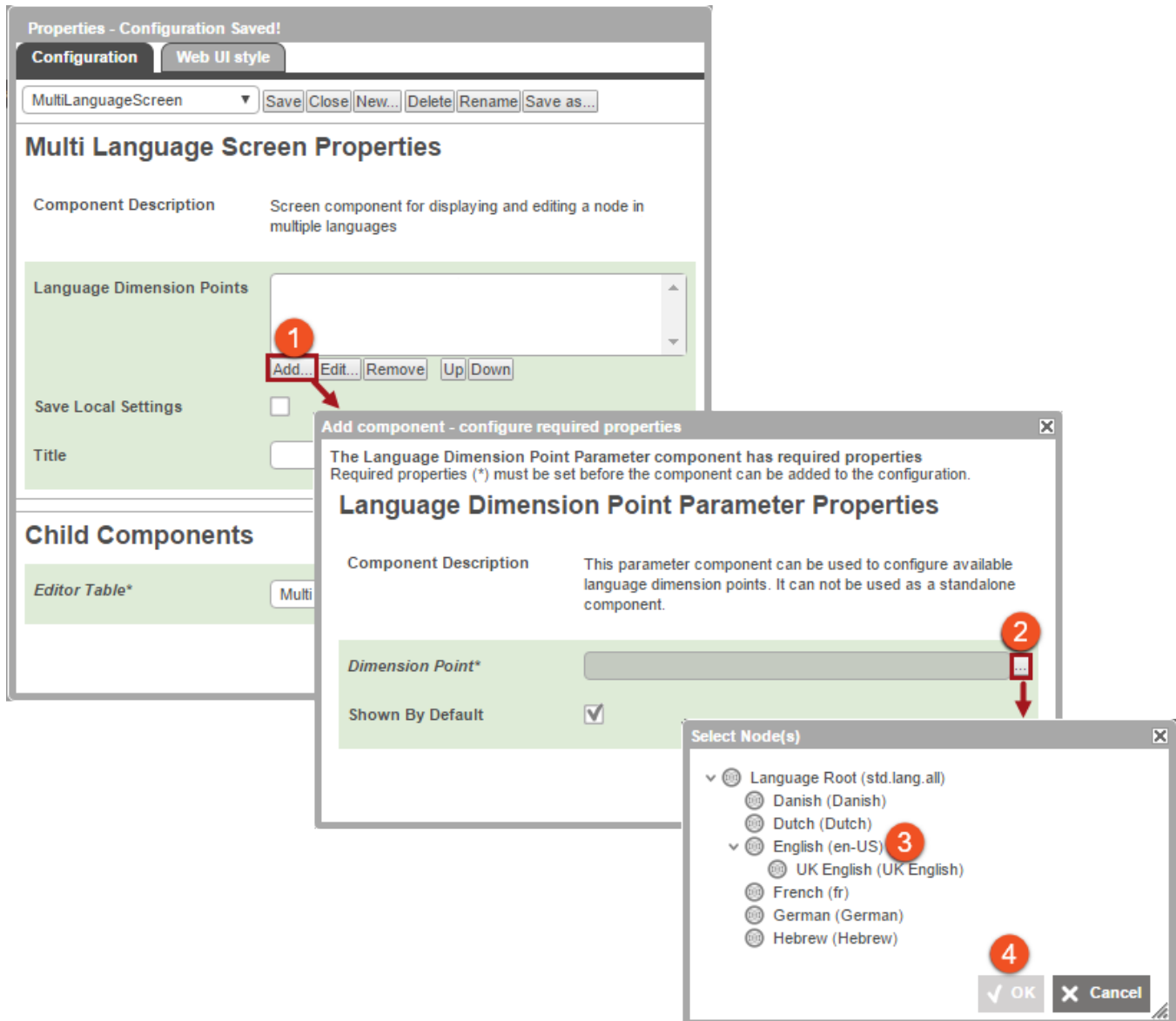


1. Go to the Multi Language Editor Properties > Headers > Click **Add**.
2. The 'Add Component' for the Multi Language Editor Properties will display. Attribute Value Header and Attribute Value Group Header can be used to display the attribute values.
3. After the selection is made, click **Add** to close the dialog. Fill out any required properties that may display after a selection is made, clicking **Add** again to return to the Multi Language Editor Properties. Add, edit and organize any additional headers.
4. Click **Save**.
5. Click **Close**.

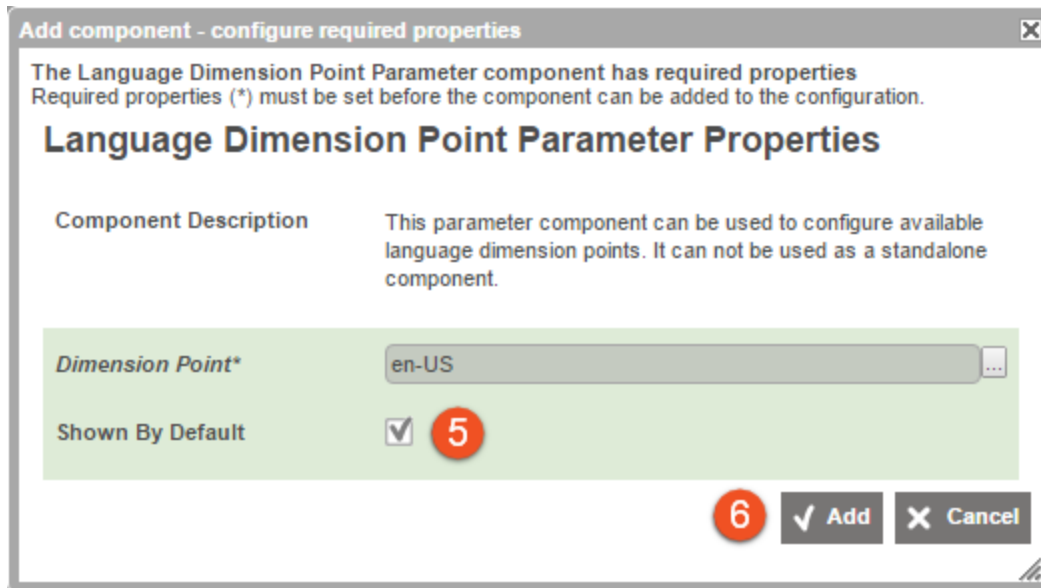
Configuring Specific Language Dimensions

If only specific languages need to display to the Web UI user, then the following steps can be used to display specific language dimension points. When left blank, users will see all languages within STEP.

1. Go to Multi Language Screen Properties > Language Dimension Points. Click **Add**.
2. The Language Dimension Point Parameter Properties dialog will display. Click the ellipsis button (...) for the Dimension Point parameter.
3. The 'Select Node(s)' dialog will display. Select one language.
4. Click **OK**.



5. You are returned to the Language Dimension Point Parameter Properties dialog. The checkbox for Shown By Default is enabled by default. Selecting this ensures the selected language dimension will display when a user navigates to the Multi Language Screen, unless Save Local Settings is enabled.
6. Click **Add**.



7. The Multi Language Screen properties will display. Add additional language dimension points by repeating the 'Adding Language Dimension Points' steps.
8. If a user will need the ability to select other language dimension points, after the selected languages display by default, repeat the steps above and disable the Shown By Default option. This will allow a user to select the language from the 'Select languages' icon, but not show those languages by default.
9. Click **Save**.

For an example regarding how to use the screen once configured, see the **Multi Language Screen** topic.

Multi Reference Editor

(Component name: Multi Reference. Available on a Tab Page, Node Editor, or as a child to a display mode.)

The **Multi Reference** Web UI component can be used to display references with multiple reference types and classification link types in the same table. It can be configured with a list of reference type and/or classification link types to narrow the references (links) that are shown in the table.

Additionally, it can be configured to display either forward references or reverse references (referenced by mode).

It is pre-configured with a Node List in Multi Edit Display Mode with the add and remove reference toolbar actions shown. It can be inserted where a container component can be inserted (e.g., as the content of a Tab Page or as content of the Split Panel or Columns components).

Properties

Configuration

Web UI style

Sales Item detail

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

Multi Reference Properties

go to parent

Component Description

The Multi Reference component can be used for displaying references to or from the selected object. When using the component with the panel types ColumnsControl, NodeEditor, or VerticalPanel it is necessary to define the height. If the component is not used with one of the aforementioned panel types height must be set to 0 or left blank.

Height

0

Reference direction

References

Reference types

PrimarySupplierItem

MultiSupplierItem

PrimaryDataSource

AlternateSupplierItem

Add... Remove Up Down

Child Components

Node List

1 Node List

go to component

Properties

Configuration

Web UI style

Sales Item detail

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

Node List Properties

2

go to parent

Component Description

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

Hide Standard Buttons

☐

ID*

cdbfc edbc aeeb

Lookup Screen Type For Navigation

☒

Page Size

25

Use Details Overlay

☐

Default Sorting Order

Ascending

Enable Default Sorting

☒

Label Texts

Selection Screens

Child Components

Display Modes

Multi Edit Display Mode

Add... Remove Up Down

Actions

Add Reference Action

Remove Reference Action

Reference Cloned Target Action

Add... Remove Up Down

Since the Multi Reference component is based on the Node List component and the Multi Edit Display Mode, sorting and filtering of the header component values are supported. This allows for multiple reference types to be shown in the same table with the column filtering capabilities. Also, the number of reference items shown in the configured table is conveniently displayed under the table allowing a user to easily see how many references there are without having to scroll through the data.

Item

English US Main English US

Basic Information and references Revisions Category Information Additional Information Packaging Hierarchy Status Date Testing Manufacturer Information References Attributes

Select all Clear filter Multi edit view List view Compare view Sequence view Gallery view Grid view Add Reference

	Acme	555-22346_US	RP4100	555-2033_M
ID	168241	8808	8947	8801
Name	Acme	555-22346_US	RP4100	555-2033_M
Object Type	Logo	Item	Product Image	Installation Manual
Reference type	Brand Name Logo	Supplier Replacement Item	Primary Product Image	Installation Manual
Thumbnail				

Multi Reference Properties

Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

Height

When using the component with the panel types Columns Control, Node Editor, or Vertical Panel, it is necessary to go into Design mode and define the **Height** parameter found on the properties screen. If the component is not used with one of these panel types, then the height must be set to 0 (zero) or left blank.

Reference Direction

With the **Reference direction** parameter is possible to choose the direction of the displayed references:

- References where the selection is the source (References)
- Reverse references where the selection is the target (Referenced by)

Reference Types

Select specific reference type nodes using the **Reference types** parameter **Add** button. Reference types can be re-ordered and removed, as needed.

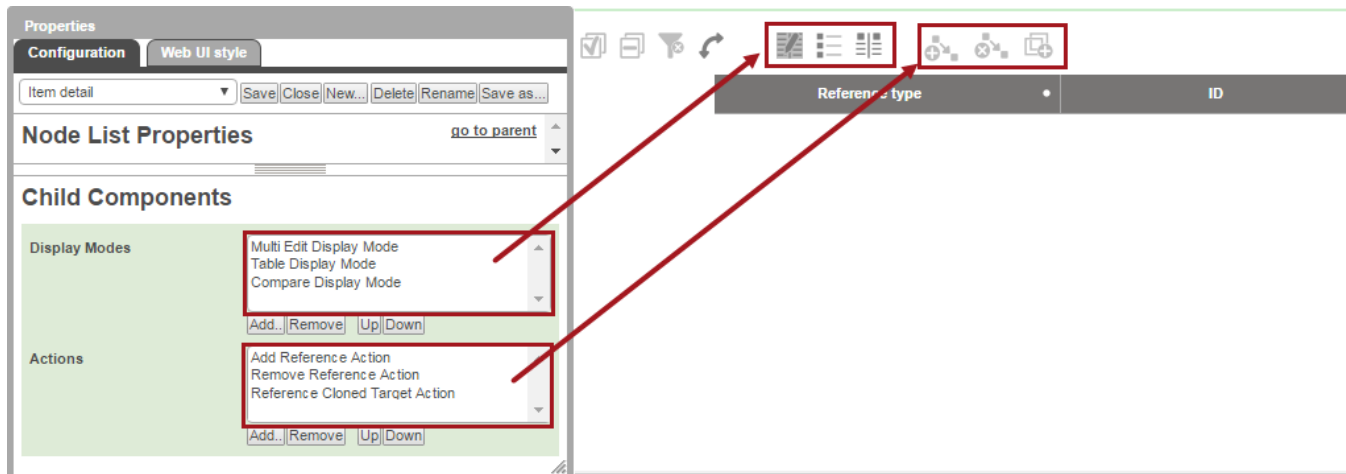
Node List

Click on 'go to component' to the right of the **Child Components > Node List** field. The **Node List Properties** screen will display.

Node List Properties

Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

In the Child Components section of the properties screen:



Display Modes

Click the **Add** button to select display modes. Each display mode has a corresponding button that displays above the Node List. Re-order the list or remove unneeded display modes.

One option is **Multi Edit Display Mode**, and it comes pre-configured on this particular Node List. As the name implies, you can edit multiple objects and multiple object attributes on the same screen and save the changes automatically (using the 'Use Immediate Save' parameter) or manually.

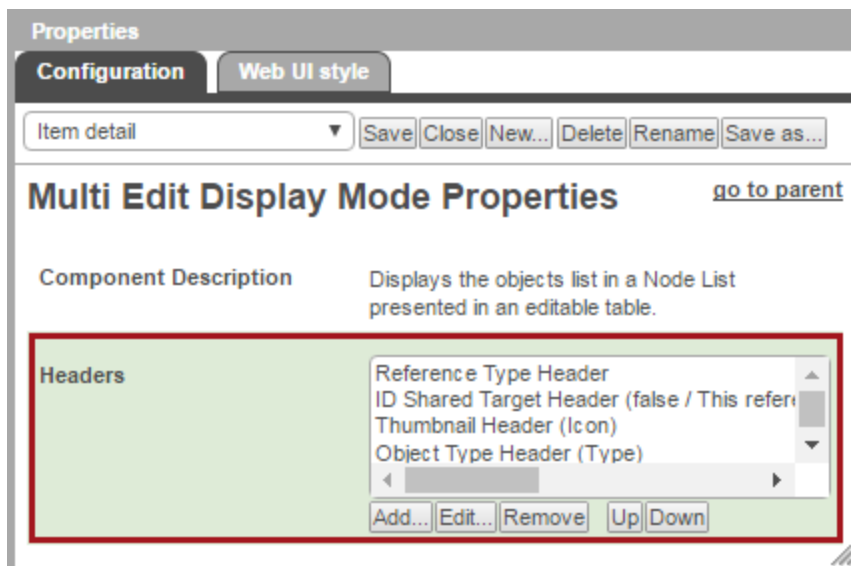


Table Headers

While configuring the headers in Display Mode properties, a user can choose to set up the table sort order based on a specific header. By editing a particular header's properties, sorting order (ascending or descending) can be designated using the drop down next to Table Sorting. Once the properties are saved, the table will re-sort itself based on the new header settings, and the Display Mode properties will be retained until configured differently.

The Table Sorting designation can only apply to one header at a time. It has to be removed from one header before set up on another. Additionally, if 'Enable Default Sorting' is enabled / selected in the Node List properties, selecting a header to sort by overwrites this setting.

Below are some header examples. The bullet under each header explains what is displayed in that header column. Additional headers may be used (e.g., Name, ID Shared Target, Attribute Value, Attribute Value Group). When adding headers, you can read a description of each before adding them to the Headers field.

Note: It is suggested that the **ID Shared Target Header** be used in place of the ID Header to prevent unintended data changes to shared objects. When used, a visual indicator (⚠) appears in the ID cells for objects that are referenced by two or more other objects.

Reference Metadata Value Header

- The value of a metadata attribute on the reference / link

Reference Type Header

- The title of the reference type or the classification link type for the reference / link in the table

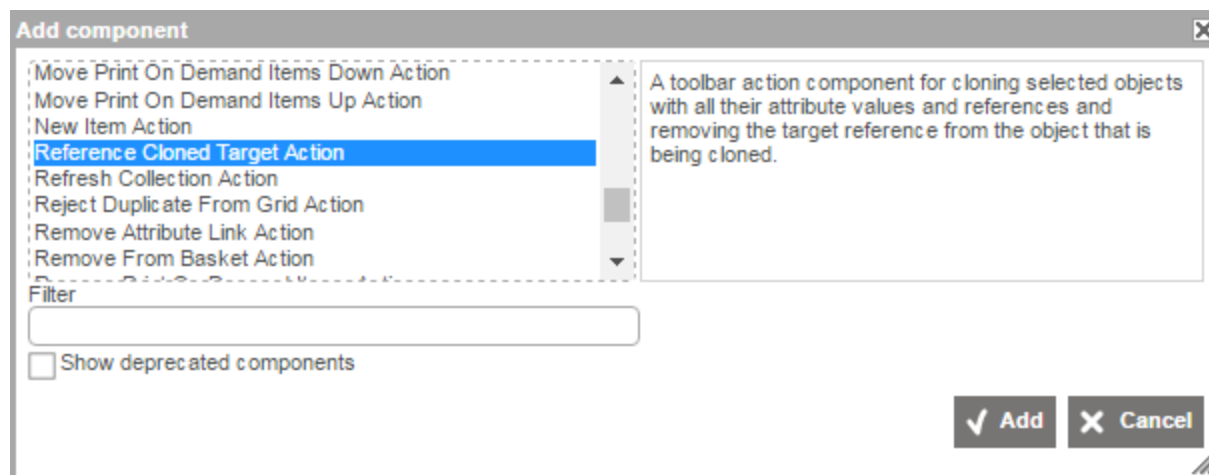
Reference Visibility Header

- The contexts in which the reference or classification link is visible

Actions

A number of action buttons can be added to a screen to be used with a Node List. These are all added and configured within the **Actions** field on the Node List Properties screen. The **Add Reference Action** and the **Remove Reference Action** come pre-configured. These actions and the Reference Cloned Target Action are described below. Other actions may be appropriate for you to use.

After you click Add, you can view action component descriptions in the 'Add component' dialog.



Add Reference Action

The **Add Reference Action** component () opens an 'Add reference' dialog with Reference type and Reference target / Reference source (depending on the reference direction) options.

When a user clicks on a node picker icon, they are presented with standard Browse and Search tabs to use when selecting or multi-selecting an existing object or objects to reference. The 'Reference target' and 'Reference source' value fields support type-ahead (by name) functionality, which allows users to easily add and remove references without having to click through various hierarchies and/or folders.

Additional functionality can be configured that allows users to create new objects using existing objects as a template or to search for existing objects in an effort to avoid duplicating data. For more details regarding how to fully configure the properties for the Add Reference Action component, see the **Add Reference Action** section of the **Web User Interfaces / Using a Web UI** documentation.

Remove Reference Action

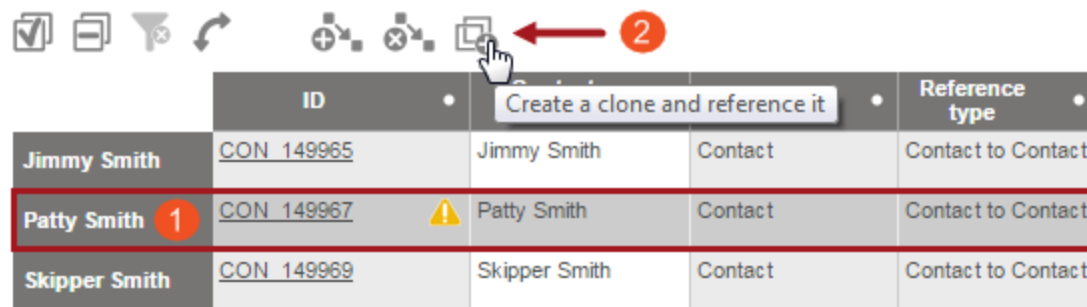
The **Remove Reference Action** () is enabled when a reference is selected in table. When clicked, it will show a dialog with a warning asking if you want to remove the references and telling you how many references are about to be removed. A success message displays upon removal.

Reference Cloned Target Action

The **Reference Cloned Target Action** () allows a user to select an existing reference target and duplicate / clone it, creating a new object that includes the original attribute values and references. This is particularly useful in making sure a user does not inadvertently edit shared data that could have implications to other objects with the same reference. When a user needs to make changes to data that is shared (e.g., the object is referenced by multiple objects), they can clone the existing object and freely edit the data on the clone, without fear of impacting the other objects with references to the original object. An example is shown below.

Note that users can only clone one object at a time, and objects being cloned must use auto-generated IDs.

Important: Asset References cannot be cloned.



	ID			Reference type
Jimmy Smith	CON 149965	Jimmy Smith	Contact	Contact to Contact
Patty Smith 1	CON 149967	Patty Smith	Contact	Contact to Contact
Skipper Smith	CON 149969	Skipper Smith	Contact	Contact to Contact

Reference cloned target

Are you sure you want to clone the target object and set the reference to the new object?

3



	ID	Contact Name	Object Type	Reference type
Jimmy Smith	CON 149965	Jimmy Smith	Contact	Contact to Contact
Patty Smith 4	CON 150883	Patty Smith	Contact	Contact to Contact
Skipper Smith	CON 149969	Skipper Smith	Contact	Contact to Contact

Considerations and Limitations

- The Multi Reference Editor is not compatible with the Target Value Header or Reference Link Metadata Header.
- The Multi Reference Editor cannot be used with the Split panel display mode.

Add Reference Action

The Add Reference Action functionality can be configured beyond the basic Browse / Search functionality described in the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

If configured to do so, the Add Reference Action dialog can also include the **Create** and **Create From Template** tabs to allow users to create new objects to reference rather than having to choose from existing objects only. Additionally, **Find Similar** functionality allows users to search for and identify similar objects on a more granular level prior to adding references and creating target objects. These tabs are all omitted by default but can be enabled within the Add References Action Properties.

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

Add Reference Action Properties

Each parameter is explained following the image below. Also, the parameters required to set up the Create, Create From Template, and Find Similar tabs are described as a whole in the applicable section. Anyone designing the Web UI can determine what features or combination of features are preferred and set them up based on the descriptive info below.

Properties (edited)

Configuration
Web UI style

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

Add Reference Action Properties [go to parent](#)

Component Description
A toolbar action component for adding references to the selected object.

Navigate To Created Object
☐

Show Create
☐

Show Create From Template
☐

Template Root

Duplicate Handler

Find Similar Search Fields

Show Find Similar Tab
☐

Temp Object Type For Find Similar

Temp Parent For Find Similar

Parent

Create From Template List
[go to component](#)

Find Similar List Dialog
[go to component](#)

The Add Reference Action component is highly configurable. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name. An expanded description of each parameter is available below.

Parameter	Description
Navigate to Created Object	The parameter that decides if the 'Go to created object' option on the Create tab is enabled by default; when enabled, the end user will be auto-navigated to the new object upon creation (using Create)
Show Create	The Create tab will be shown in the node picker dialog
Show Create From Template	The Create From Template tab will be shown in the node picker dialog
Template Root	The root node from which child objects can be used as templates (Create From Template)
Duplicate Handler	A parameter / option required when using Find Similar; works with Find Similar functionality to return potential duplicate objects based on search values and a matching algorithm
Find Similar Search Fields	The object attribute or referenced object attribute fields that end users can search upon to determine if a similar object already exists in STEP; Find Similar functionality
Show Find Similar Tab	The selection that determines if the Find Similar tab should be shown in the node picker dialog; if enabled, then Duplicate Handler, Find Similar Search Fields, Temp Object Type for Find Similar, Temp Parent for Find Similar, and the Child Component > Find Similar List Dialog also need to be configured
Temp Object Type for Find Similar	The temporary object type for objects that are stored while the Find Similar functionality is being used
Temp Parent for Find Similar	The location that temporary objects reside when searching with the Find Similar functionality
Parent	This setting allows the designer to determine a single parent under which all new objects will be created; used with Create and Create From Template
Create From Template List	The configurable results list when using the Create From Template functionality; List Dialog must be selected from the dropdown; a Dialog List Screen needs to be created, selected, and configured
Find Similar List Dialog	The configurable results list when using the Find Similar functionality; List Dialog must be selected from the dropdown; a Dialog List Screen needs to be created, selected, and configured

Create

Properties (edited)

Configuration Web UI style

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

Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Navigate To Created Object ☐

Show Create ☐

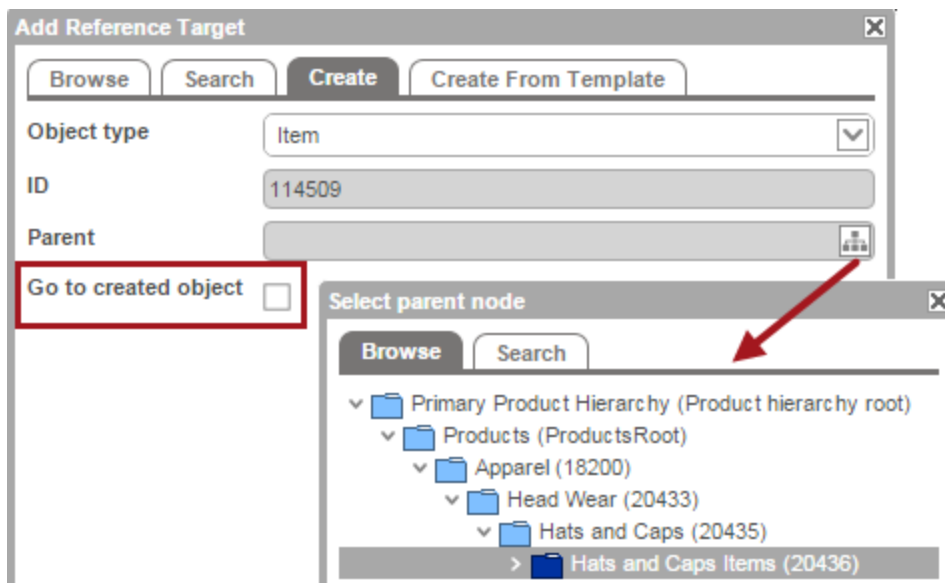
Parent <Select an option> Edit...

Follow these configuration steps to display the Create tab when adding references:

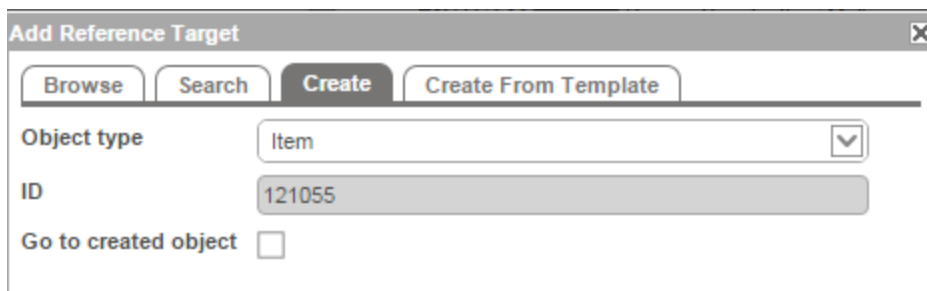
1. Enable **Navigate to Created Object** if the 'Go to created object' option on the Create tab should be enabled by default (shown as disabled in the screenshot in Step 3 below).
2. Enable the **Show Create** parameter.
3. Select a **Parent**, if desired. Choose **Configured Parent Handler** from the dropdown in the value field. In the **Configured Parent Handler Properties** that pops-up, use the ellipsis to the right of the **Parent** value field to browse or search to select a single parent under which all new objects will be created.

When the **Show Create** parameter is selected (checked), users are able to create new objects when building references.

Users must select a valid object type and parent combination, and the object type selection must align with the reference type selected.



If the **Parent** parameter is left unconfigured, end users will have the option to select any valid parent from existing objects. Choosing a **Parent** is useful if the Multi-Reference Editor will only be used to create a single object type which will reside in a flat hierarchy structure. In this case, end users are not presented with a parent selection option.



When creating new objects from the Multi-Reference Editor, the ID field is editable unless the objects being created utilize auto-generated IDs.

Create From Template

Template objects can be whatever the Web UI designer chooses for them to be. They can be 'live' objects or a set of configured objects that exist only for selection as templates. When a user selects a template object, a new object is created with the same attribute links and values as the selected template object and references it to the selected source. Users then need only to populate the subset of data that differs between the template and the new object.

When creating a new object from a template and following the dialog path of options, users are ultimately presented with a **Pick a Template** option that has three tabs: List, Browse, and Search. In addition to displaying a list of templates (similar to the Browse tab), the List tab is configurable and users can choose to include attributes within the tab view, making it easier to identify the template that best fits the new object.

Properties (edited)

Configuration Web UI style

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

Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Show Create From Template ☒

Template Root ... Clear

Parent <Select an option> Edit...

Child Components

Create From Template List <Select a child component> go to component

Follow these configuration steps to display the Create From Template tab when adding references:

1. Enable the **Show Create From Template** parameter.
2. Select a **Template Root** by clicking the ellipsis to the right of the value field. Any objects under the root are available for selection as a template for new object creation. This creates a new object with the same attribute links and values as the selected template object and references it to the selected source so that users need only to populate the subset of data that differs between the template and the new object. It is a good idea to use a specific, limited set of objects, easily identifiable, as templates for an end user to choose from.

Note: The selected template must be valid for the selected reference type, and only a single Template Root may be selected. It is therefore recommended that a separate area be created for this purpose and that all existing objects that are allowed to be used as templates be linked into that area.

3. Select a **Parent**, if desired. Choose **Configured Parent Handler** from the dropdown in the value field. In the **Configured Parent Handler Properties** that pops-up, use the ellipsis to the right of the **Parent** value field to browse or search to select a single parent under which all new objects will be created. If the **Parent** parameter is left unconfigured, end users will have the option to select any valid parent from existing objects.
4. Under **Child Components** > **Create From Template List**, select **List Dialog** from the dropdown menu.
5. When presented with the **List Dialog Properties**, click the **Add** button to the right of the **Dialog List Screen** field.

6. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
7. If a **Dialog List Screen** already exists, skip the previous two steps and simply select the screen using the dropdown.
8. Back on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Create From Template Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.

Properties (edited)

Configuration Web UI style

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

List Dialog Properties [go to parent](#)

Component Description A list of items which can be used in a dialog

Dialog List Screen* Dialog List Screen - Create from Template Add

Child Components

Buttons Create From Template Use Selected Item Action

Add.. Remove Up Down

9. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen - Create from Template.
10. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Create From Template tab for the results list. The **Help Text** is editable and will display at the top of the template results list.

Properties - Configuration Saved!

Configuration Web UI style

Dialog List Screen - Create f Save Close New... Delete Rename Save as...

Dialog List Screen Properties

Component Description Screen with a list which can be used in a popup dialog

Help Text Select the wanted choice and click OK

Child Components

Headers

Id List Header
Title List Header
Attribute List Header
Attribute List Header

Add.. Remove Up Down

11. Select the headers for the columns to be displayed to end users. If you are using an Attribute List or Attribute Group List, make sure you fill in the **Label** for the attribute to be displayed in the results list.

Properties - Configuration Saved!

Configuration Web UI style

Dialog List Screen - Create f Save Close New... Delete Rename Save as...

Attribute List Header Properties [go to parent](#)

Component Description List header for showing an attribute

Attribute* ContactName

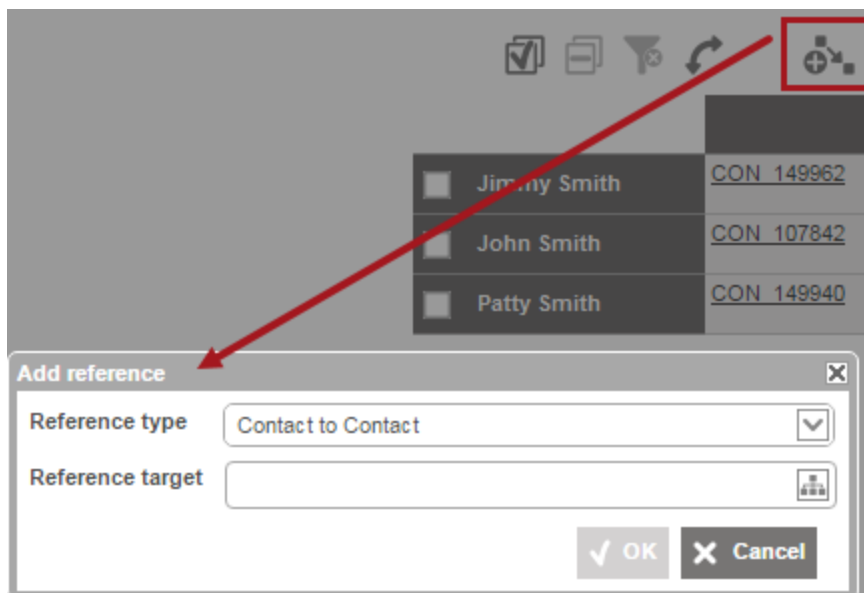
Label Name

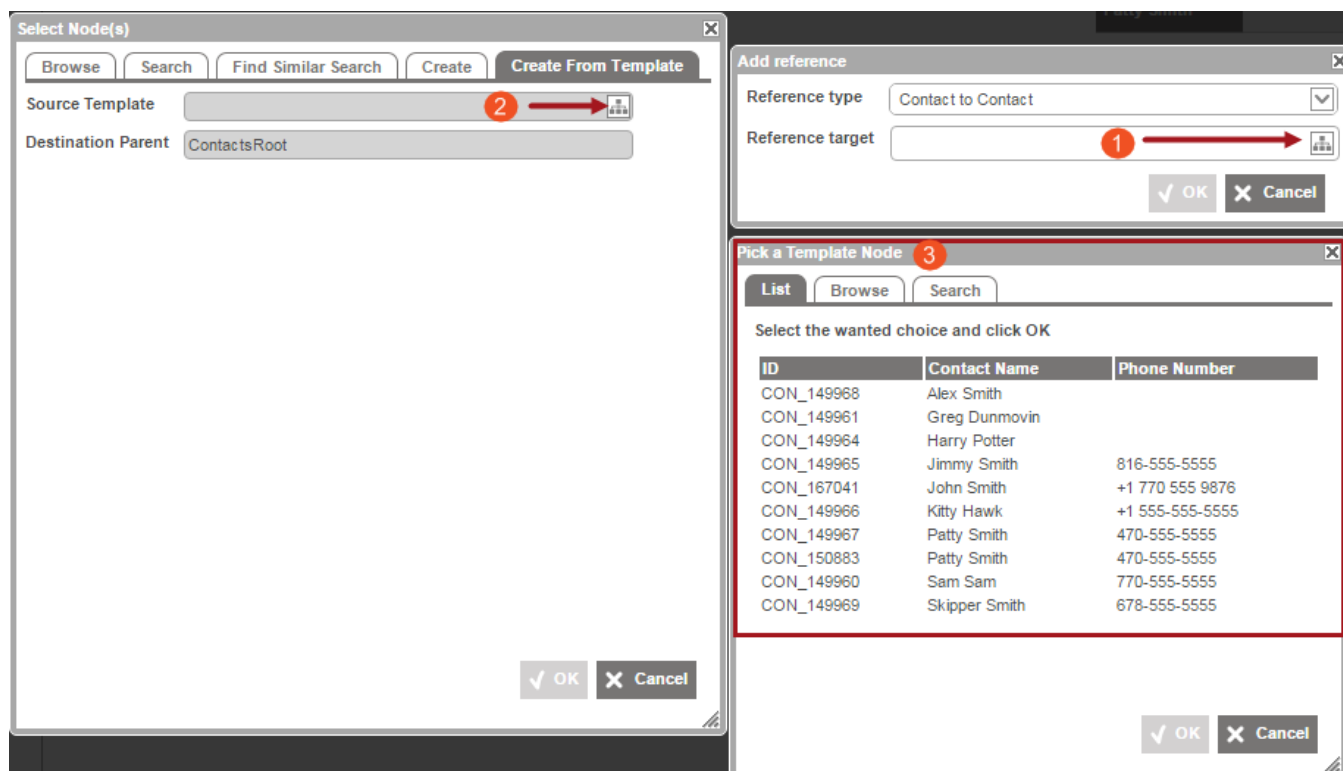
12. Click **Save** and **Close** design mode to return to normal Web UI mode.

Create From Template Example

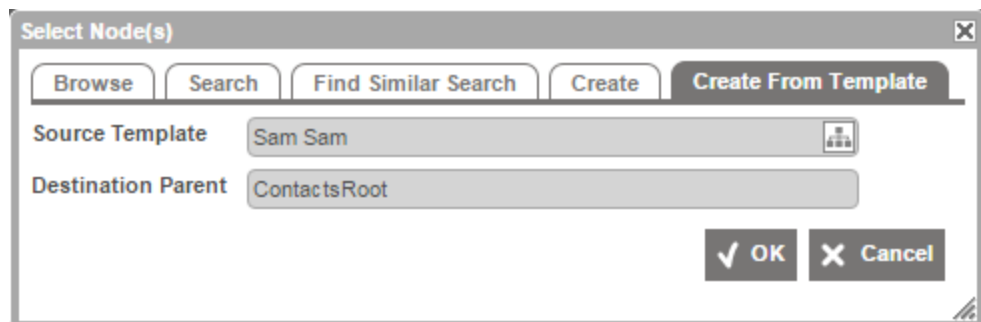
Here is an example of a configured Create From Template tab. While using a Multi-Reference Editor component, the end user clicked 'Add reference' and then clicked the node picker icon on the 'Add reference' dialog that appeared. The Create From Template tab is displayed in the 'Select Node(s)' dialog. By clicking the node picker icon for the Source Template field, the end users gets a Pick a Template Node dialog that displays the List screen based on the headers / attributes configured to display.

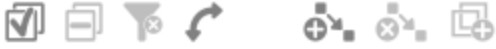
      					
		ID	Contact Name	Object Type	Reference type
☐	Jimmy Smith	<u>CON 149962</u> 	Jimmy Smith	Contact	Contact to Contact
☐	John Smith	<u>CON 107842</u> 	John Smith	Contact	Contact to Contact
☐	Patty Smith	<u>CON 149940</u> 	Patty Smith	Contact	Contact to Contact





A maximum of fifty (50) template objects are shown at one time on the results list. The end user selects a single template to use. Once a selection is made, the OK button will be available. The end users clicks OK and continues through the remaining dialog screens. The end result will be a new reference that can be edited (the ID field is editable unless the object being created utilizes an auto-generated ID).





	ID		Contact Name	Object Type	Reference type
☐ Jimmy Smith	CON 149962	⚠	Jimmy Smith	Contact	Contact to Contact
☐ John Smith	CON 107842	⚠	John Smith	Contact	Contact to Contact
☐ Patty Smith	CON 149940	⚠	Patty Smith	Contact	Contact to Contact
☐ Sam Sam	CON 168109		Sam Sam	Contact	Contact to Contact

Considerations and Limitations

- Create From Template functionality is available for Product and Entity object types only.
- Care must be taken in the configuration of the Add Reference Action component (and in particular of the Create From Template option) to ensure that end users are provided with valid selection options. The selections for object type of the template (if used), object type of the object being created, parent, and reference type must all align to yield valid results based on the data model and configurations.

Find Similar Search

To help prevent users from creating duplicate objects in the STEP system, users can now use Find Similar functionality to search for and identify similar objects prior to adding references and creating target objects within a Multi-Reference Editor. When using the Add References Action, the Find Similar functionality can be configured to display on a new Find Similar Search tab. Attribute values of both direct objects and target objects (based on a specific reference type) can be configured as searchable fields. If similar objects are found, a configurable results list will display attribute values for the direct objects. This allows users to compare the results to determine if they can use an existing object.

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

Find Similar functionality is also available using a Find Similar Action Button on an Initiate Item screen type. This functionality is explained in the **Find Similar** section of the **Web User Interfaces / Using a Web UI** documentation.

Properties (edited)

Configuration Web UI style

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

Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Duplicate Handler <Select an option> Edit...

Find Similar Search Fields

Add... Edit... Remove Up Down

Show Find Similar Tab ☐

Temp Object Type For Find Similar ... Clear

Temp Parent For Find Similar ... Clear

Child Components

Find Similar List Dialog <Select a child component> [go to component](#)

To configure the Find Similar Search tab:

1. Select **Duplicate Handler** in the dropdown for the **Duplicate Handler** parameter.
2. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis to the right of the value field and select a matching algorithm. Click **Save**.

Edit component

Duplicate Handler Properties

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

Detail Screen*

homepage

▼ Add

Editor Screen*

homepage

▼ Add

Matching Algorithm*

FindSimilarMatchingAlgorithm

...

Threshold

80

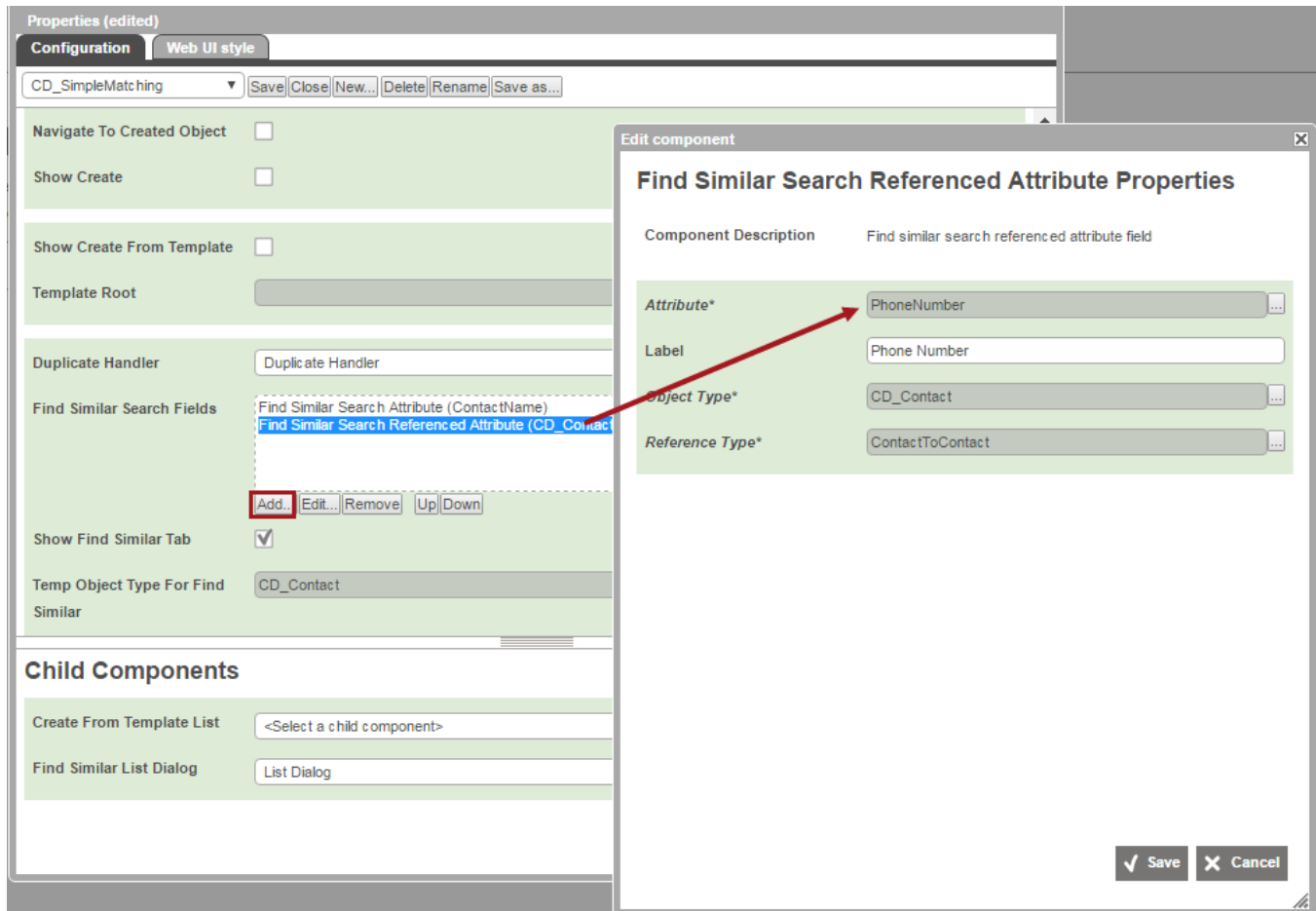
Window Size

10

✓ Save

✗ Cancel

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



5. Enable the **Show Find Similar Tab** setting back on the **Add Reference Action Properties**.
6. Using the ellipsis buttons, make a selection for the **Temp Object Type For Find Similar** parameter and the **Temp Parent For Find Similar** parameter. (When the matching algorithm is run, it creates temporary objects based on the input in the search fields. These objects are then used in the algorithm to compare and find similar objects. The temporary objects need a parent and object type to be created. After the user finishes the operation, the temporary objects are deleted by the system. These parameters have to be configured for the functionality to work. The object types of both the direct objects and the referenced objects need to be made valid under the location used for the Temp Parent For Find Similar parameter.)
7. Under **Child Components** > **Find Similar List Dialog**, select **List Dialog** from the dropdown menu.
8. On **List Dialog Properties**, click **Add** to the right of the Dialog List Screen value field.
9. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
10. If a **Dialog List Screen** already exists, skip the previous two steps and on the **List Dialog Properties**, simply select the **Dialog List Screen** using the dropdown.

11. Also on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.

12. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
13. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Find Similar Search tab for the results list. The **Help Text** is editable and will display at the top of the template results list.
14. Click **Save** and **Close** design mode to return to normal Web UI mode.

Find Similar Search Example

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

The screenshot displays two overlapping dialog boxes in the Stibo Systems interface. The top dialog, titled 'Add reference', has a red arrow pointing to its title bar from a toolbar icon. It contains a 'Reference type' dropdown set to 'Contact to Contact' and a 'Reference target' field with a red box around its selection icon. The bottom dialog, titled 'Select Node(s)', has the 'Find Similar Search' tab selected with a red box. It includes input fields for 'Contact Name', 'Phone Number', and 'Reference Contact Name', and 'OK'/'Cancel' buttons at the bottom.

Add reference

Reference type: Contact to Contact

Reference target: [Selection Icon]

✓ OK ✗ Cancel

Select Node(s)

Browse Search **Find Similar Search**

Enter values to assist in finding similar

Contact Name: [Text Field]

Phone Number: [Text Field]

Reference Contact Name: [Text Field]

✓ OK ✗ Cancel

Select Node(s)

Browse Search **Find Similar Search**

Enter values to assist in finding similar

Contact Name **1** John Smith

Phone Number 770 555 9876

Reference Contact Name Patty Smith

Find Similar **3**

Select the wanted choice and click OK

ID	Contact Name	Phone Number
CON_129729		
CON_129731		
CON_129755		
CON_129773		
CON_149939	Harry Potter	
CON_149940	Patty Smith	
CON_149944	Jimmy Smith	
CON_149961	Greg Dunmovin	
CON_149962	Jimmy Smith	
CON_149964	Harry Potter	
CON_149968	Alex Smith	
CON_168112		

2 ✓ OK ✗ Cancel

✓ OK ✗ Cancel **4**

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

Add reference

Reference type Contact to Contact

Reference target Patty Smith (CON_149940)

✓ OK ✗ Cancel

Success

1 reference was created!

English US

Main

Revisions

Data Visualization

	ID		Contact Name		Object Type		Reference type	
Patty Smith	CON_149940		Patty Smith		Contact		Contact to Contact	

For additional information about the Multi-Reference Editor and its features, see the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

Suppressing References in the Multi Reference Editor

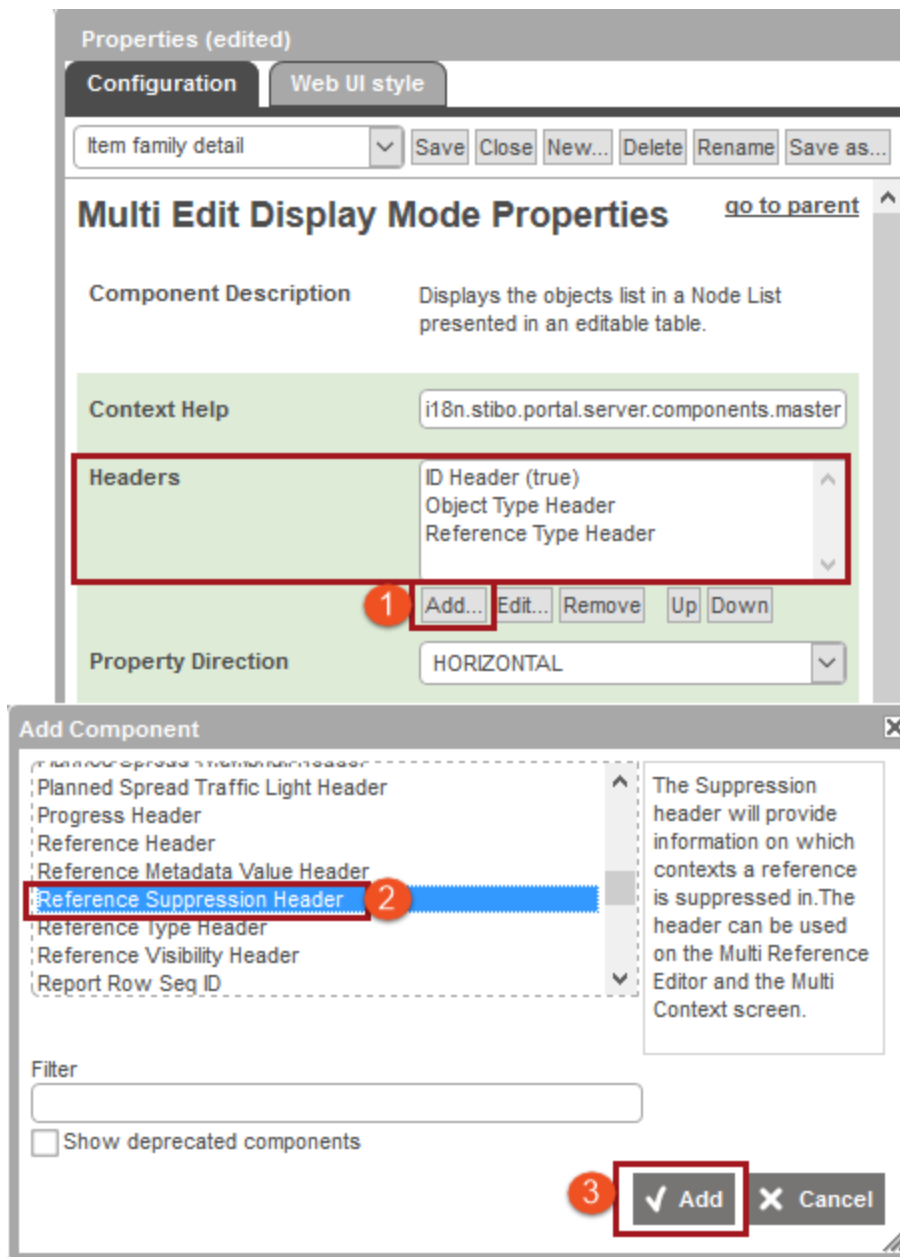
Dimension dependent references may be suppressed, by context, using the Multi-Reference Editor in Web UI. For example, let us say an image of a person modeling a t-shirt is referenced by a t-shirt product. The same image is referenced by the t-shirt product in all contexts that the t-shirt product exists in. But for one of the countries where the t-shirt is sold, the image is deemed culturally insensitive. To address the issue, the user could go into the relevant country-language context, suppress the reference to the image in question, and then add a reference to a different, more appropriate image. The image reference would remain for all contexts except for one where it has been suppressed. This action may be taken in Web UI using the Multi Reference Editor.

Configuring Reference Suppression

To add the reference suppression capability to a Multi Reference Editor, an administrator must add and configure a Reference Suppression header, the Remove suppression toolbar action, and the Suppress reference toolbar action.

Reference Suppression header

To view whether a reference is suppressed in the current context, an administrator must add the Reference Suppression Header to the Multi Reference Editor in the designer.



To add the Suppression header to the Multi Reference Editor, follow these steps (which correspond to the numbers in the above screenshot):

1. On Multi Edit Display Mode Properties, click the **Add...** button for Headers.
2. In the Add component window that displays, select **Reference Suppression Header**.
3. Click the **Add** button.

The Multi Reference Editor may look like this with the new header applied:

Item Family

English US

Main

Additional Information

Status

Attribute Link Editor

Multi-Reference Editor

Title

Reference Value

Select all

Clear filter

Apply view

Clear view

Add Reference

Remove Reference

Suppress Reference

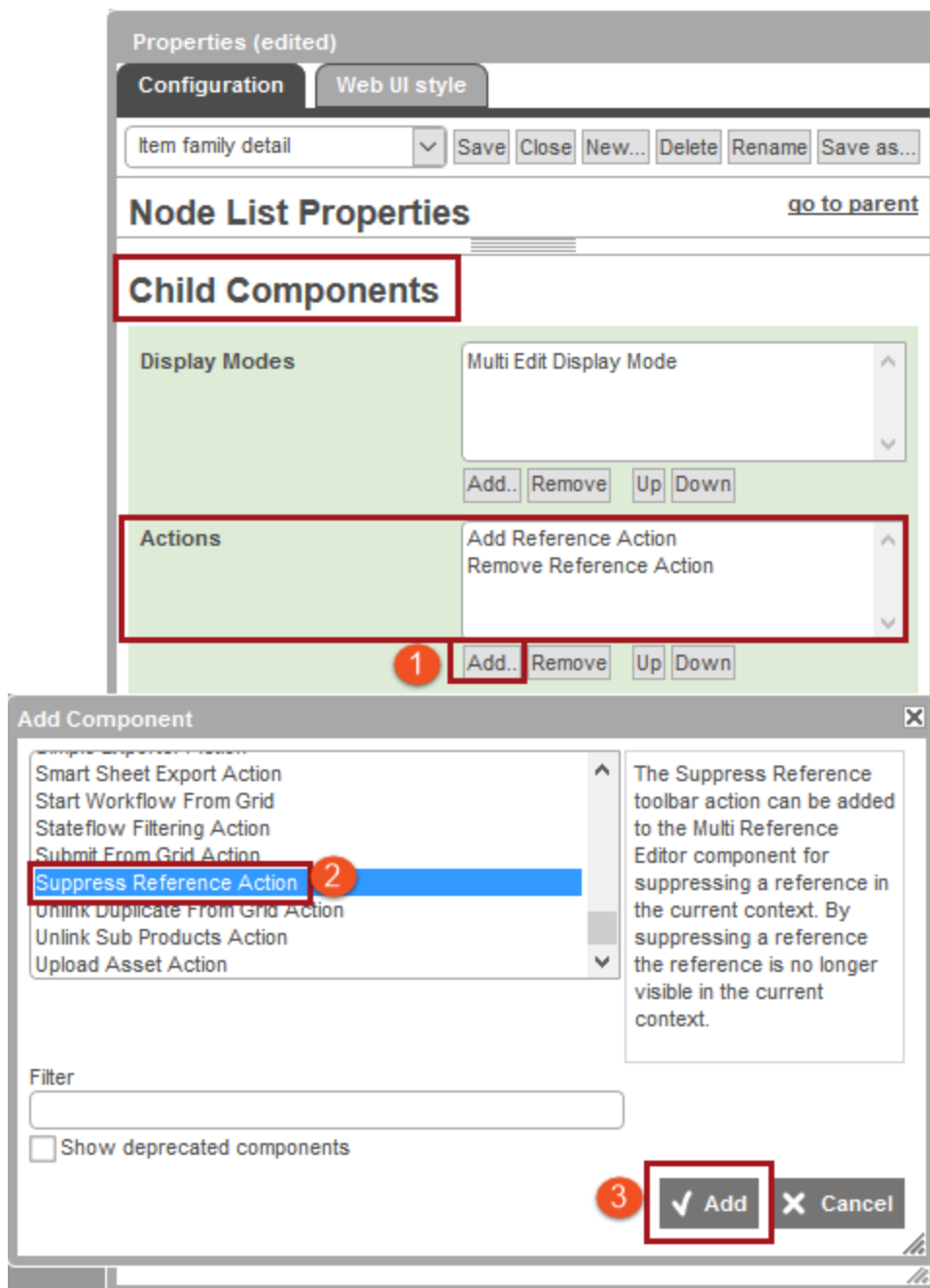
Remove suppression

	ID	Object Type	Reference type	Suppression
☐	107625	Product Image	Primary Product Image	Cannot be suppressed
☐	180935	Illustration	Illustration	Cannot be suppressed
☐	ProductsGaloreProducts	Suppliers Products	Supplier Link	Suppressed
☐	107628	Product Image	Product Image	Visible
☐	107629	Product Image	Product Image	Visible
☐	110608	Product Image	Product Image	Visible

Number of items : 9

Suppression toolbar actions

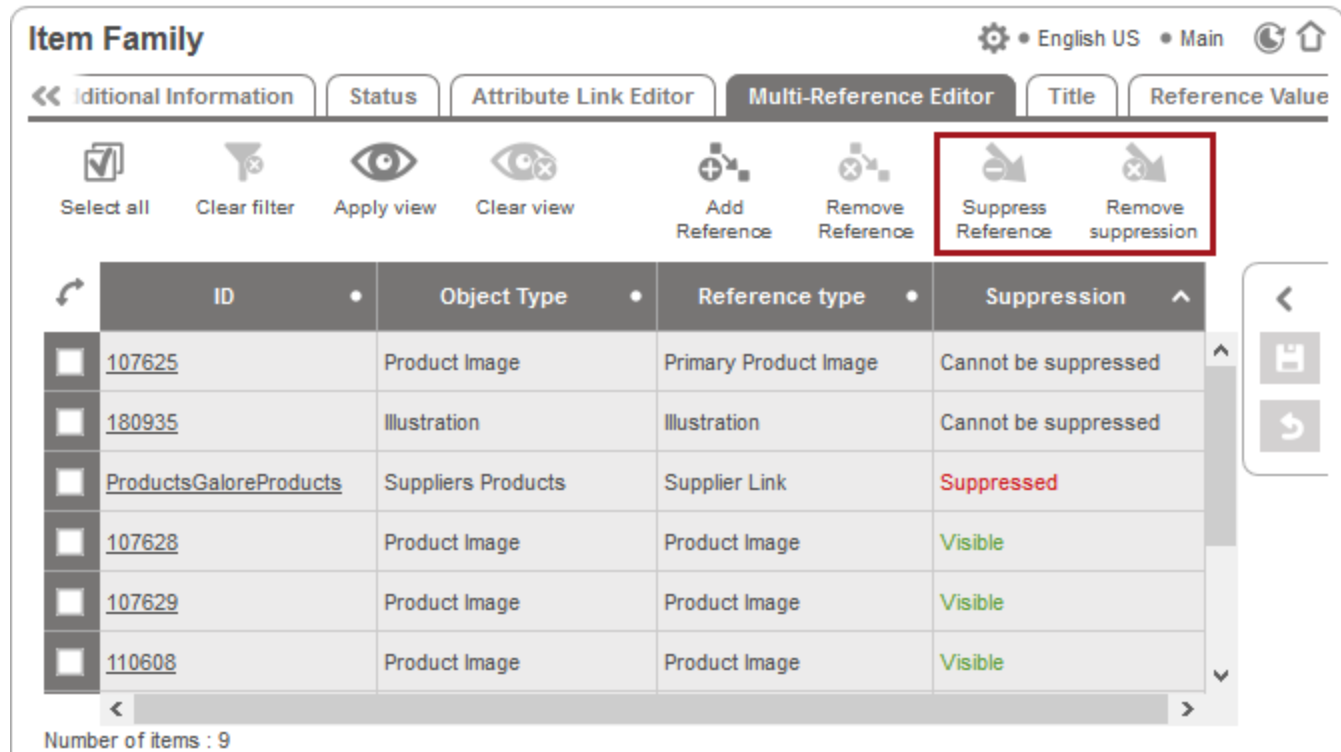
To enable users to suppress a reference or remove an existing suppression from a reference, an administrator must configure two toolbar actions: Suppress reference and Remove suppression.



To add these toolbar actions to the Multi Reference Editor, follow these steps (which correspond to the numbers appearing in the screenshot above):

1. On the Multi Reference > Node List Properties view of the designer, under Child Components, under Actions click the **Add..** button.
2. In the Add Component dialog that displays, select **Suppress Reference Action**.
3. Click **Add**.
4. Repeat these steps to add the Remove suppression action.

When you have saved this configuration and closed the designer, your Multi Reference Editor may look like this:



Note: The toolbar actions are configurable in that their icons and labels can be changed from their defaults. For more information on changing toolbar action labels and icons, see the **Action Button Configuration on a Node** documentation.

Suppressing References in the Multi Reference Editor

To suppress references or remove suppression from references in the Multi Reference Editor, the reference in question must first be checked. If the reference is suitable for the proposed action, the toolbar action will be enabled, otherwise it is disabled.

Note: Checkboxes only appear on the Multi Reference Editor when an administrator has added one or more toolbar actions to the screen using the designer.

Whether a reference can be suppressed or have its suppression removed is dependent on that reference's status in the Suppression column. These are the statuses that may show for a reference, along with the actions available for a reference based on the status:

Cannot be suppressed – The reference cannot have suppression applied to it in the current context. This status shows for references that are not dimension dependent.

Inherited – The reference is inherited from a parent object; therefore, it cannot be suppressed.

Suppressed – Suppression has already been applied to this reference in the current context. On references with this status, the Remove suppression toolbar action is active and the Suppress reference toolbar action is inactive.

Visible – The reference is currently visible in the current context and can be suppressed. On references with this status, the Suppress reference toolbar action is active and the Remove suppression toolbar action is inactive.

When selecting multiple references with a combination of Visible and Suppressed statuses, both the Remove suppression and Suppress reference toolbar actions are active. However, clicking a suppression toolbar action causes STEP to only execute the command on the applicable references. For example, if a user selects three references, two that are Visible and one that is Suppressed, and then clicks the Remove suppression toolbar action, the following things will happen:

1. The references with the Suppressed status have the suppression removed.
2. The reference with the Visible status is unaffected.
3. An info window appears listing all references and how they were affected by the selected toolbar action.

Below is an example of an info window that will display in this scenario:



Important: Using the Multi Reference Editor screen, references may only be actioned in the current context. If you are viewing references in the France_French context, as an example, you may suppress references in that context, but you cannot suppress references in the Germany_German context without first switching to that context in the Web UI.

To suppress references in multiple contexts in a single screen in Web UI, consider adding a Multi Context screen to your Web UI. For more information on how to configure and use the Multi Context screen, see the **Multi Context Screen** documentation.

Multi Revision Screen

The Multi Revision Screen is a screen designed to show revision information on the attribute values and outbound references of an object. This screen and its child component, the Multi Revision Editor table, need to be configured to display the desired attributes and references to compare.

By default, a Multi Revision screen displays the last five (5) object revisions, including the current revision. If less than five revisions exist, then fewer revisions will be displayed.

Users can filter *all* revisions that exist for an object, not just those shown, using various date options.

Sales Item

Basic Information and References

Cost and Prices

Status

Revisions

Revisions

ID 101567

Name 20808-013

Filter revisions

	Approval	Revision	Description, Web	Translation
0.32 (CURRENT)	Last Approved on Thu Aug 18 10:10:06 EDT	0.32 Created by USER8 on Mon Oct 17 21:40:40 EDT	100% Cotton	Not Translated
0.31	N/A	0.31 Created by USERM on Mon Oct 17 12:18:52 EDT	90% Cotton, 10% Polyester	N/A
0.30	N/A	0.30 Created by USER8 on Wed Oct 12 09:20:31 EDT	90% Cotton, 10% Polyester	N/A
0.29	N/A	0.29 Created by USERB on Wed Oct 12 09:06:33 EDT	90% Cotton, 10% Polyester	N/A
0.28	N/A	0.28 Created by USER8 on Tue Oct 11 15:16:55 EDT	90% Cotton, 10% Polyester	N/A

Number of revisions : 5

If an admin user has configured the Multi Revision Screen Properties, then the user may also see the hide equal and/or the mark different action icons, which can be especially useful to quickly evaluate an object for approval. Additionally, if enabled, the user will also have the option to filter all revisions based on the user group (of the user) that made a change and created a revision and use the hide equal and/or the mark different actions. Examples of the different filtering options appear at the end of this topic.

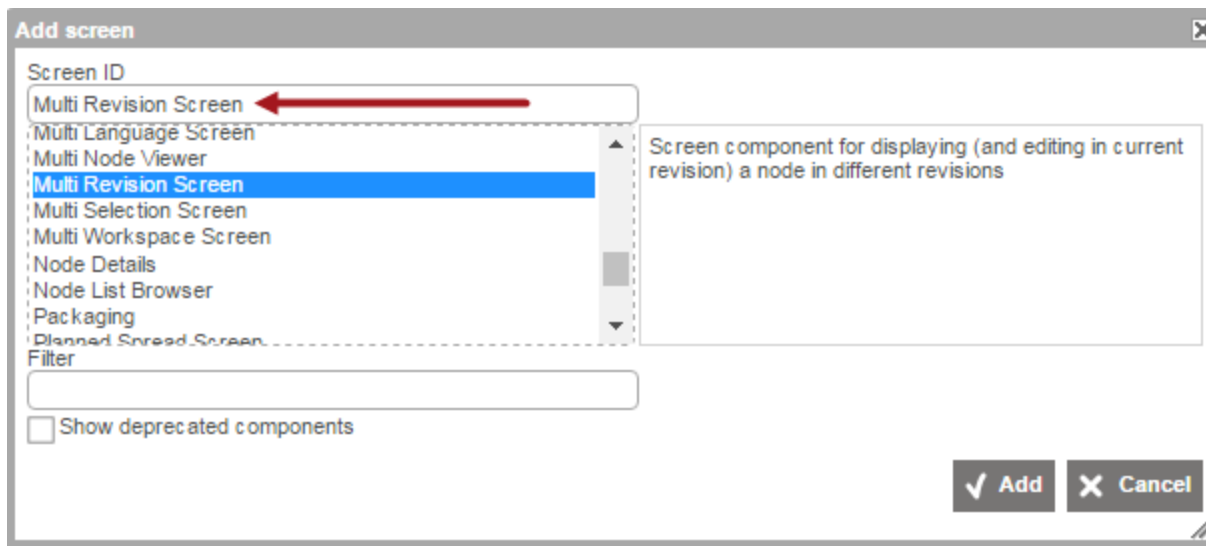
Careful consideration should be taken when using the Multi Revision Screen. If objects contain a large number of attributes or filtering revisions returns numerous revisions, users may experience system slowness as they work in Web UI.

Configuration Prerequisites

It is expected that anyone configuring the Multi Revision Screen component is familiar with the Web UI Designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Adding a New Multi Revision Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Select 'Multi Revision Screen' as the screen type (shown in the screenshot below).



At this point, either close the designer and configure the screen at a later time, or continue on with the steps in the next section.

Configuring a Multi Revision Screen

Steps for configuring the Multi Revision Screen Properties are below.

1. In Multi Revision Screen Properties, enable the **Allow Group Filtering** parameter if end users are allowed to filter the revisions by user group as an addition to the standard date filtering options.
2. Determine if you want to enable the Show Hide Equals Button and/or the Show Mark Different Button parameters. Details regarding what these parameters do can be found in the **Comparing Data Using Hide Equal and Mark Different** section.
3. Type in a title for the screen, if desired. This title will display on the screen in the top left corner.



- Go to the Child Components > Editor Table parameter and select **go to component**. Please note that Multi Revision Editor is pre-populated in the value dropdown since it is mandatory to configure the editor before the Multi Revision Screen will render correctly.

Properties (edited)

Configuration Web UI style

Multi Revision Screen Save Close New... Delete Rename Save as...

Multi Revision Screen Properties

Component Description Screen component for displaying (and editing in current revision) a node in different revisions

Allow Group Filtering ☒

Show Hide Equals Button ☒

Show Mark Different Button ☒

Title

Child Components

Editor Table*	Multi Revision Editor	go to component

Configuring a Multi Revision Editor

The **Multi Revision Editor Properties** now need to be configured.

Properties

Configuration **Web UI style**

Multi Revision Screen Save Close New... Delete Rename Save as...

Multi Revision Editor Properties [go to parent](#)

Component Description Table component for editing multiple attributes of nodes on a Multi Revision Screen

Headers

ID Header (true)
Name Header
Approved Header
Revision Header

Add... Edit... Remove Up Down

Property Direction HORIZONTAL

Current Revision Read Only ☐

1. Add, edit, remove, and reorganize table headers, as desired, in the **Headers** value field. The image above shows headers that have already been added. Relevant headers to consider including, as needed, are: ID Header, Name Header, Attribute Value Header, Attribute Value Group Header, Approved Header, Revision Header, Path Header, Reference Header, and Translation Header. Clicking on each component in the 'Add component' dialog provides a description of the component on the screen.

Add component

Reference Type Header
Reference Visibility Header
Report Row Seq ID
Report Row Text
Report Row Type
Result Header
Revision Header
Started By Header
Started Date Header

Filter

☐ Show deprecated components

✓ Add ✗ Cancel

Table header that shows the revision of the items in the table.

2. Determine the direction of the table using the **Property Direction** parameter.
VERTICAL means that the data (determined by the headers selected) will appear in rows and the column headers will be the revision numbers.

ID
Name
Approval
Revision
Path
Translation
Brand Name

HORIZONTAL means that data will appear in columns, while the revisions numbers are listed as the row headers. If no direction is selected, HORIZONTAL will populate the field once the screen is saved.

ID	Name	Approval	Revision	Path	Translation	Brand Name

- 3. **Current Revision Read Only** should be selected if you want to restrict end users from editing the current version of data displayed in the table. If disabled (unchecked), then the current revision of data can be edited, as applicable to the selected object.
- 4. Display additional optional parameter settings by clicking the arrowhead next to the **Group Options** heading and/or the **Advanced** heading. Make selections as desired. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

Please note that the Advanced > Show Details parameter is not applicable to the Multi Revision Screen and enabling / disabling has no impact.

Properties

Configuration Web UI style

Multi Revision Screen Save Close New... Delete Rename Save as...

Multi Revision Editor Properties [go to parent](#)

▼ Group Options

Groups Initially Open ⓘ ☒ ←

Show Empty Group Headers ☒

Show Group Headers ☒

▼ Advanced

Dimensions <Select an option> Edit...

Display Mode Height 200

Show Details ☐

Show Only Valid Attributes ☐

5. **Save** all selections and **Close** the designer.
6. As with any screen, the Multi Revision screen must be mapped appropriately in Main Properties > Mappings for end users to be able to access it. As an alternative to mapping, the Multi Revision screen can be added as a Sub Screen Tab Page on a Node Details screen (as shown in the examples within this topic).

For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about sub screen tab pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

Here is an example of a Multi Revision Screen configured to display as a Sub Screen Tab Page on a Node Details screen.

Sales Item

Basic Information and References

Cost and Prices

Status

Revisions

Revisions

ID 101567

Name 20808-013

 Filter revisions

 Hide equal

 Mark different

	Approval	Revision	Description, Web	Translation
0.32 (CURRENT)	✗ Last Approved on Thu Aug 18 10:10:06 EDT	0.32 Created by USER8 on Mon Oct 17 21:40:40 EDT	100% Cotton	Not Translated
0.31	N/A	0.31 Created by USERM on Mon Oct 17 12:18:52 EDT	90% Cotton, 10% Polyester	N/A
0.30	N/A	0.30 Created by USER8 on Wed Oct 12 09:20:31 EDT	90% Cotton, 10% Polyester	N/A
0.29	N/A	0.29 Created by USERB on Wed Oct 12 09:06:33 EDT	90% Cotton, 10% Polyester	N/A
0.28	N/A	0.28 Created by USER8 on Tue Oct 11 15:16:55 EDT	90% Cotton, 10% Polyester	N/A

Number of revisions : 5

- **Allow Group Filtering** is enabled (checked)
- **Show Hide Equals Button** is enabled
- **Show Mark Different Button** is enabled
- **Title** value is Revisions
- **Headers:** Approval, Revision, Attribute Value (Description, Web), and Translation
- **Property Direction** is HORIZONTAL
- **Current Revision Read Only** is disabled

Note: Enabling 'Allow Group Filtering' will not change the look of the screen. The setting impacts the Filter Revisions dialog. When enabled, the Group selection is available. If disabled, Date filtering is the only available selection. Examples of the filtering feature appear in the next section.

Examples: Filtering Revisions

When a user is on the Multi Revision screen and clicks the 'Filter revisions' action icon, the Filter Revisions dialog displays. If 'Allow Group Filtering' is enabled, then the user will have two filtering options: Date and Group (as shown in the examples that follow).

Filter Revisions

☒ Date

☐ Today

☐ Group

☐ Last 14 days

☐ Last 30 days

☐ From:

☐ Select multiple dates:

✓ OK

✕ Cancel

Filtering by Date

With the Date radio button selected (default option), revisions can be filtered based on dates ranges, a single date, or multiple (single) dates can be selected for comparison searches (using the 'Select multiple dates' option and adding additional dates by clicking the green + button and deleting dates by using the red x button).

Using the filtering options shown below, any revisions created 2016-10-11 and any revisions created on 2016-10-17 will be displayed to the user after they click OK. The user can compare data using the hide equal / mark different selections to compare the data.

Filter Revisions

☒ Date

☐ Today

☐ Group

☐ Last 14 days

☐ Last 30 days

☐ From:

☒ Select multiple dates:

✓ OK

✕ Cancel

	0.32 (CURRENT)	0.31	0.28
Approval	✕ Last Approved on Thu Aug 18 10:10:06 EDT 2016	N/A	N/A
Revision	0.32 Created by USER8 on Mon Oct 17 21:40:40 EDT 2016	0.31 Created by USERM on Mon Oct 17 12:18:52 EDT 2016	0.28 Created by USER8 on Tue Oct 11 15:16:55 EDT 2016
Description, Web	100% Cotton	90% Cotton, 10% Polyester	90% Cotton, 10% Polyester
Primary Product Image	Blue cap	Blue cap	Blue cap
Translation	Not Translated	N/A	N/A

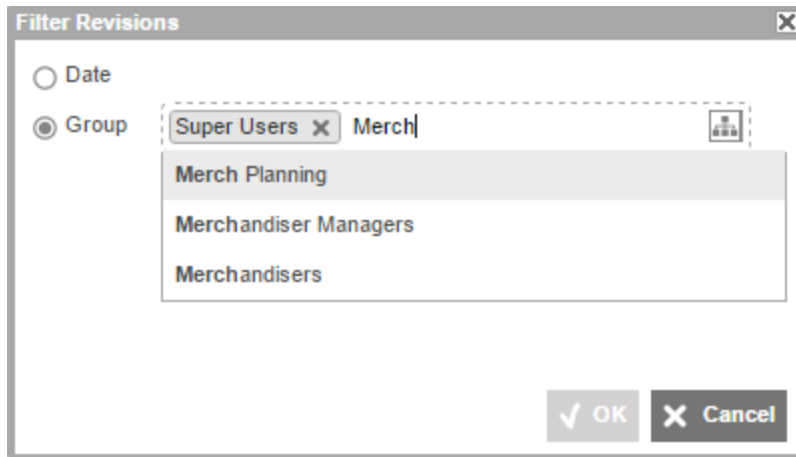
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482

Filtering by User Group

Alternatively, if the Allow Group Filtering parameter is enabled in the Multi Revision Screen Properties, users can filter revisions by user group or user groups. Revision results are returned if a revision was created by a user within one of these groups.

User groups can be selected simply by putting the cursor in the value field and choosing from the list that displays. Users can also start typing and allow typeahead functionality to suggest applicable groups, or the user can also click the Node Picker icon and make a selection from the 'Select User Groups' dialog that displays. Upon clicking OK, the revision screen will display revisions based on the group or groups entered.



Multi-Select from the Tree Navigator

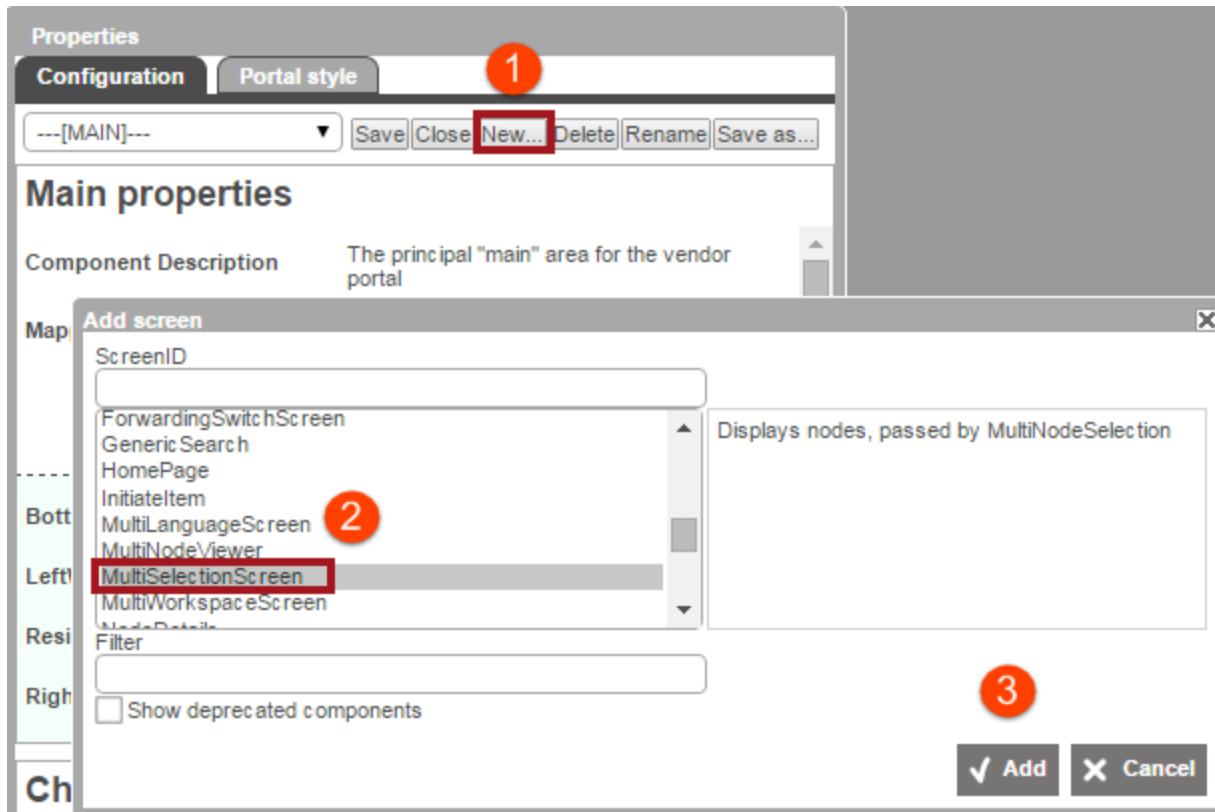
Users browsing through data using the Tree navigator sometimes want to focus in on a small subset of the data in order to perform the same action to all of the selected objects. A new mapping condition (MultiNodeSelectionCondition) is now available that allows for multi-view and/or multi-editing. When multiple objects are selected from the Tree, the appropriate list view will be shown to the user, as defined by the configuration of the Web UI (Portal) screen.



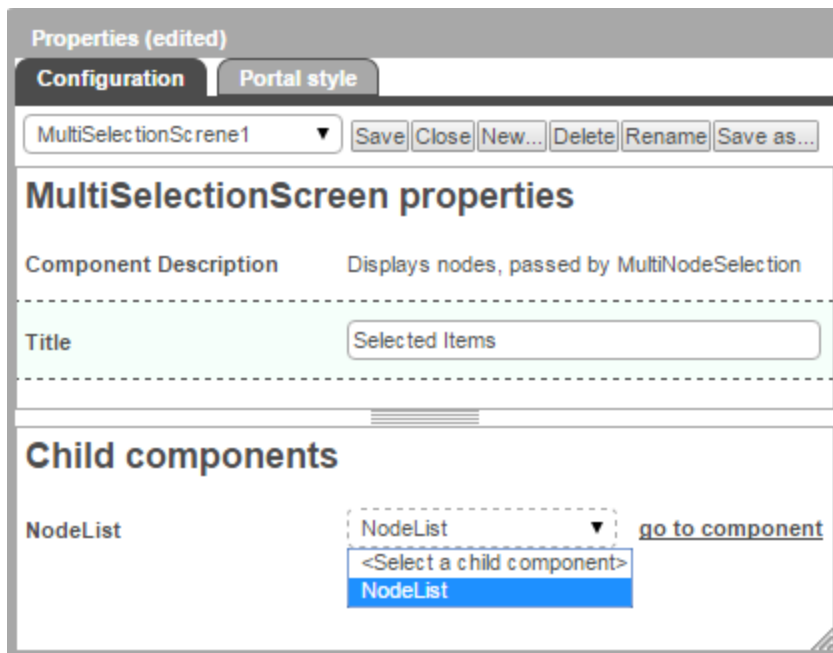
Setting up the Multi-Select from Tree Navigator

To set up the Multi-Select from Tree Navigator function a new screen of the type MultiSelectionScreen must be configured.

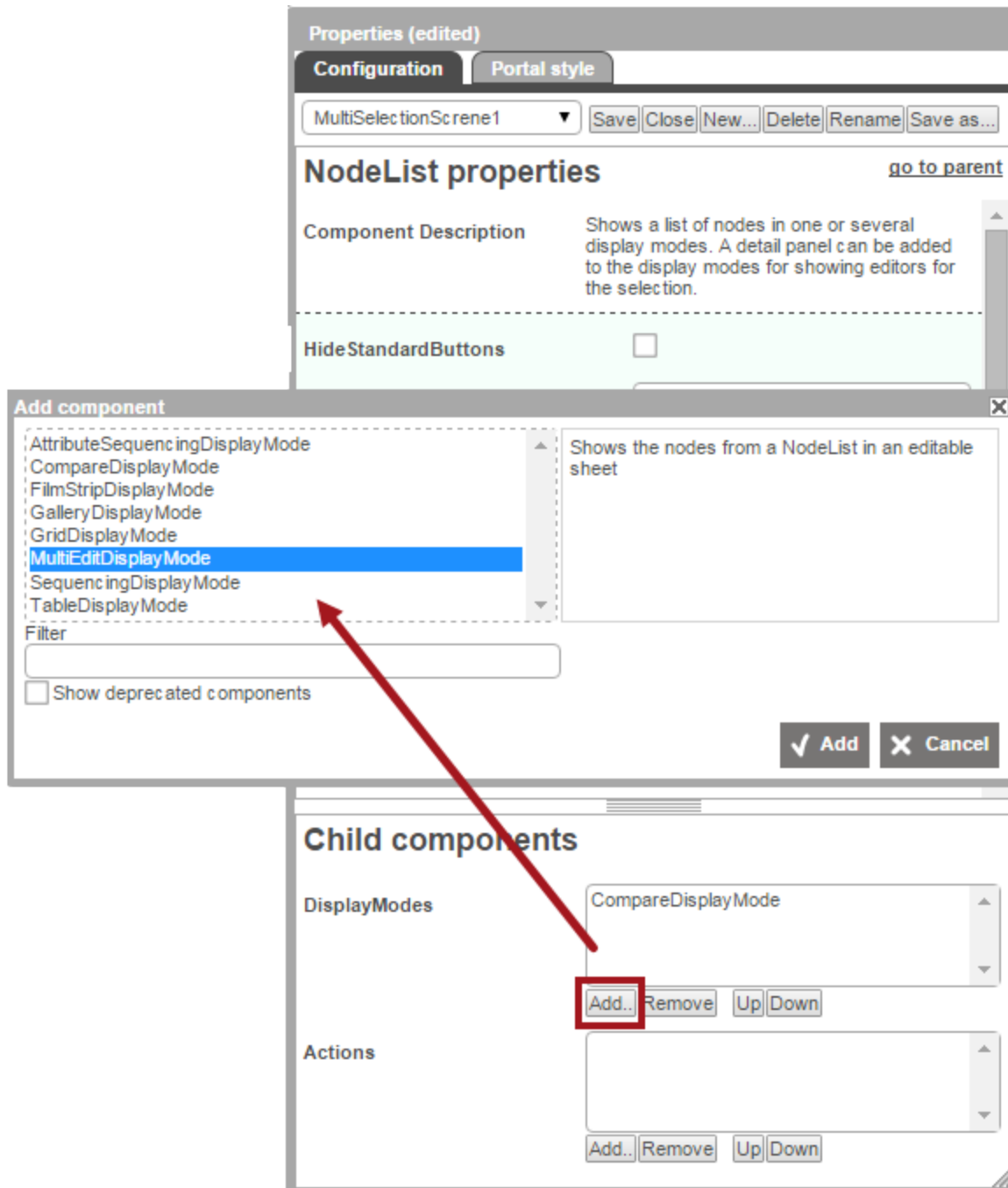
1. This screen is added by selecting "New" in the Portal Designer and then scroll down the list to find the MultiSelectionScreen.



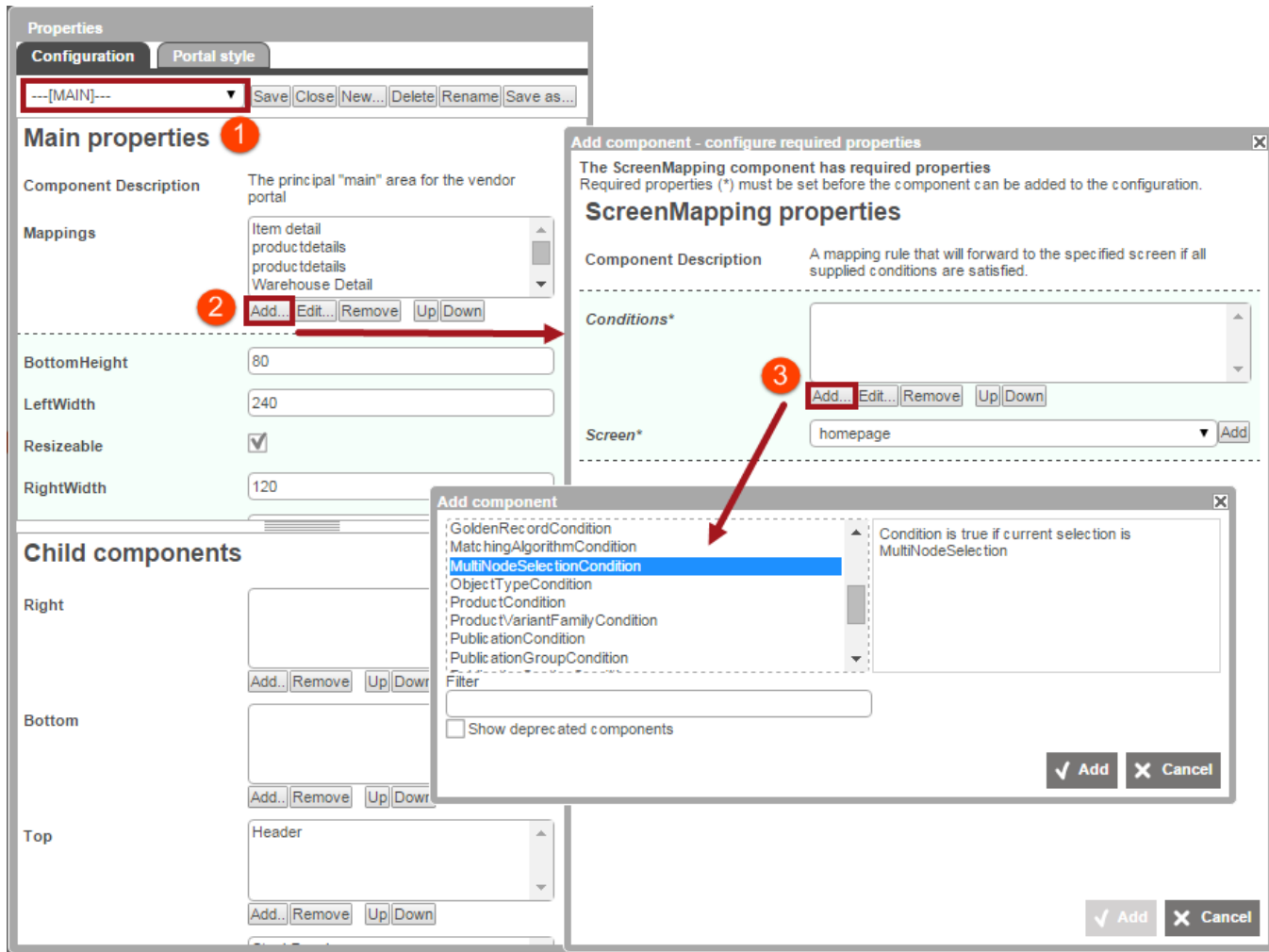
2. Next configure the screen with a NodeList (child component) and set it up with the desired Display Modes.



3. If the purpose is to edit the objects selected in the Tree navigator, then be sure to select the Multi-Edit display. When your components are added, press save.



4. After configuring the screen, go to "MAIN" in the Portal Designer. Under Mappings click "Add" to open the Screen Mappings dialog. Click "Add" under Conditions and find the MultiNodeSelectionCondition in the list. Click "Add" to select the mapping condition and thereby add it to the list of Conditions.



5. Now the mapping condition must be paired with a screen. Select the MultiSelectionScreen that was configured for the purpose of showing multiple objects. The selected screen is the screen that the condition will forward to when then condition is triggered as the user navigates the Web UI (Portal). Press save again.

Add component - configure required properties

The ScreenMapping component has required properties
Required properties (*) must be set before the component can be added to the configuration.

ScreenMapping properties

Component Description

A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

Conditions*

MultiNodeSelectionCondition

Add... Edit... Remove Up Down

Screen*

MultiSelectionScreen11

Add

Item folder detail
MultiNodeDisplay
MultiNodeScreen
MultiSelectionScreen11
OLD
Open item list
Pallet detail

Add Cancel

Note: A dedicated screen (MultiSelectionScreen) must be configured to display the multiple objects selected from the tree navigator.

Multi Workspace Screen

The Multi Workspace Screen is a Web UI screen type designed to display both the Main and Approved workspaces, allowing a user to quickly view the differences between the current draft data and approved (uneditable) data for a given object. Users can also easily edit attribute values for the Main workspace using the Multi Workspace Editor.

Similar functionality is available in the workbench. Users can switch to workspace mode, which allows them to view the Main and Approved workspaces at the same time.

This topic addresses:

- Using a Multi Workspace Screen
- Configuring a Multi Workspace Screen

Using a Multi Workspace Screen

Using a Multi Workspace Screen allows users to more easily edit attribute values for an object while seeing the values that have previously been approved.

In the Main workspace, object information is editable (unless it is configured as read only). However, in the Approved workspace, the user can only view values that have been approved. If an object has never been approved, then only Main will display.

There are a variety of ways to configure the Multi Workspace Screen. It can be configured with the Hide Equal and/or Mark Different tools to help the user quickly identify which values do not match across the two workspaces and focus on values that differ from each. For more information on the Hide Equal and Mark Different Buttons, see the **Comparing Data Using Hide Equal and Mark Different** documentation. Additionally, the attributes that you want to view values for can be added via the Multi Workspace Editor.

In the example that follows, when a user navigates to a 'Sales Item' object, the Multi Workspace Screen displays as a sub screen tab page on a Node Details screen. The user has access to both the Hide equal and Mark different actions, can edit attribute values for the Main workspace, and view the attribute values for the Approved workspace.

Because the Property Direction parameter for the Multi Workspace Editor has been set to vertical instead of horizontal (*default*), the Main and Approved workspaces display as column headers, and the configured attributes display as rows. In this scenario, to view the Main and Approved Workspaces as rows instead of columns, select the flip table  icon.

Node Details
English US • Main

Multi Workspace Screen

ID 101567
Name 20808-013

Hide equal

Mark different

	Main	Approved
Approval	✗ Last Approved on Thu Aug 18 10:10:06 EDT 2016	✓ Approved on Thu Aug 18 10:10:06 EDT 2016
Revision	0.25 Created by USER3 on Wed Sep 28 16:46:43 EDT 2016	0.13 Created by USER6 on Thu Aug 18 10:10:06 EDT 2016
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric
Description, Table	100% Cotton	100% Cotton
Description, Web	100% Cotton	100% Cotton
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric

For the example above, the Multi Workspace Screen / Multi Workspace Editor Properties are configured as follows:

- **Show Hide Equals Button** is enabled (checked)
- **Show Mark Different Button** is enabled
- **Title** value is blank
- **Headers:** Approved, Revision, Attribute Value Group Header (Sales Item Marketing Descriptions)
- **Property Direction** is VERTICAL
- **Use Immediate Save** is enabled

Editing Attribute Values

A user can edit configured attribute values by double clicking within a Main workspace cell. The cell being edited will appear with a dotted line border.

In this case, the 'Description, Web' attribute value for the Main workspace needs to display '90% Cotton, 10% Polyester.'

Node Details
English US • Main

Multi Workspace Screen

Multi Workspace

ID 101567
Name 20808-013

Hide equal
Mark different

	Main	Approved
Approval	✖ Last Approved on Thu Aug 18 10:10:06 EDT 2016	✔ Approved on Thu Aug 18 10:10:06 EDT 2016
Revision	0.26 Created by USER8 on Wed Oct 05 12:19:13 EDT 2016	0.13 Created by USER6 on Thu Aug 18 10:10:06 EDT 2016
Sales Item Marketing Descriptions		
Description Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric
Description, Table	100% Cotton	100% Cotton
Description, Web	90% Cotton, 10% Polyester	100% Cotton
Feature Bullet 1	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric

While the cursor is in the edited cell, the dotted line border remains. However, the Multi Workspace Screen configuration determines how the changes are saved. If the configuration uses immediate save, then the changes will be saved after the cursor leaves the edited cell. If immediate save is not enabled, then after the cursor leaves the edited cell, the edited cell will be shaded and the save icon will activate. In this case, the changes are not saved until the user selects the save icon.

Information regarding configuration can be found in the **Configuring a Multi Workspace Screen** topic.

Configuring a Multi Workspace Screen

Any number of Multi Workspace Screens can be added to a Web UI. Once added, as with any screen, an admin user must configure how users access a Multi Workspace Screen. Other configuration options include configuring a default layout, determining which headers (values) users can view and/or edit, how edits are saved, and enabling the use of the Hide equal and / or Mark different actions.

This topic addresses design Prerequisites, Creating a New Multi Workspace Screen, and Configuring:

- Access to a Multi Workspace Screen
- Multi Workspace Screen Properties
- Multi Workspace Editor Properties
- Headers for the Multi Workspace Editor

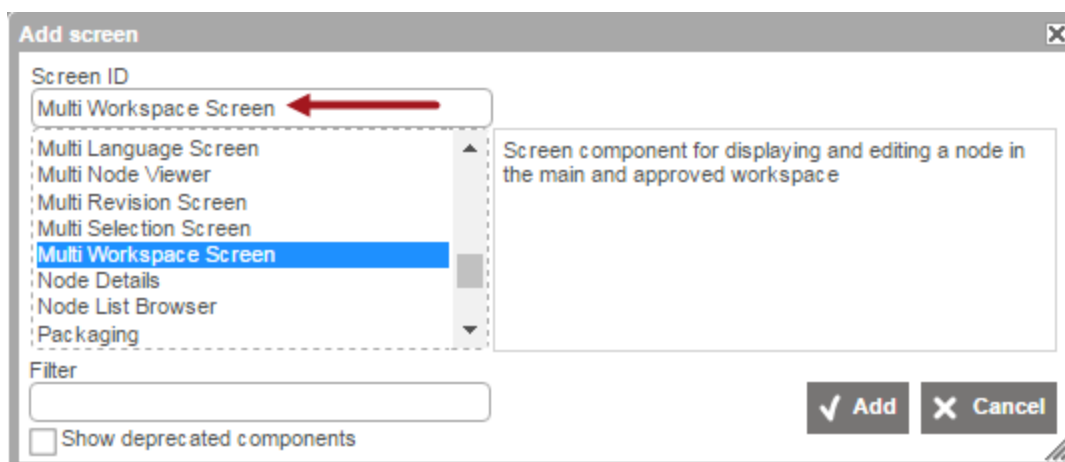
Prerequisites

It is expected that anyone configuring the Multi Workspace Screen component is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Also, for configuration of the Multi Workspace Screen, it is expected to be familiar with the **Workspaces** section of the **System Setup** documentation, and know how to use attribute values / attribute value groups, which is explained in the **Attribute Value Components** documentation and the **Attribute Value Group Components** documentation.

Creating a New Multi Workspace Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Click 'Multi Workspace Screen' as the screen type (shown in the screenshot below).



At this point, either close the designer and configure the screen at a later time, or continue on with the steps in the next section.

Configuring Access to a Multi Workspace Screen

An admin user must configure how a user will access a Multi Workspace Screen. The Multi Workspace Screen can either be mapped using Main Properties or added to a sub screen tab page on a Node Details Screen. For more information about mapping, see **Configuring the Parameters** in the **Main Properties** documentation, and for more information about sub screen tab pages, see **Adding Sub Screen Tab Pages** in the **Tab Pages** documentation.

Below is an example of a Multi Workspace Screen that is configured (mapped) to display when an object is selected.

Multi Workspace
English US • Main

ID 186314
Name ThickPad X2 Carbide

Hide equal

Mark different

English US • Main

	Main	Approved
Approval	✗ Last Approved on Thu Sep 29 16:39:54 EDT 2016	✓ Approved on Thu Sep 29 16:39:54 EDT 2016
Revision	0.9 Created by USERM on Thu Sep 29 16:40:53 EDT 2016	0.8 Created by USERM on Thu Sep 29 16:39:54 EDT 2016
Sales Item Marketing Descriptions		
Description Long		
Description, Web	Description, Web	Description, Web
Product Group Description		

Configuring Multi Workspace Screen Properties

Steps for configuring the Multi Workspace Screen Properties are below.

1. With the designer window open, select the screen ID for the **Multi Workspace Screen** using the screen dropdown list. (If continuing on after creating a new Multi Workspace Screen, Multi Workspace Screen Properties should already be displayed.)
2. In Multi Workspace Screen Properties, determine if you want to enable the Show Hide Equals Button and/or the Show Mark Different Button parameters. Details regarding what these parameters do can be found in the **Comparing Data Using Hide Equal and Mark Different** section of the **Web User Interfaces / Using a Web UI** documentation.
3. Type in a title for the screen, if desired, and the title will display on the screen in the top left corner. When blank, no title appears.

Node Details English US Main 🔍 🏠

Multi Workspace Screen

Multi Workspace 

ID 101567
Name 20808-013

 Hide equal  Mark different

	Main	Approved
Approval	✖ Last Approved on Thu Aug 18 10:10:06 EDT 2016	✔ Approved on Thu Aug 18 10:10:06 EDT 2016
Revision	0.25 Created by USER3 on Wed Sep 28 16:46:43 EDT 2016	0.13 Created by USER6 on Thu Aug 18 10:10:06 EDT 2016

- Go to the Child Components > Editor Table parameter and Click **go to component**. Please note that Multi Workspace Editor is pre-populated in the value dropdown since it is mandatory to configure the editor before the Multi Workspace Screen will render correctly.

Properties (edited)

Configuration **Web UI style**

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

Multi Workspace Screen Properties

Component Description Screen component for displaying and editing a node in the main and approved workspace

Show Hide Equals Button ☐

Show Mark Different Button ☐

Title

Child Components

Editor Table* Multi Workspace Edit go to component

Configuring the Multi Workspace Editor Properties

The Multi Workspace Editor Properties now need to be configured.

- Go to Multi Workspace Screen Properties > Child Components > Editor Table > Click **go to component**.

The Multi Workspace Editor Properties will display.

2. Add, edit, remove, and reorganize table headers, as desired, in the **Headers** value field. Relevant headers to consider including, as needed, are: ID Header, Name Header, Attribute Value Header, Attribute Value Group Header, Approved Header, and Revision Header. Clicking on each component in the 'Add component' dialog provides a description of the component on the screen.

3. Determine the direction of the table using the **Property Direction** parameter.
 - **VERTICAL** will display the added Headers as rows. **HORIZONTAL** will display the added headers as columns.

- **HORIZONTAL** will display the added headers as columns.
- 4. Enable **Use Immediate Save** if the edits made by a user should be saved as soon as the cursor leaves the cell or leave disabled if the user will be required to manually Click the save button after editing.
- 5. Display additional optional parameter settings by clicking the **Group Options** heading and/or the **Advanced** heading. Make selections as desired. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

6. Click **Save**.
7. Click **Close**.

Note: The Advanced > Show Details and Show Only Valid Attributes parameters are not applicable to the Multi Workspace Screen and enabling / disabling has no impact.

Configuring Headers for the Multi Workspace Editor

To display specific information within the Multi Workspace Screen, an admin user must add and configure Headers within the Multi Workspace Editor Properties. If left blank then only the ID and Title (Main / Approved)

headers will display. It is common to configure attribute value and attribute value group components within the Headers. Additional information can be found in the **Attribute Value Components** documentation, and the **Attribute Value Group Components** documentation.

1. Go to the Multi Workspace Editor Properties > Headers > Click **Add**.
2. The 'Add Component' dialog will display. Clicking on each component in the dialog provides a description of the component on the screen.
3. After the selection is made, click **Add** to close the dialog and return to the Multi Workspace Editor Properties. Add, edit, and organize any additional headers.
4. Click **Save**.
5. Click **Close**.

For an example regarding how to use the screen once configured, see the **Multi Workspace Screen** topic.

Node Details Component

The Node Details screen type / component is a top-level component. It is used as a 'base' and configured to display other components (e.g., Node Editor, Multi-Reference Editor).

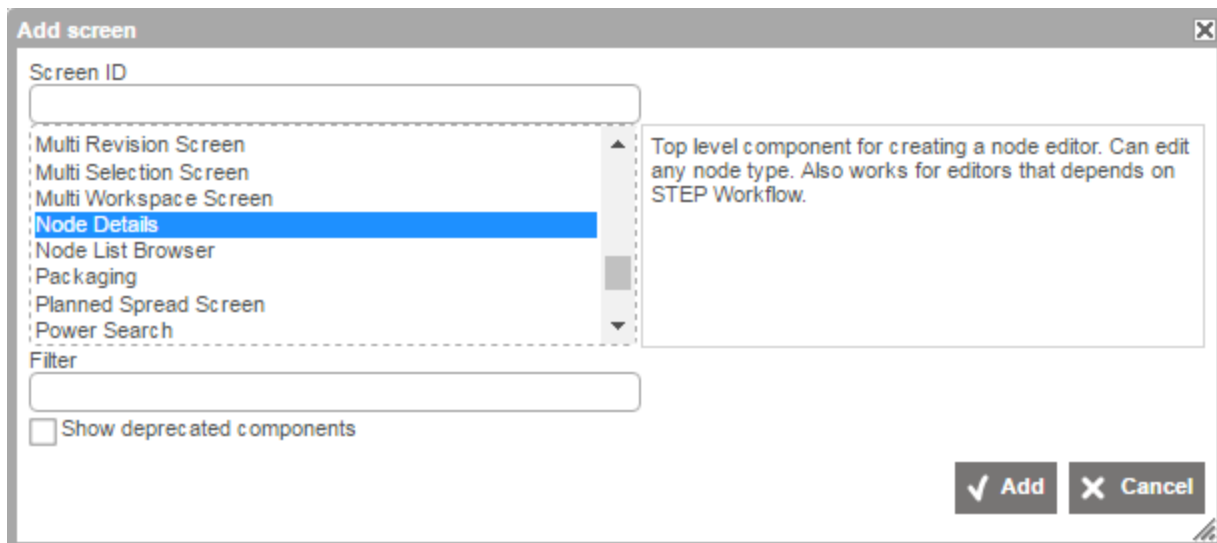
Prerequisites

It is expected that anyone configuring the Node Details component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Adding a New Node Details Screen

Steps for creating a new screen using the Node Details component are below.

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



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

Configuring Node Details Properties

Each parameter should be configured as needed. To guide you in your setup, help text is available for each parameter and is accessible by clicking a yellow info icon to the right of each parameter name (displays upon mouse over).

Properties

Configuration

Web UI style

Node Details
Save
Close
New...
Delete
Rename
Save as...

Node Details Properties

Component Description

Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title

Css Class

Validation

Business Conditions

Add...
Edit...
Remove
Up
Down

Post Save Validation Script

Multiple Target References

Show Warning

☐

Child Components

Main

<Select a child compo

go to component

Buttons

<Select a child compo

go to component

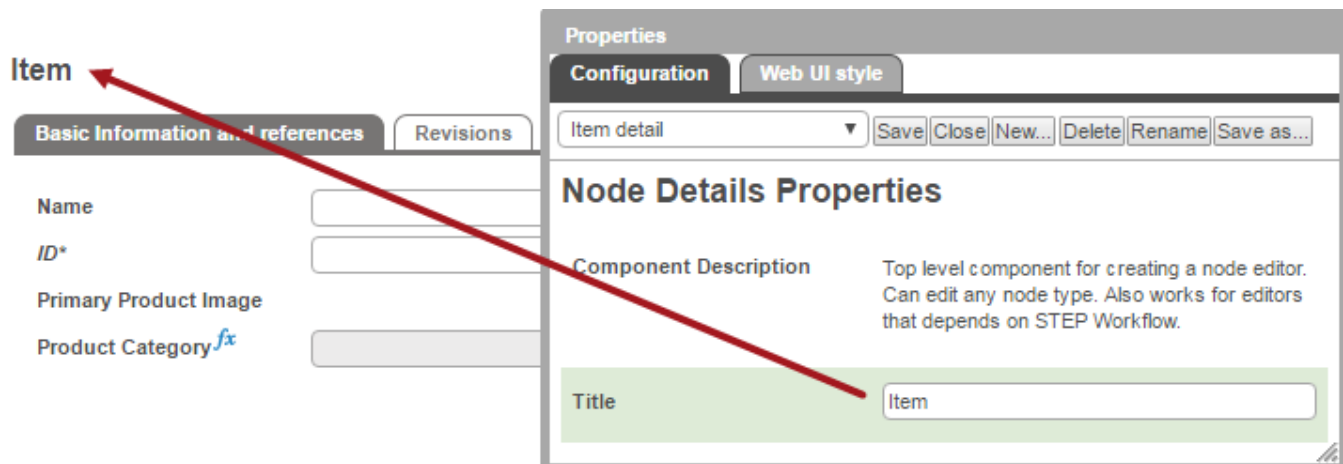
Breadcrumb

<Select a child compo

go to component

Main Components

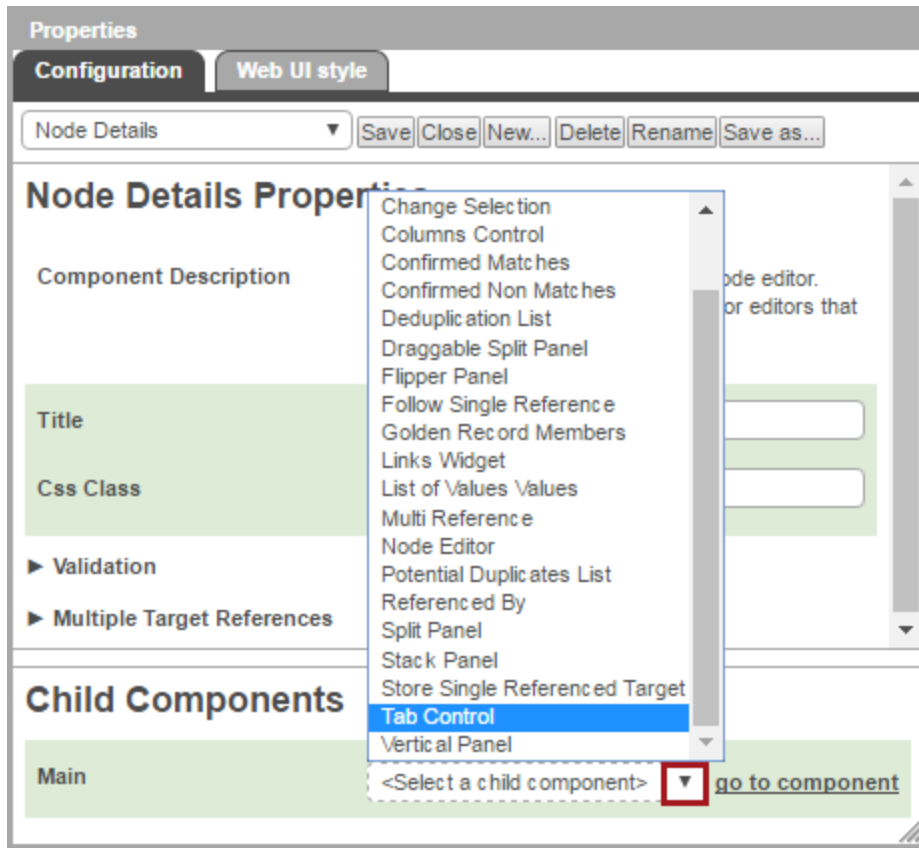
1. In the **Title** field, enter a descriptive title that will display on the screen. In the example below, the Node Details component has an 'Item detail' screen ID and an 'Item' title so users will know that they are working with an Item object type.



2. Click on **Validation** to expand the following optional parameters.
 - **Business Conditions:** Click **Add...** to select an existing business condition to be executed to validate attribute values on the node being edited. Multiple business conditions can be added, but all must succeed for the process to continue. For more information about Business Conditions, see **Business Conditions** in the **Business Rules** documentation.
 - **Post Save Validation Script:** Enter a JavaScript expression for performing a post-save validation of a node.
3. Click on **Multiple Target References** to display the **Show Warning** parameter (disabled by default). When Show Warning is enabled / checked, a warning will display to end users when a shared object is edited and then saved, either through an actual Save action or implied save (e.g., Submit Action or Approve Action). For more details, see the **Shared Data Handling** section of the **Web User Interfaces / Using a Web UI** documentation.

Child Components

1. From the dropdown menu for the **Main** parameter, choose a component. For example, you can add a Node Editor. Or, add a Tab Control component and configure different components and/or screens to display on different tabs all on a single Node Details screen. Additional configuration will be required depending on the selected component.



2. Select **Buttons** from the Buttons parameter dropdown, then click **go to component**.
3. On **Buttons Properties**, click the Add button below the **Actions** field, then select a component from the 'Add component' list and click **Add**. Additional configuration may be required depending on which action is selected.

Important: An example is the **Save Action** button—if you are placing a Node Editor on a Node Details screen, a Save button must be configured so that when object data is edited, it can be saved before the user navigates to another screen.

4. Repeat the previous step as needed to add additional actions. The action buttons will display in the order they are listed in the Actions value field. Re-organize by using the Up and Down buttons.
5. When all actions are added, click **go to parent** to navigate back to Node Details Properties.

Properties

Configuration | **Web UI style**

Node Details ▼ Save Close New... Delete Rename Save as...

Buttons Properties go to parent

Component Description Contains a number of buttons to display

Child Components

Actions

Save Action

Add.. Remove Up Down

6. If desired, set up the Breadcrumb parameter by selecting **Breadcrumb** from the dropdown. Click **go to component**.
7. In Breadcrumb Properties, at a minimum, the **Root Object Type** must be selected. Click the ellipsis button, make a selection, and then click OK. Once configured, a breadcrumb showing the hierarchy from the current node and up to the nearest node of the specified root type will be displayed. Each breadcrumb node is clickable unless the **Readonly** parameter (the checkbox directly above Root Object Type) is selected.

Tree

- ▼ Products
 - ▼ Apparel
 - > Upper Body Wear
 - ▼ Head Wear
 - ▼ Hats and Caps
 - ▼ Hats and Caps Items
 - 109308
 - Blue Hat
 - Gray Hat
 - Industrial Hard Hat

Item

Products > Apparel > Head Wear > Hats and Caps > Hats and Caps Items > Blue Hat

Basic Information and references | **Revisions**

Name Blue Hat

Brand Name Caps Galore

Brand Owner Products Galore, Inc.

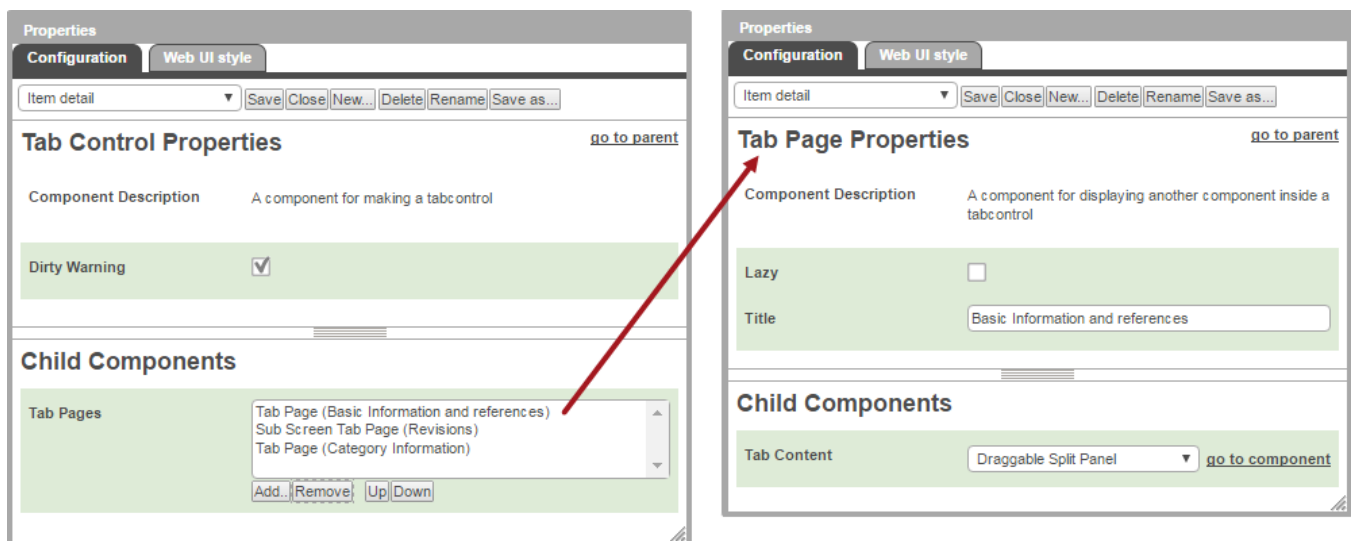
8. Click the **Save** button in the designer. Additional configuration can be performed on this Node Details screen, as desired. Additionally, multiple Node Details screens can be created and used for different objects / purposes.
9. From the designer dropdown, select ---[MAIN]--- to configure the **Mappings** parameter. It is important to remember this step so you can set up the condition / results screen combinations that allow end users to view / use the Node Details screen(s). See **Main Properties** in the **Using a Web UI** documentation for step-by-step instructions.

Example Node Details Screens

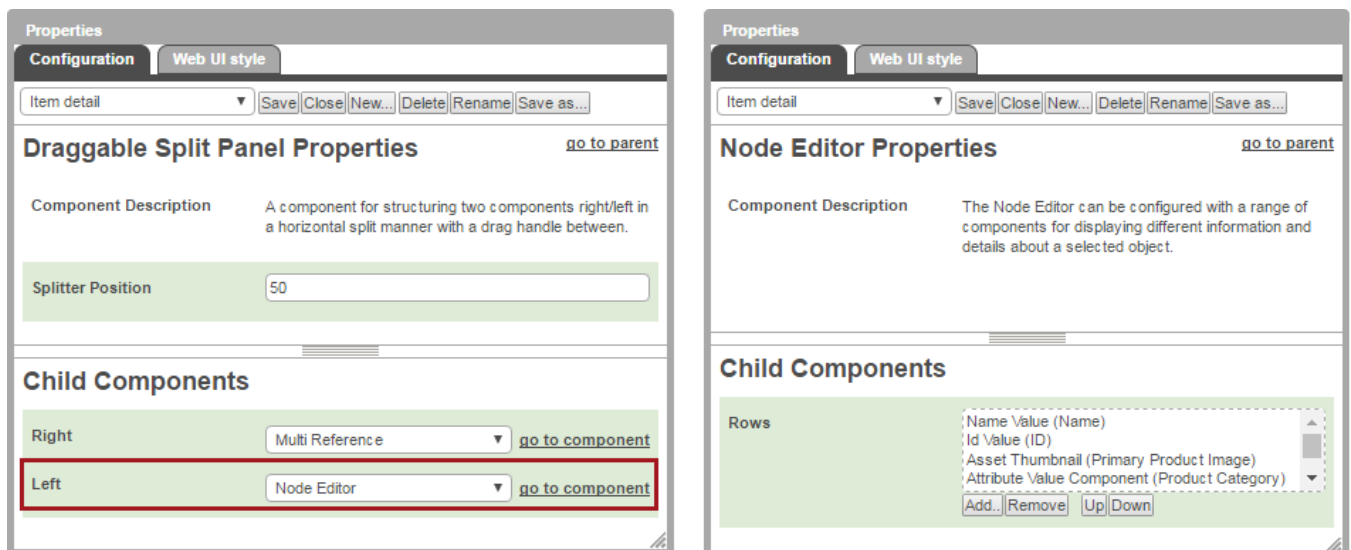
In the simple example below, a Node Details screen type has been used to create a new screen that has a 'Node Details' screen ID.

Note: The Node Details screen ID is used to simplify the example. The screen ID should have a descriptive name that better describes the purpose / usage of the screen and is easily identifiable.

- **Node Details Properties** is configured as follows: Child Components > Main > **Tab Control** (as seen in the screenshot under 'Child Components,' Step 1 of the 'Configuring Node Details Properties' section of this topic). For more information, **Tab Pages** are described in the **Using a Web UI** documentation.
- **Tab Control Properties** has Child Components > **Tab Pages** configured with Tab Page (Basic Information and references), Sub Screen Tab Page (Revisions), and Tab Page (Category Information) components.



- The Node Editor is a child component of a Draggable Split Panel component.



- The attributes (i.e., Name, ID, Primary Product Image) shown below are configured to display within the **Node Editor** component. Attribute Value components are added within the Child Components section of the Node Editor Properties. They can be added and removed using the buttons below the **Rows** field, and the attribute values will display on screen based on how they are ordered within the field. They can be re-ordered using the Up and Down buttons. For more information, see the **Node Editor Component** documentation in the **Web User Interfaces / Using a Web UI** documentation.

Item

Basic Information and references

Revisions

Category Information

Name12-GGK79

ID100703

Primary Product Image


Product Categoryfx
Products | Apparel | Upper Body Wear | T-shirts | T-shirts |

⚠ The object is shared with 2 objects

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

Brand NameYes

Brand Owner

Base Unit of MeasureCASE

Product NameThe Blue Shirt

Description Source

Description Target

Short Item DescriptionThis is a blue shirt.

Long Item DescriptionThis is a dazzling blue shirt.

Node Editor Component

A Node Editor component is used to display different information and details about a selected object. A Node Editor can be added as a child component of other components such as Node Details, Split Panel, Tab Page, and Draggable Split Panel.

As the Node Editor name suggests, most of the information / values displayed is editable data. However, if the end user should be restricted in regards to changing data, components (where applicable) can be made read only during configuration.

Prerequisites

It is expected that anyone configuring the Node Editor component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

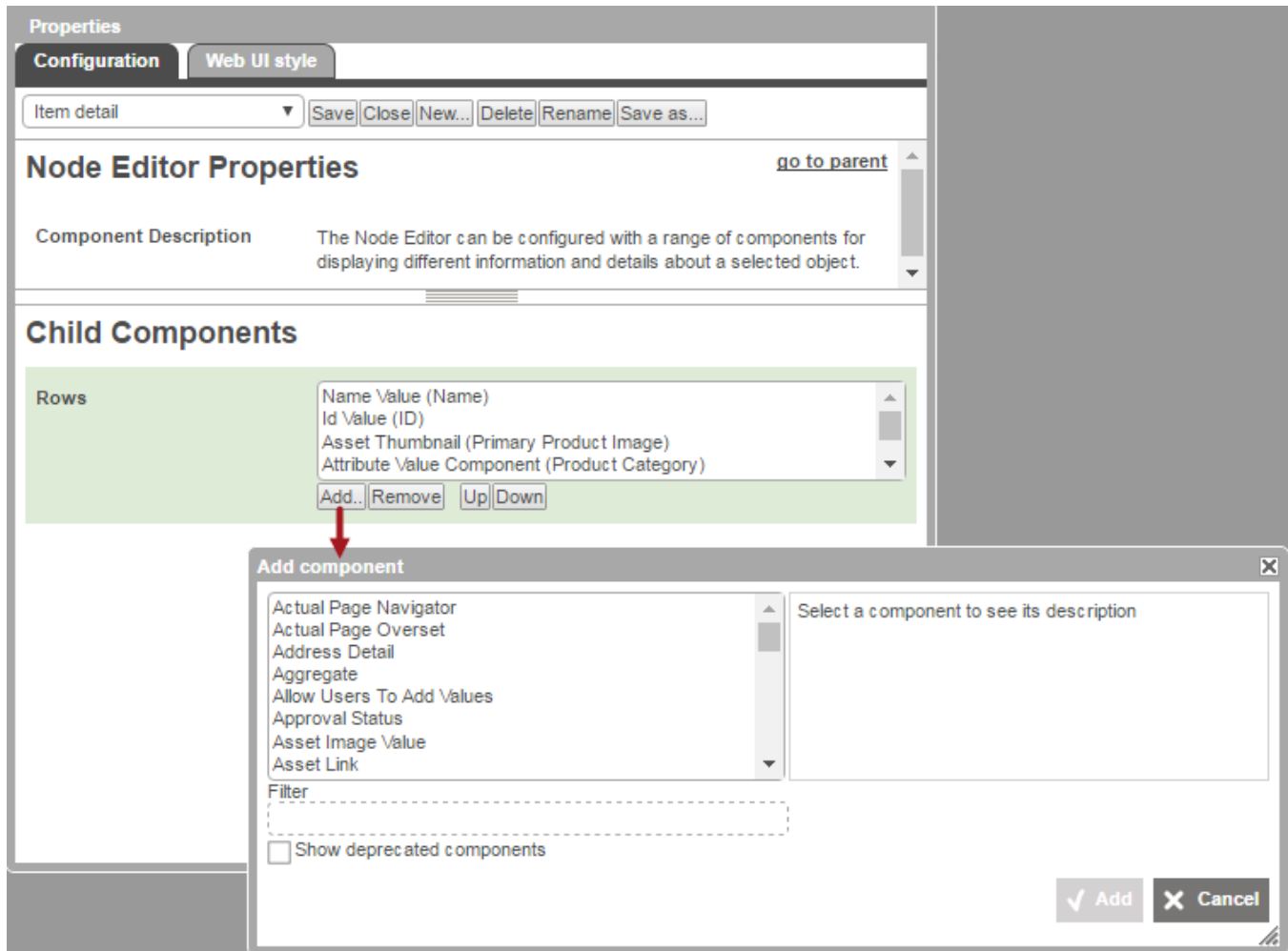
Configuring Node Editor Properties

The Node Editor Properties consists of a **Rows** child component, which allows for the selection of various components to be used to display needed information.

1. On Node Editor Properties, click **Add** and make a selection from within the 'Add component' dialog. Clicking on the component name displays a description of the component.

Note: Two main components used for displaying and editing attribute values are Attribute Value and Attribute Value Group. When displaying different types of objects of the same object type that have different valid attributes, a useful feature of these two components is that invalid attributes will be automatically hidden and not displayed on screen.

2. Once a selection is made, click **Add**.
3. Configure the added component, if applicable. As an example, adding an Attribute Value Component automatically brings up an additional properties screen with a required Attribute parameter. If you are adding Name Value or Id Value components, no additional configuration is needed.



4. Components can be added and removed using the buttons below the Rows field, and the components will display on-screen based on how they are ordered within the field. They can be re-ordered using the Up and Down buttons and can be edited by double clicking the component name.
5. Once the configuration is complete, click **Save** in the designer and **Close** to return to normal Web UI operation.

For additional information on using a Node Editor, see the following topics in **Web User Interfaces / Using a Web UI**:

- **Node Details Component**
- **Attribute Value Components**
- **Attribute Value Group Components**

Examples of Configured Node Editor Components

Below are examples of Node Editors that are configured to fit different purposes and screenshots of how they would display to end users.

Example 1: A Node Editor configured to display sellable product information. Components added to the Rows field (and shown below, in order from top to bottom) are Name Value, Id Value, Asset Thumbnail, Attribute Value Component (Product Category), Shared Target Information, Approval Status, and Attribute Value Group Component (Brand Name through Long Item Description).

Item

Basic Information and references
Revisions
Category Information

Name
12-GGK79

ID
100703

Primary Product Image


Product Category ^{fx}
Products | Apparel | Upper Body Wear | T-shirts | T-shirts |

⚠ The object is shared with 2 objects

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

Brand Name
Yes

Brand Owner

Base Unit of Measure
CASE

Product Name
The Blue Shirt

Description Source

Description Target

Short Item Description
This is a blue shirt.

Long Item Description
This is a dazzling blue shirt.

Example 2: A Node Editor configured to display customer address detail information. The Address Detail component is configured as the only component in the Node Editor Properties > Child Components > Rows field. Further configuration is done in the Address Detail Properties by adding components to Child Component > Rows.

Address

☒ Map
 ☐ Satellite
 ☐ Terrain



Country

State

City

Street Number

Street Name

Example 3: A Node Editor configured to display GDSN details. Components added to the Rows field (and shown below) are Name Value, Object Type, and three Reference Value components, each with different reference types selected.

Name

Object Type

GDSNCIC Recipient

GDSNCIC Registration

GDSNTarget Market

Node List Component

A Node List component displays objects in a table / grid format. The view can be further customized by configuring the data to display via different display modes and adding different action buttons that users can click while working with the object data. The display modes can then be customized with a range of headers, allowing for different information about the listed objects to be displayed. The behavior of many of the various actions can be further configured, also.

A Node List can be added as a child component of various other components including, but not limited to, Multi Reference, Packaging, Task List, Display Children Screen, Collection Content, and Advanced Search.

Below is one example of a Node List (configured as a child component within Multi Reference Properties).

Item

English USMainEnglish US

Basic Information and referencesRevisionsCategory InformationAdditional InformationPackaging HierarchyStatusDate TestingManufacturer InformationReferencesAttributes

Select allClear filterMulti edit viewList viewCompare viewSequence viewGallery viewGrid viewAdd Reference

	Acme	555-22346_US	RP4100	555-2033_M
ID	168241	8808	8047	8801
Name	Acme	555-22346_US	RP4100	555-2033_M
Object Type	Logo	Item	Product Image	Installation Manual
Reference type	Brand Name Logo	Supplier Replacement Item	Primary Product Image	Installation Manual
Thumbnail				

Specific details on setting up this particular Node List can be found in the Multi-Reference Editor topic in Using a Web UI. General Node List configuration instructions can be found below.

Prerequisites

It is expected that anyone configuring the Node List component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuring Node List Master Component Properties

A Node List is highly configurable. Each parameter in Node List Properties features help text, accessible by hovering over and clicking a yellow info icon to the right of each parameter name. The default parameter settings may differ depending on where a Node List is used. The following screenshot shows another example of a Multi Reference Properties Node List.

Properties

Configuration

Web UI style

Node Details

SaveCloseNew...DeleteRenameSave as...

Node List Properties

go to parent

Component Description

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

Hide Standard Buttons

☐

ID*

c bbeffc bbab

Lookup Screen Type For Navigation

☒

Page Size

25

Use Details Overlay

☐

Default Sorting Order

Ascending

Enable Default Sorting

☒

Label Texts

Selection Screens

Child Components

Display Modes

Multi Edit Display Mode

Add...RemoveUpDown

Actions

Add Reference ActionRemove Reference Action

Add...RemoveUpDown

Label Texts

Clear All Filters

i18n.stibo.portal.server.components.masterdetail.N

Clear Selection

i18n.stibo.portal.server.components.masterdetail.N

Multi Select Help Text

Select All Label

i18n.stibo.portal.server.components.masterdetail.N

Selection Screens

Asset Selection Screen

<Select a screen>

Add

Classification Selection Screen

<Select a screen>

Add

Empty Selection Screen

<Select a screen>

Add

Entity Selection Screen

<Select a screen>

Add

Multi Selection Screen

<Select a screen>

Add

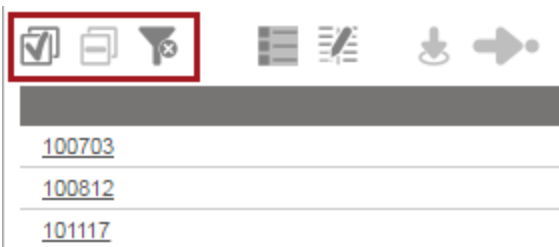
Product Selection Screen

<Select a screen>

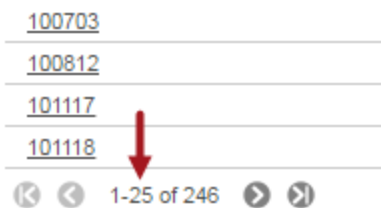
Add

Follow these steps to configure the component:

1. Enable or disable **Hide Standard Buttons**, as desired. When enabled, the 'Select all,' 'Clear selection,' and 'Clear all filters' buttons display above the table.



2. The only mandatory parameter is **ID**. A descriptive, unique ID can be given or the standard pre-filled text can be kept. The STEP system uses this ID to recognize which Node List to display.
3. Either enable or disable **Lookup Screen Type For Navigation** based on the desired behavior, outlined below:
 - If unchecked, then the object screen selection that is defined under Selection Screens will be used as a target screen (e.g., Asset Selection Screen, Classification Selection Screen, Product Selection Screen, and Entity Selection Screen).
 - If checked, then the screen mappings that are defined in the Main Properties are used when selecting the object from the Node List.
4. When using Table Display Mode (List view), Film Strip Display Mode (Filmstrip view), and Gallery Display Mode (Gallery view), the objects in the table are displayed by page. You can determine the maximum number of objects to show per page. Change the number in the **Page Size** field or use the default (25 objects per page).



5. Determine how the object data should be displayed when you click on an object ID link in a Node List. You can either view the object details directly on the same screen by enabling the **Use Details Overlay** parameter—or view the object details on a different screen. Both methods use the same screen mappings (dependent on how you have set up the parameters) and display the same information. To better explain, below are two examples, both using the Advanced Search screen type:

A user runs a search and then clicks on ID 101117 that is shown in the results list, which is a Node List in List view.

- Example 1: **Use Details Overlay** is disabled, so the screen navigation takes the user to the Item Details screen.
- Example 2: **Use Details Overlay** is enabled, so the Item Details screen displays as an overlay on the Advanced Search screen. Users can easily return to the results list / Node List by clicking the  icon in the upper right corner and can use the arrows to navigate through each Node List item.

Advanced Search

Object type: Item (Item)

Search Criteria: Hierarchy, Attribute, Object type, Search from List

Search, Save, Create collection from search criteria

ID: 100703, 100812, 101117, 101118, 109242, 109308, 109951

Status flag

Tree

- Products
 - Apparel
 - Footwear
 - Safety
 - Hardware
 - Displays
 - Furniture
 - Automotive
 - Building Products
 - Sealers/Fillers/Adhesives
 - Caulking
 - 22621-12
 - 444420
 - 8245035-01
 - Board glue

Item 1

Basic Information and references, Revisions, Additional Information

Name: 444420

ID: 101117

Product Category: Products | Building Products | Sealers/Fillers/Adhesives | Caulking | Caulking Items

Approved: Last approved 9/30/15 9:25 AM

Brand Name

Brand Owner

Base Unit of Measure

Product Name

Advanced Search

Object type: Item (Item)

Search Criteria: Hierarchy, Attribute, Object type

Search, Save, Create collection from search criteria

Item

Basic Information and references, Multi Context, Attribute Link Editor, Referenced By, Revisions, Packaging Hierarchy, Data Visualization, Asset Preview, Title, Title

Name: 444420

ID: 101117

Primary Product Image

Product Category: Products | Building Products | Sealers/Fillers/Adhesives | Caulking | Caulking Items

Approved: Last approved 9/30/15 9:25 AM

Brand Name

Brand Owner

Base Unit of Measure

Product Name

Save, Reset

Reference type, ID, Icon, Type

Reference type	ID	Icon	Type
Installation Manual	8801		Installation Manual
Primary Product Image	22234		Product Image

Number of items: 2

6. Select a **Default Sorting Order** option (Ascending or Descending), if desired.
7. If a Default Sorting Order is selected, enable **Enable Default Sorting** by checking the box. When enabled, initial table sorting will be performed on the contents of the first column or row (depending on property direction) when applicable, otherwise on ID. If disabled, no initial sorting will be performed.

Note: If Table Sorting is enabled for one of the headers configured within a display mode, then that setting overrides the Node List Enable Default Sorting selection.

Access additional parameters by clicking on **Label Texts**.

8. Under Label Texts, if desired, change the hover text displayed for one or all of the three standard buttons (described in Step 1) by typing the desired text into the **Clear All Filters**, **Clear Selection**, and/or **Select All Label** parameter fields.
9. To display text / information to a user looking at data in Table Display Mode (List view), Film Strip Display Mode (Filmstrip view), or Gallery Display Mode (Gallery view), add it to the **Multi Select Help Text** parameter. It is blank by default. An example follows.

The screenshot shows two parts of the Stibo Systems configuration interface. On the left, the 'Label Texts' section is expanded, showing four input fields: 'Clear All Filters', 'Clear Selection', 'Multi Select Help Text', and 'Select All Label'. Each field contains a default configuration path. A red arrow originates from the 'Multi Select Help Text' field and points to the right. On the right, the 'Advanced Search' section is visible, featuring a search bar, a table with columns for 'Object type' and 'ID', and a list of search results. The 'Multi Select Help Text' column in the table is highlighted, and the red arrow points to it. Below the table, there is a pagination bar showing '1-25 of 246' and a 'Multi Select Help Text' button.

Access additional parameters by clicking on **Selection Screens**.

10. Under Selection Screens, if you wish to override the configured Web UI mappings, make selections regarding which screen(s) a user will see after clicking on object links in the table. Using the dropdown for each parameter, select the ID of the screen to display when:
 - **Asset Selection Screen:** A single asset is selected.
 - **Classification Selection Screen:** A single classification is selected.
 - **Empty Selection Screen:** The selection is empty.
 - **Entity Selection Screen:** A single entity is selected.
 - **Multi Selection Screen:** The selection has multiple entries.
 - **Product Selection Screen:** A single product is selected.

▼ Selection Screens

Asset Selection Screen	<Select a screen>	▼ Add
Classification Selection Screen	<Select a screen>	▼ Add
Empty Selection Screen	<Select a screen>	▼ Add
Entity Selection Screen	<Select a screen>	▼ Add
Multi Selection Screen	<Select a screen>	▼ Add
Product Selection Screen	<Select a screen>	▼ Add

Child Components

Display Modes	<Select a screen> homepage login Address Detail Address Detail Screen Address Detail Screen 2 Address Root Node Details Advanced Search Alternate selection Asset detail Asset list Attribute Group Management Attribute Link Editor Screen Attribute Management Background process detail Background process list Basket detail Basket statistics Batch category detail Batch detail
Actions	

Important: If using these screens instead of the Main Properties mappings, you also need to disable the Lookup Screen Type For Navigation parameter, as described earlier in this topic.

Configuring Node List Child Component Properties

Display Modes and **Actions** are configured in the Child Components section. Each selection corresponds to a button / icon that will display above the data table. Display Modes determine how the entire Node List displays, and actions can be performed on the selected nodes and/or objects. The buttons / icons are enabled when they are applicable for use.

Here are basic instructions for configuring each with more detail following the steps.

1. Click the **Add** button under the parameter field.
2. Make a selection in the 'Add component' dialog.

3. Click **Add** again. New selections are added to the bottom of the list and can be re-ordered using the Up and Down buttons. The icons / buttons will display left to right on the screen in the top-to-bottom order shown for the parameter.
4. Repeat Steps 1 through 3 as needed.
5. Double click on the display mode title in the field to configure the component properties.

Icon	Display Mode	Button Hover Text	Description
	Multi Edit	Multi edit view	Configurable table; allows for editing of the objects
	Table	List view	Configurable list (vertical columns)
	Compare	Compare view	Table with customizable headers; can change table direction and select a title to use for identifying the objects displayed
	Film Strip	Filmstrip view	A single row of icons / images representing the objects
	Gallery	Gallery view	Grid with icons / images representing the objects; typically used for lists of image assets
	Grid	Grid view	Configurable grid; designate what attribute value is displayed
	Sequencing	Sequence view	Table used for sequencing children of the current object (via the Display Children Screen and Children of Type)

Clicking through the actions in the 'Add component' list will provide more details on what each action does. Also, many actions are explained in detail in applicable topics within the **Using a Web UI** documentation, as they pertain to specific functionality. Actions examples include (but are not limited to) Add Reference Action, Remove a Reference Target, Excel Export Action, Start Workflow from Grid, and Simple Exporter Action.

For additional information on using a Node List, see the following topics in **Web User Interfaces / Using a Web UI**:

- **Node Details Component**
- **Main Properties**

- **Multi-Reference Editor**
- **Advanced Search**

Onboarding Multiple Objects Using Web UI Screens

Prerequisites

Onboarding multiple objects using Web UI Mass Creation components requires designers to configure a screen and a widget. Detailed configuration instructions are provided in separate topics of the Web UI documentation:

- **Configuring a Mass Creation Screen**
- **Mass Creation Widget**

Additionally, end users must have the necessary privileges to create and onboard objects in STEP as well as have access to selected parts of the Tree hierarchy (e.g., the product hierarchy). For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

Mass Creation Screen

The Mass Creation screen is used to set up multiple Product, Entity, and Classification objects in STEP and initiate them into STEP simultaneously. Using Web UI screens to onboard multiple objects into STEP provides an alternative to using more complex import methods such as Smartsheets.

Mass Creation Widget

The Mass Creation homepage widget should be configured as the entry point to a Mass Creation screen. Admin users can set the static root nodes that limit what an end user has access to when onboarding objects. If a STEP hierarchy is extensive, this is particularly useful if an end user should focus on one product category and not another one.

Multiple widgets and screens can be set up to meet onboarding needs. As an example, multiple users may be onboarding products in different categories, and it would be useful to have multiple widgets set up to direct users to the applicable Mass Creation screen they should use.

For more information on using a configured Mass Creation screen and widget, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

Configuring a Mass Creation Screen

The Mass Creation screen is used to set up multiple **Product**, **Entity**, and **Classification** objects in STEP and initiate them simultaneously.

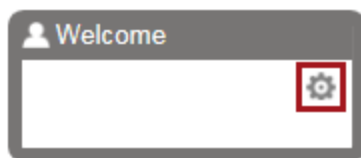
Admin users first need to create a screen using the Mass Creation screen type. Once the screen is created, configuration can begin.

Multiple screens / configurations can be saved to meet a variety of onboarding needs.

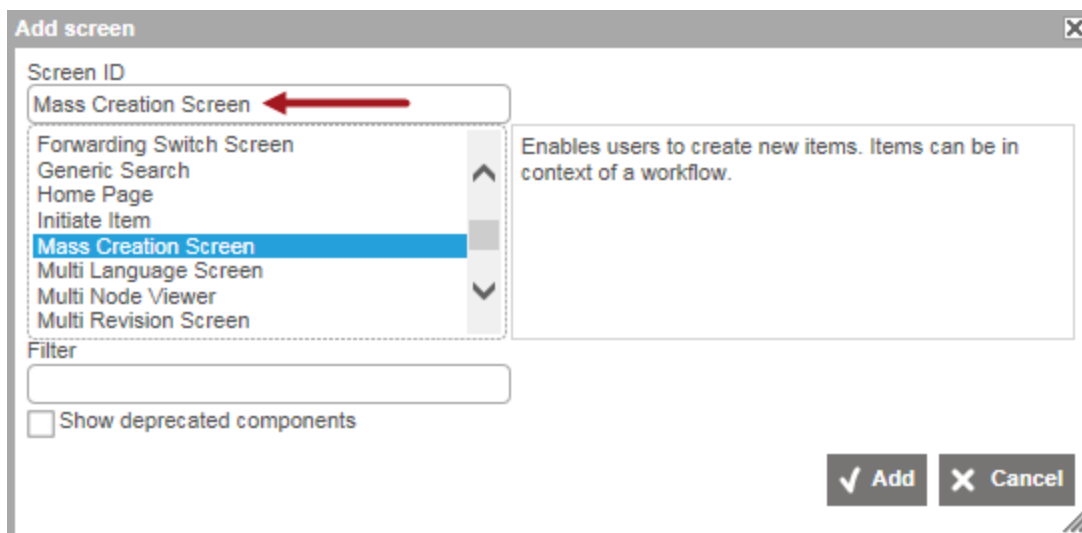
Adding a New Mass Creation Screen

To add a screen using the Mass Creation screen type:

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



3. Click the **New** button in the action icon row.
4. Choose **Mass Creation Screen** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable as this will be what is shown to anyone trying to access the screen through design mode or who is using the screen as a results screen for a Mass Creation Homepage widget.



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

Configuring a Mass Creation Screen

A screenshot of the default properties screen follows. In place of outlining steps a Web UI designer should take to configure the screen properties, the sections directly after the image explain what each parameter does and the options for configuring them. Each parameter should be configured as needed.

Attributes and Groups

Any attribute groups and/or attributes selected will display as editable columns, if applicable, in the **Mass Creation** screen grid. These can be added, removed, and re-ordered using the buttons under the **Attributes and Groups** field.

Administrators are encouraged to follow best practices and put all category-specific attributes into one super attribute value group (e.g., Dimensions). Objects can be further divided into sub-groups (e.g., Height and Width). Any attribute sequencing will need to be done following standard procedures if attribute values should be filled out in a specific order.

There are three default columns that will display automatically, even if the **Attributes and Groups** field is empty. They are **Structure**, **ID**, and **Name**. See the example below.

Mass creation - Products (ProductsRoot)

☒
☐
 > <
 × + ↶ ↷

	Structure	ID	Name
	Level1		

Business Condition

Business Condition ... Clear

To apply a business condition, within **Mass Creation Screen Properties**, click the ellipsis button to the right of the Business Condition field to browse / search and select one. The business condition ID displays within the properties field. Click the ellipsis button to select a different business condition , and click the Clear button to the right of the ellipses button to remove an existing condition.

A business condition may be selected and used for validating object data. An end user can run a business condition validation on all rows at any time by clicking the business condition button. Also, if only a subset of the data should be tested, a user can select certain rows prior to clicking the business condition button. The business condition also runs and validates the data automatically when the Create button is clicked.

The business condition button appears to the right of the Create (shown by default) button within the user interface. The business condition name is shown on the button, and the button only displays if a business condition is selected.

For more information about Business Conditions, see **Business Conditions** in the **Business Rules** documentation.

Object Types

Object Types

Product, **Entity**, and **Classification** object types can be added, removed, and re-ordered using the Add, Remove, Up, and Down buttons under the **Object Types** field. The configured list will serve as the object type or types available for the user when creating new objects.

Please note that assets cannot currently be created using a Mass Creation screen.

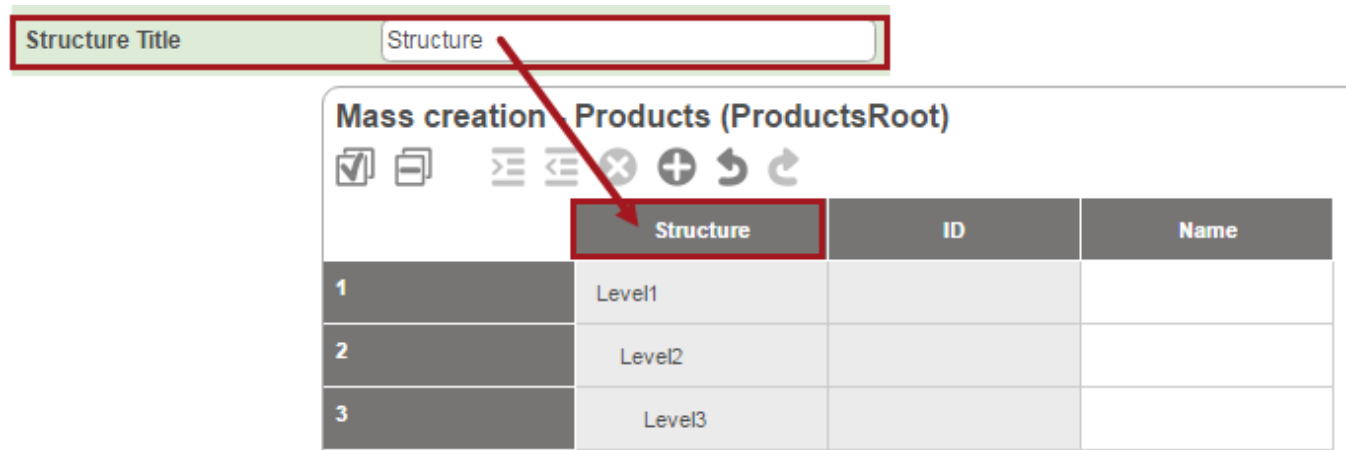
Screen

Using the Screen dropdown list, select the screen that users will be forwarded to once they create and successfully save objects in STEP. If the desired screen does not already exist, there is an Add button to the right of the dropdown.



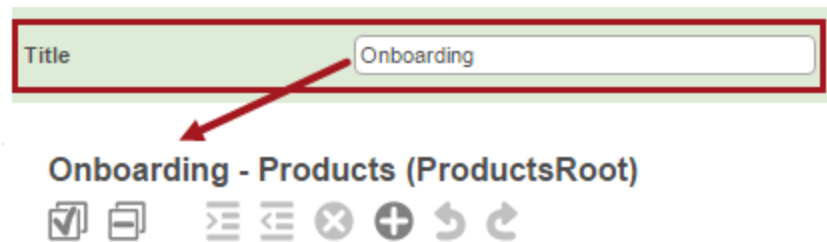
If adding a new screen, pick a screen type, and give it a descriptive Screen ID as described in the **Adding a New Mass Creation Screen** section of this topic. Once **Add** is clicked within the 'Add screen' dialog, the newly created Screen ID will auto-populate in the Screen field. Using standard processes, configuration can be done on the newly created screen once the **Mass Creation Screen Properties** are saved.

Structure Title



The object hierarchy Structure column, displayed by default, can be renamed to something more meaningful to the end user.

Title



'Mass creation' is the default title given to a new Mass Creation screen and is displayed at the top of the screen above the action buttons. Edit the **Title** field, if desired, to something more descriptive. The title is especially important if using multiple Mass Creation screens to onboard different object categories or object types.

Below is an example of the **Mass Creation Screen Properties**, fully configured:

The screenshot shows the 'Mass Creation Screen Properties' dialog box. It has a 'Configuration' tab selected. At the top, there's a dropdown menu showing 'Mass Creation Screen' and a row of buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main area is titled 'Mass Creation Screen Properties' and contains several sections: 'Attributes And Groups' with a list box containing 'MassCreation' and buttons 'Add...', 'Remove', 'Up', 'Down'; 'Business Condition' with a list box containing 'MassCreate1' and a 'Clear' button; 'Object Types' with a list box containing 'Level1', 'Level2', 'Level3', and 'SalesItemFolder', and buttons 'Add...', 'Remove', 'Up', 'Down'; 'Screen' with a dropdown menu showing 'productdetails' and an 'Add' button; 'Structure Title' with a text box containing 'Levels'; and 'Title' with a text box containing 'Onboarding'.

After parameter selections have been made, click **Save** at the top of the Designer window. Close the window or select --[HOMEPAGE]-- to continue on and configure the Mass Creation widget. For more information, see the **Mass Creation Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

For more information about using the Mass Creation components, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

Using a Mass Creation Screen and Widget

Users can create objects, create object hierarchies, and initiate objects into workflows all on one dedicated Mass Creation screen—and get to that screen using a Mass Creation homepage widget. Multiple Mass Creation screens and Mass Creation widgets can be configured and saved to meet different onboarding needs.

Steps to Multiple Object Creation

For simplicity, these steps and images are provided using the final property configurations shown in the **Configuring a Mass Creation Screen** and **Mass Creation Widget** documentation.

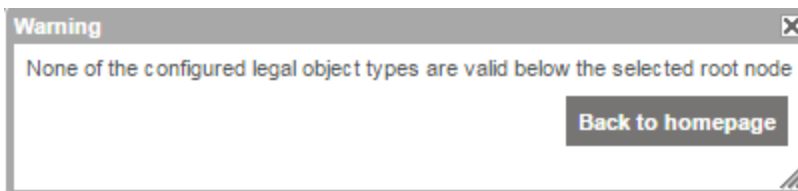
It is important to note that a maximum of 500 objects can be created per Mass Creation screen session.

All create actions must occur in a single session without navigating away from the Mass Creation screen. Incomplete data cannot be saved in Web UI for a later submission. Also, only one super type at a time can be loaded per Mass Creation screen session (e.g., all Products or all Classifications—not a mix of both).

1. Go to the Mass Creation widget on the Web UI homepage.
2. Select a parent object by clicking the node picker and using the configured selection tabs. The widget also has a type-ahead search feature (type in the empty area to the left of the node picker icon). The last nine selections / searches are listed on the widget under the **Latest searches** heading. The Mass Creation screen designated as the results screen in the widget configuration will display.



- If a user clicks on the widget node picker and chooses a root node that is not compatible with the Object Types selected during the screen Mass Creation Screen configuration, then the below message will display.



- If there are no issues, then the Mass Creation screen will display.

Onboarding - Products (ProductsRoot)

Select all

Indent selected items

Outdent selected items

Insert new line

Remove selected lines

Undo latest change

Redo latest change

	Levels	Id	Name	Manufacturer Name	New Product	Sales Item Short De...
☐	Level1					

3. Enter and organize the data. (Up to 500 objects can be created per Mass Creation screen session.)
- To begin, enter object data by cutting and pasting data into the table (e.g., from an Excel spreadsheet) or manually entering it.
 - Navigate by tabbing through cells or clicking in cells using a mouse. List of Values (LOV) cells are identifiable by a light gray enter icon that will display once you click or tab into the cell (↵).

Note: Engaging an LOV cell works the same across STEP Web UI components. Standard instructions to engage an LOV are to double-click in the cell. Because behavior between browsers and systems differs, if you are using just your keyboard, hit enter twice when you have tabbed in to an LOV cell; if the LOV does not display automatically, press the Alt key and the down arrow at the same time (or just the down arrow key). Click on a value to make a selection or type two or more letters / digits to identify a selection. If you want to filter through all entries, as an example, that start with 'G,' just type the letter G multiple times to cycle through the options.

- Once you enter data in the first available cell and hit tab or enter, a data row is created. An empty data row remains at the bottom of the grid for ease and convenience of entering data and adding rows. Only the data in rows marked with numbers will be used to create actual objects.
- Organize the object hierarchy and create parent / child relationships on the screen using the Structure cell options and the action buttons.
 - Users are limited by the existing object type structure. The structure on the Mass Creation screen is created based on the existing object data model set up and configured to be used.
 - If more than one object type is available for the structure level you are creating, then the cell in the Structure column will change colors and there will be a dropdown of choices available.
 - The action buttons are located on the screen below the title and above the grid. The buttons will become active when it is valid for them to be used. From left to right order, the buttons are:

Icon	Button	Function
	Select all	Highlights / selects all lines of the grid except the last line; can be used if you want to validate data using a business condition any time during the data entry process; only displays if there are no rows selected

Icon	Button	Function
	Clear all	Deselects all rows; only displays if a row is selected
	Indent selected items	Creates child objects; highlight row(s) and click the indent button; Structure column will update accordingly
	Outdent selected items	Creates parent objects; highlight row(s) and click the outdent button; Structure column will update accordingly
	Insert new line	Adds a row to the grid above selected entry
	Remove selected lines	Deletes rows from the grid; select at least one row to activate the button User will receive a confirmation message they must confirm; empty row cannot be removed
	Undo latest change	Allows user to undo their last change
	Redo latest change	Allows user to redo a change after undoing it

- As data is entered, any cells with validation issues will be marked with a yellow indicator icon. These errors (e.g., entered data does not match an LOV value, entered data is not valid for the attribute's validation base type) need to be addressed before the Create button is clicked.
- If using a business condition, additional validation can be done at any time by clicking the business condition button, which is located to the right of the Create button on the bottom left side of the screen. In the example that follows, the business condition is named Mass Create. The business condition automatically runs when a user clicks the Create button. See **Validating Data** below for more information regarding validation responses.



- When done entering data into the grid and correcting any validation errors, click **Create**.
- Address any issues, if applicable, that are displayed via an informational pop-up message (see **Validating Data** below). If the business condition validation fails for any reason upon clicking Create, none of the objects nor the object hierarchy structure will be created.
- When creation is successful, the user will automatically be routed to the screen configured in the Screen parameter of the Mass Creation Screen Properties settings. If applicable, the new objects will automatically

be initiated into workflows based on your existing workflow rules. (For more information about workflows and auto-initiation, see the **Auto-Initiation of Tasks in Workflows** topic in the **Workflows** documentation.)

Example

The images that follow show a simple example of objects and an object hierarchy being created.

- The object type directly under Level1 has two options (Level2 and Level2.1).
- Level3 is being indented to become a child of Level2.
- The set of objects passed validation when Create was clicked. The objects / object hierarchy were created and the screen was routed appropriately based on the configured Screen parameter within the Mass Creation Screen Properties.
- The newly created objects are shown in the Web UI Tree.

Onboarding - Products (ProductsRoot)

	Levels	ID
☐ 1	Level1	
☐ 2	Level2	
☐ 3	Level1	
☐ 4	Level1	
☐	Level1	

Onboarding - Products (ProductsRoot)

	Levels	ID
☐ 1	Level1	
☐ 2	Level2	
☐ 3	Level2 Level2.1	
☐ 4	Level1	
☐	Level1	

Onboarding - Products (ProductsRoot)

	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
☐ 1	Level1					
☐ 2	Level2					
☒ 3	Level2					
☐	Level1					

Onboarding - Products (ProductsRoot)



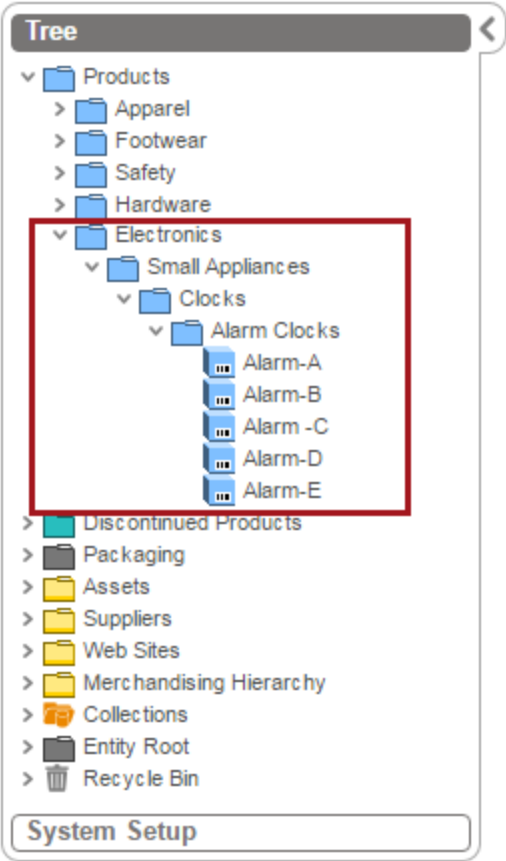
	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
☒ 1	Level1					
☒ 2	Level2					
☒ 3	Level3					
☐	Level1					

Onboarding - Products (ProductsRoot)



	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
☒ 1	Level1		Electronics	Rise-N-Shine	Yes	Top folder for electr...
☒ 2	Level2		Small Appliances	Rise-N-Shine	Yes	Top folder for small ...
☒ 3	Level3		Clocks	Rise-N-Shine	No	Top folder for clocks
☒ 4	SalesItemFolder		Alarm Clocks	Rise-N-Shine	Yes	Variety of alarm cloc...
☒ 5	SalesItem		Alarm-A	Rise-N-Shine	Yes	Digital
☒ 6	SalesItem		Alarm-B	Rise-N-Shine	Yes	Analog
☒ 7	SalesItem		Alarm -C	Rise-N-Shine	Yes	Glow s in the dark
☒ 8	SalesItem		Alarm-D	Rise-N-Shine	No	Large display
☒ 9	SalesItem		Alarm-E	Rise-N-Shine	Yes	Travel size
☐	Level1					

Create Mass Create



Validating Data

- If there is a **cell-level validation** error, an icon appears in the cell: 
- If a **business condition validation** fails, an icon appears in the row with an error and a validation message appears:

Onboarding - (157621)      

				Manufacturer Name	New Product	Sales Item Short De...
☐ 1	SalesItem			Rise-N-Shine	Yes	Large display screen
☐ 2 	SalesItem		Alarm-234	Rise-And-Shine	Yes	9-minute snooze
☐ 3 	SalesItem		Alarm-345		Yes	Great for kids
☐ 4	SalesItem		Alarm-456	Rise-N-Shine	No	Travel sized
☐ 5 	SalesItem		Alarm-567	Rise-N-Shone	No	Easy to set time

Create

▶ Mass Create

 **Mass Create Validation Failed**
5 object(s) validated; found 3 error(s)
2 : Value for "Manufacturer Name": "Rise-And-Shine" does not equal "Rise-N-Shine"
3 : Value for "Manufacturer Name": "no value" does not equal "Rise-N-Shine"
5 : Value for "Manufacturer Name": "Rise-N-Shone" does not equal "Rise-N-Shine"

- If a **business condition validation** is successful (pre-Create), a 'Succeeded' validation message appears:

Onboarding - Products (ProductsRoot)

1

Level1

Electronics

Rise-N-Shine

Yes

Top folder for electr...

2

Level2

Small Appliances

Rise-N-Shine

Yes

Top folder for small ...

3

Level3

Clocks

Rise-N-Shine

No

Top folder for clocks

Mass Create Validation Succeeded

3 object(s) validated; found 0 error(s)

- When the **business condition validation** is done at the time a user clicks Create, no message displays if the validation is successful. A message only appears if the validation fails.

Packaging Hierarchy Editor

The Packaging Hierarchy Editor is a component designed to ease the work with the often comprehensive task of packaging logistics. The Editor is built around an intuitive graphical user interface that visualizes all available packaging hierarchies that a selected item is part of or a packaging object is included in.

The user interface interacts seamlessly with a multi-editor, enabling the user to browse through available packaging hierarchies quickly and see relevant information about an item and packaging objects (e.g., dimensions and weight). In addition to displaying information, the multi-editor also allows for the maintaining of attribute links and attribute values on packaging objects. Users are also able to add new levels to build on existing packaging hierarchies and to unlink removed levels.

For information about setting up and using the Packaging Hierarchy Editor, see these sections in the Web User Interfaces documentation:

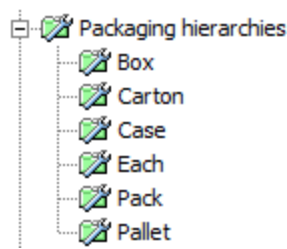
- Configuration of the Packaging Hierarchy Editor in STEP Workbench
- Set Up of the Packaging Hierarchy Editor in Web UI
- How to Use the Packaging Hierarchy Editor

Configuration of the Packaging Hierarchy Editor in STEP Workbench

Data Structure and STEP Workbench Setup

Create object types for packaging objects

The first step when configuring the STEP Workbench is to create the packaging object types that are going to be used in the Packaging Hierarchy Editor. These packaging objects represent the different packaging types making up the packaging hierarchies (e.g., Box, Case, and Pallet). The packaging object types should be created under Object Types & Structures under System Setup. Once the desired folder is found, right-click on it to create a New Object Type.



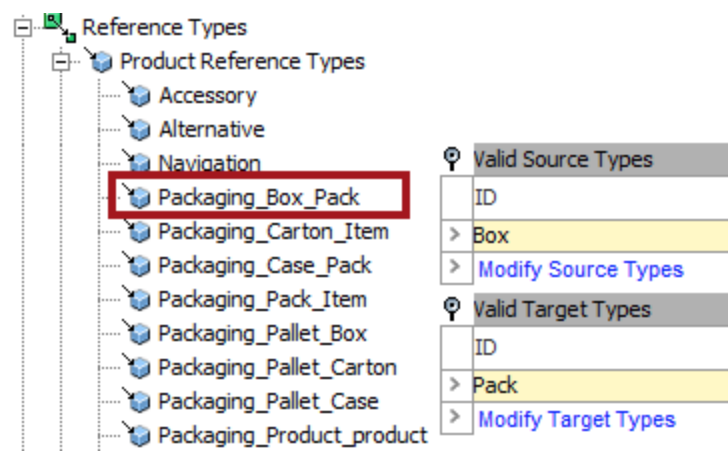
For the Packaging Hierarchy Editor to work, it is important that all Packaging Object Types created are configured to have automatically generated IDs. For this purpose set ID Pattern to **[id]**.

Description		
	Name	> > Value
>	ID	Box
>	Name	Box
>	Last Edited by	2014-12-05 10:25:00 by STEPSYS
>	Name Pattern	
>	ID Pattern	[id]
>	Manually Sorted	No
>	Enable Profiling	No
>	InDesign Template Allowed	No
>	Quark Template Allowed	No
>	Icon	
>	Dimension Dependencies	
>	Offers	

Create references between the packaging objects

In order to create the level structure of the Packaging Hierarchy Editor, after creating the needed packaging objects, the objects should be linked to. This is done by creating product references between the packaging objects (System Setup > Reference Types > Product Reference Types). Since it is the direction of the references

between the packaging objects that decides the packaging hierarchy structure, it is crucial that the reference source is the higher level packaging object and the reference target is the lower level object type. For example, Pallet-to-Box.

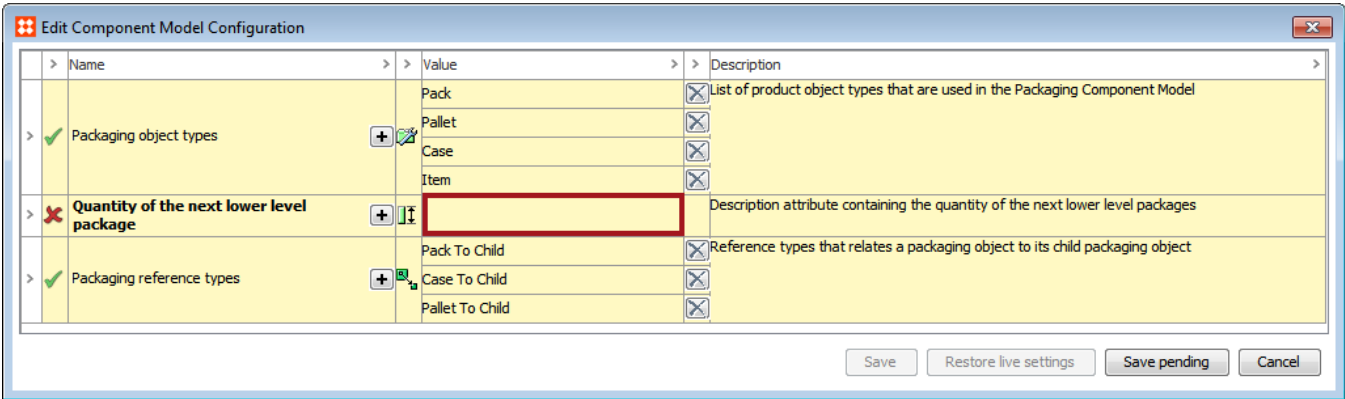


Create quantity attribute

For the Packaging Hierarchy to work, it is a requirement to create a Description attribute valid for all configured references between packaging types. This attribute should be set up to contain the quantity of the next lower level package quantity and will be used in the Component Model Configuration, which is explained in the next section. In the examples going forward, this attribute is named 'Qty of Next Lower Package.'

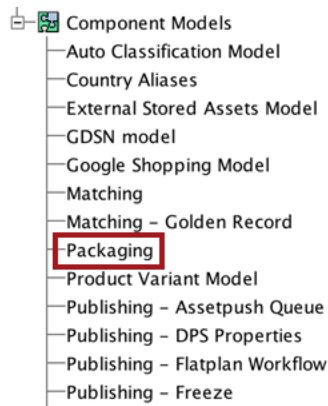
Note: This quantity attribute should be a single-valued attribute. If it is a multi-valued attribute, end users may run into errors within the Packaging Hierarchy Editor (Number Of Items calculations and Node List editing).

Packaging Hierarchy References				
Reference Type		Source	Qty Of Next Lower Package	
> Case To Child	+			
> Pack To Child	+			
> Pallet To Child	+			



Set up the Component Model

When all previously mentioned steps have been completed and the data structures have been defined, it is possible to set up the Component Model Configuration. The Component Model for the Packaging Hierarchy is found under Component Models on the System Setup tab.



The configuration of the Packaging Component Model consists of three sections (Click Edit to populate the model):

- **Packaging object types** should contain all object types used in the Packaging Hierarchy Editor.
- **Quantity of the next lower level package** should point to the quantity attribute created as part of the setup.
- **Packaging reference types** should include all reference types that are used in the packaging hierarchy structure.

Important: In order to set up the Component Model properly, it is important the that packaging hierarchy object types contain the item (product), which represents the lowest level in the packaging hierarchy.

Component Model Configuration			
Name		Value	Description
> Packaging object types		Pack	List of product object types that are used in the Packaging Component Model
		Pallet	
		Case	
		Item	
> Quantity of the next lower level package		Qty Of Next Lower Package	Description attribute containing the quantity of the next lower level packages
> Packaging reference types		Pack To Child	Reference types that relates a packaging object to its child packaging object
		Case To Child	
		Pallet To Child	
> Edit			

When editing, use (double-click) the + icon to make value additions and the X icon to remove any values. Save any setting changes before moving forward.

Edit Component Model Configuration

>	Name	>	>	Value	>	Description	>
>	✓ Packaging object types	+		Pack	✕	List of product object types that are used in the Packaging Component Model	
				Pallet	✕		
				Case	✕		
				Item	✕		
>	✓ Quantity of the next lower level package	+		Qty Of Next Lower Package	✕	Description attribute containing the quantity of the next lower level packages	
>	✓ Packaging reference types	+		Pack To Child	✕	Reference types that relates a packaging object to its child packaging object	
				Case To Child	✕		
				Pallet To Child	✕		

Save

Restore live settings

Save pending

Cancel

To continue Packaging Hierarchy Editor setup, see the 'Set Up of the Packaging Hierarchy Editor in Web UI' section in the Web User Interfaces documentation.

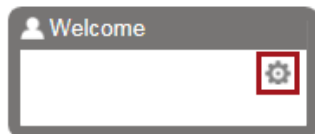
For information about using packaging hierarchy, see the 'How to Use the Packaging Hierarchy Editor' section in the Web User Interfaces documentation.

Set Up of the Packaging Hierarchy Editor in Web UI

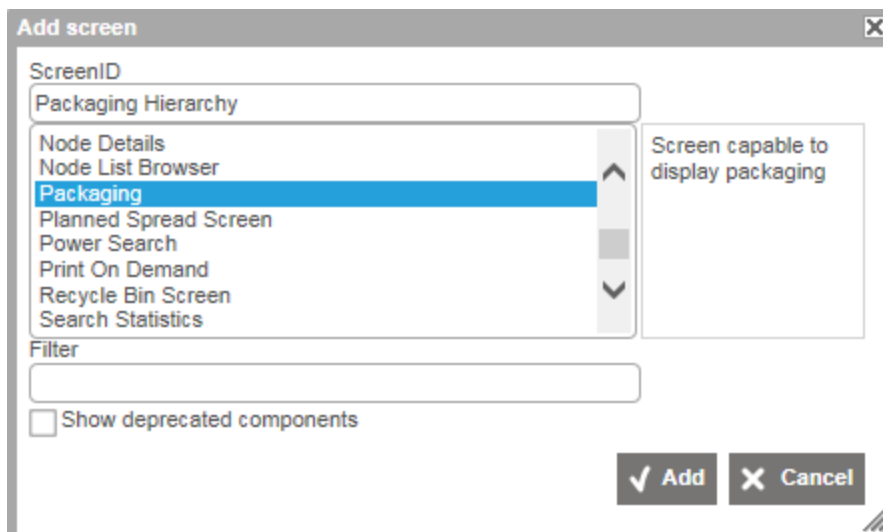
Prior to setting up the Packaging Hierarchy Editor in Web UI, make sure the STEP Workbench setup has been completed. For more information, see the 'Configuration of the Packaging Hierarchy Editor in STEP Workbench' section in the Web User Interfaces documentation.

Create a new screen

1. Log into the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the homepage (in the user widget) or from the corner bar, if configured, on any other Web UI page.



3. To create a new screen, click New and select Packaging to add the Packaging Hierarchy screen. Also, type in a ScreenID. This should be something users can easily identify, if needed, from the list of screens.



Configure the Packaging Hierarchy Editor Screen

There is a basic default configuration as part of the STEP system, however, some additional setup is required.

If still in the Web UI Designer mode after creating a new screen, go to the following step. Otherwise, log in to Web UI and enter design mode before continuing. Bring up the Packaging Properties for the Packaging Hierarchy ScreenID.

Properties

Configuration

Portal style

Packaging Hierarchy - New
Save
Close
New...
Delete
Rename
Save as...

Packaging Properties

Component Description

Screen capable to display packaging

Attributes

3

UPC
SupplierName

Add...
Remove
Up
Down

Hide Package Hierarchy

☐

Image To Object Mappings

2

Image To Object Mapping (Item / theme/gf
Image To Object Mapping (Pack / theme/g
Image To Object Mapping (Case / theme/c
Image To Object Mapping (Pallet / theme/

Add...
Edit...
Remove
Up
Down

Packaging Product Folders*

1

PackagingRoot
PackagingData

Add...
Remove
Up
Down

Use Node Picker For Save

☐

Child Components

Actions

5

Remove Packaging Action
Add Lower Packaging Action
Add Higher Packaging Action
Add Between Packaging Action

Add...
Remove
Up
Down

Node List

4

Node List

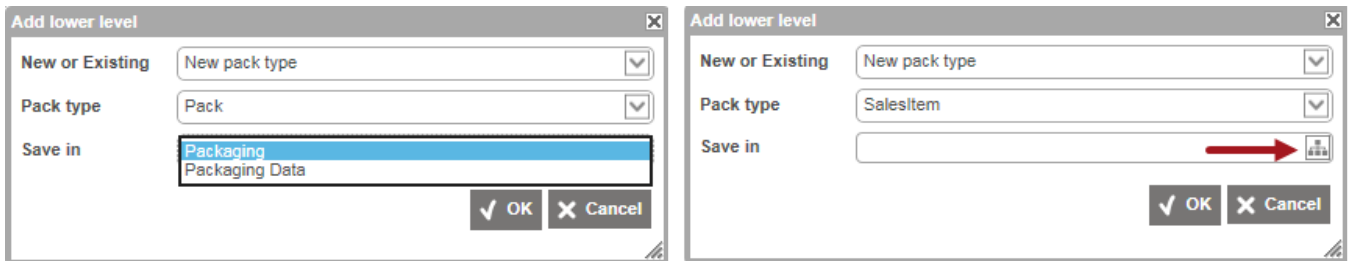
go to component

1. Configure the **Packaging Product Folders** parameter to designate the folder or folders where the packaging objects are / will be saved. Folders need to be set up prior to using this Add functionality.

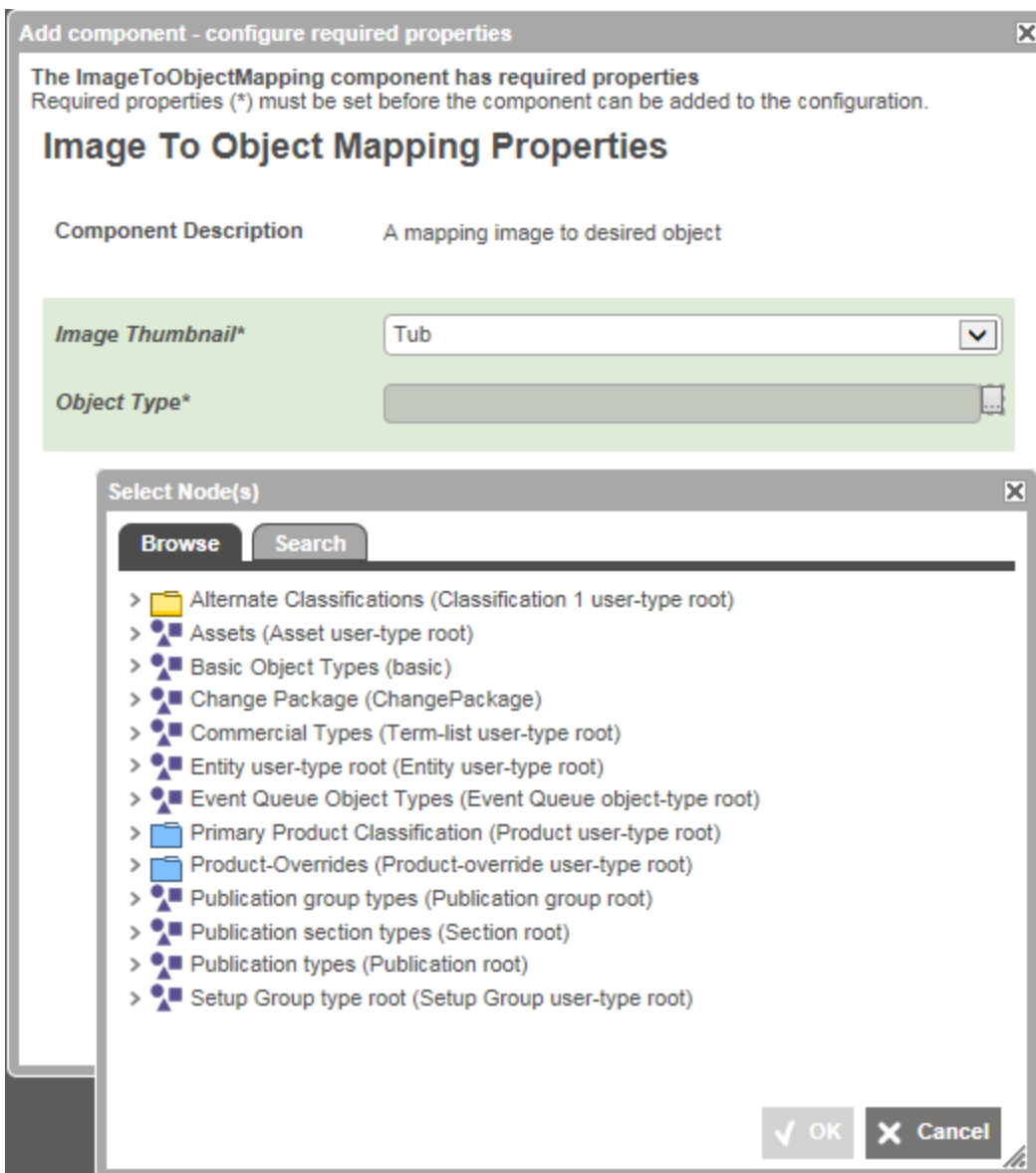
If users should only pick from the configured designated Packaging Product Folders when saving a packaging object, choose to disable / uncheck the **Use Node Picker for Save** parameter. *(If the Node Picker option is enabled / checked, users will be given a node chooser dialog to pick any folder available See the example screenshots that follow.)*

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536



2. Configuring **Image To Object Mappings** will connect a predefined icon to a specific packaging object type. These icons are used as representations of the specific packaging types in the Packaging Hierarchy Editor and help distinguish between the available packaging types. Choose to Add an Image to Object Mapping, select from the Image Thumbnail dropdown choices, and select an Object Type. Add, Edit, Remove, or reorganize the mappings as needed.



- If desired, up to two **Attributes** can be configured to show on the graphical elements along with the packaging icon. This makes it possible to display valuable information directly in the diagram, allowing users to quickly get a visual overview of the available Packaging Hierarchies for the selected product.

Example of an icon that includes the packaging type icon and two attribute values:



Note: More than two attributes can be added in the Attributes parameter value field on the Packaging Properties screen. However, only the first two attributes will display on the icon.

Hide Package Hierarchy can be enabled to remove the graphical user interface from display. This may be useful for simple hierarchies where end users do not need to see the graphics and just want to work within the Node List itself.

- When setting up the Packaging Hierarchy Editor Child Components, It is possible to configure the **Node List** component like any other Web UI Node List. However, by default, Multi Edit Display Mode is set as the display mode. The Multi Edit Display Mode is pre-populated with four attribute headers: Name, ID, the quantity attribute used in the Component Model Configuration, and Number Of Items (determined by hierarchy structure and the quantity attribute).

- Also under Child Components, users can set up the following Packaging Hierarchy **Actions** using the Add button: Add Lower Packaging Action, Add Higher Packaging Action, Add Between Packaging Action and Remove Packaging Action.

Also, a **Business Condition** can be added to each action. This option can be found under the Advanced section of each Action Properties screen.

The screenshot shows a 'Properties' window with 'Configuration' and 'Portal style' tabs. The 'Configuration' tab is active, showing 'Packaging Hierarchy - New' with buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. Below this is the 'Add Between Packaging Action Properties' section with a 'go to parent' link. The 'Label' field contains 'Add Between Level'. The 'Advanced' section is expanded, showing a 'Business Condition' field with a 'Clear' button. A red arrow points to the 'Clear' button.

Validation of packaging hierarchy

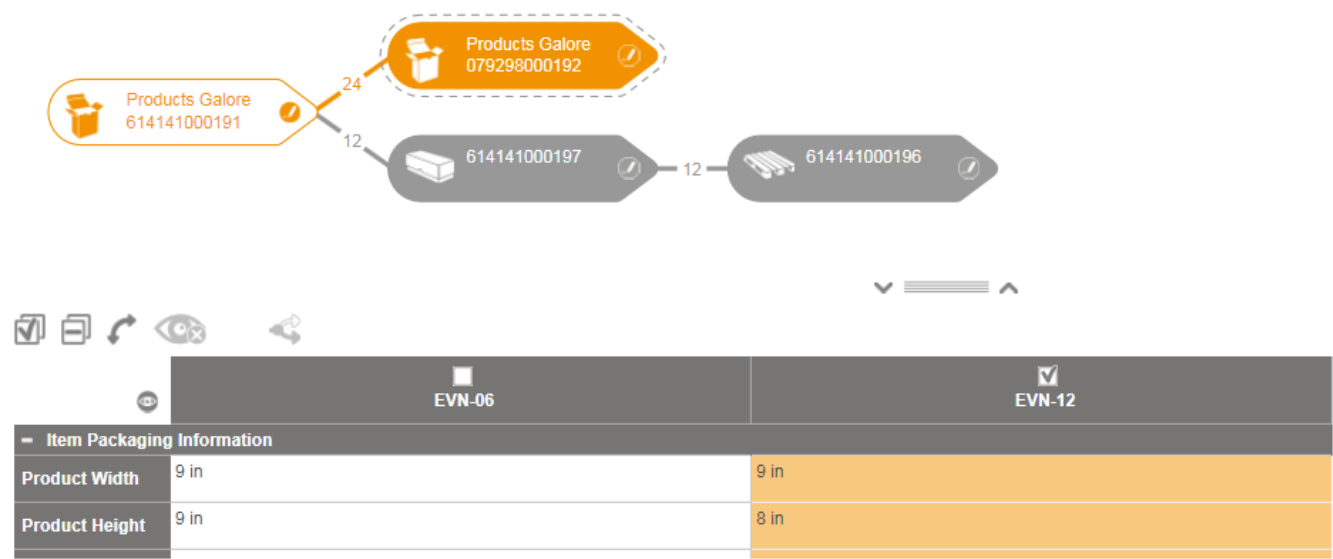
It is possible to run a business rule / business condition to validate the entire Packaging Hierarchy. Business rules and conditions can be added using the Actions component on the Node List Properties accessed from the Packaging Properties screen.

The screenshot shows a 'Properties' window with 'Configuration' and 'Portal style' tabs. The 'Configuration' tab is active, showing 'Packaging Hierarchy - New' with buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. Below this is the 'Node List Properties' section with a 'go to parent' link. The 'Child Components' section is expanded, showing 'Display Modes' with 'Multi Edit Display Mode' and buttons for 'Add...', 'Remove', 'Up', and 'Down'. The 'Actions' section is highlighted with a red border, showing 'Initiate Business Action' and 'Initiate Business Condition' with buttons for 'Add...', 'Remove', 'Up', and 'Down'.

For additional information about using packaging hierarchy, see the 'How to Use the Packaging Hierarchy Editor' section in the Web User Interfaces documentation.

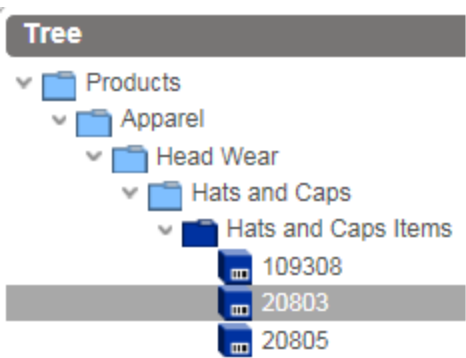
How to Use the Packaging Hierarchy Editor

When the Packaging Hierarchy Editor has been configured to display in Web UI, it is possible to view and edit packaging hierarchies. When set up and used correctly, the Packaging Hierarchy Editor looks similar to the following screenshot:



Opening the Packaging Hierarchy Editor can be done by selecting an object or a packaging type from the Tree or from on a product details screen.

For the Packaging Hierarchy Editor to display, the packaging hierarchy for a selected object type needs to be configured in the Component Model. For more information about the Component Model configuration, see the 'Configuration of the Packaging Hierarchy Editor in STEP Workbench' section in the Web User Interfaces documentation.



When configured properly the Packaging Hierarchy Editor will display the packaging hierarchy for a selected item or packaging type. If the selected item is not included in a packaging hierarchy, only the selected item will be represented in the Editor as shown below and the table will only have one column:

Item

- Basic Information and references
- Category Information
- Additional Information
- Packaging Hierarchy



	20803
Item Packaging Information	
Product Width	7 in
Product Height	5 in

Create or modify a packaging hierarchy

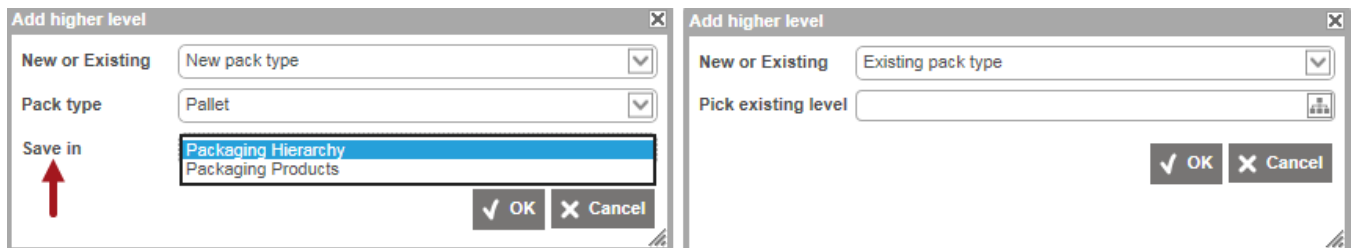
1. To create a packaging hierarchy for the selected item or to create an additional hierarchy for the item, the user can click on the edit button on the right side of the icon and select the configured actions. In the example, available actions are: Add lower level, Add higher level, Add between level, or Unlink.
- When adding levels to a hierarchy, it is best to build the hierarchy upward (e.g., from item to pallet).
 - To use the 'Add level between' feature, the user must be on an orange icon.
 - The lower, higher, and between levels may show differently on an end user's screen depending on what titles these options were configured with.



4. When adding a level, a dialog box with the available packaging types will appear. It is only possible to select the valid packaging types that have been set up in the workbench and in accordance with the references between the packaging types. If a new pack type is chosen, then it is possible to select the Packaging Product Folders

folder / folders by using 'Save in' (either by dropdown selection or Node Picker - depending on the configuration set up for Packaging Properties).

If only one folder is configured for the Packaging Product Folders parameter and the Packaging Properties Node Picker option is disabled, the new packaging type will automatically be saved in the designated folder. The 'Save in' option will not display.

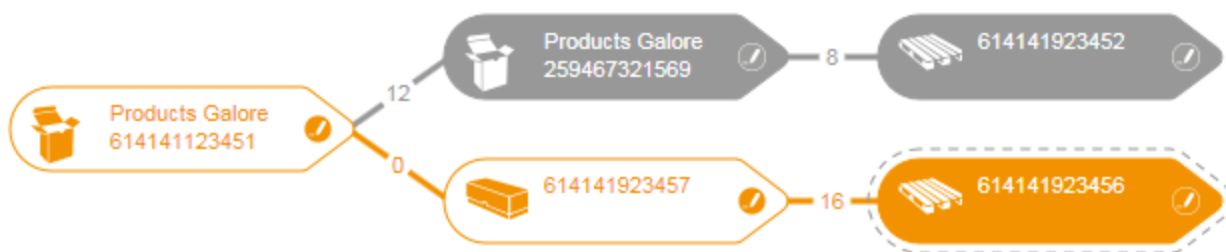


Note: It is also possible to create new actions for maintaining the Packaging Hierarchy Editor by using the Extension API for full control of the behavior and logic that applies when adding and removing a level to the Packaging Hierarchy. For more information on the Extension API, please see the STEP API documentation.

- After clicking the OK button, the new level is added to the graphic as well as adding a new level to the packaging hierarchy for the selected item.



- Using the 'Add higher level' feature, it is possible to create various types of hierarchy structures. The image below shows an item for which two packaging hierarchies are available:



To select a particular packaging type in the hierarchy, click on the icon in the graphic and the selected packaging type will be highlighted in both the graphical view and in the table.

Parameterized Business Actions in Web UI

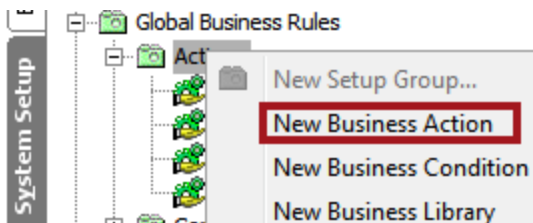
The option to configure and associate a business action with a number of referenced parameters allows users to provide their own values when running a business action in the Web UI. This not only gives the users a better sense of control, as the changes entailed by running a business action become much more apparent, but also provides a more dynamic and useable setup. The same business action can be reused for a variety of similar tasks without the need for reconfiguration.

Configuration of Parameterized Business Actions in STEP Workbench

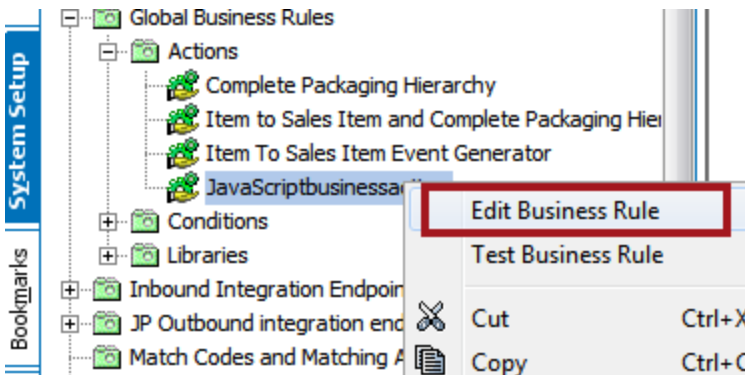
1. Creating a JavaScript business action with binds

Creating a JavaScript business action with binds is done within the STEP Workbench under System Setup.

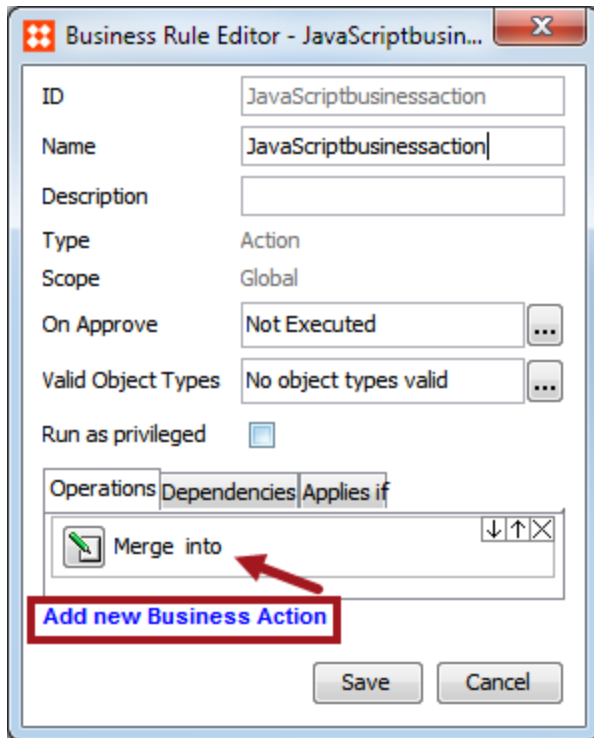
1. To add the JavaScript Business rule, go to the Global Business Rules folder and under the folder Action, right-click and select **New Business Action**.



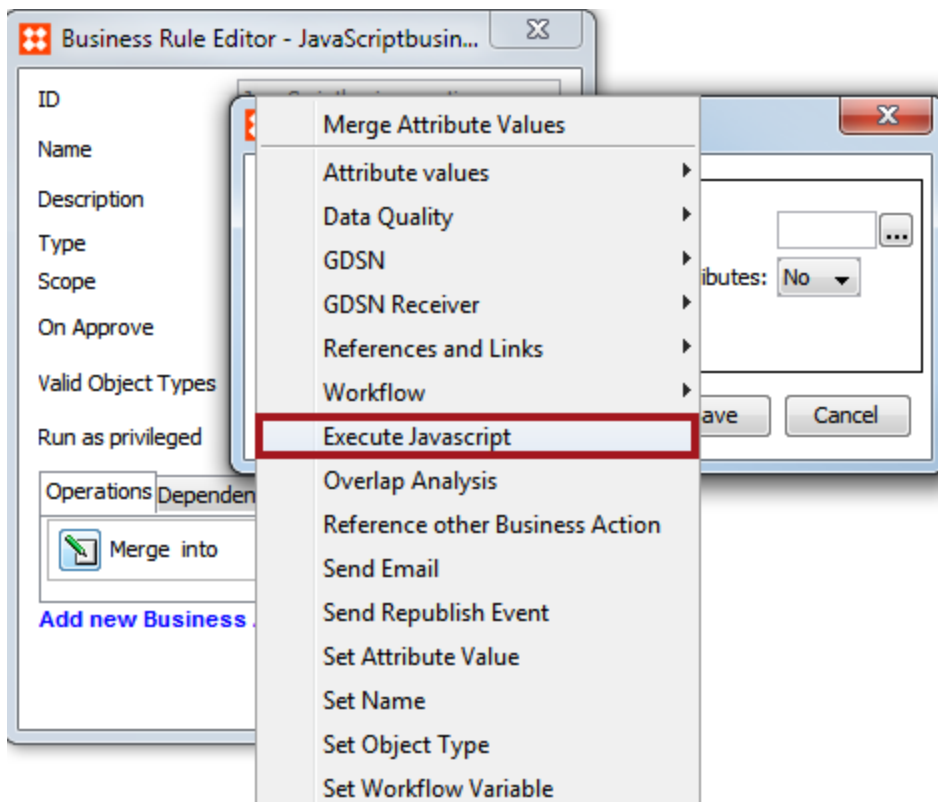
2. Label it JavaScript Business and press create.
3. Once it is created, right click on it and select Edit Business Rule.



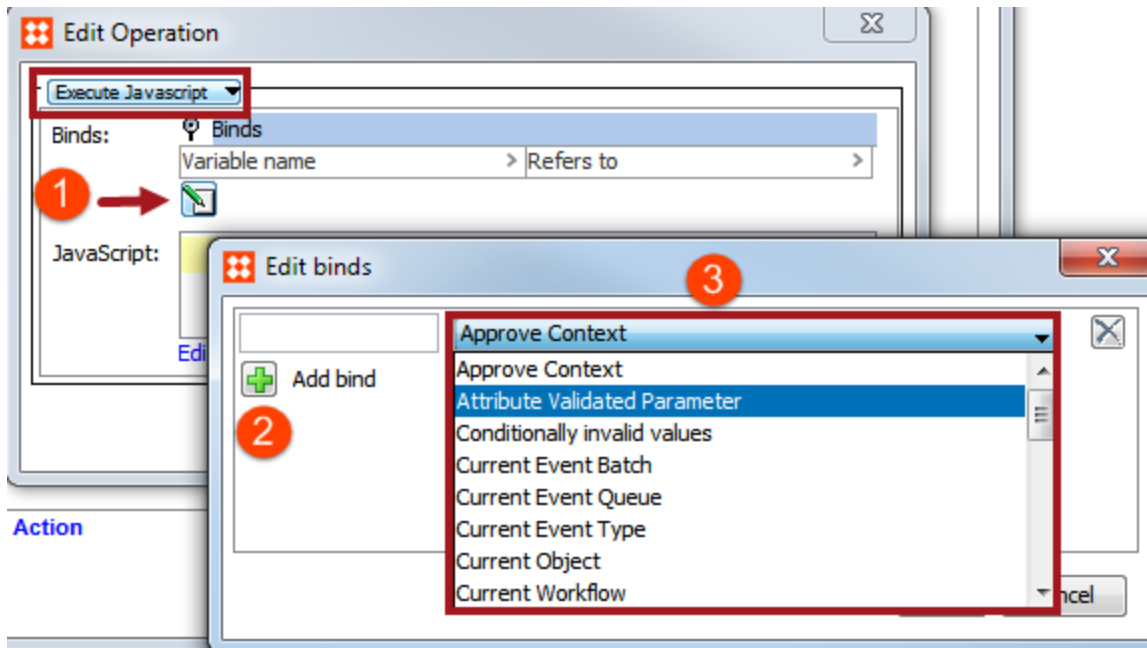
4. In the field that opens, select **Add New Business** and the **Merge into** icon (**Edit bind** icon) will appear in the empty box above.



5. Click on the Edit bind icon and select Execute JavaScript from the top left hand drop down menu.



6. In the next window, select the **Edit bind** icon again and in the window that pops up, click **Add bind**. This will populate a drop down menu. In the menu, select **Attribute Validated Parameter** and a total of four columns should be displayed:



- The first column (JavaScript value) should be populated with the name of the parameter that should be executed (*required)
- Second column (Bind Type) defines the bind type - here 'Attribute Validated Parameter' (*required)
- Third column (External ID) is used for entering the external ID of the parameter which will be used when embedding the business action in a bulk update configuration (*required)
- Fourth column (Attribute for validation) contains the attribute, and hereby the validation base type, that the parameter value will be validated as when used in the Web UI. If the field is left empty the value will be validated as text. It is possible to select between the validation base types: Text, Number, Date, or List of Values. For example, the parameter of a business rule that is bound to a date validated attribute will display a date picker, while LOV options will display as a drop down.

When the binds have been configured, it is important also to define the node that should be changed, e.g. 'Current Object' as shown in the example.

JavaScript Value	Bind Type	External ID	Attribute for validation
lov_attr	Attribute Validated Parameter	B_lov_attr	jsp_lov_attr (jsp_lov_at ...)
date_attr	Attribute Validated Parameter	C_date_attr	jsp_date_attr (jsp_date ...)
number_attr	Attribute Validated Parameter	A_number_attr	jsp_number_attr (jsp_r ...)
node	Current Object		

Buttons: Cancel, OK

After configuring the binds, write the JavaScript that refers the configured binds.

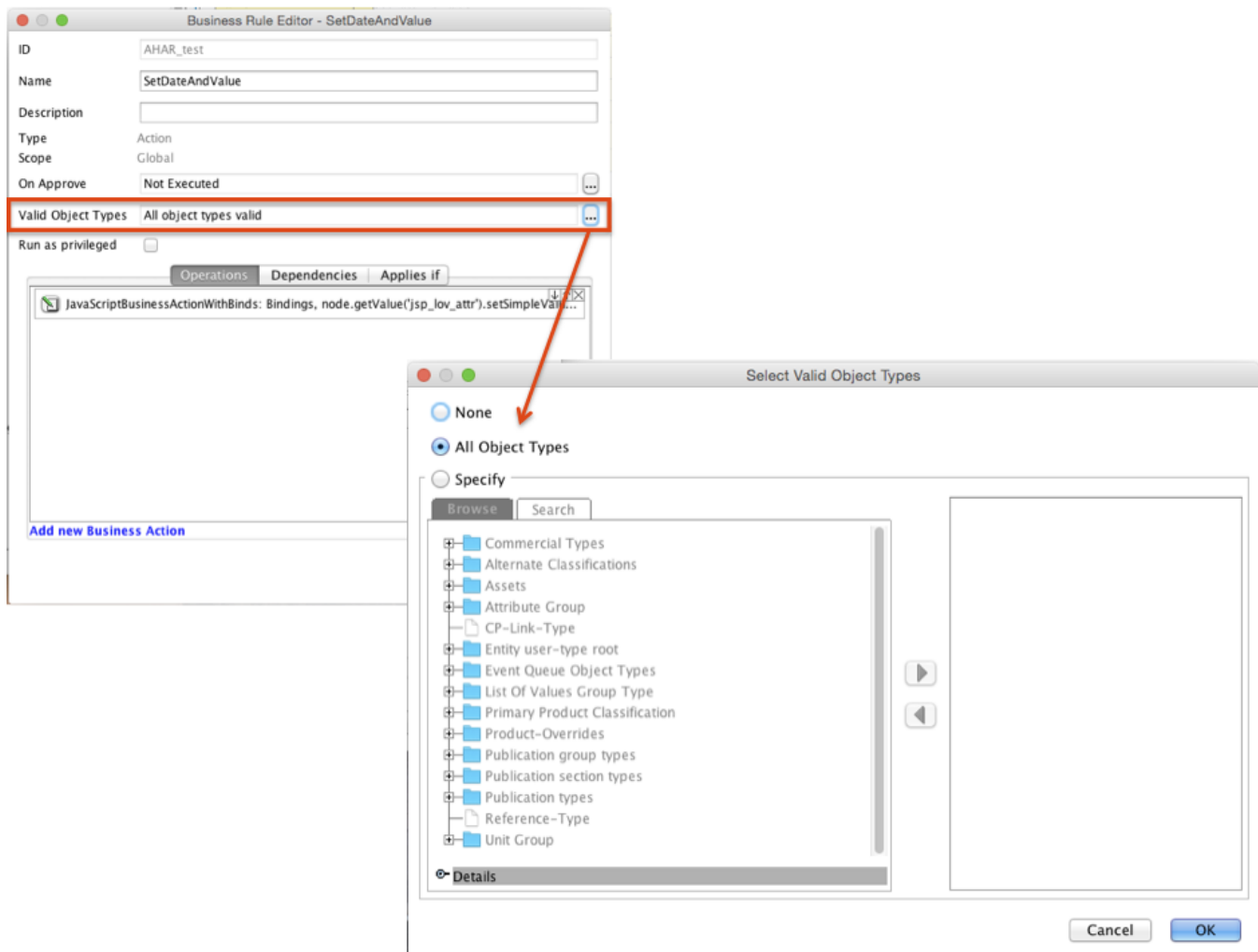
Variable name	Refers to
lov_attr	Attribute Validated Parameter
date_attr	Attribute Validated Parameter
text_attr	Attribute Validated Parameter
number_attr	Attribute Validated Parameter
node	Current Object

JavaScript:

```
node.getValue('jsp_lov_attr').setSimpleValue(lov_attr);
node.getValue('jsp_date_attr').setSimpleValue(date_attr);
node.getValue('jsp_text_attr').setSimpleValue(text_attr);
node.getValue('jsp_number_attr').setSimpleValue(number_attr);
```

Buttons: Cancel, Save

When the business action has been configured, make sure to define the validity of the business action (Valid Object Types). It is possible to configure the business action so it is valid for all object types or only a subset of object types.

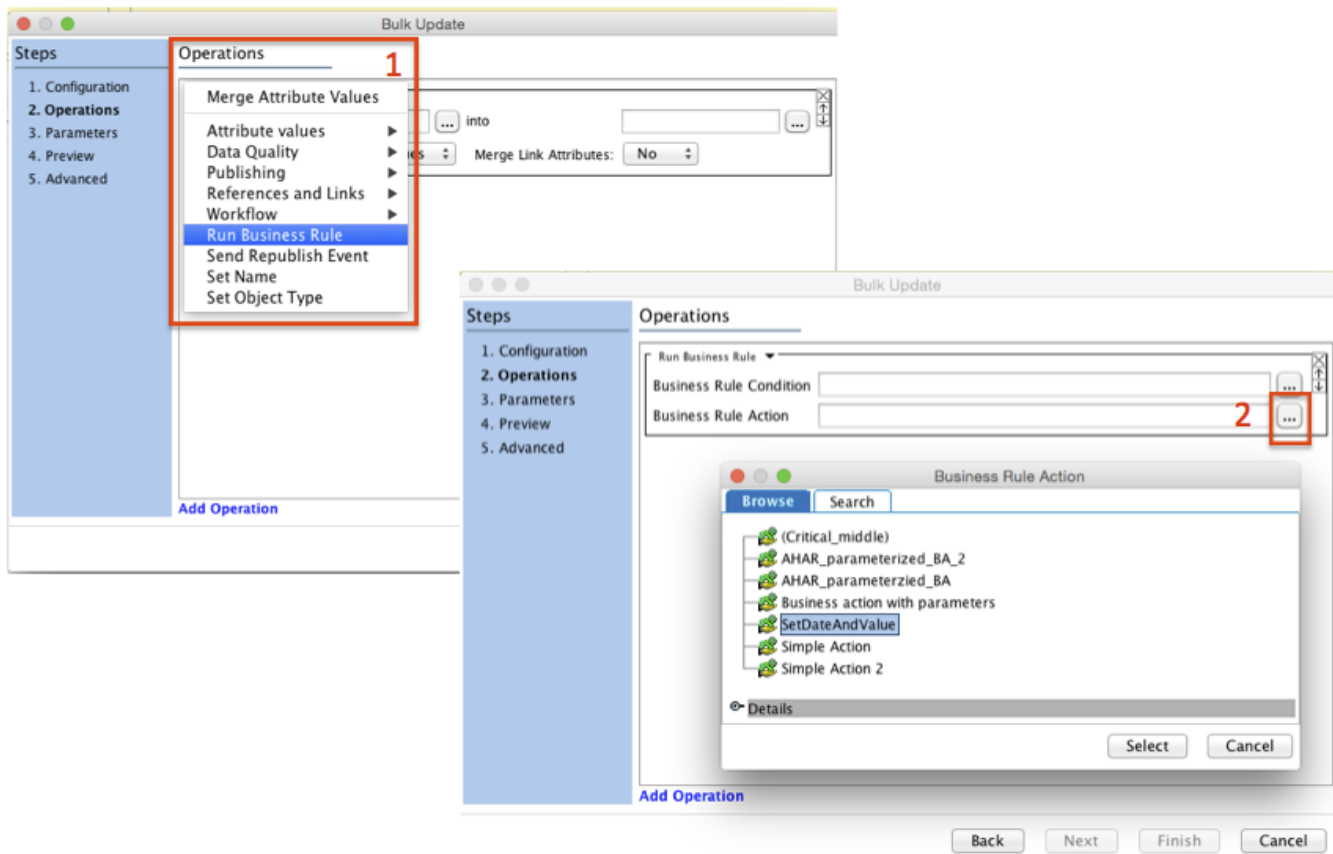


2. Embedding the business action in a bulk update configuration

After configuring the business action, it must be embedded into a bulk update configuration to work as a parameterized business action in the Web UI. To embed the business action, open the Run Bulk Update wizard from the File menu in the STEP Workbench.

In the first step of the wizard, select the 'Create New Configuration', if this is a new bulk update configuration being created. If the purpose is to reconfigure an existing bulk update configuration, select 'Use Existing Configuration'.

In the second step, select the operation 'Run Business Rule'. Next, find and select the business action configured with bindings (see section above for configuration of business action with bindings).



In the third step of the bulk update wizard, it is possible to enter a title for each of the configured parameters. The title is displayed as a label in the dialog when running the bulk update in the Web UI.

Bulk Update

Steps

1. Configuration
2. Operations
3. Parameters
4. Preview
5. Advanced

Parameters

Run Business Rule Action [SetDateAndValue] depending on predicate [No condition selected]

Parameters templates—

ID	Typ...	Title
A_number_attr	jsp_number_attr	Enter a value
B_lov_attr	jsp_lov_attr	Select a value
C_date_attr	jsp_date_attr	Pick a date
D_text_attr	jsp_text_attr	Write a text

↑ External ID ↑ Attribute for validation ↑ Title (label displayed in the Portal (Web UI))

Back Next Finish Cancel

Bulk update dialog in the Portal (Web UI)

Bulk update

Enter a value

Select a value

Pick a date

Write a text

OK Cancel

In the fifth and final step of the wizard (Advanced), the configuration is saved (Save Configuration) and the valid object types are defined. The configuration will not be shown in the Web UI if the selected object is not valid.

Note the following details:

- To be able to perform bulk updates, the user must have privileges to maintain bulk updates, view classifications, view attributes, and create collections.
- Use of this functionality is supported for JavaScript business actions only.
- Configuration of business actions and bulk update configurations must be done within the STEP Workbench. Additionally, the business action must be referenced and set up via a bulk update configuration using the 'Run Business Rule' operation.
- The 'Test Business Rule' functionality in the STEP Workbench is not supported for parameterized business actions.
- For ease of maintenance, it is recommended that only a single business action should be used in each bulk update configuration.

Making Parameterized Business Actions Available in the Web UI

There are three components in the Web UI that can be used to run bulk updates (including bulk updates configurations that embed parameterized business actions).

1) BulkUpdateList Action

BulkUpdateListAction in the designer

The screenshot shows the 'BulkUpdateListAction properties' dialog in the designer. The 'Configuration' tab is active. The 'Component Description' is 'Bulk Update of the selected items with templates and root node parameter for adding bulk update configurations'. The 'MaxNodesCount' is set to 100. The 'RootNodeURLs*' list contains one entry, 'Bulk update', which is highlighted with a red box. Below the list are buttons for 'Add...', 'Remove', 'Up', and 'Down'. The 'TooltipLabel' is 'Bulk update'. The 'Child components' section is empty.

BulkUpdateListAction in the user interface

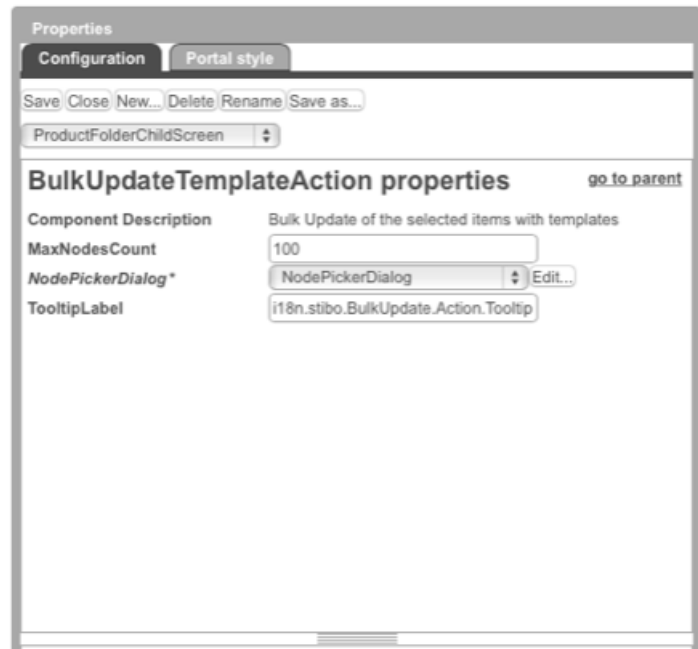
The screenshot shows the 'Bulk update dialog' in the user interface. It has a list of radio buttons for different update types: 'BA with parameters' (selected), 'Bulk update SetValue', 'Bulk update configuration with a very long name', 'Set Date and Value', 'Simple BA(1)', and 'Simple BA2'. At the bottom are 'OK' and 'Cancel' buttons.

The Bulk Update List Action is a toolbar action that can be used from a NodeList. The action is configured by pointing at one or multiple root nodes where the bulk update configurations are saved (RootNodesURLs). All valid bulk update configurations will then be selectable in the bulk update dialog. If more than ten bulk update configurations are available, the list will display with a scroll bar.

If the user selects a number of objects that exceeds the defined number of allowed objects (MaxNodesCount), the user will get a warning stating that 'Too many nodes are selected, bulk update cannot be performed'.

2) BulkUpdateTemplateAction

BulkUpdateTemplate in the designer



BulkUpdateTemplate in the user interface

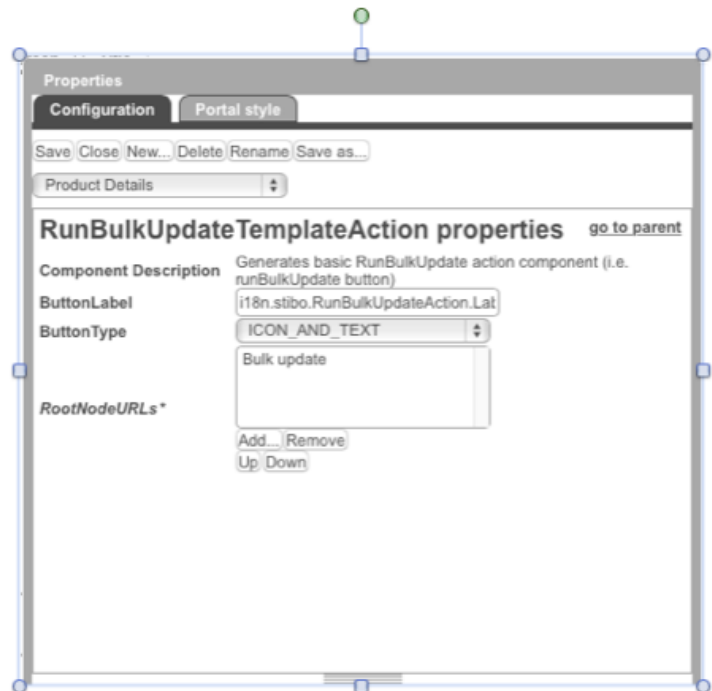
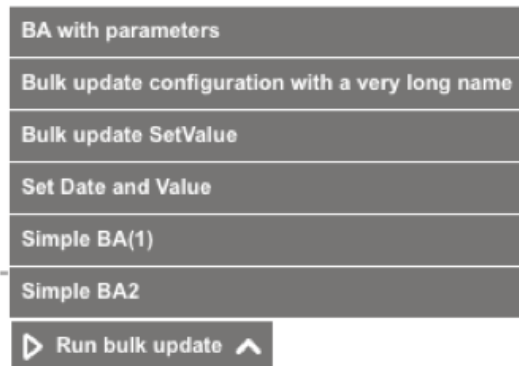


The Bulk Update Template action is a toolbar action to be used on a NodeList. The action has parameters in the Designer for MaxNodesCount (maximum number of objects that can be selected at a time) and configuration of the NodePicker dialog.

If the user selects a number of objects that exceeds the defined number of allowed objects (MaxNodesCount), the user will get a warning stating that 'Too many nodes are selected, bulk update cannot be performed'.

3) RunBulkUpdateTemplateAction

RunBulkUpdateTemplateAction in the user interface



RunBulkUpdateTemplateAction in the designer

The Run Bulk Update Template action is similar to the Bulk Update List Action, but can be placed on a NodeDetails screen. When running bulk update on a single object, then the update will run in real time and not as a background process. If more than ten bulk updates are available the drop up list will be replaced by a dialog with radio buttons.

Potential Duplicates List

When making use of STEP's simple matching capabilities for deduplication, where the matching threshold value is set so that all matches higher than the threshold are seen as potential duplicates, Web UI end users can see a list of potential duplicates so that they can confirm or reject the potential duplicates. This is similar to the functionality offered in the STEP Workbench on the Matching tab for an object that a matching algorithm has been run on.



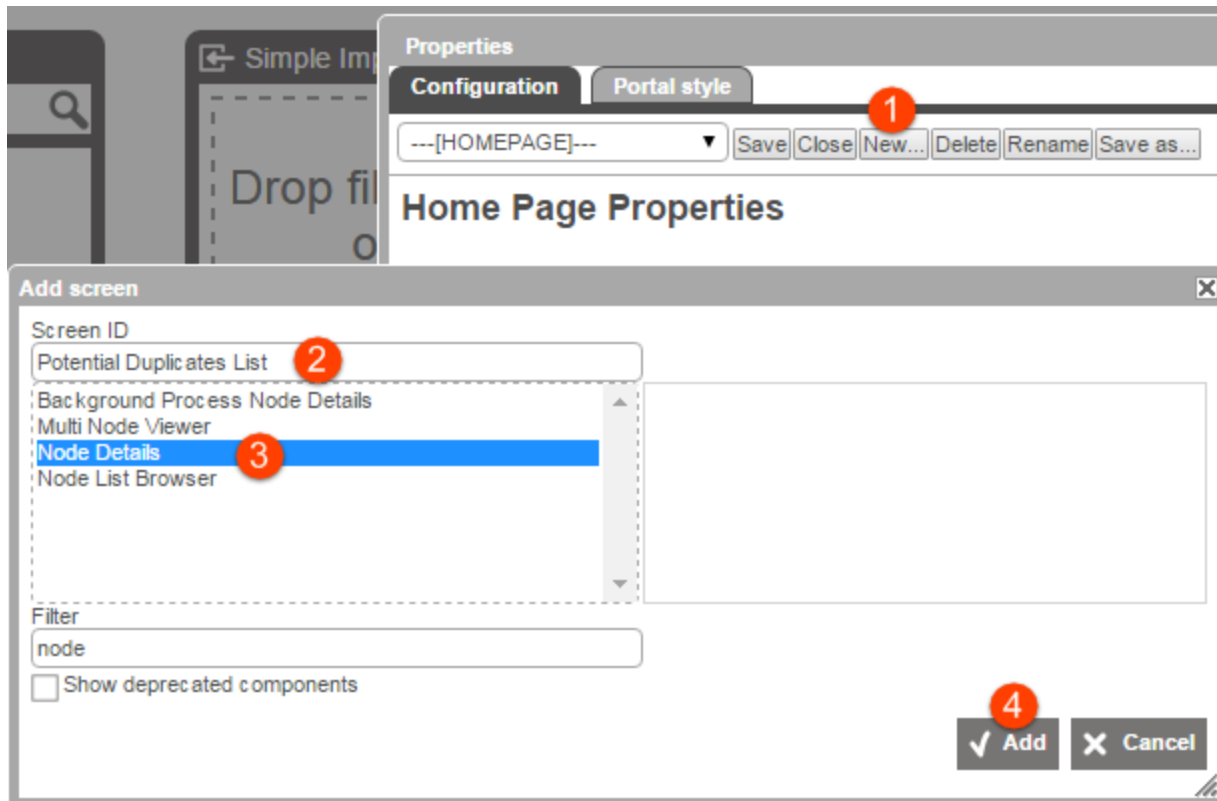
	Score	Matching Algorithm	Name	Object Type	Phone	Email
Sean Duke	-	-	Sean Duke	Subscriber	4923684295	sean.duke@priceless.co.uk
Sean Duke	94.771 ⓘ	I Case B Matching Algorithm DT	Sean Duke	Subscriber	4923684295	sedu@boom.com

Note: As the Potential Duplicates List component uses a Matching Score and Algorithm to identify potential duplicates, these must have been previously created in the STEP Workbench. For more information, see the 'About Match Codes and Matching Algorithms' section of the Data Quality documentation.

Configuring the Deduplication Table

The Potential Duplicates List component can be added to any Node Details or Tab Control / Tab Page component. The following steps show an example of how to configure the component using a Node Details screen.

1. In the Web UI designer, create a new screen, assign a screen ID, select the Node Details screen type, and click **Add**.



2. Upon clicking Add, the newly created screen is opened. Go to **Child Components > Main** and select **Potential Duplicates List** from the drop down menu. Then click the **go to component** link.

Properties

Configuration

Portal style

Potential Duplicates List

SaveCloseNew...DeleteRenameSave as...

Node Details Properties

Title

Css Class

Validation

Child Components

Main

Buttons

Breadcrumb

<Select a child comp>

Border Panel

Change Selection

Columns Control

Confirmed Matches

Confirmed Non Matches

Deduplication List

Draggable Split Panel

Flipper Panel

Follow Single Reference

Golden Record Members

Links Widget

Multi Reference

Node Editor

Potential Duplicates List

Referenced By

Split Panel

Stack Panel

Tab Control

Vertical Panel

go to component

o to component

o to component

- Configure the component following standard table configuration principles. An example is shown below. Specific to the Potential Duplicates list, a Matching Algorithm can be selected which determines how potential duplicates are identified. If no selection is made, results from all relevant algorithms are shown. In addition, the Confirm / Reject actions should be added. Upon completion of the configuration, save and close the Web UI Designer. Note that the Score and Matching Algorithm headers are included as headers in the component by default. Any other headers added will appear after these in the table.

Properties (edited)

Configuration
Portal style

Potential Duplicates List
Save
Close
New...
Delete
Rename
Save as...

Potential Duplicates List Properties [go to parent](#)

Component Description
A component for displaying a tab with a list of possible duplicates listview

Dimensions
Compare Display Mode Dimension
Edit...

Event

Headers

Name Header
Object Type Header
Attribute Value Header (false / false / false /
Attribute Value Header (false / false / false /
Add...
Edit...
Remove
Up
Down

Hide Selection Buttons
☐

Matching Algorithm
PersonMatchAlgorithm
...
Clear

Property Direction
HORIZONTAL

Show Group Headers
☐

Child Components

Actions

Confirm Duplicate From Grid Action
Reject Duplicate From Grid Action

Add...
Remove
Up
Down

- The screen must then be mapped to display as needed, per standard Web UI screen mapping capabilities
The 'Hide Equal' and 'Mark Different' actions will automatically appear alongside any other actions configured. For more information, see the **Comparing Data Using Hide Equal and Mark Different** section of the **Web User Interfaces / Using a Web UI** documentation.

Rich Text Editor

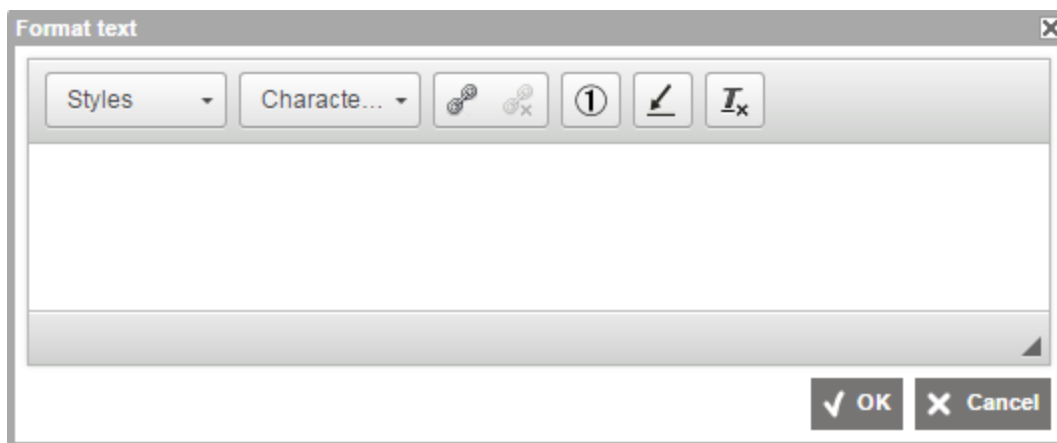
Rich text editing allows users to enter and edit text within a web browser. Attribute value text-editing options include adding character formatting plus options for adding hyperlinks, footnotes, and inline references. Using a Rich Text Editor (RTE) when editing attribute values within a Node Editor eliminates the need for users to be familiar with any special coding and web markup languages such as XML. Another benefit is that users can see what the text will look like immediately within the editor window.

Rich text editing is available for attributes with text and numeric text validation base types. The Rich Text Editor icon displays when RTE is enabled via the Enable Tag Conversion parameter within the Attribute Value properties and the Enable Tag Conversion parameter or Rich Text Editing parameter within the Attribute Value Group component properties.

Rich Text Editor Icon

Users can identify when an attribute value field is using RTE based on the icon in the right side of the field. Simply click the edit icon and the 'Format text' dialog appears.

Description, Web

Once an attribute field has any formatting done to the text, it becomes locked (meaning that you cannot just click in the field to edit it). Clicking the RTE icon is the only way to make additional edits to the text.

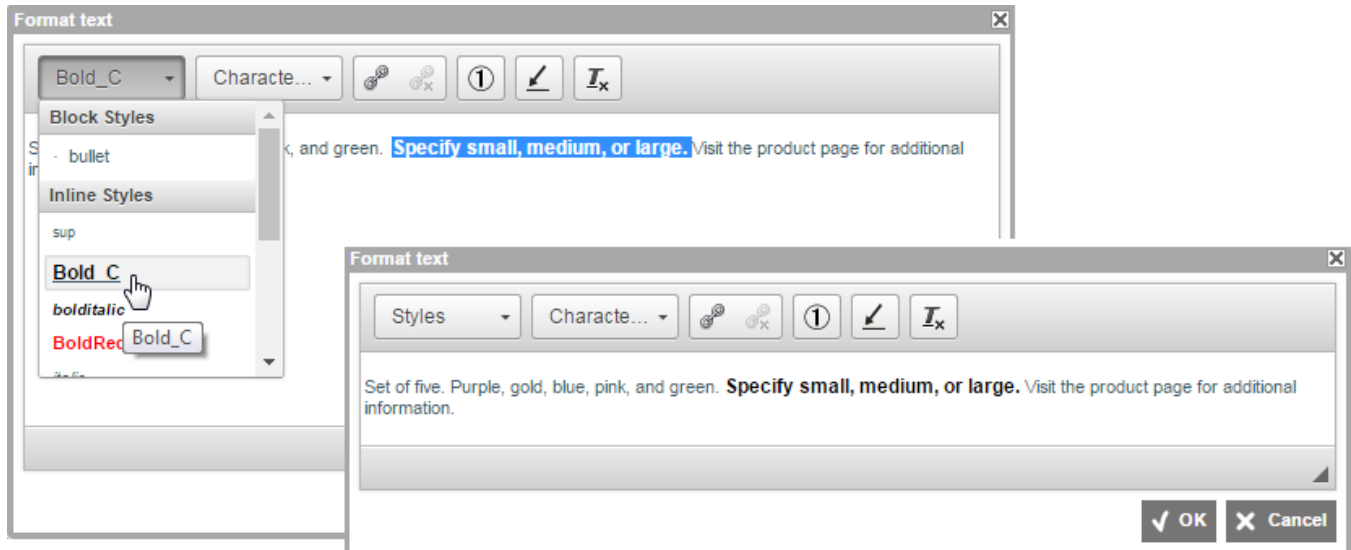
Format Text Options

The options shown in the 'Format text' dialog, and their descriptions, are listed below. The text format options are important since they will apply, if applicable, when fed into other systems (for example, when used as website text or within printed publications).

The headings below correspond with the hover text that displays when you mouse over each of the format dropdowns or icons at the top of the 'Format text' dialog.

Formatting Styles

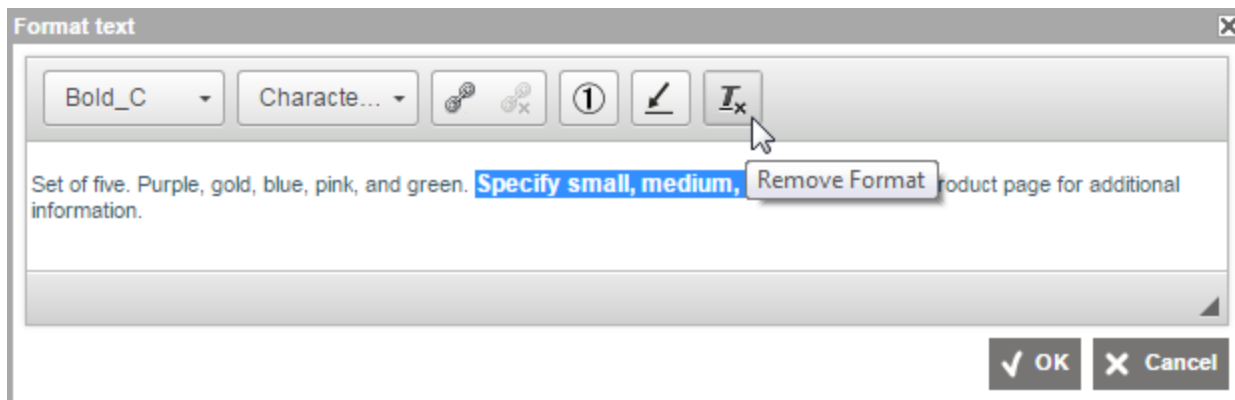
To apply a style, you must first select the text to apply it to. Then make a selection via the **Styles** dropdown.



Note that a set of style tags may already exist within your STEP system. Additional styles can be created in the STEP Workbench and will then be available in the **Styles** dropdown list. For more information on style tags, see the **Tags** section of the **System Setup / STEP Super User Guide** documentation.

Remove Format

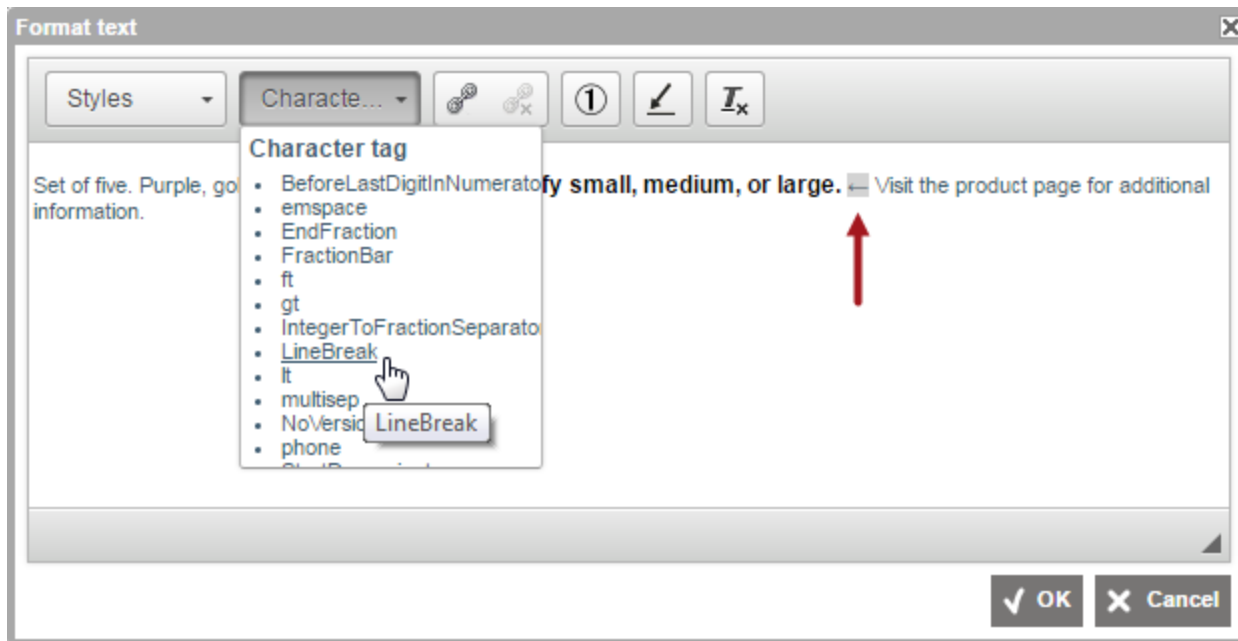
To delete a style and go back to the default text (no style), select the specific word or phrase that has a style applied to it, then click the 'Remove Format' icon. To remove character styles from the entire body of text, select it all before removing the formatting.



Character tag

To insert a character tag, place your cursor within the text exactly in the spot where you want the character tag to display. Then, click the **Character tag** dropdown and make a selection. Character tags appear with a gray background within the 'Format text' dialog and within the attribute value field.

No special icon is required to delete a character tag. Just delete from the text using standard procedures (Delete or Backspace).

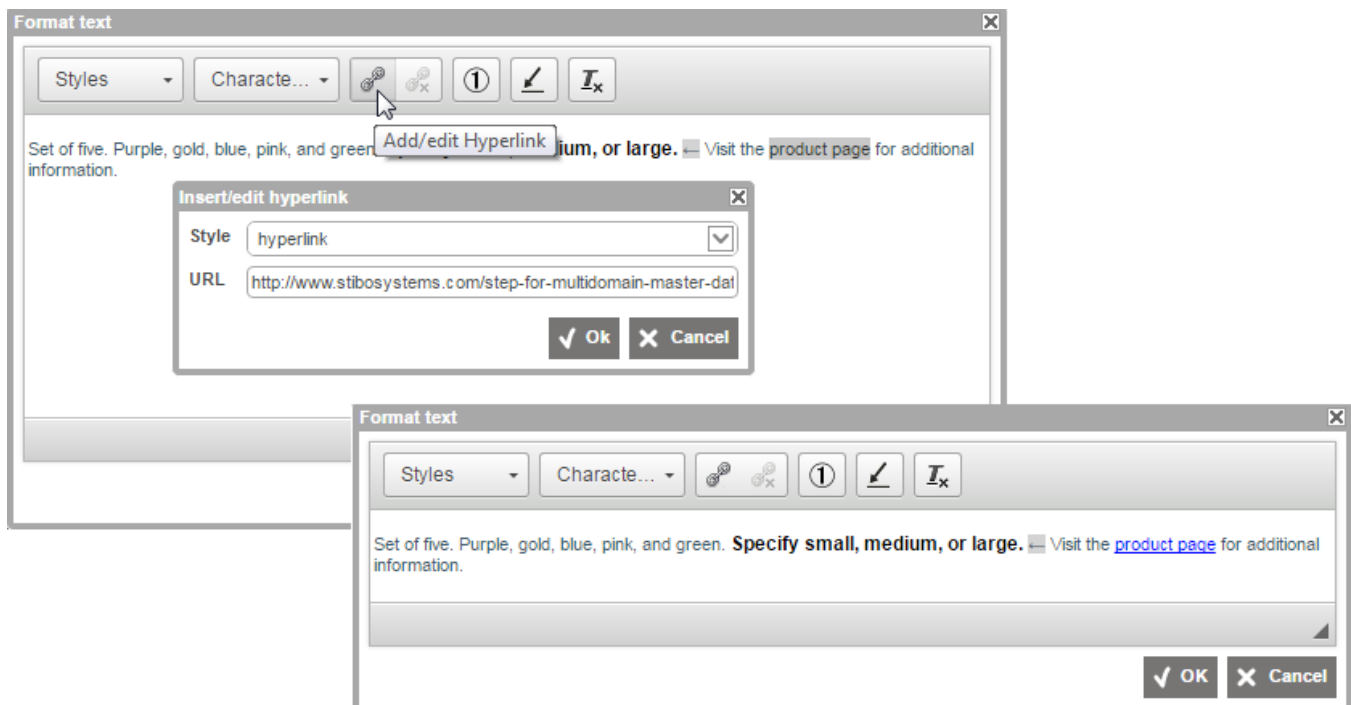


Note that some character tags may already exist. Additional character tags can be created in the STEP Workbench and will also be available in the **Character tag** dropdown list within Web UI. For more information on character tags, see the **Tags** section of the **System Setup / STEP Super User Guide** documentation.

Add/edit Hyperlink

Hyperlinks are added to text similar to how styles are applied. Select the text you want to make into a hyperlink, type the URL in the 'Insert/edit hyperlink' dialog, and click Ok.

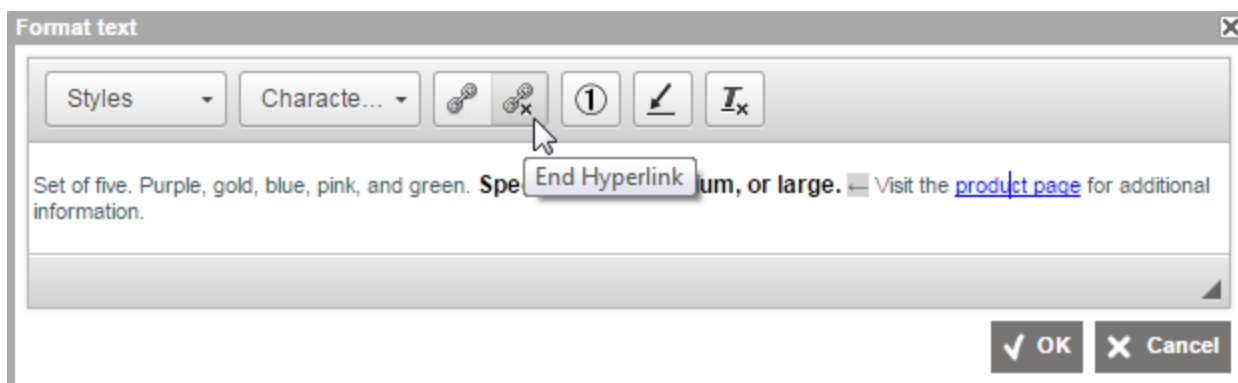
To edit the hyperlink, place your cursor anywhere within the hyperlinked text, and click the 'Add/edit' hyperlink icon. Make any changes within the URL field and click Ok.



If the hyperlink tag does not already exist, a hyperlink tag (or tags) can be created and formatting set up in the workbench and will be available in the **Insert/edit hyperlink > Style** dropdown list within Web UI. For more information on hyperlink tags, see the **Tags** section of the **System Setup / STEP Super User Guide** documentation.

End Hyperlink

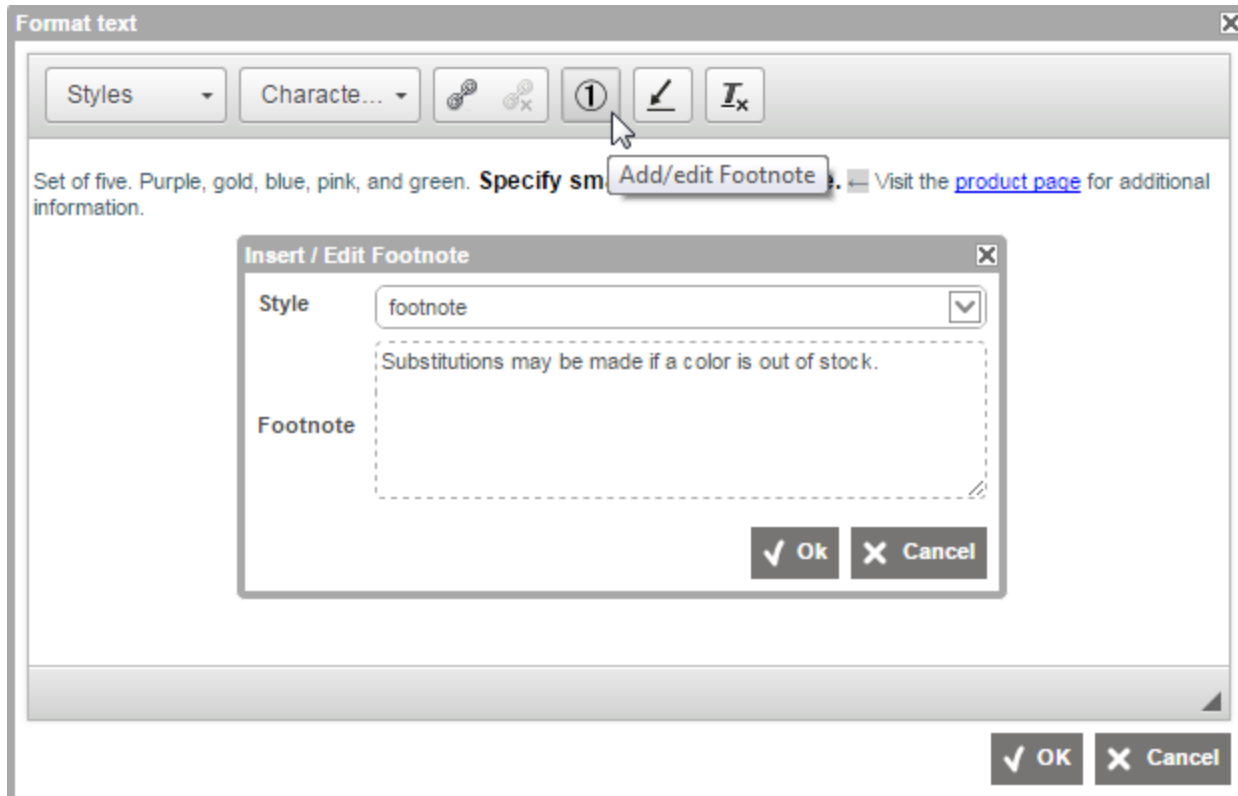
The 'End Hyperlink' icon activates when you click anywhere within hyperlinked text. Click the icon to remove the applicable hyperlink.



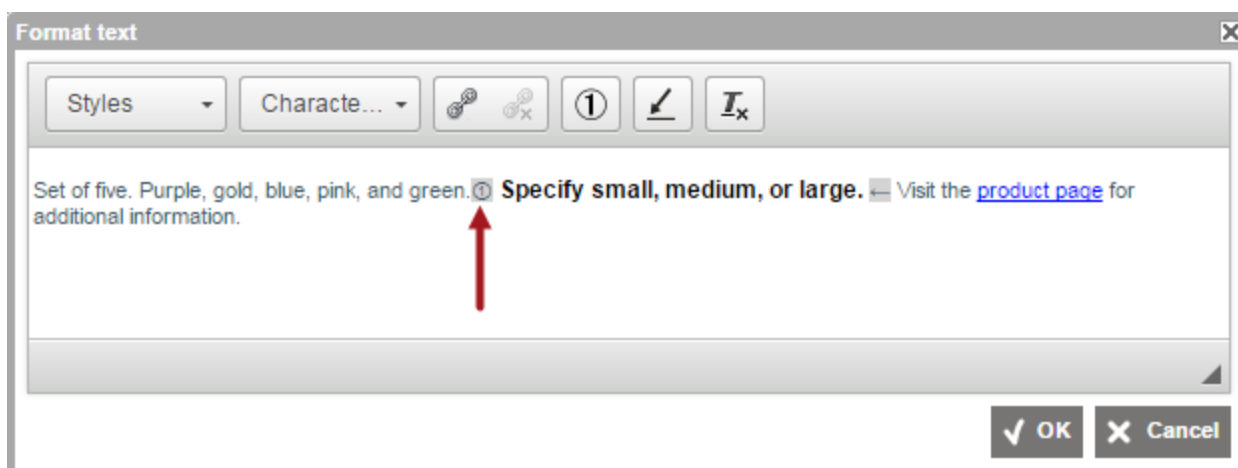
Add/edit Footnote

To insert a footnote into the text, place your cursor where you want the footnote inserted and click the 'Add/edit Footnote' icon.

If the footnote tag does not already exist, one can be created in the workbench and will be available in the **Insert/Edit Footnote > Style** dropdown list within Web UI. For more information on how to add a footnote tag, see the **Footnotes** section of the **System Setup / STEP Super User Guide** documentation.



To edit a footnote, select the footnote icon that is within the text body, taking care to highlight only the icon. Click the 'Add/edit Footnote' icon, make any changes within the 'Insert/Edit Footnote' dialog that displays, and then click Ok.

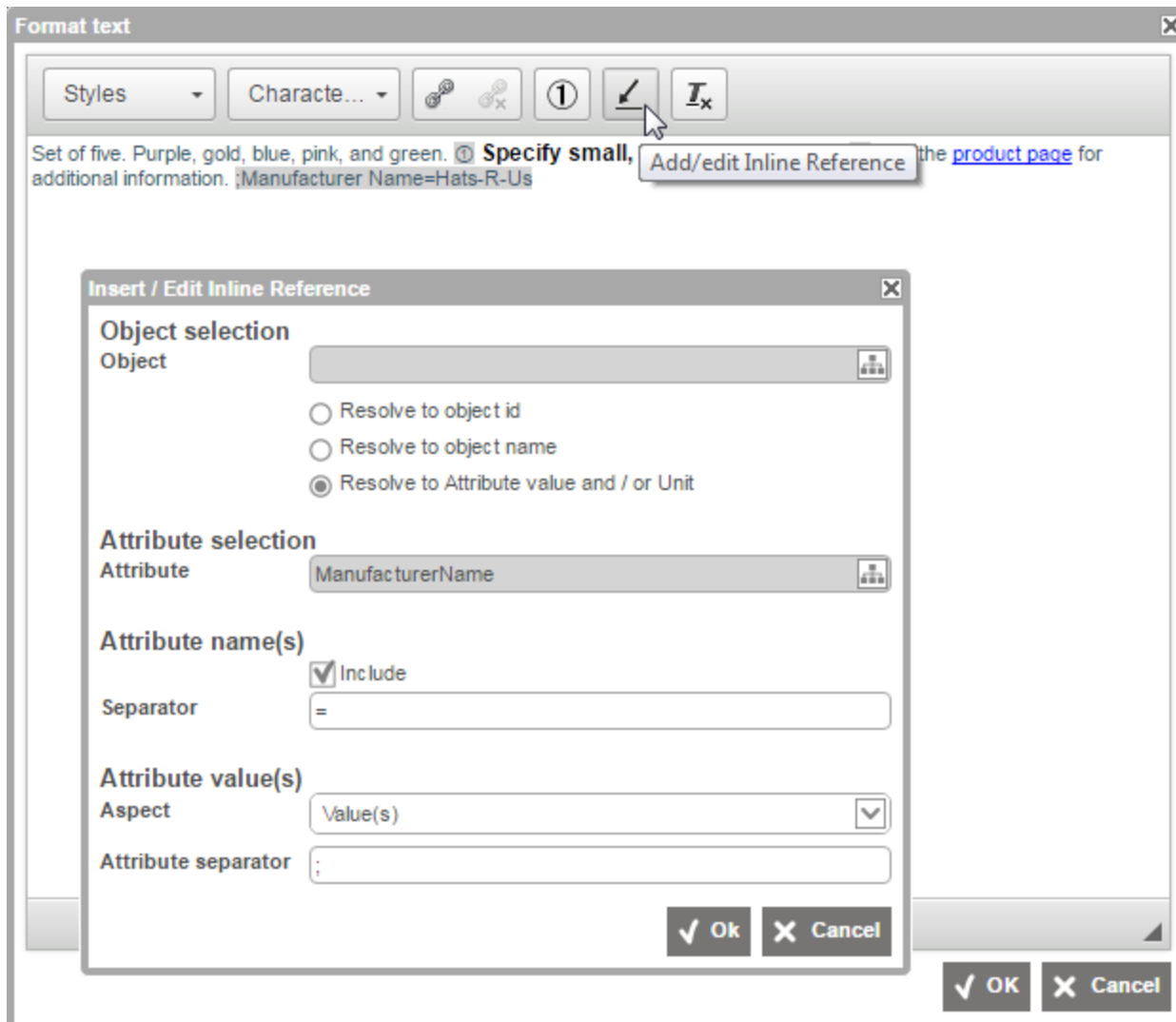


No special icon is required to delete a footnote. Just delete from the text using standard procedures (Delete or Backspace).

Add/edit Inline Reference

Using the RTE, inline references can be embedded in attribute values using Web UI. For an introduction to inline references, see the **Inline References to Attribute Values** section of the **Getting Started / STEP User Guide** documentation.

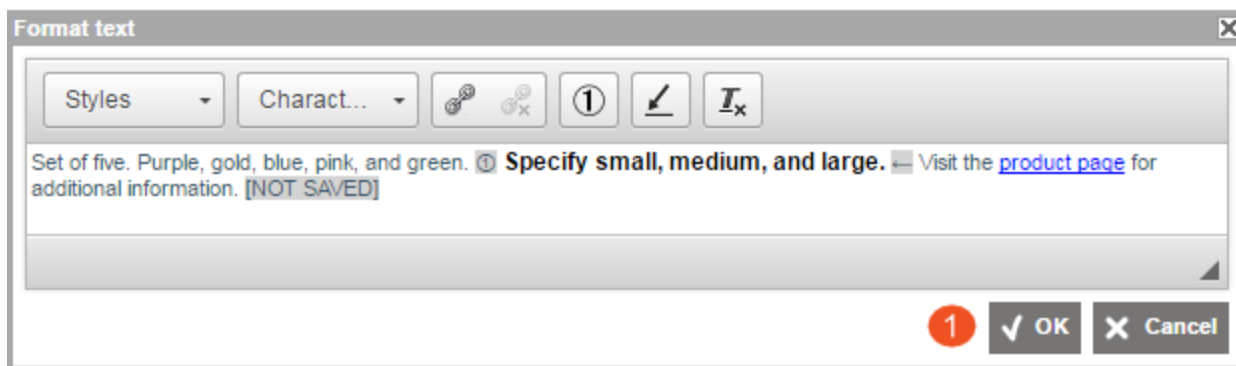
Place your cursor where you want the inline reference to go—or select the text you want to replace—and click the 'Add/edit Inline Reference' icon.



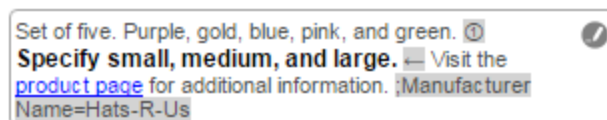
1. For the **Object** field, click the Node Picker icon () to open the 'Select Node(s)' dialog. Search or browse for the relevant object that holds the attribute value to be referred to, and then click OK.
2. Choose 'Resolve to object ID,' 'Response to object name,' or 'Resolve to Attribute value and / or Unit' by clicking the corresponding radio button.

Note: When 'Resolve to Attribute value and / or Unit' is selected, then the other selections within the 'Insert / Edit Inline References' dialog activate and the remaining steps outlined below become valid. If selecting an alternate radio button, then click Ok and your steps are complete.

3. For the **Attribute selection > Attribute** field, click the Node Picker icon to open the 'Select Node(s)' dialog to search and browse for the relevant attribute (or attribute group) for the inline reference, and then click OK. (Only one attribute or attribute group may be selected.)
4. For **Attribute name(s)**, check the 'Include' check box if the name of the attribute(s) should be included in the inline reference. If including the name, then go on to Step 5. If not, skip to Step 6.
5. In the **Separator** field, type a Separator to be used between the name and value of the attribute. An equals sign (=) is the default.
6. Under **Attribute Value(s)**, use the **Aspect** dropdown to select the relevant value to include for the attribute. You can select between Value(s) and Unit(s), Value(s), and Unit(s).
7. The **Attribute Separator** field is only available if a multi-valued attribute has been selected. If applicable, in the **Attribute Separator** field, type a separator to specify how values should be separated. A semicolon (;) is the default separator.
8. Click **Ok**.
9. Once you click Ok, the 'Format text' editor will show the inline reference as '[NOT SAVED]'. You will need to click OK on the text editor and then save the data before it will display in the value field. The attribute must be valid for the object type, otherwise the inline reference disappears from the value field upon save.



Description, Web



Editing an inline reference works the same way as editing a footnote. Select the inline reference text within the editor, taking care to highlight only the applicable text. Click the 'Add/edit Inline Reference' icon, make any changes within the 'Insert/Edit Inline Reference' dialog, and then click Ok. Next, click OK on the text editor dialog, and then click Save (or Save & Approve) on the screen that you are one.

For more information about the attribute components in Web UI, see the **Attribute Value Components** topic and the **Attribute Value Group Components** topic.

Important: After all changes have been made within the text editor, you must click **OK** to save all of the changes. Clicking 'Cancel' or navigating away from the page means that the changes made in the RTE will not be saved or displayed.

If you experience issues while using the Rich Text Editor in Internet Explorer, use an alternate browser such as Chrome, Firefox, or Safari.

Shared Data Handling

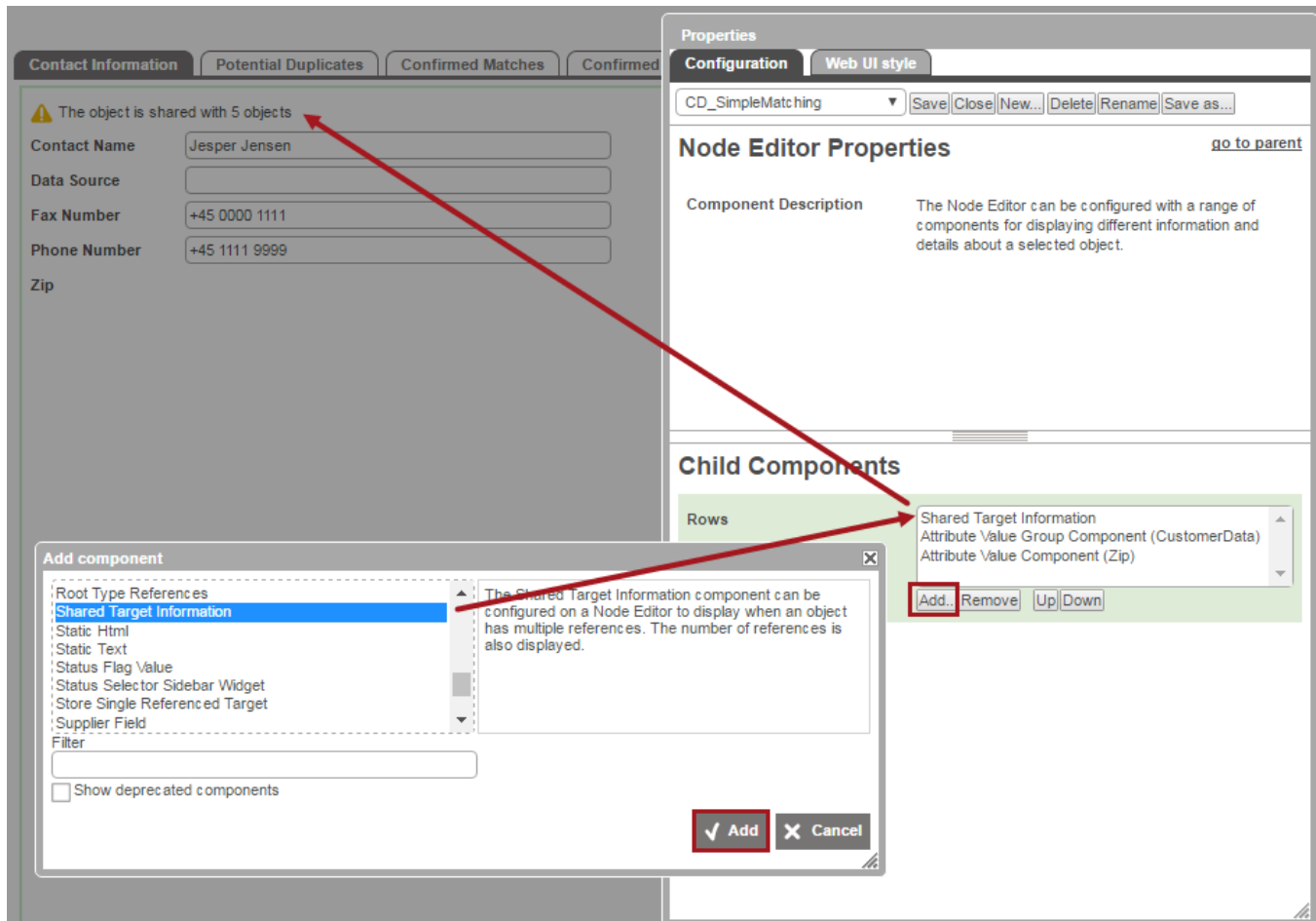
Users must be careful when working with shared data in order to maintain data integrity and safeguard data from inadvertent changes. This becomes particularly relevant when objects are referenced by more than one other object. In this case, changes to that target object have the potential to impact every source object referencing it. In order to better assist users in working with shared data, there are various Web UI features to improve the way shared data is identified and handled.

These features include, but are not limited to, a visual indicator that can be configured to display for shared objects shown on a Node Editor screen, a warning that can be presented to users when attempting to save changes to a shared object, and the ability to clone a reference target.

Shared Target Information on Node Editor

The Shared Target Information component can be added to a Node Editor to provide a visual indicator that an object is referenced by two or more objects. The total number of those referencing (source) objects is also displayed. These all combine to serve as a notice to the user that updating data, if allowed, will impact more than the selected object.

The Shared Target Information component is available to add as a child component within Node Editors (Child Components > Rows), following the same process that is used to add other components like Name Value, ID Value, Attribute Value, and Attribute Value Group.

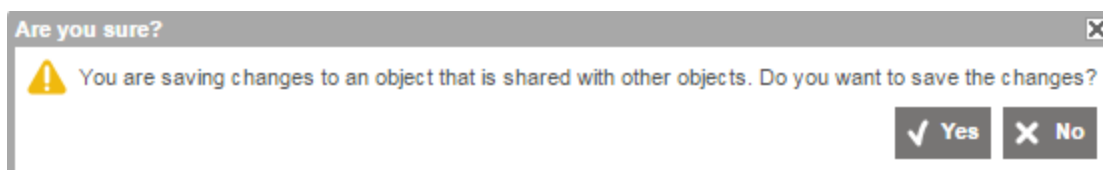


Similar visual indicators for shared objects are the ID Shared Target Header component (Multi-Reference Editor) and the Follow Single Reference component (Node Editor).

For more information on Web UI components and configurations, see the Web User Interfaces documentation.

Shared Object Save Warning

When a shared object is edited and then saved, either through an actual Save action or implied save (e.g., Submit Action or Approve Action), an additional layer of protection (a warning message) can be added by an admin user. An end user will be presented with a 'Are you sure?' dialog letting them know that the object that they have edited and are saving is a shared object and any changes could have implications for other objects. The user must actively confirm that this is acceptable before the object can be saved successfully. The user may also choose to cancel out of the warning and decide not to save the changes.



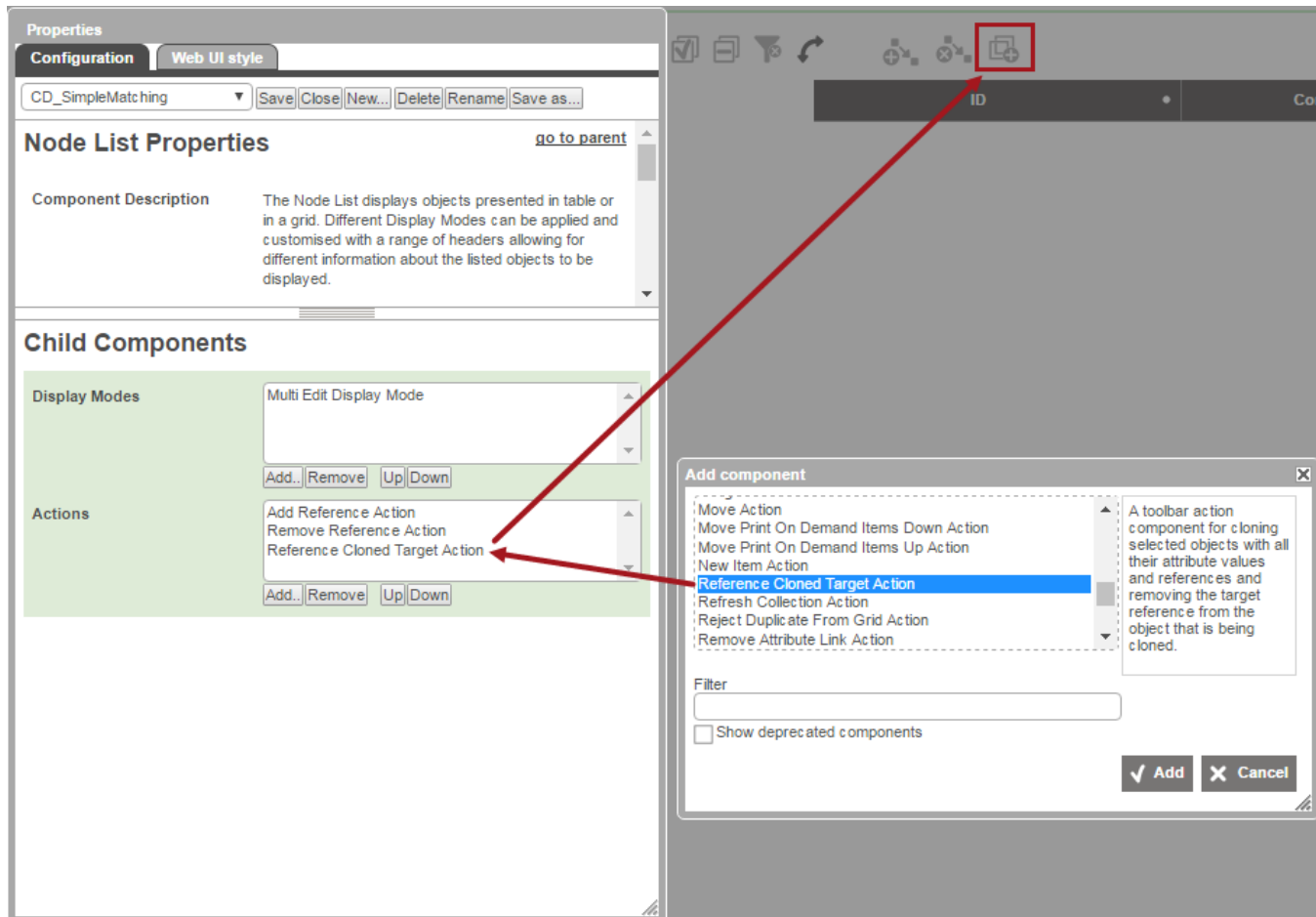
To activate the warning, it must be enabled on the Node Details configuration. The Show Warning parameter is accessed under the Multiple Target References parameter group. When Show Warning is enabled (checked), the warning will display to end users upon save. If disabled (which is the default), no warning will be shown and changes will save as they have previously.

The screenshot shows the 'Node Details Properties' configuration window. At the top, there are tabs for 'Configuration' and 'Web UI style'. Below the tabs is a dropdown menu showing 'CD_SimpleMatching' and several buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Node Details Properties'. It contains a 'Component Description' field with the text: 'Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.' Below this is a green box containing 'Title' and 'Css Class' input fields. Underneath is a 'Validation' section with a 'Multiple Target References' group expanded. Inside this group, the 'Show Warning' checkbox is checked. At the bottom is a 'Child Components' section with three rows: 'Main' (Tab Control), 'Buttons' (Buttons), and 'Breadcrumb' (<Select a child component>). Each row has a 'go to component' link.

Reference Cloned Target Action

The Reference Cloned Target Action allows a user to select an existing reference target and duplicate / clone it, creating a new object that includes the original attribute values and references. This is particularly useful in making sure a user does not inadvertently edit shared data that could have implications to other objects with the same reference. When a user needs to make changes to data that is shared (e.g., the object is referenced by multiple objects), they can clone the existing object and freely edit the data on the clone, without fear of impacting the other objects with references to the original object.

Note that users can only clone one object at a time, and objects being cloned must use auto-generated IDs.



The Reference Cloned Target Action is exclusive to the Multi-Reference Editor. Information about how to add action buttons and an example of what it looks like to clone a reference is shown in the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

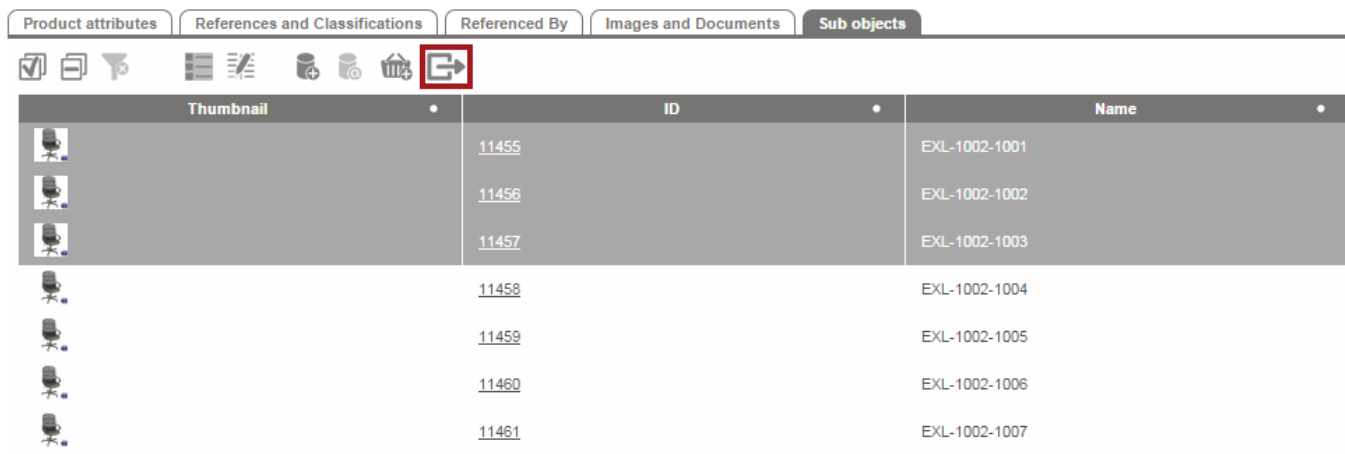
Simple Export

With simple export, it is easy to export any selection of products, entities, and classifications. Users may export one node type at a time. And supported export formats are Excel or CSV.

To begin using the simple export functionality, the action for this has to be applied to toolbars on relevant screens.

Adding a Simple Export Action to toolbar

In the designer an action called "SimpleExporterAction" can now be added to a toolbar on a given screen of the type nodelist or tasklist:



Configuring The Simple Exporter Action

When configuring it is possible to change the default settings shown in the screenshot below:



Properties (edited)

Configuration
Portal style

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

SkuChildren
▼

SimpleExporterAction properties

go to parent

Component Description

This action can be added to nodelists and tasklists making it possible to export a selection of products, classifications, or entities. Supported export formats for the simple export are Excel and CSV.

Charset (CSV)

utf8 ▼

Delimiter (CSV)

semicolon ▼

InheritDataAndReferences

☐

Label

Simple export

Newline (CSV)

convert ▼

NumberOfSuggestedAttributes

50

ValueFormatting (CSV)

quotes ▼

Charset (CSV): Can only be configured in the designer.

Delimiter (CSV): A default can be set here, but the end user can overwrite this setting when doing an actual export.

InheritedDataAndReferences: If selected, the Export Manager extracts values for products that have inherited values from products at a higher level in the hierarchy.

Label: The mouse over label for the simple export icon can be changed here.

NewLine (CSV): Select whether you want to keep carriage return (new line) or convert to a space instead. The latter is recommended. If you keep the carriage returns, you may experience issues with the data integrity.

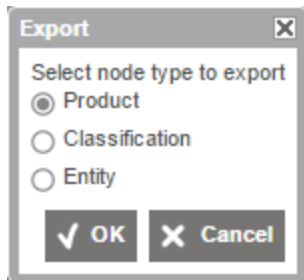
NumberOfSuggestedAttributes: When mapping the attributes, the number of suggestions can be changed here.

ValueFormatting (CSV): Select either to export all values in quotes or without quotes.

Using the Simple Export Action

When the portal user has not picked a selection of objects to be exported, the icon will not be enabled and will be grayed out.

If the selection consists of more than one node type, the user is asked to decide which node type to export:



If the selection is limited to less than one hundred objects, this choice is only presented when objects of different node types are present in the selection.

Mapping

On the Simple Export mapping screen (shown below), the ID is pre-selected for inclusion.

1. There is a type-a-head field where the user can search for attributes, keys, references, names, and object types to map to.
2. It is also possible to browse by using the node picker icon.

Simple Export

Mapping

<ID>	X
<Name>	X
Unique Key 1	X
Address	X
Country	X
Email	X
First Name	X
Phone	X
State	X
Surname	X
ZIP	X

Limit Export via Object Type

none equals all

1

2

Export Objects

☒ Export including below objects

☐ Export only leaf objects

☐ Export only selected objects

Format

☒ Excel

☐ CSV

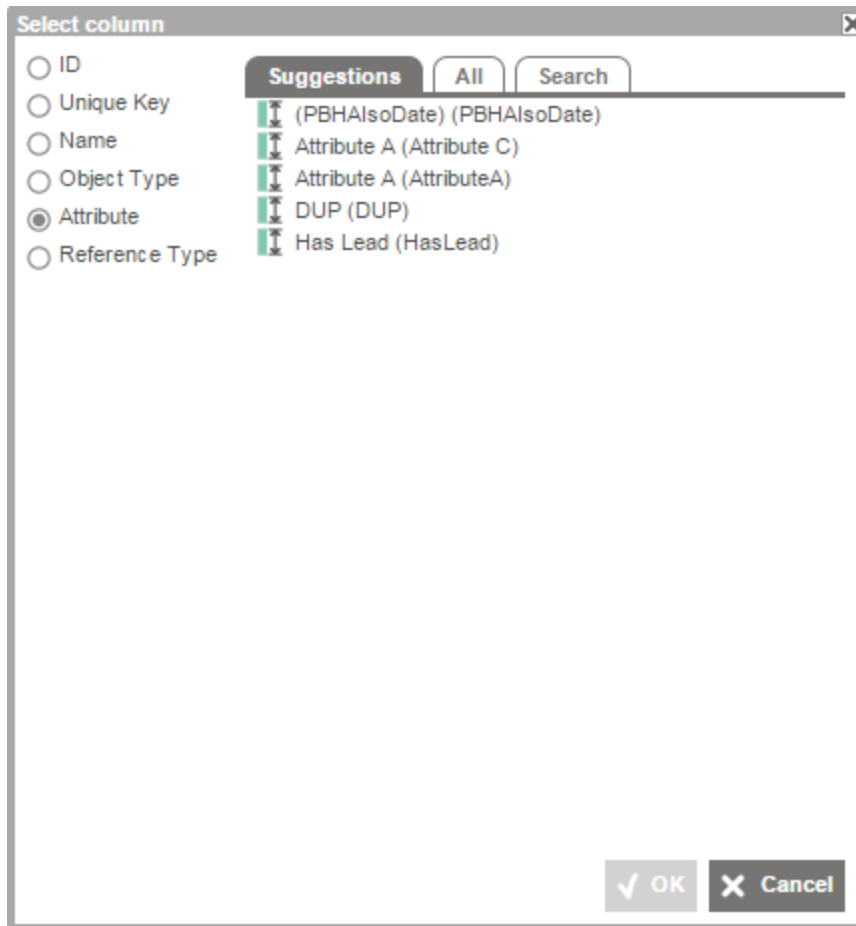
Version

Excel 2007

Start Export

Cancel

Invoking the node picker gives the following:



ID, Key, Name, Object Type, Attribute, and Reference Type can be mapped from this screen.

For attributes, suggestions are given based on a sample of the objects in the beginning of the selection.

Under the 'All' tab you can browse through all the attributes in the system. Finally, you can search for a given attribute under the 'Search' tab.

Limiting the object types to export

At the bottom of the Simple Export mapping screen, the user can choose which objects to export:

- Export including below objects
- Export only leaf objects
- Export excluding below objects

Also on this screen, the Exported Objects can be limited further by choosing specific object types to be exclusively exported.

Format

Also, the user needs to pick an export format: Excel or CSV.

If CSV is selected, the user can choose which delimiter to use (if the default one configured in the designer is not applicable for the given job).

Simple Importer

The Simple Importer allows users to create or update products, entities, classifications, and their attribute values by dragging and dropping a valid import file onto the Web UI widget. More than one Simple Importer Widget can be added to the homepage, allowing users easy access to many on-demand simple imports.

Prerequisites

A Simple Importer is accessed via a Simple Importer Widget on the homepage. For information on adding a widget to the homepage, please see the **Adding Widgets to the Homepage** section of the **Homepage Widgets** document.

To use the Simple Importer Widget, users must have privileges allowing them to create, modify, and update the products, attribute values, classifications, and entities in STEP (as appropriate for the data being imported). Also, the *attributes* mapped during import must be valid for the object type being created or updated. Otherwise, the import will appear as successful to the user, but will not actually update.

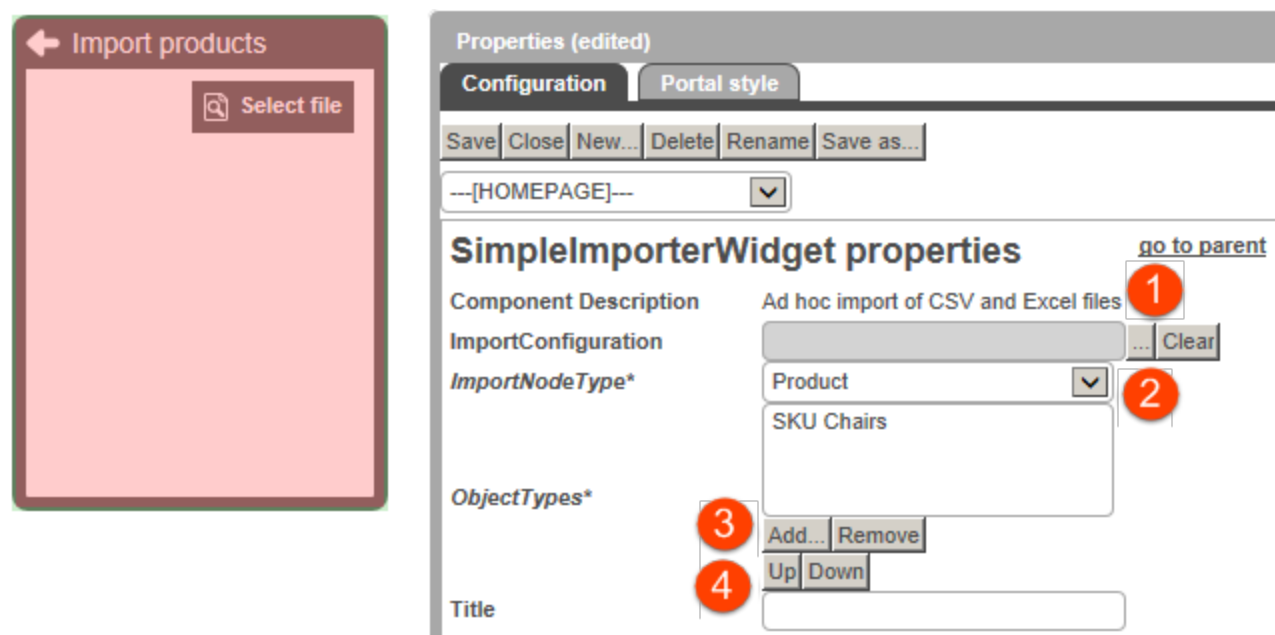
If expected results are not achieved, then a firm understanding of Action Sets, Privilege Rules, and Unique Keys is very important. More information can be found in the **About Action Sets** section within System Setup, the **About Privilege Rules** section within Users and Groups, and the **About Unique Keys** section within System Setup.

Valid File Types

The valid file types are Excel 2003 to 2010 or CSV.

Adding an Importer Widget to Homepage

On the Homepage a Simple Importer Widget can be added using the designer.

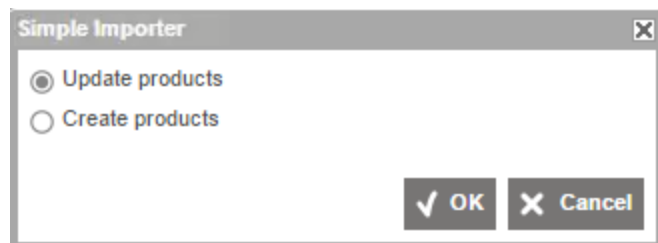


1. An existing import configuration made in workbench can be applied. This allows for using more advanced importing features. For more information please see the **Import Manager** section of the **Data Exchange** documentation.
2. An Import Node Type must be selected: product, entity, or classification. Widgets can be made for each node type, if necessary.
3. One or more object types can be added. This means that only the defined object types can be imported with the widget. It is required to choose at least one object type to import with the widget.
4. The user may input a title. The default title given is 'Import <nodetype>'.

Using the Simple Importer Widget

An import file format is selected (either an Excel 2003/7 or a CSV file). If using the Chrome browser, the user may drag and drop the file to the widget. Otherwise, the 'Select file' button is used for picking an import file.

Next, the user determines if they are updating existing objects or creating new ones:



Note: If the imported file holds a mix of existing products and products to be created, the 'Import products' choice determines what will be successfully imported. If "Create products" is selected, then new products will be created. And if "Update products" is the picked, only the existing products will be updated.

If picking a 'create' task, the user will have to choose where in the hierarchy the objects should be created.

If more than one object type is chosen when configuring the widget, a dropdown is automatically added to the widget for the user to choose which type to create when importing new products.

Create Product

ID*

Name*

Description

Manufacturer Part Number

Brand Name

Country of Origin

Parent Node*

Supplier Assets

Supplier

- GLN1
- GLN2
- GLN3

Mapping

After pressing 'OK' the file is imported and columns are automatically mapped where column headers match an attribute name in STEP. If successfully mapped, the background color changes to green. If not mapped, the user can manually map the column by starting to type the STEP attribute name and choosing from the suggested attributes shown.

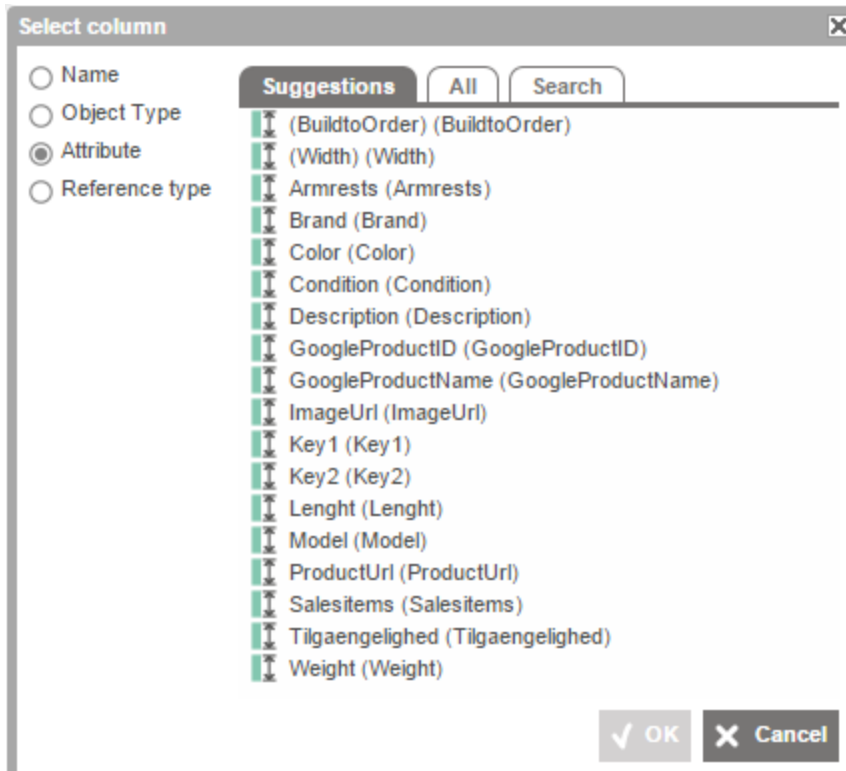
Import products						
☐ Unique key Testkey						
<ID>	<Name>	Aspect Ratio	Attribute Description	Attribute Description (2)	CA-CONDITION	Clothing Type
ID	<Unmapped>	<Unmapped>	Attribute Description (Armrests)	<Unmapped>	<Unmapped>	<Unmapped>
L6576	Panasonic Viera TC-P65VT50	16.9				
L6577	Samsung UN55ES8000F	16.9				
L6578	Panasonic Viera TC-P50UT50	16.9				
L6579	LG 50PN6700	16.9				
L6580	Sony KDL-55W900A	16.9				
L6581	Vizio E471VLE	16.9				
L6582	Sony Bravia KDL-46BX450	16.9				
L6940	Samsung UN70ES800	16.9				
L7123	Panasonic TC-P60ZT60	16.9				
L7130	Samsung PNF8500	16.9				
L7133	Toshiba L2300U	16.9				
L7143	Toshiba L2300U	16.9				
L7144	LG 42GA6400	16.9				
UNSPSC000 52161600	Audio visual equipment accessories					
L6587	MELICONI STILE S800					
L6588	Digicom Super Flat Tiltable LED Wall Mount					
L7219	Flex Mount					
L7225	MultiBrackets M Universal Tilt Wallmount					
L10336	MultiMount Wall Mount					
L7346	Milano Cotton Chino Trousers (male)					Chinos
L7352	Chile Cargo Cotton Shorts (male)					Shorts
L8304	Oslo Jeans (male)					Jeans
L18907	Jeans 1a					Bermuda Shorts
L19250	Shorts					Shorts
L59250	Shorts					Shorts
L19252	Shorts2					Shorts
L19254	Shorts2					Shorts
L19277	Shorts3					Shorts
L19294	Shorts4					Shorts
L7354	Skinnyfive Cotton Trousers					Trousers
L10092	Vienna Bermuda Shorts					Bermuda Shorts
L7351	Milano Cotton Chino Trousers (female)					Chinos
L7357	Chile Cargo Cotton Shorts (female)					Shorts

In the top right corner, it is possible to hide all mapped attributes. This makes it easy to find the attributes which need to be mapped manually. When at least 'ID' or another key has been mapped, then the 'OK' button is enabled.

If the naming of the attribute is uncertain the edit icon can be invoked:



and the following shows up:



In the 'Suggestions' tab, suggestions are made for mapping to an attribute based on a set of the imported objects. In the second tab, 'All' attribute groups and attributes are made available. You can search for a given attribute using the 'Search' tab.

Note: It is important to note that all reference types will have to be mapped manually. Automatic mapping of references is not supported.

If values from an attribute do not validate, they are shown with a red background in the preview window. When importing, those values will be skipped.

Note: Derived attributes cannot be mapped for import.

Map Keys on Import

If STEP ID is omitted from the input file, it is possible to match an existing product via its key instead. To accomplish this, the user must map a key in place of STEP ID during the import, using the **Unique key** radio button.

New products cannot be created in this way as a key cannot exist until its underlying attributes have been defined. Click the **Unique key - mapped by Attribute** radio button to create a new product using the underlying attributes of a key. This method can also be used to update existing products.

1. In the Import Products window, click the **Unique key** radio button.

The 'Simple Import' window shows three radio buttons: 'ID', 'Unique key' (selected), and 'Unique key - mapped by Attribute'. A dropdown menu next to the third option shows 'Key 2'. In the top right, it says 'Mapped columns: 3 of 3' and 'Hide mapped columns' with an unchecked checkbox. Below is a table with three columns: '<ID KeyID=Key 2>', '<Name>', and '<Object Type Name>'. Each column has an edit icon. The table contains four rows of data.

<ID KeyID=Key 2>	<Name>	<Object Type Name>
<ID KeyID=Key 2> (Key 2)	Name	Object Type
3457-7962	Product A	SalesItem
5198-4432	Product B	SalesItem
8666-9064	Product C	SalesItem
7622-9810	Product D	SalesItem

2. Click the edit icon in the desired field and the Mapping window will appear.
3. Click the **Unique key** radio button and select a key from the drop down menu. Click **OK**.

The 'Mapping' window shows five radio buttons: 'ID', 'Unique key' (selected), 'Name', 'Object Type', 'Attribute', and 'Reference type'. A dropdown menu is open next to the 'Unique key' button, showing 'Unique Key 2a' (selected), 'Unique Key 2a', and 'Unique Key 1'. At the bottom are 'OK' and 'Cancel' buttons.

4. Map the remaining fields and then click **OK** to start the import.

Note: The option to map keys will only be available when applicable to the imported object type and when there is a valid key active in the system.

Smartsheets in Web UI

Smartsheets can be imported and exported directly from the Supplier Web UI. Before the required Web UI components can be configured, however, a Smartsheet template must have already been created, as well as data export and import configurations.

For more information, see the **Smartsheet Data and Template Configurations** and **Smartsheet Import Configurations** sections of the documentation.

Note: In order to configure Smartsheet components in the Supplier Web UI, the user must be a member of a Supplier Web UI user group.

Three components are available for handling Smartsheets in the Supplier Web UI:

- **Smartsheet Export Widget** - Used to initiate products into STEP. For more information, see the **Smartsheet Export Widget** section of the **Web User Interfaces** documentation.
- **Smartsheet Export Action** - Used to export data from products in a workflow so that it can be edited in a Smartsheet. For more information, see the **Smartsheet Export Action** section of the **Web User Interfaces** documentation.
- **Smartsheet Import Action** - Used to import modified or newly created product data into STEP. For more information, see the **Smartsheet Import Action** section of the **Web User Interfaces** documentation.

Smartsheet Export Action

The Smartsheet Export Action is used alongside the Smartsheet Import Action to maintain product data. Specifically, this action allows users to download Smartsheet maintenance files from products in a workflow. Once the product data has been updated in the sheet, you can import the changes into STEP via the Smartsheet Import Action.

For more information, see the **Smartsheet Import Action** section of the **Web User Interfaces** documentation.



This action can be configured on a Tasklist screen, and is available for products moving through a workflow.

Prerequisites

It is expected that anyone configuring the Smartsheet Export Action is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuration

The only mandatory parameter for this action button is **Narrowed Export Configurations**, which determines which Smartsheet export configurations are available for selection.

Properties

Configuration

Web UI style

Tasklist

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

Smart Sheet Export Action Properties

go to parent

Component Description

Component used for starting download of multilevel smartsheet using a specified export-configuration. When the export is started certain properties are set in the configuration. These settings are derived from the current users supplier classifications so the component will be excluded if user is not member of a supplier group

Button label

i18n.stibo.SmartSheetExportActionServerComponent.Actio

Cancel Download Button Text

i18n.stibo.SmartSheetExportActionServerComponent.Canc

Custom Icon

...

Reset

Dialog Title

i18n.stibo.SmartSheetExportActionServerComponent.Dialo

Enable All In State Export

☐

Narrowed Export Configurations*

SmartSheetExport_Enrich

Add...

Remove

Up

Down

No Export Configurations Message

i18n.stibo.SmartSheetExportActionServerComponent.NoEx

No Selection Message

i18n.stibo.SmartSheetExportActionServerComponent.NoSe

Process Description

Selection Header

i18n.stibo.SmartSheetExportActionServerComponent.Selec

Start Download Button Text

i18n.stibo.SmartSheetExportActionServerComponent.Startl

Context Help

i18n.stibo.SmartSheetExportActionServerComponent.ToolT

1. In the **Button label** parameter, enter a label for the action button.
2. In the **Cancel Download Button Text** parameter, enter the displayed text for the cancel button.
3. In the **Custom Icon** parameter, click the ellipsis button (...) and select an icon to use for the action button.

4. In the **Dialog Title** parameter, enter a title for the export dialog.
5. In the **Enable All In State Export** parameter, check the box to add a radio button to the export dialog, allowing for the export of all products in the current workflow state.
6. In the **Narrowed Export Configurations** parameter, click **Add...** and select which export configurations should be made available to the end user. This must be a data export configuration, not a template configuration.
7. In the **No Export Configuration Message** parameter, enter a message to display when no configurations can be found.
8. In the **No Selection Message** parameter, enter a message to display when no configuration has been selected.
9. In the **Process Description** parameter, enter a template for the process description.
10. In the **Selection Header** parameter, enter a header for the export dialog.
11. In the **Start Download Button Text** parameter, enter text that should be displayed for the download button.
12. In the **Context Help** parameter, enter text to display for the action button tooltip.

Smartsheet Export Widget

The Smartsheet Export widget is used alongside the Smartsheet Import Action to initiate new products into STEP. Specifically, this widget allows users to download Smartsheet template files. Once products have been added to the sheet, you can import them into STEP via the Smartsheet Import Action.

For more information, see the **Smartsheet Import Action** section of the **Web User Interfaces** documentation.



In order to use this widget a Smartsheet template must be specified in the configuration.

Prerequisites

It is expected that anyone configuring the Smartsheet Export Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuration

A number of configuration options are available for this widget, including options to redirect the end-user to a Background Process screen, export a template with multiple categories, configure the node picker, etc. It also has two mandatory parameters: **Export Configuration** and **Valid Object Type**.

Properties
Configuration
Web UI style

---[HOMEPAGE]---
Save
Close
New...
Delete
Rename
Save as...

Smart Sheet Export Widget Properties
[go to parent](#)

Component Description

Widget used for starting download of multilevel smartsheet using a specified export-configuration. When the export is started certain properties are set in the configuration. These settings are derived from the current users supplier classifications so the component will be excluded if user is not member of a supplier group. Note that this widget can only export smartsheet templates, i.e. empty smartsheets that can be use on-boarding new products

Export Configuration*

SmartSheetExport_Initiate

Multiple Categories

☐

Node Picker

Node Picker Dialog

Edit...

Redirect To Background Process Screen

☐

Title

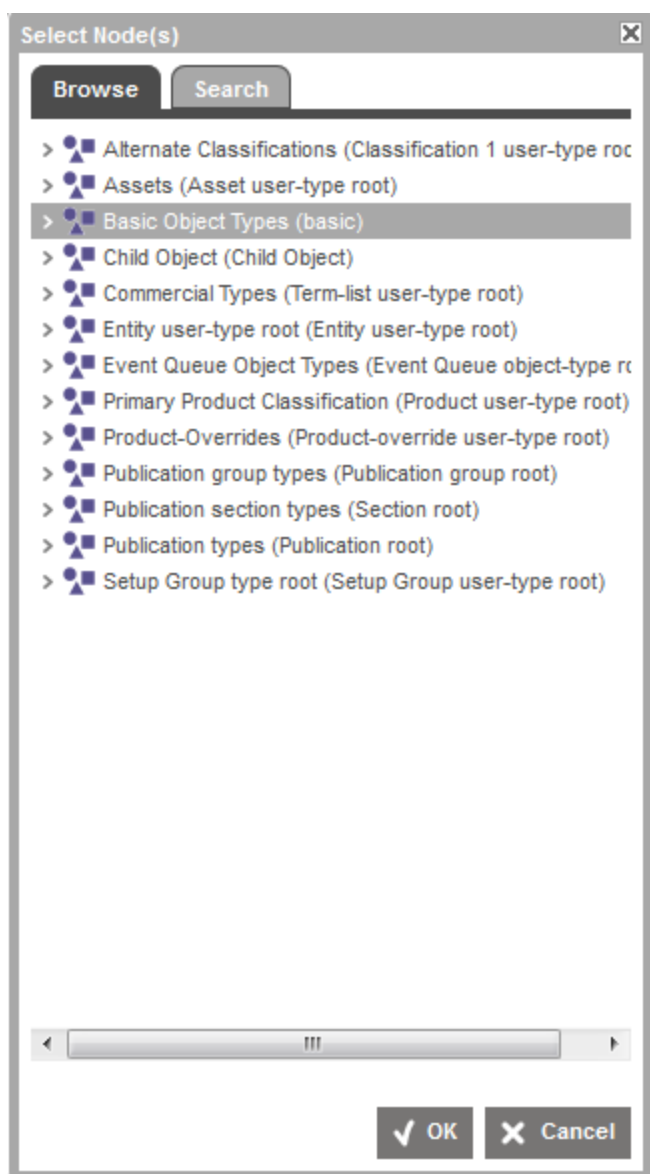
i18n.stibo.SmartSheetExportWidget.Title

Valid Object Types*

SalesItem

Add... Remove Up Down

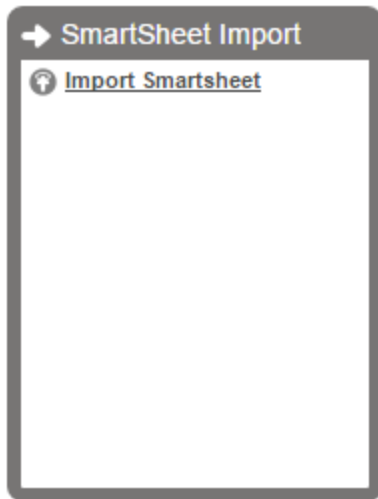
1. In the **Export Configuration** parameter, click the ellipsis button (...) to **Browse** or **Search** for the relevant export template configuration. This is a required property and must have a value.
2. In the **Multiple Categories** parameter, check the box to allow users to export template Smartsheets with mutiple product categories. When browsing via the node selector, use CTRL+click to select multiple categories for export.
3. In the **Node Picker** parameter, configure the node selections available to the user.
4. In the **Redirect to Background Process Screen** parameter, check the box to direct the user to a background process screen upon export.
5. In the **Valid Object Types** parameter, click **Add**, select the object types that should be valid for the template, then click **OK**. This is a required property and must have a value.



Smartsheet Import Action

The Smartsheet Import Action is used alongside the Smartsheet Export widget and Smartsheet Export Action to import product data into STEP.

For more information, see the **Smartsheet Export Widget** and **Smartsheet Export Action** sections of the documentation.



This component can be configured on the Links Widget.

Prerequisites

It is expected that anyone configuring the Smartsheet Import Action is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Configuration

As the bulk of the import logic is tied to the Smartsheet itself, there is only one truly relevant parameter, **Fallback Import Configuration**.

Properties

Configuration
Web UI style

---[HOMEPAGE]---
Save
Close
New...
Delete
Rename
Save as...

Smart Sheet Import Action Properties
[go to parent](#)

Component Description

Action for initiating an Excel Smartsheet import. Shows a dialog and do not require the user to select a import configuration

Action Title

i18n.stibo.SmartSheetImportActionServerCom

Cancel Import Button Text

i18n.stibo.SmartSheetImportActionServerCom

Dialog Title

i18n.stibo.SmartSheetImportActionServerCom

Fallback Import Configuration

SmartSheetImport

... Clear

Process Description

Selection Header

i18n.stibo.SmartSheetImportActionServerCom

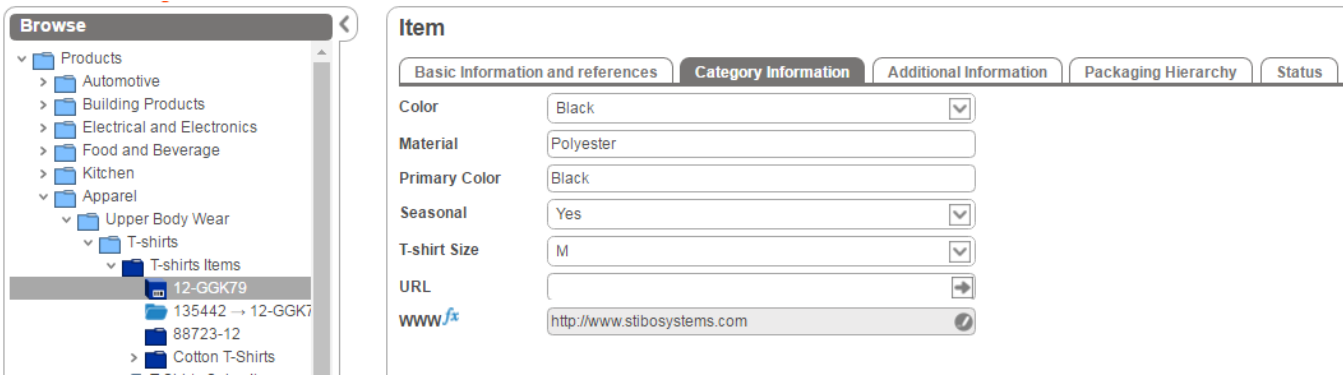
Start Import Button Text

i18n.stibo.SmartSheetImportActionServerCom

1. In the **Action Title** parameter, enter a name for the action.
2. In the **Cancel Import Button Text** parameter, enter the displayed text for the cancel button.
3. In the **Dialog Title** parameter, enter a title for the import dialog.
4. In the **Fallback Import Configuration** parameter, click the ellipsis button (...) and select an existing import configuration to apply to all Smartsheet imports where no import configuration was specified in the export configuration.
5. In the **Process Description** parameter, enter a template for the process description.
6. In the **Solution Header** parameter, enter a label for the select file prompt.
7. In the **Start Import Button Text** parameter, enter the text that should appear for the start import button.

Tab Pages

When viewing objects in Web UI, it is often helpful to have tab pages configured so that users can access all relevant information in a single screen, while also sectioning it into meaningful groupings that provide a user-friendly and more efficient work stream.



Adding Tab Pages

To add tab pages, a **Node Details** screen must be configured.

1. Open an existing **Node Details** screen type, or create a new one. Select **Tab Control** for the **Main** parameter under Child Components. Click the **go to component** link.

Properties

Configuration

Web UI style

Item detail ▼

Save

Close

New...

Delete

Rename

Save as...

Node Details Properties

Title

Item

Css Class

► Validation

► Multiple Target References

Child Components

Main

Tab Control ▼

[go to component](#)

Buttons

Buttons ▼

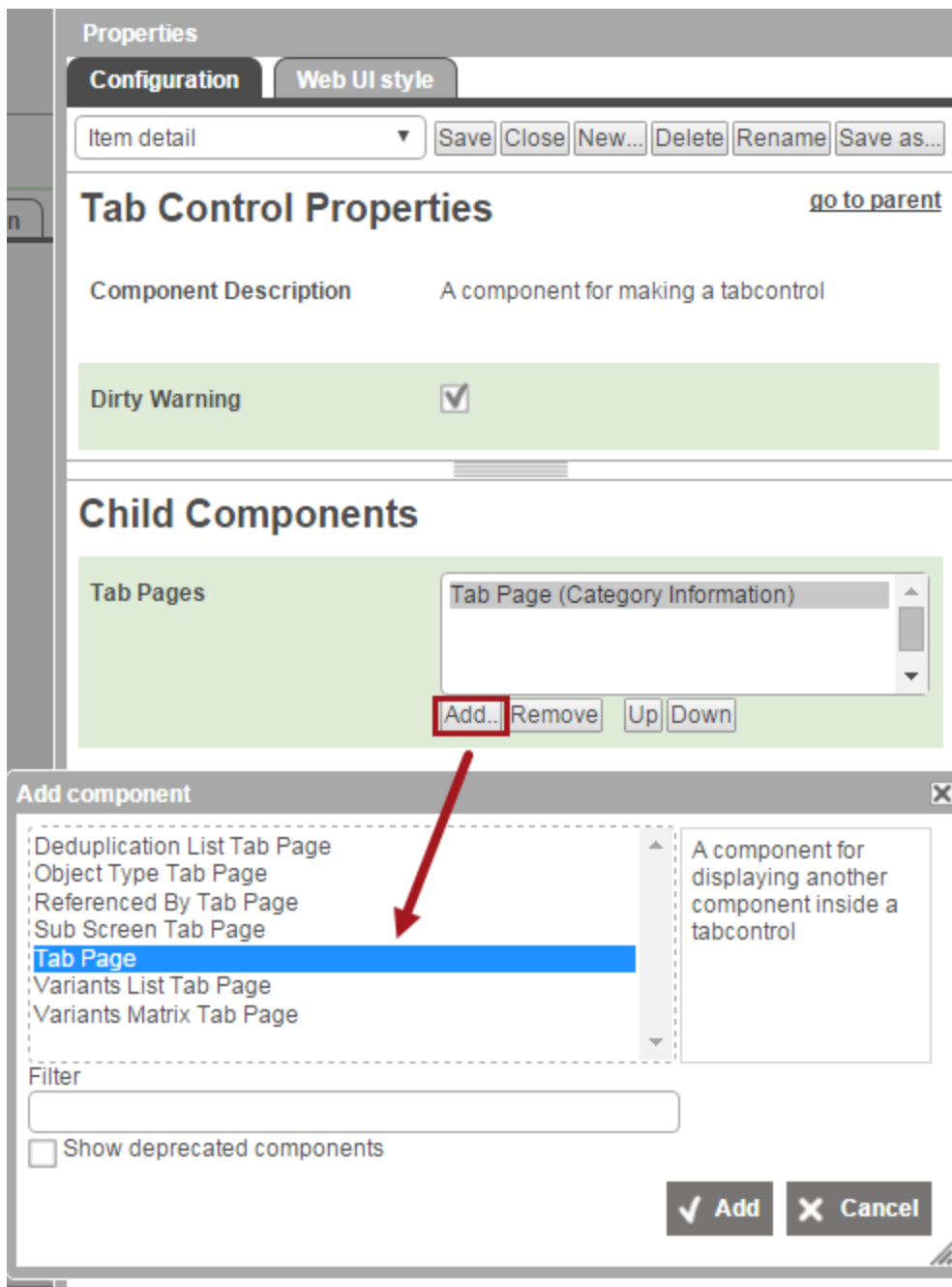
[go to component](#)

Breadcrumb

<Select a child compo ▼

[go to component](#)

- On **Tab Control Properties**, add a **Tab Page** to the **Tab Pages** parameter in Child Components. Double click on **Tab Page** once it is added.



3. Check the **Lazy** box to take advantage of lazing loading functionality, if / when applicable.

Components will be 'lazy' loaded from STEP and rendered only when needed (i.e., when a tab is selected). This can reduce screen load time (e.g., a Node Details screen configured to display multiple Tab Pages) since only the needed components are loaded and visible to the user.

It is important to note that any components that are not loaded yet due to lazy loading will not be able to be evaluated as part of a set of mandatory / invalid components in combination with the Save and the Submit buttons.

- On the **Tab Page Properties**, type in a name for the tab page under **Title**.

Properties (edited)

Configuration Web UI style

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

Tab Page Properties [go to parent](#)

Lazy ☐

Title

Child Components

Tab Content [go to component](#)

- Under Child Components, add the desired component(s) to the **Tab Content** parameter. In many cases, this will be a Node Editor, and that example will be followed in the next steps. However, any component can be used and the proper selection is determined only by the layout the designer wishes to provide for the end user. If more than one component should be accessible on a single tab, oftentimes a Draggable Split Panel component will be added in this step, with individual components subsequently being added as children to the Split Panel. Regardless of the component selected, click the **go to component** link after it has been added to configure the child component.

Properties (edited)

Configuration

Web UI style

Item detail ▼

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

Tab Page Properties

go to parent

Lazy ☐

Title

Child Components

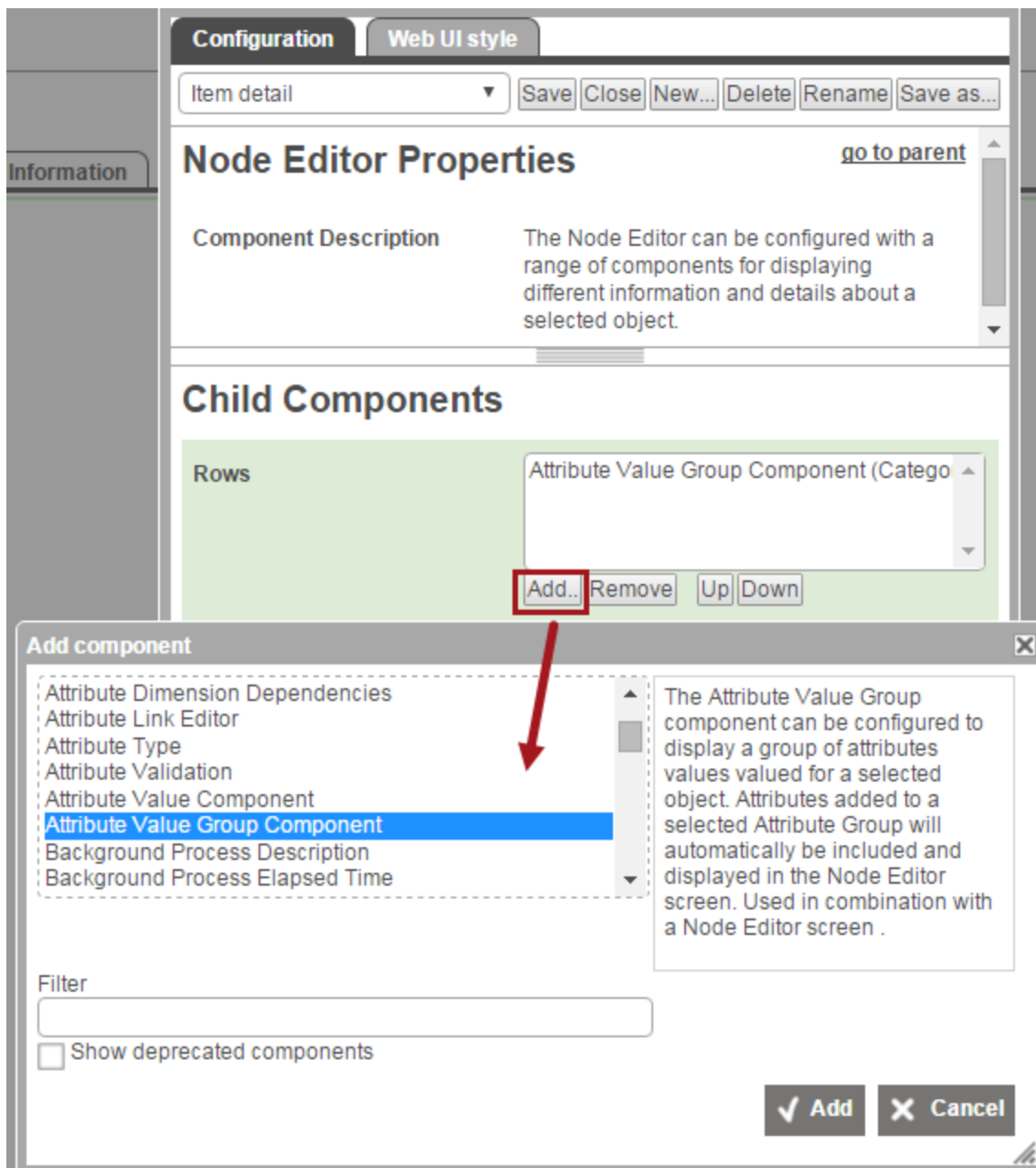
Tab Content

Node Editor ▼

go to component

<Select a child component>
Attribute Validity Table
Border Panel
Links Widget
List Of Values Values
Multi Reference
Node Editor
Potential Duplicates List
Referenced By
Split Panel
Stack Panel

- As mentioned above, any component could have been selected in the previous step, but this example will continue using a Node Editor. On the **Node Editor**, add the desired child components to the **Rows** parameter. Depending on the component selected in the previous step, differing child components may be available, and any number of them can be selected to build the appropriate interface for the end user. It is likely that each selected child component will require additional configuration, which users are prompted to complete as the components are added.



7. The above steps can be repeated as needed to add additional tabs. To do this, click on the **go to parent** link in each properties window until the **Tab Control Properties** are shown again. From there, steps 2-5 can be repeated as many times as needed to complete the configuration.

Tab Page Data Error Indicator

When using tab pages, if there is any type of error that impacts the data displayed on a tab (a validation error or missing mandatory value), then a yellow line is displayed directly under the tab name. The underline serves as an easy notification to users that attention is required on a particular tab page or on multiple tab pages. No configuration is needed to turn on this feature.

In the screenshot below, the first tab shows the Basic Information and References title with a yellow underline because Feature Bullet 1 is mandatory. Additionally, there is a missing mandatory attribute value on the Cost and Prices tab also.

Sales Item

Basic Information and References | Cost and Prices | Status | Translation | Data Visualization

Product Category ^{fx} | Products | Apparel | Head Wear | Hats and Caps | Hats and Caps

Name | 20808-013

Description, Web | 100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor Matching Fabric Underpiece Matching

Feature Bullet 1* |

Adding Sub Screen Tab Pages

Sub Screen Tab Pages can also be added as child components under Tab Control Properties. Instead of configuring components to display on the tab, you select a screen to display. No additional mapping is required since the end user will see the screen as a tab option when clicking on the Node Details screen.

Properties

Configuration | Web UI style

productdetails | Save | Close | New... | Delete | Rename | Save as...

Sub Screen Tab Page Properties | [go to parent](#)

Component Description | A component for displaying a tab which shows another screen

Details Screen* | Packaging Hierarchy | Add

Lazy | ☐

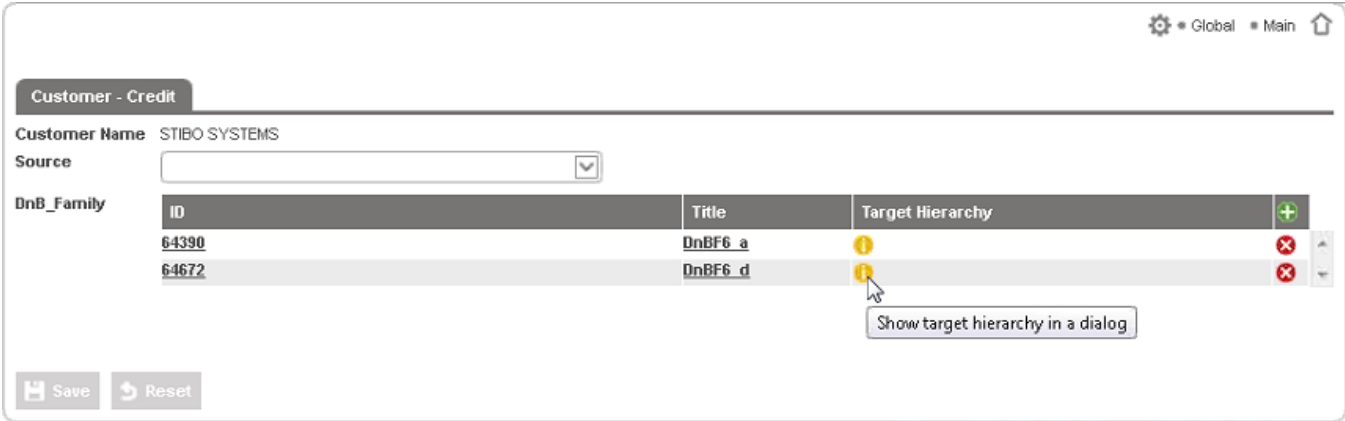
Title | Packaging_Hierarchy

The Lazy [load] option can also be enabled within Sub Screen Tab Page Properties. The functionality is identical to that described earlier in this topic within step 3 of the **Adding Tab Pages** section.

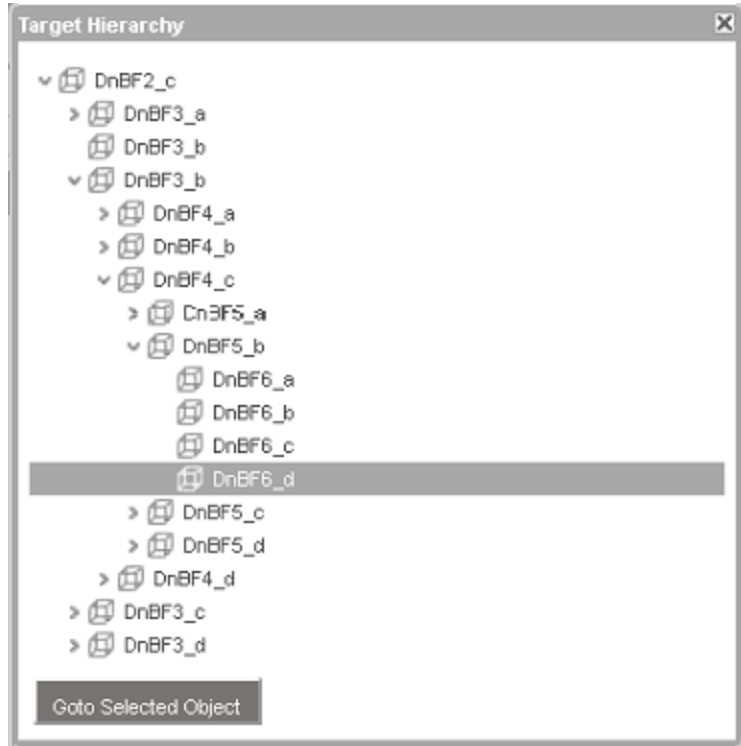
Target Hierarchy Column

Objects' references to hierarchies can be shown in tree views in the STEP Portal, thereby allowing users to view the position in the hierarchy and expand their view upwards and downwards to get an overview of alternative relationships of the objects in question.

This functionality is especially usable when wanting to, for example, model and view customer data where an organization can be related to multiple other organizational hierarchies. It is also relevant in order to display the position of a product in various web hierarchies.



The above shows an example where the TargetHierarchColumn component is in use to show references in a dialog (see below) to a hierarchy:



It is also possible to go to the object selected in the dialog.

Tree Navigator Component

A **Tree Navigator Component** is a customizable component that provides a navigable hierarchical display of the objects in STEP and is similar to the Tree tab within the workbench. It can also be configured to display attribute groups, attributes, List of Values (LOV) groups, and LOVs—similar to the System Setup tab within workbench. A Tree Navigator Component is ultimately configured through the **Main Properties > Child Components**.

Note that all steps provided in this topic assume the Web UI designer is in design mode and on the **---[MAIN]---** screen prior to starting the configuration process. A full description of how to configure and access the Main Properties screen can be found in the **Main Properties** section of the **Web User Interfaces / Using a Web UI** documentation.

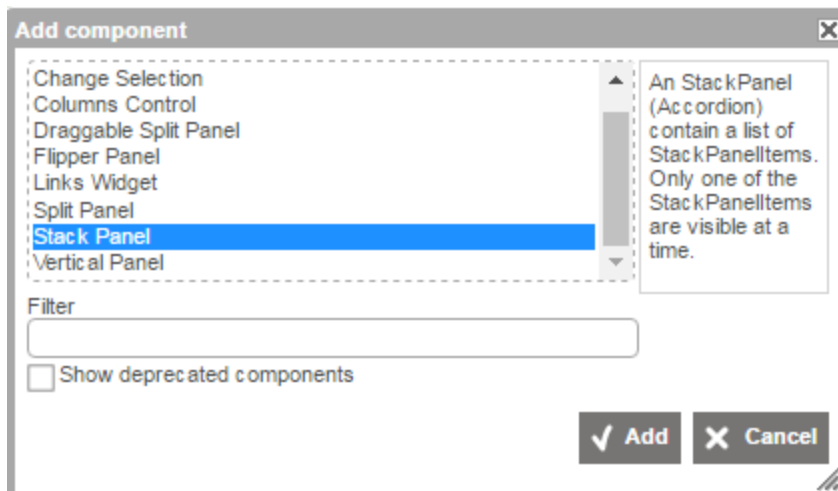
The screenshot shows the 'Properties' window with two tabs: 'Configuration' and 'Web UI style'. The 'Configuration' tab is active, showing the 'Main Properties' section. Below this, there are sections for 'Mappings', 'Bottom Height', 'Left Width', 'Resizable', 'Right Width', 'Top Height', 'Representation List', and 'Child Components'. The 'Child Components' section is highlighted with a red box and a red arrow pointing to it. It contains fields for 'Right', 'Bottom', 'Top', 'Left', and 'Corner Bar'. The 'Left' field is currently set to 'Stack Panel' and is highlighted with a red box. The 'Corner Bar' field is set to 'Corner Bar' and has a 'go to component' link next to it.

Configuring the Child Components

When using a Web UI created from one of the standard templates, by default, the Left component is already configured with a Stack Panel. This component can be removed or additional configuration of an existing component can be performed.

To add / configure a component to the Left, Right, or Bottom options, follow these steps:

1. Click **Add** under the applicable component value field in Main Properties.
2. Make a selection in the 'Add component' dialog. For example, a Vertical Panel arranges components vertically on the screen, and a Stack Panel also arranges components vertically on the screen but only one component is fully displayed at a time. (How to configure a Stack Panel will be described in the remaining steps.)



3. Select Stack Panel and click **Add**.
4. Double click the Stack Panel that was added to the value list.
5. In Stack Panel Properties > Child Components > Items, click **Add**.
6. Select Stack Panel Item and click **Add**.
7. Now, double click the Stack Panel Item that was just added to the value field. (If there are multiple Stack Panel Items, new ones will be listed at the bottom and can be re-ordered using the Up and Down buttons.)
8. In Stack Panel Item Properties > Child Components > Content, select **Tree Navigator** from the dropdown.
9. Click **go to component** to the right of Tree Navigator.

10. In Tree Navigator Properties:

- **Root Node URLs:** Click **Add...** to select specific nodes to display. If no selection is made, all nodes will be available.
- **Show Leaves:** Disabled by default; enable to display leaf nodes, if applicable.

Note: If displaying attribute group nodes and LOV group nodes, the Show Leaves parameter must be checked to enable the display of individual attributes and LOVs that fall under those groups.

- **Show Recycle:** Disabled by default; enable to display the Recycle Bin along with the root nodes.
- **Advanced > Forwarding Screen:** Forwards users to a specific screen when they click on anything that falls under the root nodes designated for the Root Node URLs parameter. If no screen ID selection is made, the screen selection will be handled by the conditions set up in the Main Properties > Mappings parameter.

11. Click **Save** to save the settings and **Close** to exit design mode. If preferred, you can return to Main Properties to evaluate other parameters (described below).

These steps are specific to the Tree Navigator component. To configure a different child component, follow Steps 1 through 7 and make a different selection in Step 8.

Configuring the Main Properties

The information that follows is applicable to the components set up to display as Child Components in Main Properties.

Height / Width Settings

The default pixel value for height and width settings varies depending on the template used when originally creating your Web UI.

The screenshot below shows the default pixel settings shared by the Web UI templates. The Left Width default may vary slightly (240, 280, 300) depending on the template used. All can be adjusted as needed.

Bottom Height	80
Left Width	300
Resizable	☒
Right Width	120
Top Height	40

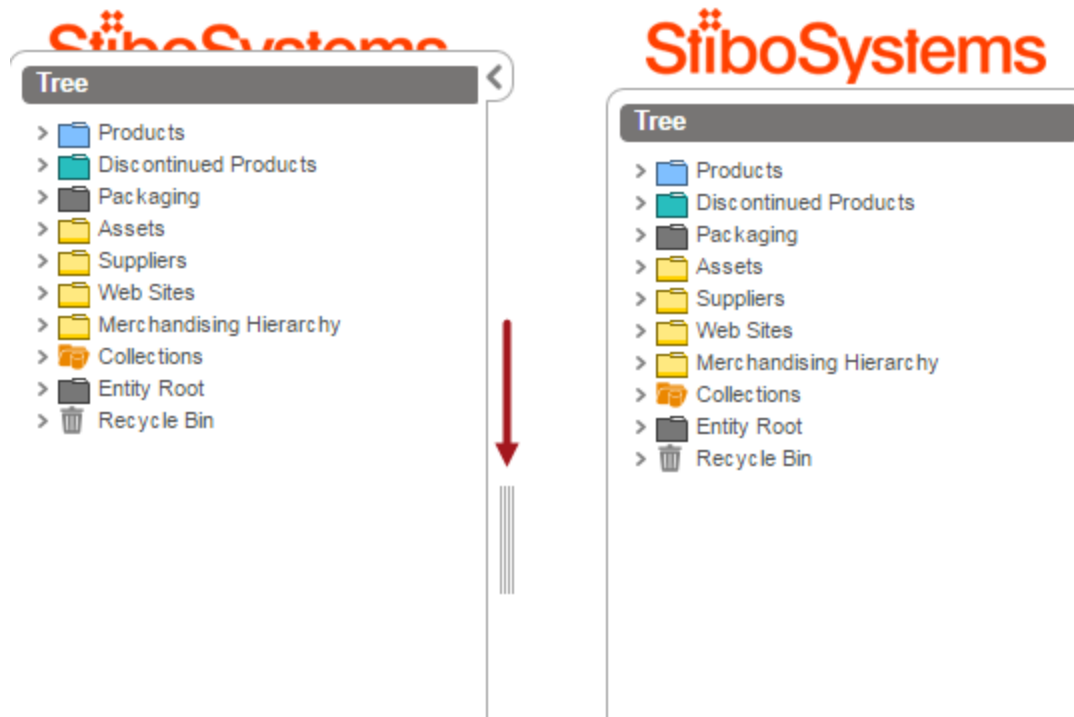
- **Bottom Height:** Determines the height of a component added to the Child Component > Bottom parameter. The parameter is placed on the bottom of the screen and expands up. The greater the number of pixels, the taller the component.
- **Left Width:** Determines the width of the component added to the Child Component > Left parameter. The parameter is placed on the left side of the screen and expands out to the right.



- **Resizable:** Determines if a drag handle (shown in the next screenshot) will appear so that the child component can be resized manually (applies to all child components set up in Main Properties). The resizing takes effect for a single screen session and the height / width parameter settings apply again automatically upon the next log in. If disabled, the drag handle does not display on the screen nor does the tab used to expand / collapse the component.

Note: If the Advanced > Default Side Panel parameter is set to COLLAPSED, disabling this setting will create an error when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

- **Right Width:** Determines the width of the component added to the Child Component > Right parameter. The parameter is placed on the right side of the screen and expands out to the left.
- **Top Height:** Determines how far down from the top of the screen the left and right child components are placed; the higher the number, the more space there is from the top of the screen to the top of the components. An example follows.



In the screenshot above, the stack panel on the left is shown with a Top Height setting of 20 and Resizable is enabled. The stack panel shown on the right side of the screenshot has a Top Height of 40 and Resizable is disabled, so there is not a drag handle nor a tab visible to the right of the stack panel.

Advanced

Click on **Advanced** to display additional parameters. A description of each parameter follows. Configure each to fit your business needs.

▼ Advanced

Business Conditions

Add... Edit... Remove Up Down

Default Side Panel SHOWN ▼

Info Alert Close Delay

Preferences

Screen Preference (SHOWN / productfolderdetails)
Screen Preference (SHOWN / Blank)
Screen Preference (SHOWN / productdetails)

Add... Edit... Remove Up Down

- **Default Side Panel** - This setting determines the behavior of the Left child component on all the pages within Web UI. Make a selection using the dropdown. An explanation of each option follows. *This is an all or nothing setting but may be overwritten for certain screens based on the Advanced > Preferences configuration.*
 - **HIDDEN**: Default setting; the component will not automatically display on the screen.
 - **SHOWN**: The component remains static on the left side of the screen as you navigate through Web UI.
 - **COLLAPSED**: The component does not automatically display on the screen but is accessible by clicking on a tab (>) shown on the left side of the screen.

Note: If the Resizable parameter is disabled, choosing COLLAPSED will cause an error message to display when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

- **Preferences**: Use the Preferences parameter to overwrite the Default Side Panel settings for specific screens. As an example, you may decide that it is best to display the Left child component on some screens (e.g., Homepage) although the Default Side Panel parameter is set to HIDDEN.
 1. Click **Add...** and make Screen and Side Panel selections on Screen Preference Properties.
 2. Repeat to add additional screen preferences.

Add component - configure required properties

The Screen Preference component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Screen Preference Properties

Component Description	A collection of settings controlling display and behavior of a screen.

Screen*

homepage

Add

Side Panel

<Select a value>

<Select a value>

SHOWN

COLLAPSED

HIDDEN

✓ Add

✗ Cancel

Stack Panel Example: Displaying a Tree Navigator Component

Here is an example of a configured Main Properties > Child Components > Left configuration. A Stack Panel configured to display three Stack Panel Items: a Tree Navigator (user-titled as Tree), a Tree Navigator (user-titled as System Setup), and a Status Selector Sidebar Widget (user-titled as Status Selector).

Properties

Configuration

Web UI style

---[MAIN]---

SaveCloseNew...DeleteRenameSave as...

Stack Panel Properties

go to parent

Component Description

An StackPanel (Accordion) contain a list of StackPanelItems. Only one of the StackPanelItems are visible at a time.

Stack Header Height

20

Child Components

Items

Stack Panel Item (Tree)
Stack Panel Item (System Setup)
Stack Panel Item (Status Selector)

Add..RemoveUpDown

Tree

> Products

> Discontinued Products

> Packaging

> Assets

> Suppliers

> Web Sites

> Merchandising Hierarchy

> Collections

> Entity Root

System Setup

Status Selector

Tree

System Setup

> Attribute Groups

> Lists of Values / LOVs

> Recycle Bin

Status Selector

Tree

System Setup

Status Selector

Enrich

Marketing

Remove Object From Workflow

Verify

0

0

0

0

User Configurable Views

User configurable views allow users to work more efficiently with less on-page navigation to find relevant data. Views can be named according to their intended purpose and saved for reuse across Web UI components and screens, as applicable, so that users can quickly and easily switch between different views tailored to meet different tasks at hand.

If an existing view does not offer what the user needs, creating, and configuring a view can be easily done without the Web UI designer, and is suitable for quick ad-hoc modifications.

This topic addresses:

- Prerequisites
- Applying a View
- Creating a New View
- Editing an Existing View
- Copying a View
- Deleting a View
- Renaming a View
- Sharing a View
- Enabling User Configurable Views

Prerequisites

The user configurable view action can be used with the following components / screens: Multi Edit Display Mode (Node List) and the Multi Context Screen. Before a user can see and access the 'Apply view' icon, the admin user will need to have enabled the Enable User Configurable View parameter within the applicable Properties. For more information see the **Enabling User Configurable View** documentation.

Applying a View

A user can choose to apply a view either created and shared by another user (Shared views) or created by the user (My views).

To apply a view:

1. Locate the **Apply view** icon in the action toolbar.


Select all


Apply view



	20808-013M	20808-015M
ID	188285	188294
Name	20808-013M	20808-015M
Sales Item Marketing Descriptions		
Short Item Description	Adjustable Plain Hat	Adjustable Plain Hat

2. Click the **Apply view** button, and a dialog will display with the option to apply a recent view, show all views, create a new view, or optionally click the **edit icon** next to a view, and options specific to the view will display.


Apply view

Recent views

★ CANADA

★ Basic View (M)

★ Website Item Descriptions

★ Barcodes (1)

★ Base View

★ Barcodes

★ Object Type

Show all views

Edit

Delete

Rename

Share

Copy

Apply a recent view

Recent views lists the last eight views the user has used. The list changes dynamically as the user applies different views. The last used or created view is placed at the top.

After clicking the **Apply view** icon, a user can then click on a specific recent view, and the apply view dialog will automatically close and the screen will render the selected view settings.

Show all views

If the list of recent views does not include the view a user needs to apply, then the user can click **Show all views** and the dialog will render the full list of 'My views.'

If the user has access to views that have been shared by other users, then those views will display in the 'Shared views' below the 'My views' section.

Once the desired view is found, click the view name to apply the view settings to the component / screen.

In the screenshot example below, a Node List displays five columns. When the **Apply view** icon is selected, a list of recent views displays. When the 'Price' view is selected the Node List displays two columns instead of five.

Attributes | Owners Manual | Primary Product Image | Installation Manual | Acc

Select contexts | Hide equal | Mark different | Apply view | Clear view

	ID	Name	Brand Name	List Price	Description, Web
English US	6806	555-22346_US	Super Value	205 \$	Air Compressor
Danish DK	6806	555-22346	Super Value	199 €	Luftkompressor
Germany German	6806	555-22346_DE	Super Value	187 €	Luftkompressor

Apply view | Clear view

Recent views +

- ★ Price
- ★ Sample
- ★ ID View

Attributes | Owners Manual | Primary Product Image

Select contexts | Hide equal | Mark different | Apply view | Clear view

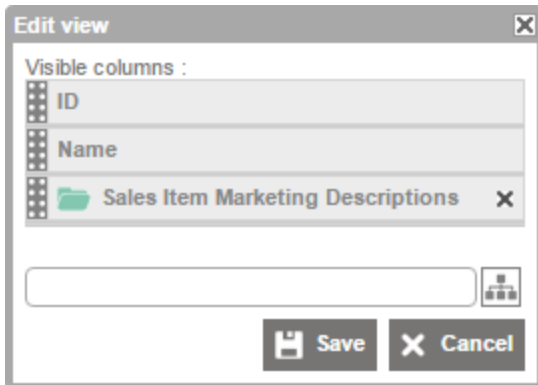
	Name	List Price
English US	555-22346_US	205 \$
Danish DK	555-22346	199 €
Germany German	555-22346_DE	187 €

Creating a New View

A user can create new views by clicking the green plus icon or copying an existing view and then editing it.

Steps to create a new view using the  icon:

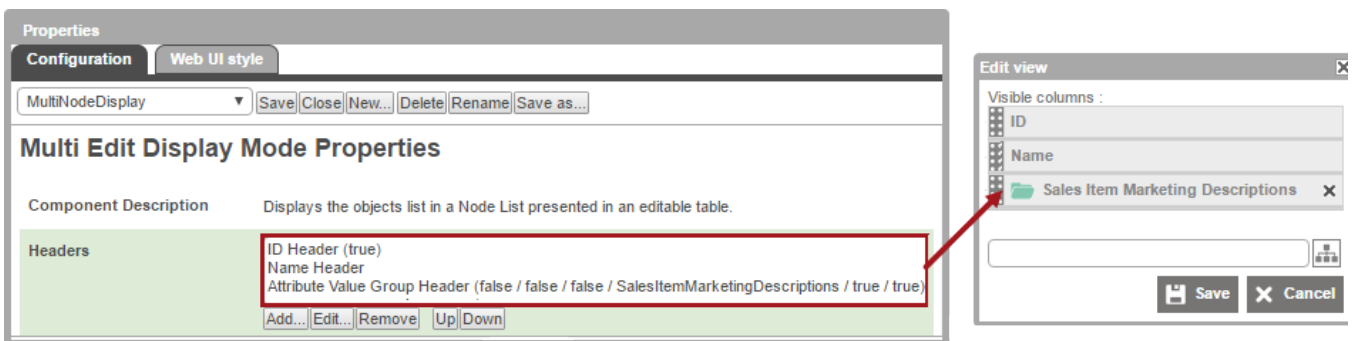
1. From the Apply view dialog, click the **green plus icon**  and the Edit view dialog will display.



When a user creates a new view using the  icon, the Edit view dialog will list different Visible columns based upon different component settings.

When creating a view while working in a Node List (Multi Edit Display Mode) and selecting the  icon, then the visible columns are ID, Reference type, Icon, and Type. Whereas, creating a view on a Multi Context screen, only the ID and Name are listed.

The screen shot below shows how the Node List (Multi Edit Display Mode) Headers added by the admin will display when the Edit view displays for the user.



2. With the Edit view dialog displayed, a user can edit the view by adding and/or removing attributes, and/or editing the display sequence.

Add Attributes / Attribute Groups as Columns

A user can add columns by using the node picker or typing the attribute / attribute group name or ID into the type ahead.

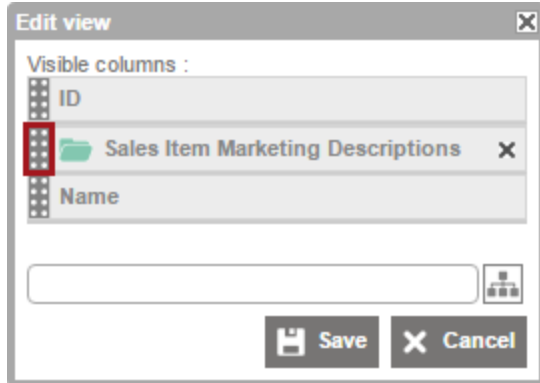
If the node picker is selected, the Select Column dialog will display, allowing the user to browse or search for the desired attribute or attribute group. After adding columns, be sure to click **Save** for the changes to take affect.

Removing Attributes / Attribute Group Columns

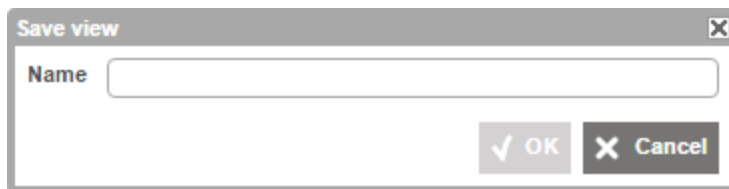
Remove a column by clicking the 'x' icon on the column. The 'x' icon will only display on columns that can be removed from the display. When the 'x' icon is selected the column immediately disappears from the Edit View, however the changes will not take effect until the user clicks **Save**.

Editing Display Sequence

From the Edit view dialog, a user can change the sequence of visible columns by clicking and holding the dark gray drag handles to the left of each column name and dragging it to the desired order.



- Once the newly created view has the necessary columns displayed as desired, click **Save**, and the Save view (Node List) / New View (Multi Context) dialog will appear prompting the user to enter a name of the new view.



- Populate the new view **Name** and the OK button will activate.

Note: The view name needs to clearly identify the intended use. The 'My views' list is *not* screen specific, the same view names will appear across *all* Node Lists with the user configurable view parameter enabled. The same is true for Multi Context screens; the same view names appear across all Multi Context screens.

- Click **OK** and the new view settings will be applied.

Editing an Existing View

When a user edits a view, they can determine the attributes and their sequencing to render on a multi edit display. A view can only be edited by the user who created it.

Steps to edit a view:

1. From the Apply view dialog, click the **edit icon** next to the view to be edited, and the dialog will display a list of applicable options.
2. Click **Edit** and an Edit view dialog will display with the visible columns per the selected view configuration.
3. Edit the view by adding and/or removing attributes, and/or editing the display sequence. Details on these are in the **Creating a new view** section above.
4. Click **Save** and the Save view dialog will appear.
5. Edit the **Name**.
6. Select to either **Overwrite current view** or **Save as new**. Change the name, if applicable.
7. Click **OK**.

Copying a View

A user can copy any view. This is useful when an existing or shared view needs changes, because once the view is copied, the user can edit it.

Steps to copy a view:

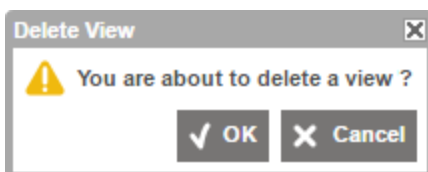
1. From the Apply view dialog, click the **edit icon** next to the view to be copied and the dialog will display a list of possible options.
2. Click **Copy** and a Copy View dialog will appear.
3. Enter the desired **Name**.
4. Click **OK**.

Deleting a View

A view can only be deleted by the user who created it.

Steps to delete a view:

1. From the Apply view dialog, click the **edit icon** next to the view to be deleted and the dialog will display a list of possible options.
2. Click **Delete**, and the Delete View warning dialog will display.



3. Click **OK**.

Renaming a View

A view can only be renamed by the user who created it.

Steps to rename a view:

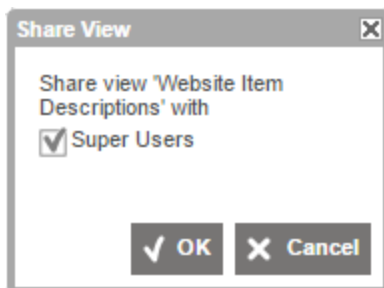
1. From the Apply view dialog, click the **edit icon** next to the view to be renamed and the dialog will display a list of possible options.
2. Click **Rename** and a Rename View dialog will appear.
3. Enter the desired **Name**.
4. Click **OK**.

Sharing a View

Users with a Share User Settings privilege (set in the Workbench) can share views to the groups that the user is a member of. Shared views cannot be edited or shared by others users. Only the user who created the shared view can edit / share. Once a user has access to a shared view, they can copy and then edit their copy of the view.

Steps to share a view:

1. From the Apply view dialog, click the **edit icon** next to the view to be shared, and the dialog will display a list of possible options.
2. Click **Share**, and the Share view dialog will display.



3. Select the appropriate user group(s).
4. Click **OK**.

Information regarding enabling a user configurable view can be found in the **Enabling User Configurable View** topic.

Enabling User Configurable Views

For a user to be able to access user configurable views, an admin user will need to have enabled the applicable parameter within Multi Edit Display Mode Properties (on a Node List) and/or the Multi Context Screen Properties.

This section addresses:

- Prerequisites
- Steps to Enable a User Configurable View

Prerequisites

It is expected that anyone enabling a user configurable view is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

It may also be helpful to understand the Node List component and where it can be added. See the **Node List Component** topic within the **Using a Web UI** documentation, and the **Multi Context Screen** topic.

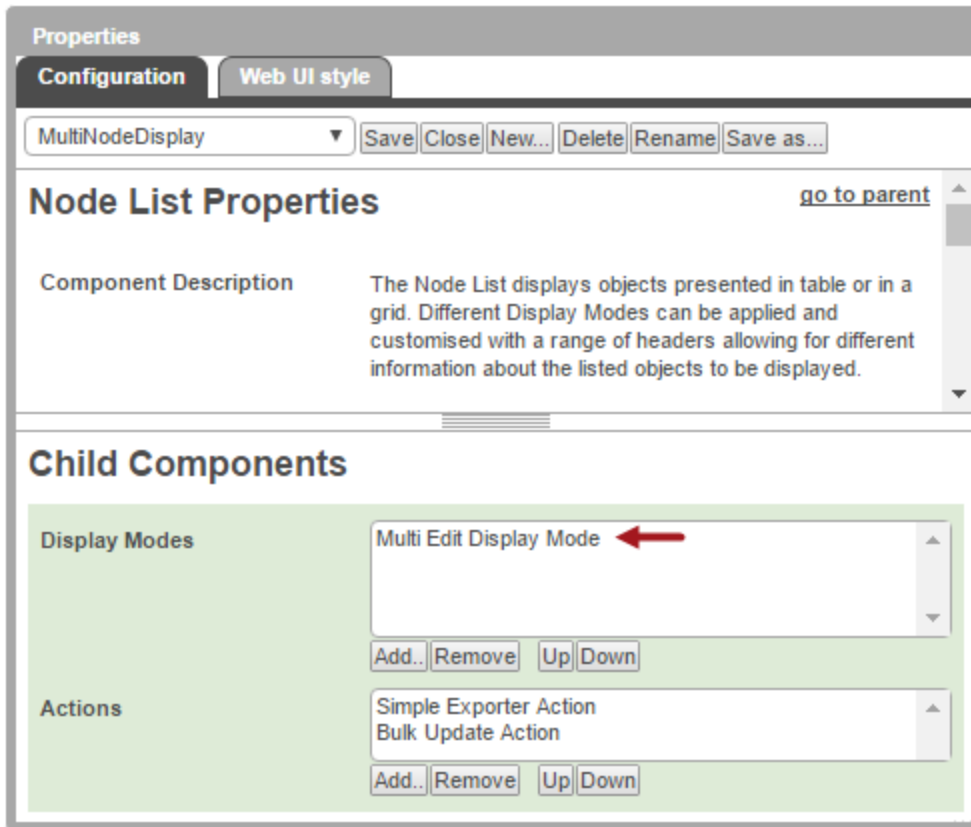
Steps to Enable a User Configurable View

Below are steps to enable a user configurable view on a Multi Edit Display Mode Properties (on a Node List) and a Multi Context Screen.

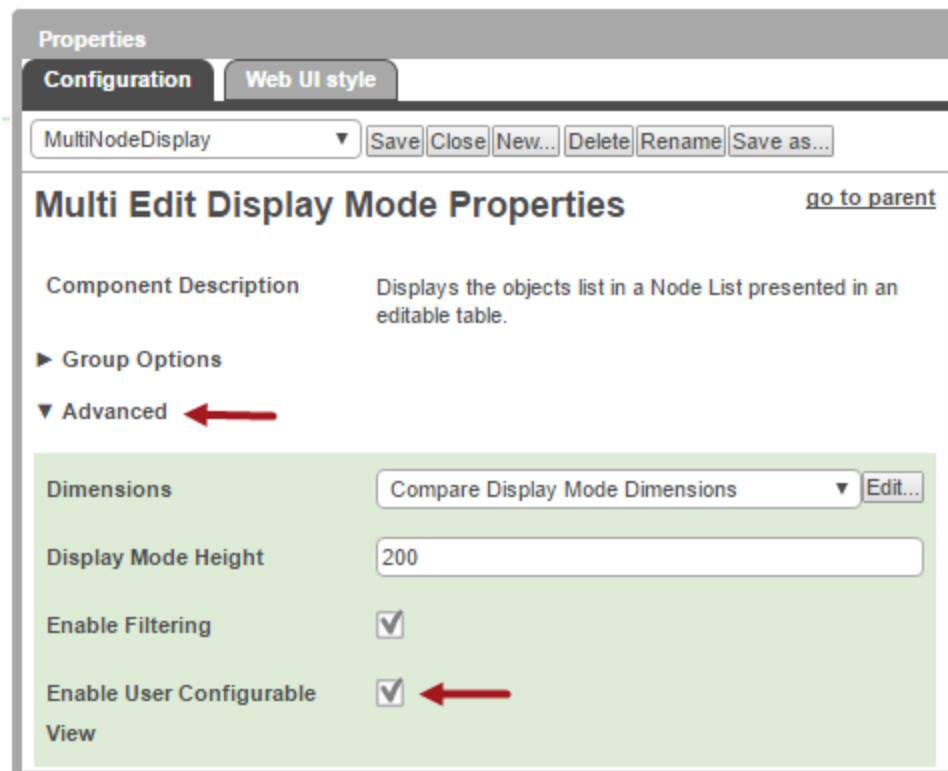
Multi Edit Display Mode

Once a Node List is configured to use Multi Edit Display Mode, an admin can easily add the user configurable view action / icon to the screen.

1. Navigate to the Node List Properties > Child Components > Display Modes parameter

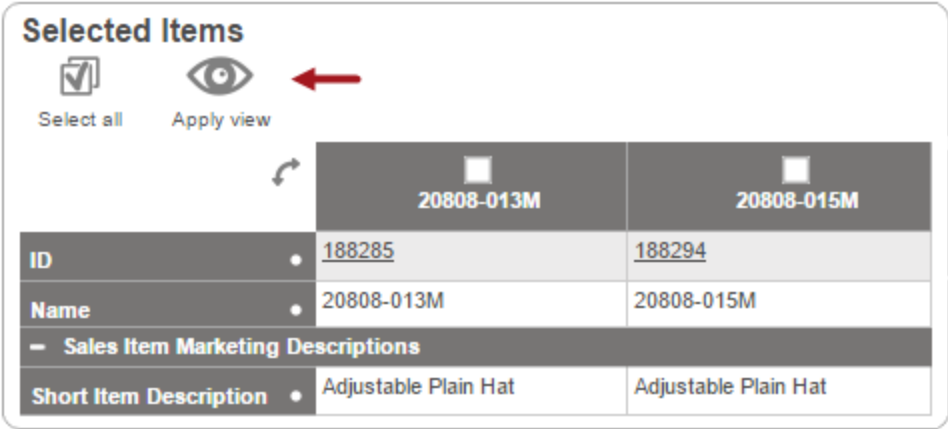


2. Double click the **Multi Edit Display Mode** and the Multi Edit Display Mode Properties will display.



- 3. Expand the **Advanced** parameters.
- 4. Enable the **Enable User Configurable View** parameter by clicking the checkbox.
- 5. Click **Save** and **Close**.

When a user navigates to the Node List and uses Multi Edit display mode, the Apply view icon will now be visible.



Multi Context Screen

Once a Multi Context screen is configured, an admin can easily enable the Enable User Configurable Views parameter for the screen, so that the Apply view icon displays.

For more information, see the Configuring a Multi Context Screen section within the Multi Context Screen documentation.

For information regarding how to use and work with user configurable views, see the **User Configurable Views** topic.

Using Checkbox Selection and Details Icons

Users select objects within Web UI tables by using checkbox selection. Clicking a checkbox is a straightforward way for users to select items, and also makes deselection much easier and more obvious to the user. The checkboxes are applicable to most tables within Web UI (including Node List component, Mass Creation screen, and Attribute Link Editor screen) with the main exception being those tables in which no toolbar actions are available.

Checkboxes and Selection Dependent Actions

When working with objects in Web UI, some objects shown in tables and different Node List views (as described in this topic) require a checkbox selection before an action can be taken on that object. Some action icons are hidden by default until a checkbox selection is made. These are user actions that are dependent on a selection being made before the action can be performed. Any action that is not dependent on a selection will continue to show on the screen. If objects are unselectable (no user actions available), then checkboxes are hidden from view.

Additionally, the Title Display parameter, specific to Multi Edit Display Mode and Compare Display Mode, has been updated to allow designers to make a 'None (Checkbox Only) selection,' which means that a checkbox, if applicable, will display in front of each row or on top of each column and no other identifying information (object name, ID, or attribute value) will display.

▼ Advanced

Dimensions

<Select an option> Edit...

Display Mode Height

200

Enable Filtering

☒

Enable User Configurable

☒

View

Title Display

Name

ID

Name

Attribute

None (Checkbox Only)

Show Details

Show Only Valid Attributes

☐

	Reference type	ID	Icon	Type
☐	Owners Manual	6900		Owners Manual
☐	Primary Product Image	6901		Product Image

Here is the same table with the orientation transposed.



		
Reference type	Installation Manual	Owners Manual
ID	<u>8801</u> 	<u>20684</u> 
Icon		
Type	Installation Manual	Owners Manual

The following example shows a Multi Reference Editor with a Node List in Multi Edit Display Mode. Within the display mode properties, the Title Display parameter is set to None (Checkbox Only), and the Show Details parameter is enabled. By default, the toolbar includes standard actions plus the user-added Add Reference action. No checkbox selection is required to add a reference, so it displays automatically.

 Select all

 Clear filter

 Apply view

 Clear view

 Add Reference



	Reference type	ID	Icon	Type
	Installation Manual	<u>8801</u> 		Installation Manual
	Owners Manual	<u>20684</u> 		Owners Manual
	Owners Manual	<u>20685</u> 		Owners Manual
	Owners Manual	<u>20686</u> 		Owners Manual
	Owners Manual	<u>6900</u> 		Owners Manual
	Primary Product Image	<u>8047</u>		Product Image

Number of items : 6







The below screenshot shows what happens when a checkbox selection is made. Additional action icons appear since specific selections are required to take those actions on the objects. If the displayed action is not applicable to the selections, it will not activate and appear light gray.

Clear all

Clear filter

Apply view

Clear view

Add Reference

Remove Reference

Create a clone and reference it

Suppress Reference

Remove suppression

	Reference type	ID	Icon	Type
☒	Installation Manual	8801		Installation Manual
☐	Owners Manual	20684		Owners Manual
☒	Owners Manual	20685		Owners Manual
☒	Owners Manual	20686		Owners Manual
☐	Owners Manual	6900		Owners Manual
☐	Primary Product Image	8047		Product Image

Number of items : 6

Details Icon

Along with checkboxes, many of the Node List display modes can be configured to display a details icon so that users can manually choose to display a details panel for that object instead of having the panel open automatically upon checkbox selection. This gives more control to the end user in determining what is needed to be displayed on the screen to complete their work. This icon is activated by enabling the Show Details parameter within the display mode properties. Please note that it is not advisable to use a multi selection screen as a mapping choice / selection screen when opening the details panel with the details icon.

The Show Details parameter is found under the Advanced header within the properties.

▼ Advanced

Dimensions

<Select an option>

Edit...

Display Mode Height

200

Enable Filtering

☒

Enable User Configurable View

☒

Title Display

Name

...

Show Details

☒

Show Only Valid Attributes

☐

Important: The details icon works independently of the checkboxes and can be configured to display even when checkboxes are not applicable.

The details icon displays for table rows within the Workflow Profile screen. No configuration is required as the icons are displayed, where applicable, by default.

The icon is shown directly to the right of the label (if a label is shown).

Examples

Example 1: Multi Reference Editor > Node List in Multi edit view; the Show Details parameter is enabled within the Multi Edit Display Mode Properties, and the details icon is selected for object 555-2033_M.

Clear all

Apply view

Multi edit view

List view

Compare view

Add Reference

Remove Reference

		Reference type	ID	Icon	Type
☒	555-2033_M	Installation Manual	8801		Installation Manual
☒	Manual FR	Owners Manual	20684		Owners Manual
☐	Manual ES	Owners Manual	20685		Owners Manual
☐	Manual DE	Owners Manual	20686		Owners Manual
☐	Manual EN	Owners Manual	6900		Owners Manual
☒	HYD543	Primary Product Image	6901		Product Image

Number of items : 6

Asset Detail

Image

ID

8801

Asset Type

Installation Manual

Name

555-2033_M

Asset Object Type

Installation Manual

Calculated Asset File Name

8801-555-2033_M

Format

PDF (Portable Document Format application)

Example 2: Workflow Profile screen; the details icon displays when applicable to the selected profile. There is no additional configuration required to display the icon. The details icon is selected for the Start task.

Workflow Profiles

Sample Workflow Profile

Live Data

Historical Data

	State	Workflow	Objects in state	Exceeded deadline...	Average time ...	Maximum time in state
	Review	Sample Workflow with Parallels	0	0	-	-
	Review Data (Review_Data)	Sample Workflow with Parallels	0	0	-	-
	Review Images (Review_Images)	Sample Workflow with Parallels	0	0	-	-
	Start	Sample Workflow with Parallels	1	0	8 days	8 days

Object	Workflow	Assignee	Status flag	Deadline	Time in state	Assignment time
12-GGK79 (100703)	Sample Workflow with Parallels	Super Users (Super user)	Normal	-	8 days	8 days

Example 3: Multi Reference Editor > Node List in Gallery view; the Show Details parameter is enabled within the Gallery Display Mode Properties, and the details icon is selected for object RP-4100.

Select all

Clear filter

Multi edit view

Compare view

Film strip view

Gallery view

Grid view

Add Reference

Manual FR

Manual ES

Manual DE

Manual EN

RP4100

555-2033_M

1-6 of 6

Asset Detail

Image

ID

8047

Asset Type

Product Image

Name

RP4100

Asset Keywords

Asset Object Type *fx*

Product Image

Save

Reset

Delete

Workflows in Web UI

While workflow setup is done in workbench, working with workflow tasks can easily be done within Web UI. The Web UI workflow documentation is divided up into two main sections.

- **Getting Started with Workflows in Web UI** is for both administrators and end users. The **Screen / Component Configuration and Mappings for Workflows** section outlines information needed for those who will be configuring the Web UI screen properties and components. And, **Working with Tasks in Workflows in Web UI** provides information for end users.
- **Advanced Web UI Workflow Topics** covers advanced topics that may not be used with every workflow. It is great information to read through and know once you have a solid grasp of workflows and interacting with them in Web UI.

Important: It is recommended that before you start working with workflows that you are familiar with all of the **Workflows** documentation and read the **Getting Started with STEP Workflows** material in order it appears, as topics build upon one another. Of particular interest to all users, regardless of your role (setup vs. end user) and whether or not you are using Web UI, is the **Workflow Terminology** topic and **Workflow Related Privileges** topic.

Getting Started with Workflows in Web UI

This portion of the material is a combination of screen and component configurations required for end users to effectively work with workflows within the Web UI, and steps the end user should follow to initiate objects into workflows as well as instructions for working with tasks.

Administrators will find setup information in the **Screen / Component Configuration and Mappings for Workflows** section.

If you are concerned only with the end user functionality, as opposed to designing and configuring components and screens, you may wish to skip directly to the **Working with Tasks in Workflows** section. The material is shown in the left-side navigation menu in the suggested reading order, as topics build upon each other.

Screen / Component Configuration and Mappings for Workflows

The details for configuring views and mappings are covered in the topics in this section. If users are going to work with workflows in Web UI, all the screens and components have to be configured for use with workflows. Any screen and workflow state mappings will also need to be created. This all ensures that users have access to the right information to complete their tasks and streamlines the work process.

The screen / component configuration determines what displays to the user and determines how a user is able to work with tasks. This is similar to the 'views' concept explained for viewing workflow information in workbench. When configuring a workflow it is important to decide what data is visible for objects (views), and define which states to display (mappings). Without views and mappings configured, all the information for a workflow will be limited to what displays within a Status Selector, leaving it impossible to work with workflows effectively within Web UI.

This section provides details regarding the components and screens that can be configured. Your setup will be dependent on your business needs, so examples and information may not match exactly with what you will create. However, it does provide a guidance and examples on what can be done.

Before configuring screens and components, or mappings, it is important to be aware of the following points:

- The views and mappings configured in Web UI only apply to Web UI. If users will not be interacting with workflows in the Web UI, it is not necessary to configure components / screens or set up Web UI mappings. Instead, set up views and mappings in workbench using the STEP Workflow Designer. Details can be found in the **Getting Started with STEP Workflows** section of the **Workflows** documentation.
- A screen can contain both object and workflow-specific data. This means that a view can contain attributes, attribute groups, and aspects information specific to the object (such as name, ID, approval status, etc) as well as elements like workflow assignee, deadline, workflow variables, and workflow attachments.

Status Selector Homepage Widget

The Status Selector widget is the starting point for users who want to work with a workflow in Web UI. As its name implies, the **Status Selector Homepage Widget** displays on the Web UI homepage, and its main purpose is to show states and the number of tasks in each state in a particular workflow. Upon clicking one of the displayed states, users will be navigated to a screen in which they can work with an individual task or multiple tasks. The screen that a user sees to work with the tasks depends on how the widget is configured. There are a number of possibilities, including the Task List screen, a Workflow Screen, or an Advanced Search screen.

Since each widget is configured for a single workflow, multiple widgets can be set up and used as needed. Each Status Selector Homepage Widget is highly configurable and can be set up to display:

If configured properly, a user can initiate tasks into a workflow, track tasks, and see what status flags they have (if applicable).

If interested in using a widget that has the same functionality but is displayed within one of the Web UI side panels, see the **Status Selector Sidebar Widget** topic.

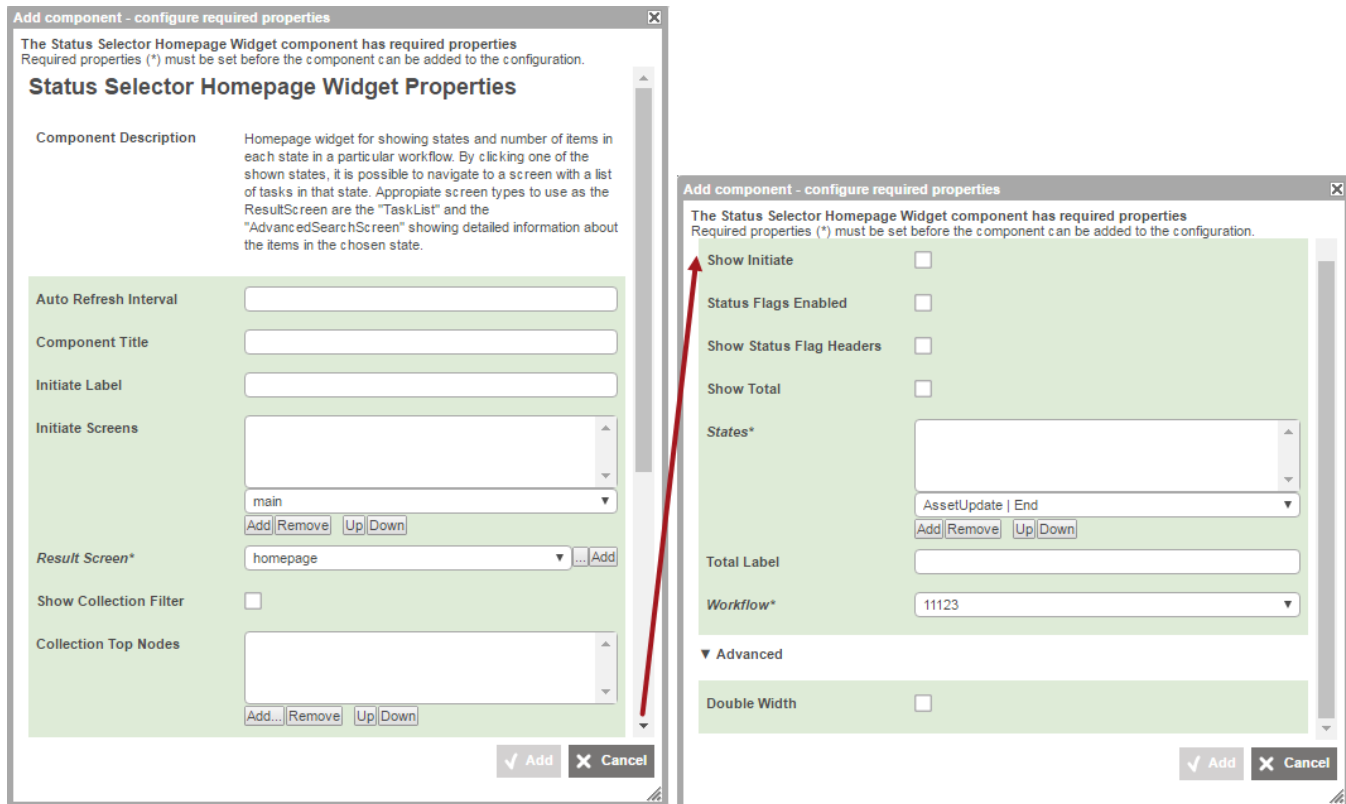
Note: From this point on, it is assumed that the workflow the widget will interact with is already set up in workbench.

Adding a Status Selector Widget

The Status Selector Homepage Widget must be added to the homepage prior to configuration. Follow the standard procedure, which is detailed in the **Adding Widgets to a Homepage** section of the **Homepage Widgets** topic.

Setting up the Status Selector Homepage Widget Properties

The Status Selector Homepage Widget Properties is shown below as two separate windows; however, it is actually just one dialog window. Users need to scroll down to view / configure all the parameters available.

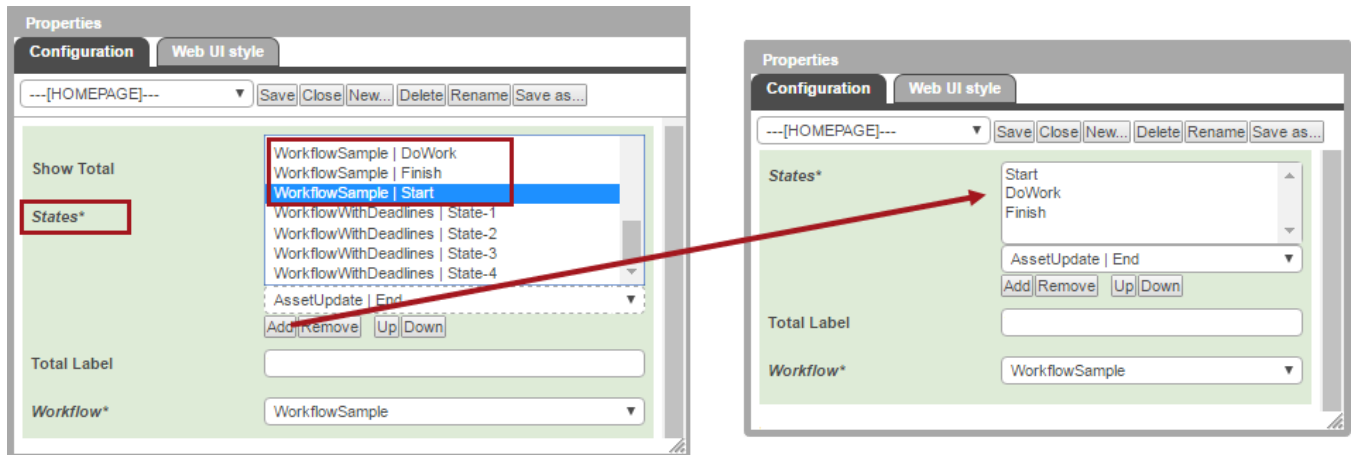


Status Selector Homepage Widget Properties can be saved as long as the workflow, the results screen, and at least one workflow state is configured. Below, the steps to set up these required parameters are listed first and then the remaining parameters go in order from top to bottom as listed within the properties.

Required Parameters

1. Towards the bottom of the properties, you will find the **Workflow*** parameter. Using the dropdown select the ID of the workflow you will be working with using the Status Selector.
2. Next, for **States***, click the dropdown to see all the states within all workflows, which are listed by workflow ID and then the state ID. Look for the states that are in the workflow you selected in Step 1. Once you have selected a state, click the **Add** button. Continue this process until all the states you need are added. Use the Up and Down buttons to reorganize the states as they will display within the Status Selector in the order they are listed in the Properties (top to bottom).

In the screenshot below, the workflow ID is WorkflowSample and the three applicable states are 'Start,' 'DoWork,' and 'Finish.'



3. Use the **Results Screen*** dropdown to select the screen, Task List or Advanced Search, that users will be navigated to upon clicking a workflow state.

If the desired screen has not been created yet, click the Add button to the right of the field and follow the typical steps for creating a new screen. The screen ID of the newly created screen will be selected once the process is complete.

If using an Advanced Search screen and wanting to further filter the task list, you can designate a specific (previously saved) search to use when navigated to the Advanced Search screen upon state selection. Simply click the ellipsis button and select a search from the Saved Search dropdown. Save the selection.

Click **Save** in the designer window to save the changes you have made up to this point

Additional Parameters

4. Set an **Auto Refresh Interval**, if desired. Enter, in seconds, how much time should pass before the Status Selector is automatically updated. Enter 0 to disable automatic updates. If you leave the field blank, it defaults to 0 upon saving the Properties.

Disabling the functionality means that you will only see updates to the number of tasks in each state when the Web UI screen is refreshed (logging in and out; navigating to another page and then back to the homepage) versus automatic updates to the info displayed on the Status Selector without user intervention.

5. If you want to give the Status Selector a specific title, enter the text in the **Component Title** field. The workflow name automatically populates as the title when this field is blank.
6. If you want an initiate object link to display in the Status Selector as a way for user to create / initiate objects into the designated workflow, then enable the **Show Initiate** parameter. Also, insert text to be used for the link in **Initiate Label**. If you leave the label field blank, then 'Initiate' will automatically populate the field after saving the Properties.

If the **Show Initiate** option is enabled (checked), a selection needs to be made for **Initiate Screens** using the dropdown. Make a selection, and then click Add. Repeat the process to add additional screens. The screen links will appear in order (top to bottom). Use Up and Down to reorganize as needed.

- Click the **Status Flags Enabled** checkbox if you use Status Flags and want the task count within the Status Selector to be grouped by Status Flag (columns) in addition to states (rows). While workflow state names are clickable and show all tasks within that particular state, clicking on a number under a Status Flag header gives you just the tasks within that state row that have that status.

Additionally, if you want the headers to display above the columns, enable **Show Status Flag Headers**.

- Enable the **Show Total** checkbox to add a row below all the workflow states that totals all the tasks. Also, the **Total Label** defaults to 'Total' upon save and can be kept as-is or alternate text can be entered into the parameter field.
- Click the **Advanced Heading** to display the **Double Width** parameter. By clicking the checkbox, you double the display width of the Status Selector widget. You may wish to enable this parameter if you are using multiple status flags and want to see all the columns at one time, or you desire a bit more space between the columns.

In the example below, standard size is shown on the left and double width is shown on the right.

Workflow Sample					
	 				
Initiate	Critical	Normal	Error	High	
Start	3	0	0	0	
Do Work	0	0	0	0	
Finish	0	0	0	0	
Total	3	0	0	0	

Workflow Sample					
	 				
Initiate	Critical	Normal	Error	High	
Start	3	0	0	0	
Do Work	0	10	0	0	
Finish	0	0	0	0	
Total	3	10	0	0	

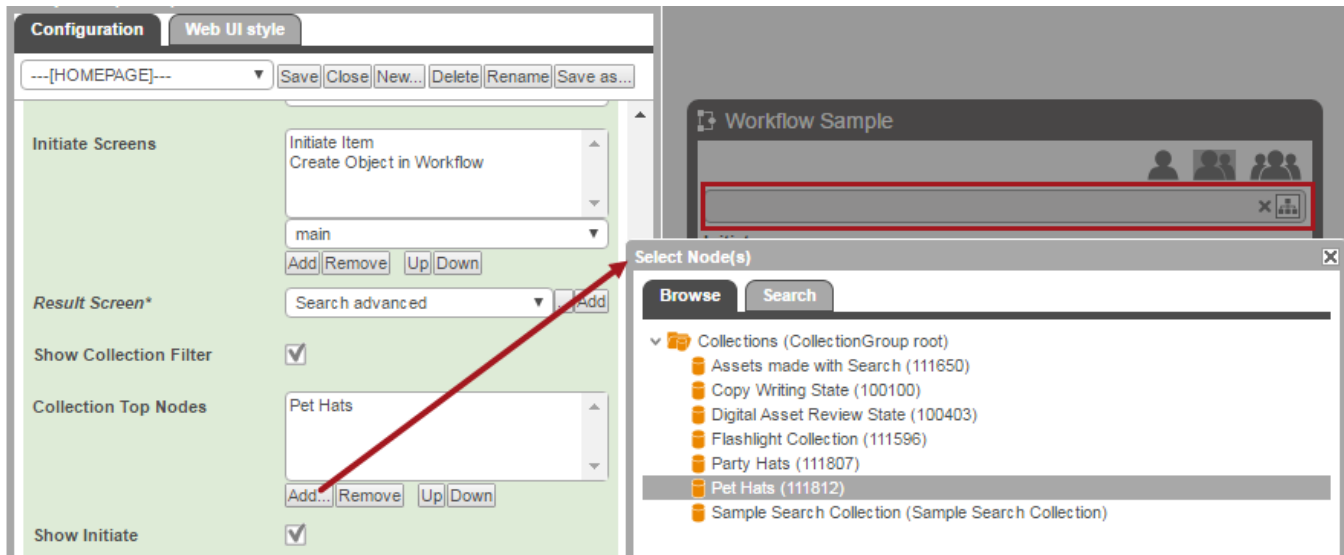
Again, click **Save** in the designer window to save the changes you have made up to this point

Setting up Collections Viewing

Collections are containers for storing sets of objects, and collection groups are containers that can hold collections or other collection groups. A collection can be applied as a filter limiting the available objects to the ones present in the chosen collection. Collections are typically used in relation to Bulk Update functionality.

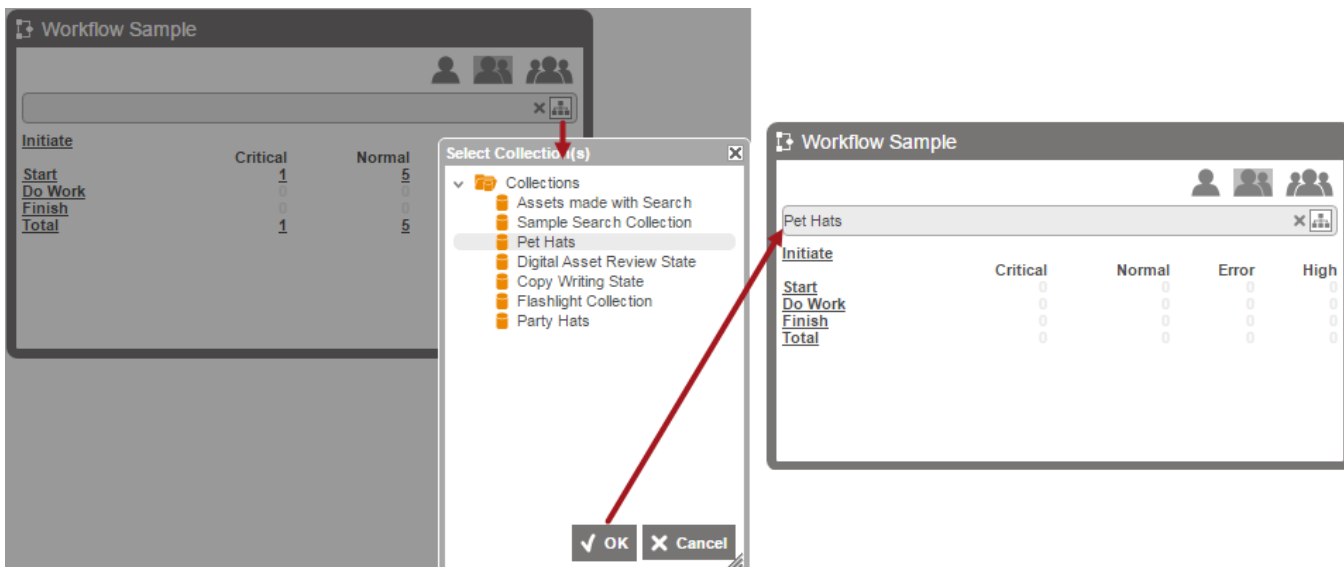
To make use of Collections Filtering in Web UI, initial setup needs to take in place in STEP Workbench and be in place before starting the next steps. Permissions for viewing and working with collections are also configured in workbench. For more on collections, see **Collections** in the **System Setup / Super User Guide** documentation.

- Select **Show Collections Filter** to show collections.
- Add any **Collections Top Node Filters** to further narrow down the collection or collections accessible to users. Click Add, and make a selection or selections, and then click OK. The selections can be reorganized as needed.



Save the changes and **Close** the designer window.

Only collections available to the user or user group will be shown when configured properly. The user can then filter the states based on the collection or collection group selected.



For more information on end-users tasks such as initiating objects into a workflow and working with states and tasks within the Status Selector Homepage Widget, see the **Working with Tasks in Workflows** section of the **Workflows in Web UI** documentation.

Status Selector Sidebar Widget

The Status Selector widget is the starting point for users who want to work with a workflow in Web UI. The **Status Selector Sidebar Widget** displays within a side panel, and its main purpose is to show states and the number of tasks in each state in a particular workflow. Upon clicking one of the displayed states, users will be navigated to a screen in which they can work with an individual task or multiple tasks. The screen that a user sees to work with the tasks depends on how the widget is configured. There are a number of possibilities, including the Task List screen, a Workflow Screen, or an Advanced Search screen.

Since each widget is configured for a single workflow, multiple widgets can be set up and used as needed. Each Status Selector Sidebar Widget is highly configurable. If configured properly, a user can initiate tasks into a workflow, track tasks, and see what status flags they have (if applicable).

If interested in using a widget that has the same functionality but is displayed on the homepage, see the **Status Selector Homepage Widget** topic.

Note: From this point on, it is assumed that the workflow the widget will interact with is already set up in workbench.

Adding a Status Selector Widget

The Status Selector Sidebar Widget needs to be added as a Stack Panel Item in Main Properties prior to configuration. Follow the standard procedure, which is detailed in the **Main Properties** topic of the **Using a Web UI** documentation.

Setting up the Status Selector Sidebar Widget Properties

The Status Selector Sidebar Widget Properties is shown below as two separate windows; however, it is actually just one dialog window. Users need to scroll down to view / configure all the parameters available.

The screenshot shows the 'Properties (edited)' window with two tabs: 'Configuration' and 'Web UI style'. The 'Configuration' tab is active, showing 'Stack Panel Item Properties' and 'Child Components'. In the 'Child Components' section, 'Status Selector Sidebar' is selected. A red arrow points from this selection to the 'Add component - configure required properties' dialog. This dialog contains the 'Status Selector Sidebar Widget Properties' form, which includes fields for 'Auto Refresh Interval', 'Initiate Label', 'Initiate Screens', 'Result Screen*', 'Show Collection Filter', 'Collection Top Nodes', 'Show Initiate', 'Status Flags Enabled', 'Show Status Flag Headers', 'Show Total', 'States*', 'Total Label', and 'Workflow*'. The 'Workflow*' field is set to 'WorkflowSample'.

Status Selector Sidebar Widget Properties can be saved as long as the workflow, the results screen, and at least one workflow state is configured. Below, the steps to set up these required parameters are listed first and then the remaining parameters go in order from top to bottom as listed within the properties.

Required Parameters

1. Towards the bottom of the properties, you will find the **Workflow*** parameter. Using the dropdown select the ID of the workflow you will be working with using the Status Selector.
2. Next, for **States***, click the dropdown to see all the states within all workflows, which are listed by workflow ID and then the state ID. Look for the states that are in the workflow you selected in Step 1. Once you have selected a state, click the **Add** button. Continue this process until all the states you need are added. Use the Up and Down buttons to reorganize the states as they will display within the Status Selector in the order they are listed in the Properties (top to bottom).

In the screenshot below, the workflow ID is WorkflowSample and the three applicable states are 'Start,' 'DoWork,' and 'Finish.'

3. Use the **Results Screen*** dropdown to select the screen, Task List or Advanced Search, that users will be navigated to upon clicking a workflow state.

If the desired screen has not been created yet, click the Add button to the right of the field and follow the typical steps for creating a new screen. The screen ID of the newly created screen will be selected once the process is complete.

If using an Advanced Search screen and wanting to further filter the task list, you can designate a specific (previously saved) search to use when navigated to the Advanced Search screen upon state selection. Simply click the ellipsis button and select a search from the Saved Search dropdown. Save the selection.

Click **Save** in the designer window to save the changes you have made up to this point

Additional Parameters

4. Set an **Auto Refresh Interval**, if desired. Enter, in seconds, how much time should pass before the Status Selector is automatically updated. Enter 0 to disable automatic updates. If you leave the field blank, it defaults to 0 upon saving the Properties.

Disabling the functionality means that you will only see updates to the number of tasks in each state when the Web UI screen is refreshed (logging in and out; navigating to another page and then back) versus automatic updates to the info displayed on the Status Selector without user intervention.

5. If you want to give the Status Selector a specific title, enter the text in the **Component Title** field. The workflow name automatically populates as the title when this field is blank.
6. If you want an initiate object link to display in the Status Selector as a way for user to create / initiate objects into the designated workflow, then enable the **Show Initiate** parameter. Also, insert text to be used for the link in **Initiate Label**. If you leave the label field blank, then 'Initiate' will automatically populate the field after saving the Properties.

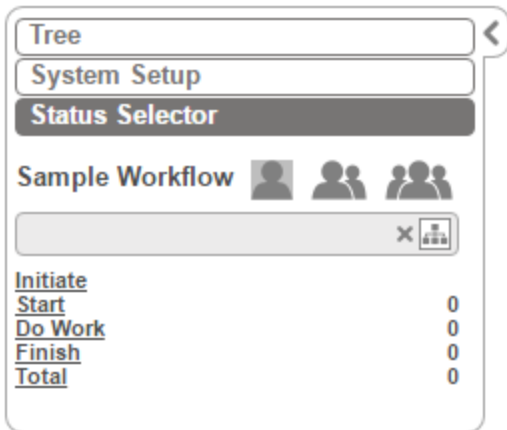
If the **Show Initiate** option is enabled (checked), a selection needs to be made for **Initiate Screens** using the dropdown. Make a selection, and then click Add. Repeat the process to add additional screens. The screen links will appear in order (top to bottom). Use Up and Down to reorganize as needed.

7. Click the **Status Flags Enabled** checkbox if you use Status Flags and want to the task count within the Status Selector to be grouped by Status Flag (columns) in addition to states (rows).

Additionally, if you want the headers to display above the columns, enable **Show Status Flag Headers**.

8. Enable the **Show Total** checkbox to add a row below all the workflow states that totals all the tasks. Also, the **Total Label** defaults to 'Total' upon save and can be kept as-is or alternate text can be entered into the parameter field.

Again, click **Save** in the designer window to save the changes you have made up to this point

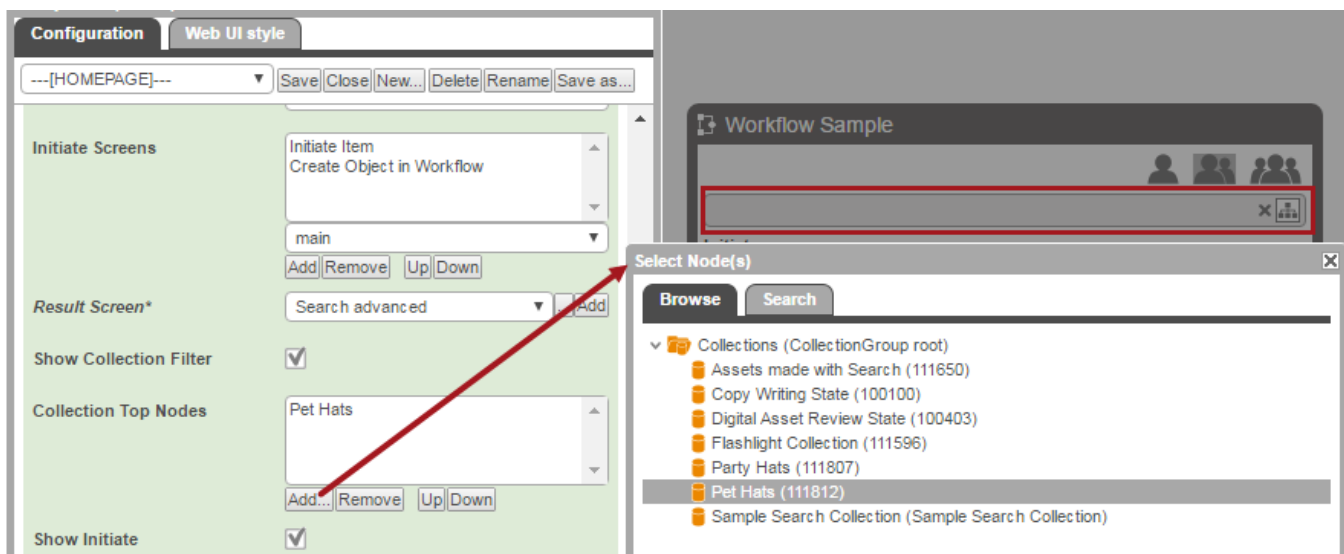


Setting up Collections Viewing

Collections are containers for storing sets of objects, and collection groups are containers that can hold collections or other collection groups. A collection can be applied as a filter limiting the available objects to the ones present in the chosen collection. Collections are typically used in relation to Bulk Update functionality.

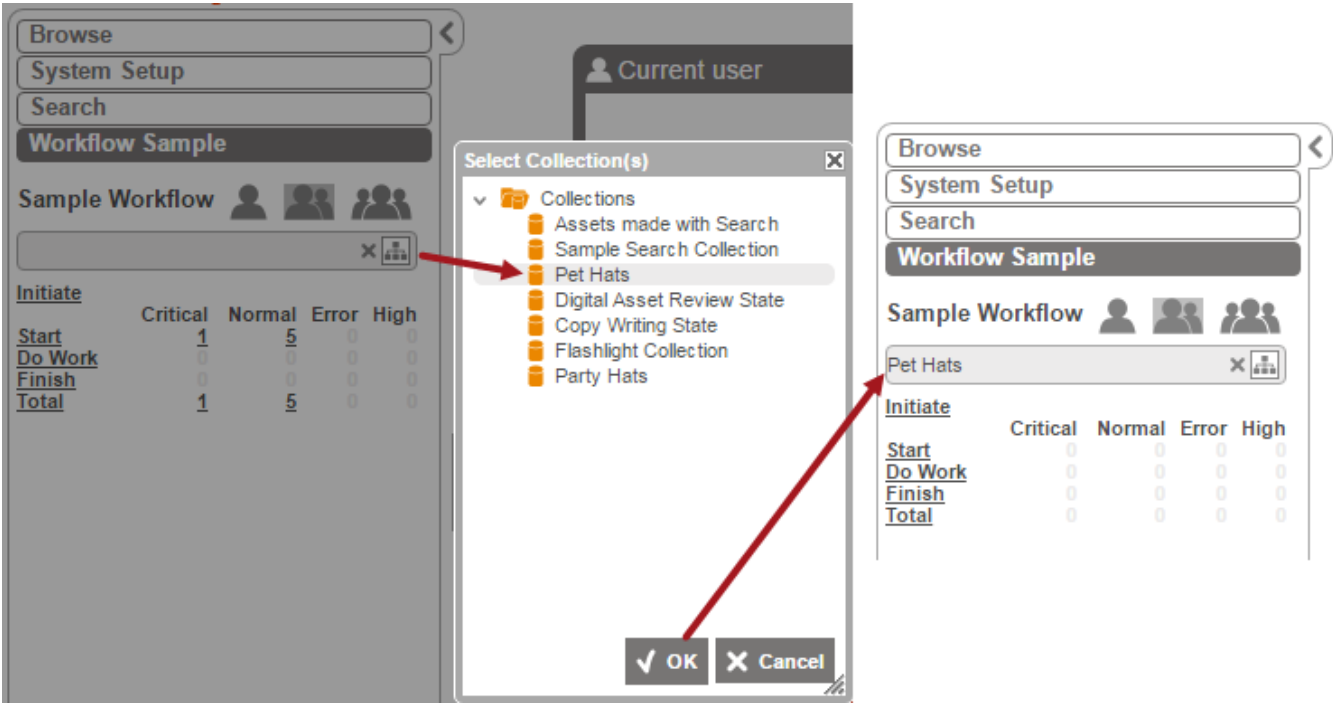
To make use of Collections Filtering in Web UI, initial setup needs to take in place in STEP Workbench and be in place before starting the next steps. Permissions for viewing and working with collections are also configured in workbench. For more on collections, see **Collections** in the **System Setup / Super User Guide** documentation.

1. Select **Show Collections Filter** to show collections.
2. Add any **Collections Top Node Filters** to further narrow down the collection or collections accessible to users. Click Add, and make a selection or selections, and then click OK. The selections can be reorganized as needed.



Save the changes and **Close** the designer window.

Only collections available to the user or user group will be shown when configured properly. The user can then filter the states based on the collection or collection group selected.



For more information on end-users tasks such as initiating objects into a workflow and working with states and tasks within the Status Selector Sidebar Widget, see the **Working with Tasks in Workflows** section of the **Workflows in Web UI** documentation.

Initiate Item Screen

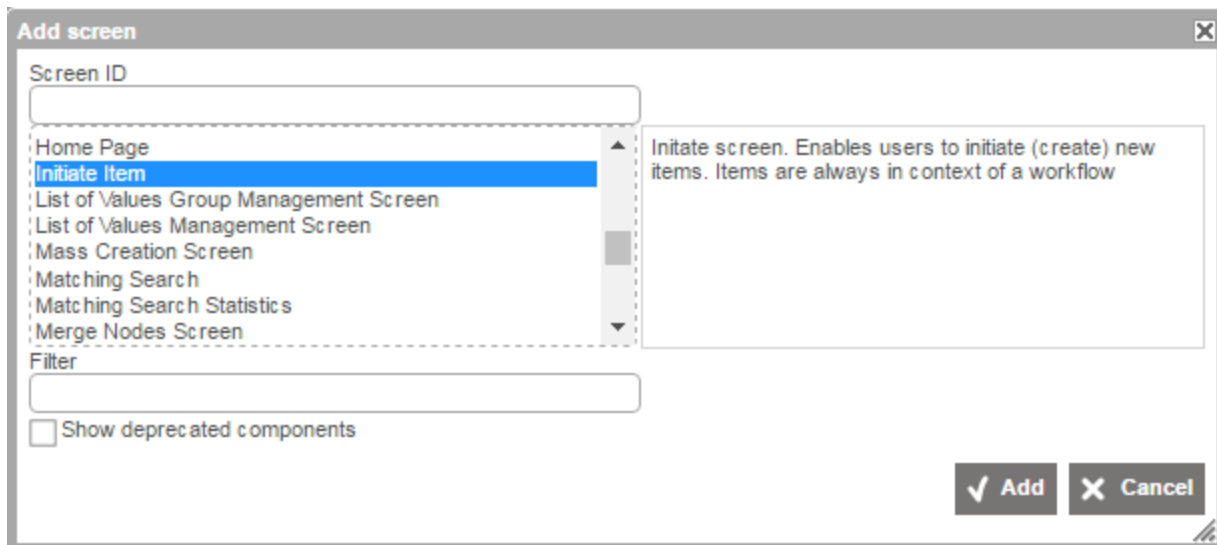
The **Initiate Item** screen is used to create new objects using STEP Web UI and initiate those objects into a workflow. Once configured, an Initiate Item screen is accessible using a Status Selector Homepage Widget and/or Status Selector Sidebar Widget.

Steps provided in this topic assume the Web UI designer is in design mode prior to starting the configuration process. For more information about getting started using a Web UI and details about design mode access / usage, see the **Web UI Getting Started** documentation.

Adding a New Initiate Item Screen

Steps for creating a new screen using the Initiate Item screen type are below.

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



3. Click **Add**.
4. At this point, either close the designer and configure the screen at a later time, or continue on with the **Initiate Item** configuration. You must do Step 1 of the next section before you can successfully save Initiate Item Properties.

Configuring Initiate Item Properties

Some STEP Web UI templates include a pre-configured Initiate Item screen type with a screen ID 'initiate.' If using the existing 'initiate' screen, there may be modifications required to the default settings. These are touched on later in this topic under the **Editing Pre-configured Initiate Item Properties** section.

The steps in this topic outline how to create a new screen and configure the parameters to your data structure and can be adapted to edit an existing screen.

Properties

Configuration | **Web UI style**

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

Initiate Item Properties

Component Description Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow

Duplicate Handler <Select an option> ▼ Edit...

Object Type ID* SalesItem ...

Root ... Clear

Root Product ID

► Screen configurations

► Business Conditions

► Styling

Child Components

Main Columns Control ▼ go to component

Buttons Buttons ▼ go to component

Breadcrumb <Select a child compo ▼ go to component

Initiate Item Master Components

- For the **Object Type ID** parameter; click the ellipsis button (...) to make a single selection from the 'Select Node(s)' dialog. When new objects are created using this screen, they will be created as the object type selected. In the example below, the Object Type is set to 'SalesItem.'

Object Type ID* SalesItem ...

2. If all new items will be created below a specific root node, click the ellipsis button (...) to make a **Root** parameter selection. If not all new items should be created in the same location, skip this step and instead use a component on the screen that allows the user to pick the parent (see Step 4 of the **Initiate Item Child Components** section).
3. The **Root Product ID** parameter field should be blank.
4. Click **Screen configurations** to access the **Forwarding Screen** parameter. Using the dropdown, you can choose a screen (by screen ID) to forward the user to once they have initiated an item successfully. If the desired screen does not exist, one can be added and configured at a later time.
5. Click **Business Conditions** to display additional parameters:
 - **Business Conditions:** Click **Add...** to select an existing business condition to be executed to validate attribute values on the node being edited. Multiple business conditions can be added, but all must succeed for the process to continue. For more information about Business Conditions, see **Business Conditions** in the **Business Rules** documentation.
 - **Disable Auto Vendor:** Click the checkbox to disable automatic linking to the supplier (vendor classification), if desired and applicable to your Web UI usage / setup.
6. Click **Styling** to display additional parameters.
 - **Title:** The default title (Initiate Item) can be used as-is or a more descriptive title can be typed in to the value field. Titles are displayed at the top left of the screen. In the example screenshot below, the default value is overwritten with 'Create Customers.'

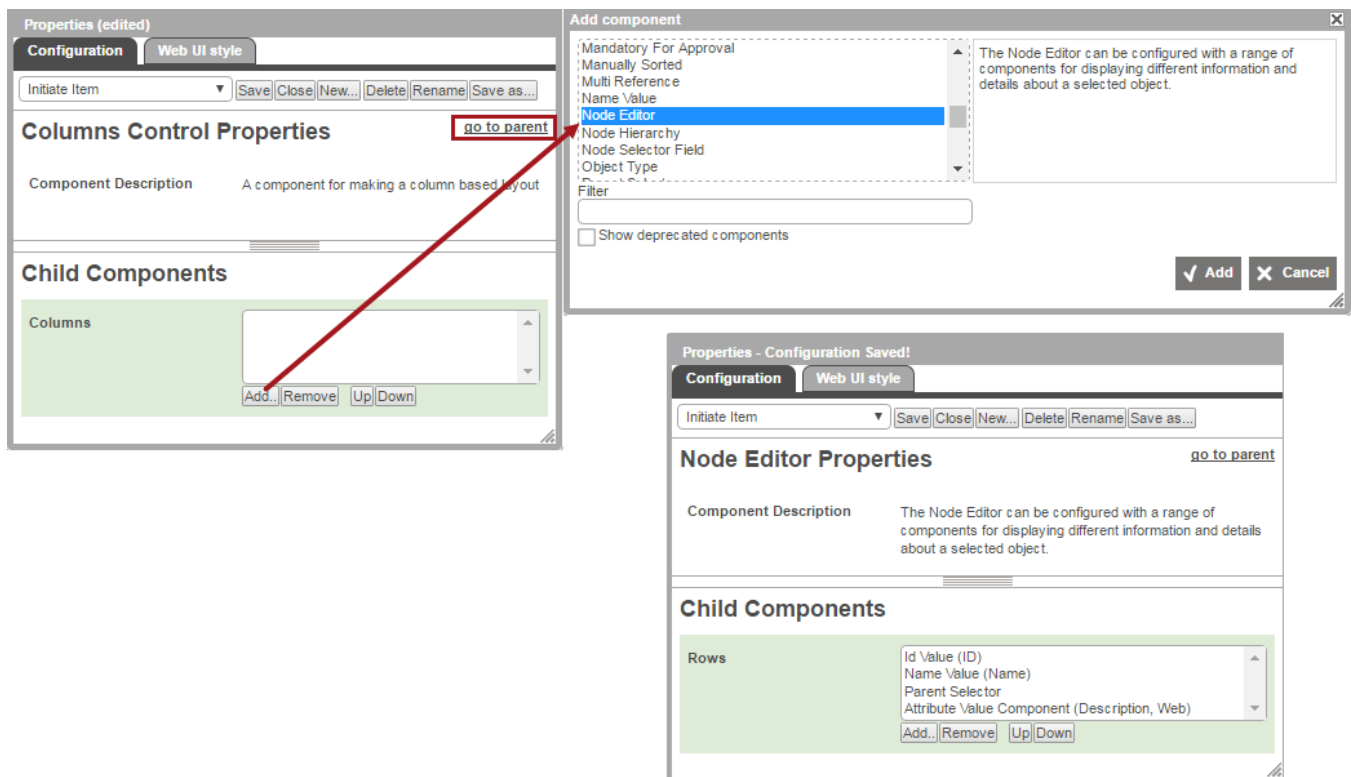
The screenshot shows a web interface for configuring a screen. On the left, a preview of the screen titled 'Create Customers' is shown with input fields for 'ID*' and 'Name*'. On the right, the 'Properties - Configuration Saved!' panel is open, showing the 'Initiate Item Properties' configuration. The 'Configuration' tab is active, and the 'Web UI style' tab is also visible. The 'Initiate' dropdown is set to 'initiate'. The 'Component Description' is 'Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow'. The 'Styling' section is expanded, showing the 'Class' as 'stibo-InitiateItem', 'Labels' as an empty list, and 'Title' as 'Create Customers'. A red arrow points from the 'Title' field in the 'Initiate Item Properties' panel to the 'Create Customers' title on the main screen.

Initiate Item Child Components

The options you pick may not exactly match the steps below. These components are configurable based on your setup needs and preferences. As an example, in Step 1 below, you are instructed to select Columns Control. Some Web UI setups may use Tab Control in place of Columns Control. The steps to configure a Tab Control component (or any other selection) will differ slightly than outlined below. Follow the Properties dialogs presented to you on the screen.

Child Components		
Main	Columns Control ▼	go to component
Buttons	Buttons ▼	go to component
Breadcrumb	<Select a child compo ▼	go to component

1. For **Child Components > Main**, choose **Columns Control** from the dropdown. Then click on **go to component**.
2. In Columns Control Properties, click the **Add** button below the Child Components > Columns field and select **Node Editor**. Click **Add**.
3. Back on Columns Control Properties, double click the **Node Editor** title in the Columns value field.
4. Click **Add** to make selections under Node Editor Properties > Child Components > Rows. These selections are the fields that will display on the Initiate Item screen as users create and initiate objects. Examples include ID Value, Name Value, Attribute Value Component, Attribute Value Group Component—anything that should have a populated value during the initial creation of an object.
 - If initiating items into different root nodes within the object structure, a component such as 'Parent Selector' can be added so that the user can select the root node for each object created. As explained earlier in this topic, if all objects should be created under one static root node, then that selection can be made in the Initiate Item Properties > Root parameter.
5. Click **go to parent** on Columns Control Properties to return to Initiate Item Properties.



6. Back on the Initiate Item Properties screen, go to **Child Component > Buttons** and select **Buttons** from the dropdown. Then, click on **go to component**.
7. On **Buttons Properties**, click the **Add** button below the Actions field, then select a component from the 'Add component' list and click **Add**. Additional configuration may be required depending on which action is selected. Here is a small sample of available Actions with brief descriptions:
 - The **Save Action** is necessary to save / create objects.
 - The **Reset Action** erases unsaved data if the user needs to clear the screen for any reason.
 - The **Find Similar Action** is used to identify similar objects prior to initiating new ones, to avoid duplicate data.

Note: The Initiate Item Properties > Duplicate Handler parameter is used with the Find Similar action button that is mentioned above. The specific setup required to use Find Similar functionality and the Duplicate Handler parameter is explained in the **Find Similar** section of the **Using a Web UI** documentation.

8. Repeat the previous step as needed to add additional actions. The action buttons will display in the order they are listed in the Actions value field. Reorganize by using the Up and Down buttons.
9. Click the **Save** button in the designer.

Properties

Configuration Web UI style

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

Initiate Item Properties

Component Description Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow

Duplicate Handler Duplicate Handler Edit...

Object Type ID* CD_Contact ...

Root step://entity?id=ContactsRoot ... Clear

Root Product ID

▼ Screen configurations

Forwarding Screen CD_SimpleMatching Add

► Business Conditions

▼ Styling

Css Class stibo-InitiateItem

Labels

Add Remove Up Down

Title Initiate

Child Components

Main Columns Control go to component

Buttons Buttons go to component

Breadcrumb <Select a child component go to component

Properties

Configuration Web UI style

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

Node Editor Properties

go to parent

Component Description The Node Editor can be configured with a range of components for displaying different information and details about a selected object.

Child Components

Rows

Attribute Value Component (Contact Name)
Attribute Value Component (Phone Number)
Store Single Referenced Target

Add... Remove Up Down

Properties - Configuration Saved!

Configuration Web UI style

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

Buttons Properties

go to parent

Component Description Contains a number of buttons to display

Child Components

Actions

Save Action
Find Similar Action

Add... Remove Up Down

10. Click **Close** to exit design mode or use the dropdown to switch screen IDs and configure other properties.

Important: Initiate Item screens are accessed via status selector widgets. The appropriate screen ID must be configured as the value for the Initiate Screens parameter within Status Selector Homepage Widget Properties and/or Status Selector Sidebar Widget Properties (example screenshots below). For more information about the widgets, see the **Status Selector Homepage Widget** section in the **Web User Interfaces / Using a Web UI** documentation.

Properties

Configuration Web UI style

---[HOMEPAGE]---

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

Status Selector Homepage Widget Properties [go to parent](#)

Initiate Label Initiate Contact

Initiate Screens

initiate

main

Add Remove Up Down

Show Initiate ☒

Contact Workflow

Initiate Contact

State-1 0

State-2 0

State-3 0

End State 0

Initiate

English US Main

Contact Name

Phone Number

Contact to Contact

Contact Name

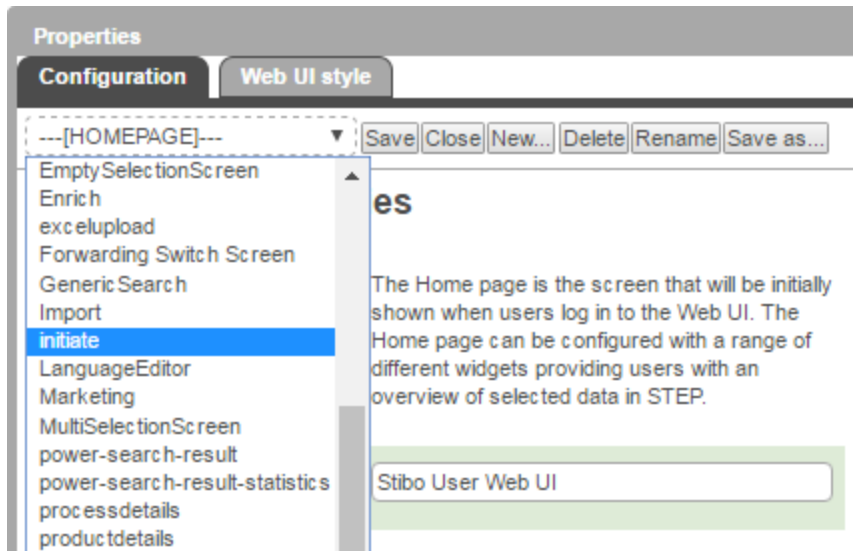
Phone Number

Save Find Similar

Note: To learn about Find Existing functionality that can be used with the Store Single Referenced Target component (shown in the screenshot above with the Contact to Contact bale and Contact Name and Phone Number attributes) and in conjunction with the Find Similar action, see the **Find Existing** section of the **Using a Web UI** documentation.

Editing Pre-configured Initiate Item Properties

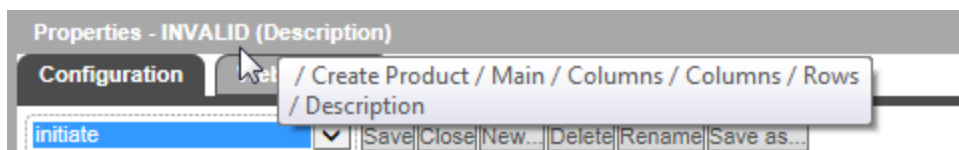
If you use one of the standard STEP templates when creating a Web UI, an Initiate Item screen type may already exist and have an 'initiate' screen ID. Below is an example from a User Web UI template.



If an 'initiate' screen ID does exist, then Initiate Item Properties comes pre-configured. However, the configuration needs to be reviewed and edited to fit your data structure. If you enter design mode and the Properties dialog indicates that there are INVALID settings, you need to update and/or remove the parameters / components that are not valid for your data structure. For troubleshooting, the Properties dialog header identifies INVALID settings. Hovering over the INVALID text displays the path to the parameter / component where there is a problem.

An example is shown in the screenshot below. When accessing the pre-configured Initiate Item screen (screen ID: initiate) in designer, an INVALID (Description) message is displayed in the Properties header. Navigating to the Node Editor (via Initiate Item Properties Main > Child Components > Columns Control), you can see that the Attribute Value Component (Description) is the offending value. The Attribute Value Component can be edited to display a valid attribute, or the component can be removed from the Rows value field.

Additional errors may exist and need to be fixed using the information described above and the error messages given on the screen.



Create Product

ID*

Name*

Value Value has errors

Value Value has errors

Value Value has errors

Value Value has errors

AssetValue

Properties - INVALID (Description)

Configuration Web UI style

initiate

Initiate Item Properties

Component Description Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow

Duplicate Handler <Select an option>

Object Type ID* Product

Root step://product?id=Sample Data

Root Product ID

► Screen configurations

► Business Conditions

► Styling

Child Components

Rows

Id Value (ID)	Name Value (Name)	Attribute Value Component (Description)
		Attribute value Component (Manufacturer P...

Child Components

Main Columns Control

Buttons Buttons

Breadcrumb <Select a child compo>

When the Properties header changes to '(edited)', invalidity issues have been fixed. Configuration can continue, and Initiate Item Properties can be saved.

Properties (edited)

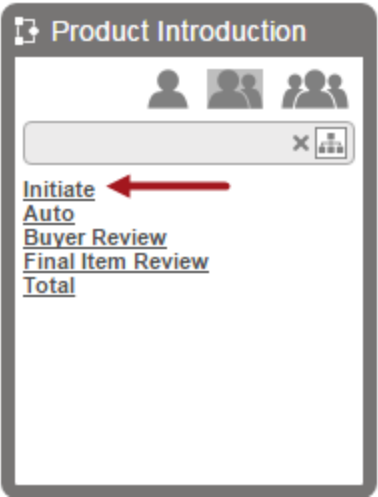
Configuration Web UI style

initiate

Using an Initiate Screen

A simple usage example follows:

A user clicks on the Initiate link on a Status Selector Homepage Widget.



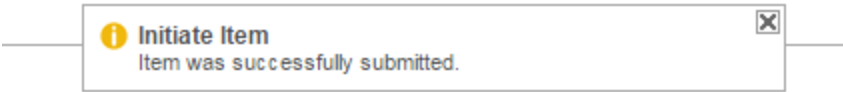
The Initiate Item screen displays. This particular Initiate Item screen displays via a Tab Control component (Initiate Item Properties > Child Components > Main) on a Tab Page.

A screenshot of the "Initiate Item" screen. The title bar shows "Initiate Item" and some system icons. Below the title bar are two tabs: "Basic Information" (selected) and "Category Information". The form contains the following fields:

- ID: (empty)
- Name: LIGHTS-10
- UPC: 123123123123
- Manufacturer Name: I.C. Enterprises

At the bottom of the form are two buttons: "Save" and "Download QuickSheet".

Once the object information is entered, the user clicks the Save button (above) and a success confirmation message displays (below).



Below is verification that the newly created object was automatically initiated into the workflow that is configured within the Status Selector Homepage Widget Properties.

Browse

Products

Apparel

Footwear

Safety

Hardware

Tools

Task Lighting

Flashlights

Flashlights Items

20862

20883

LIGHTS-10

Flashlights SalesIter

Item

Category Information

Additional Information

Packaging Hierarchy

Status

Revisions

Referenced By

Active in workflow states

Workflow name

Item Creation

Workflow state

Supplier Enrichment

Status

Revision

Date:

2016.05.18

Revision number:

0.1

Last Edited by:

USER

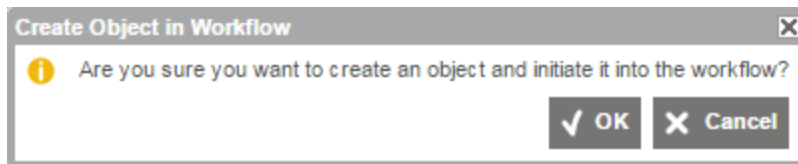
Time:

09:05:13

Bypassing the Initiate Item Screen

When creating new objects from a Status Selector component, users can create and initiate objects into a workflow in a single step if the object type utilizes an auto-generated ID. This allows for a more streamlined object creation by giving the option to bypass the Initiate Item screen.

By using the **Create Object in Workflow** screen type, fields for entering object data are not presented to the user since the object is created with the simple click of a button. Users can seamlessly go in post-creation to work with the object and edit data since they are auto-navigated to an editing screen (determined by the overall Web UI mappings).



Preconditions

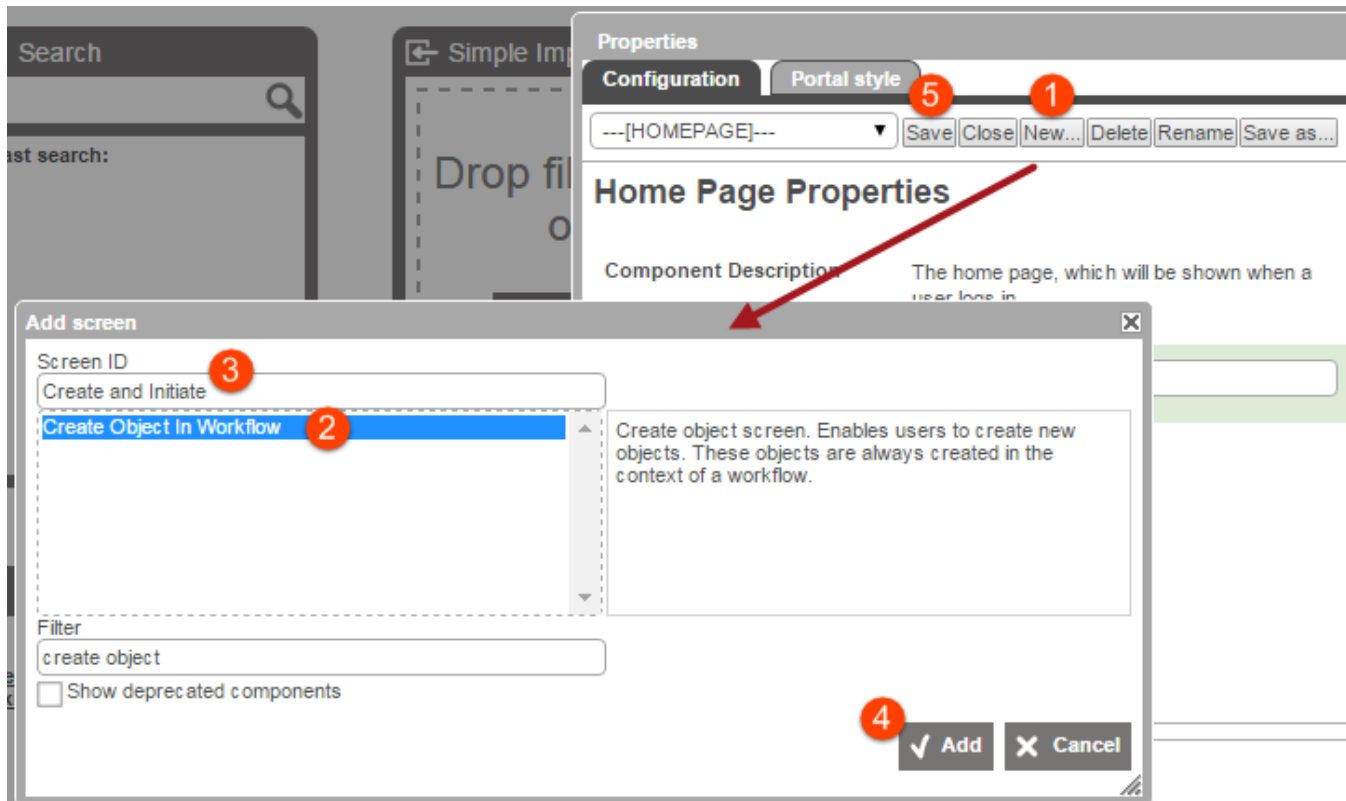
Before configuring a Create Object in Workflow screen, it is important to ensure that the data model supports the functionality and that the desired end result can be achieved. Specifically, users should be aware of the following:

1. Underlying privileges are not applied to the Create Object in Workflow screen. Therefore, only users who should be allowed to create and initiate objects into the relevant workflow should be given access to this functionality.
2. Objects created using this functionality are all created under a single common parent. It is therefore recommended that a subsequent workflow state require reparenting of the newly created objects, unless a flat hierarchy structure is desired.
3. Objects created using this functionality must use autogenerated IDs.
4. This functionality should only be used for workflows that have a single initial state. If used in within a workflow that has initial parallel states, it is not possible to specify which state they will be directed to upon creation of the object.

Required Configuration to use the Create Object in Workflow Screen

Step 1: Create a new screen of type 'Create Object In Workflow'

1. Click **New** in the Web UI Designer.
2. In the Add screen dialog, select the **Create Object in Workflow** screen type.
3. Populate an appropriate ID for the new screen.
4. Click **Add** in the bottom of the dialog.
5. Click **Save** in the main screen of the Web UI Designer.

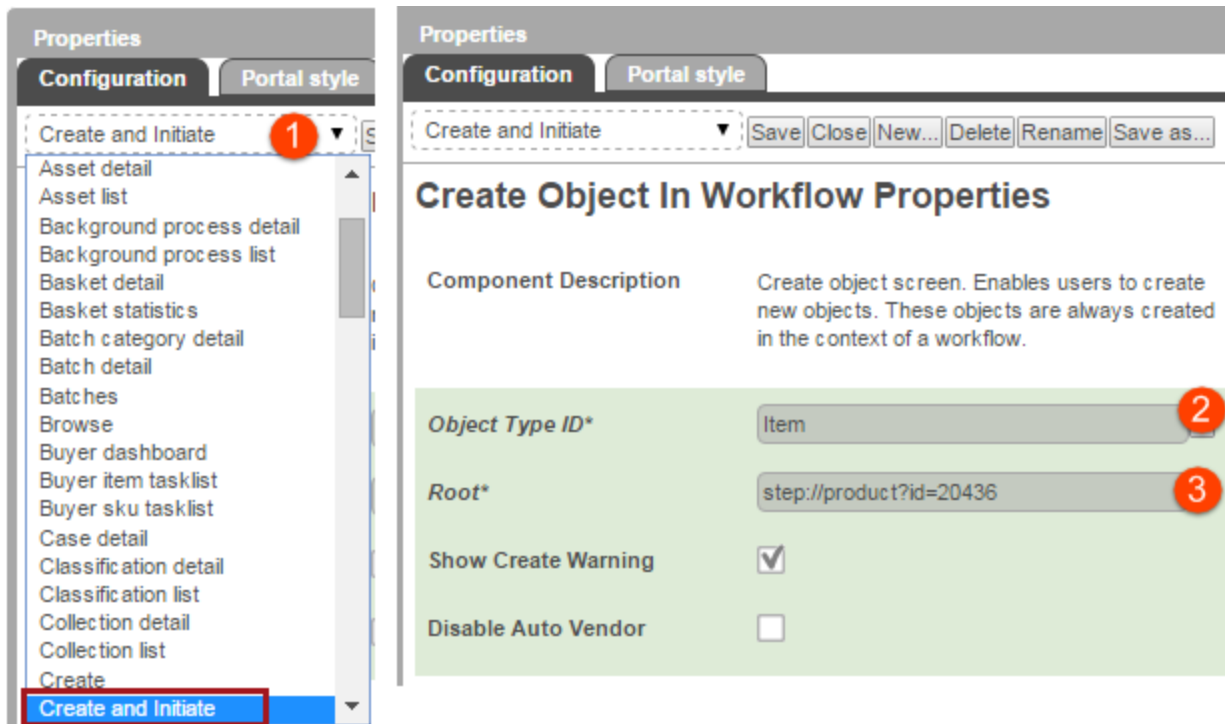


Step 2: Configure the 'Create Object in Workflow' screen

Once created, you must configure the Create Object in Workflow screen. Save the changes once complete.

1. Access the screen by selecting it from the dropdown in the Web UI Designer. Find the screen that matches the ID you populated in the previous steps.
2. Select an **Object Type ID**. This selection specifies the object type that will be applied to all new objects created via the 'Create Object in Workflow' screen. Note that the object type selected here must use an autogenerated ID.
3. Select a **Root**. This selection specifies the common parent under which all new objects created via the 'Create Object in Workflow' screen will be placed.
4. Enabled by default, **Show Create Warning** means that end users will be presented with a dialog that requires them to confirm the creation and initiation of an object upon clicking the Create Object in Workflow designated link within the Status Selector. Disable if no message should display to the user.
5. **Disable Auto Vendor** can be used to prevent automatic object linking to a vendor classification. This parameter is unchecked by default.
6. At this point, if you want to utilize the Create From Template functionality, click on the Create From Template Tab header, enable **Show Create From Template**, and select a **Template Root**. Additionally the List Dialog properties, found under **Child Components > Create From Template List**, need to be configured.

See **Using a Template to Create and Initiate an Object in a Workflow** for more information.



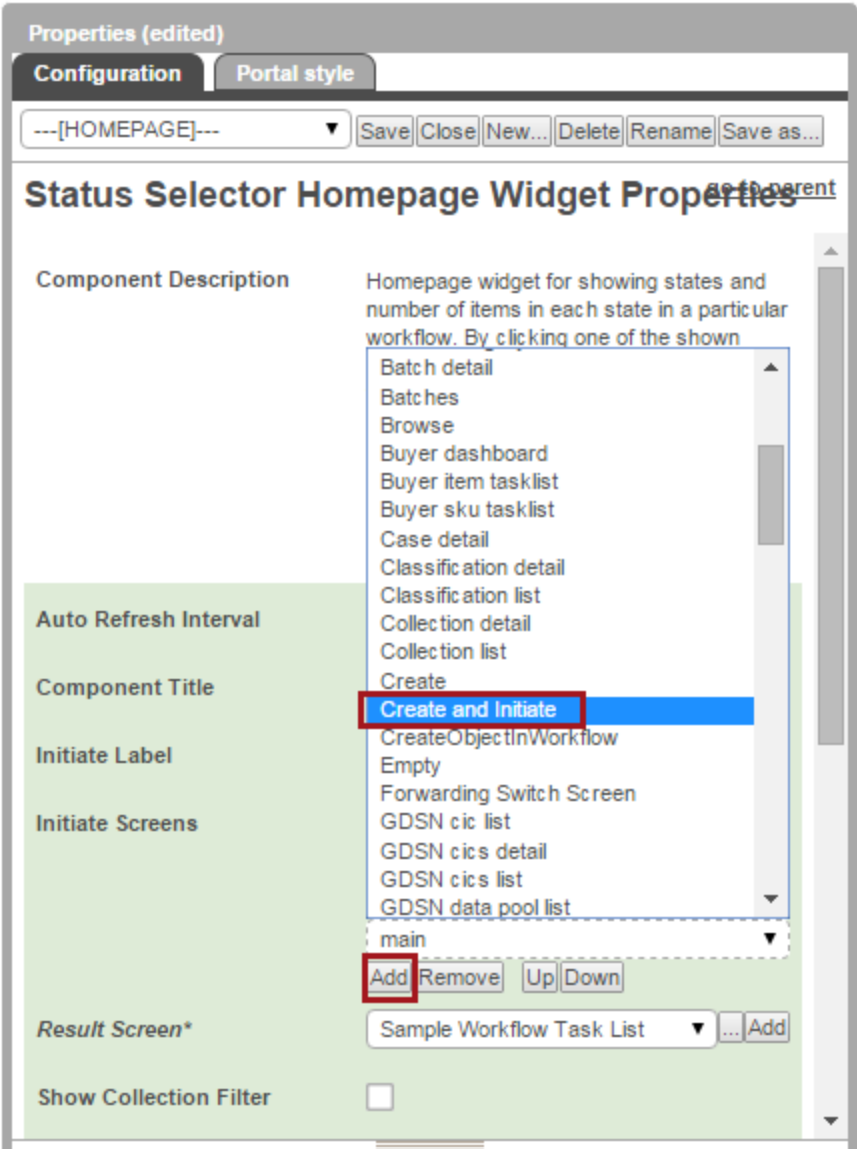
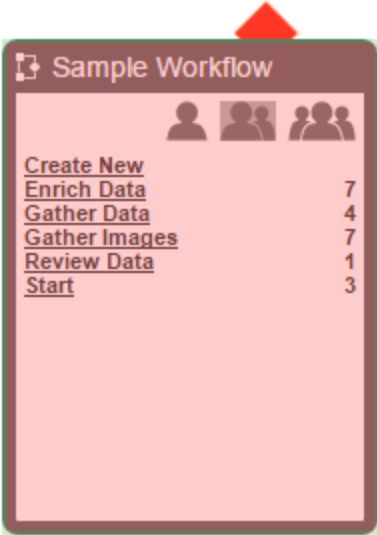
Note: All objects created using the Create Object in Workflow screen type are initially created under the same parent. It is therefore recommended that a subsequent workflow state require reparenting of the newly created objects, unless a flat hierarchy structure is desired. In addition, care should be taken in configuration to ensure that the selected object type and parent root are compatible (and valid for the workflow), else the end user will receive an error when attempting to create / initiate.

Step 3: Configure the Status Selector Initiate Screen

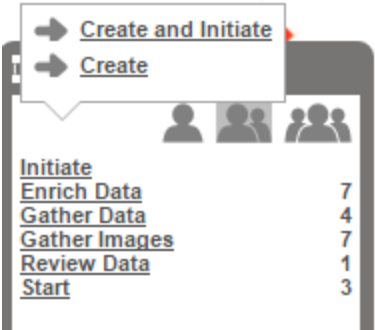
The **Create Object in Workflow** screen must be mapped as the Initiate Screen in a Status Selector component (Status Selector Homepage Widget recommended, but Status Selector Widget may also be used).

Important: Underlying user privileges are not applied to the Create Object in Workflow screen. Therefore, only users who should be allowed to create and initiate objects into the relevant workflow should be given access to the screen.

1. Open the Web UI Designer for the selected widget.
2. In the Initiate Screens parameter, find the newly created screen in the dropdown and click **Add**.



If using the superseded Status Selector Widget (rather than the Status Selector Homepage Widget), only a single Initiate Screen can be selected. If the Status Selector Homepage Widget is used, multiple screens can be mapped. In this case, users will see a selection option for each available screen when clicking the 'Initiate' link in the widget:



Step 4: Complete Status Selector Configuration

Complete configuration of the Status Selector, including selection of the relevant workflow and states. Ensure that the **Show Initiate** parameter is checked. A sample configuration of the Status Selector is shown below.

Status Selector Homepage Widget Properties

[go to parent](#)

AdvancedSearchScreen showing detailed information about the items in the chosen state.

Auto Refresh Interval

0

Component Title

Sample Workflow

Initiate Label

Initiate

Initiate Screens

Create and Initiate
Create

main

AddRemoveUpDown

Result Screen*

Sample Workflow Task List

...Add

Show Collection Filter

☐

Show Initiate

☒

Show Status Flag Headers

☐

Show Total

☐

States*

Enrich_Data
Gather_Data
Gather_Images
Review_Data

AssetUpdate | End

AddRemoveUpDown

Status Flags Enabled

☐

Total Label

Workflow*

SampleWorkflow

Using the Create Object in Workflow Screen

If configured properly, end users can click on the Initiate option in the Status Selector widget to create a new object. The object will be created with an autogenerated ID, under the parent specified by the configuration, and of the object type specified by the configuration. If the warning is enabled, users will see the confirmation 'Create

Object in Workflow' dialog (as shown).

If Create From Template has been enabled and set up, then the end user will be presented with a templates list after the warning message, or in place of it (if the warning is disabled).

Upon creation, users are taken directly to the first screen mapping that meets the conditions applicable to the object created. Users can begin work on the object, without having to have entered an Initiate Item screen to create the object.

An example of the process is shown below:

Sample Workflow (3 states)

Initiate Critical Normal

→ Create Object in Workflow

→ Initiate Item

Create Object in Workflow

Are you sure you want to create an object and initiate it into the workflow?

OK Cancel

Item

Basic Information and references Category Information Additional Information

Product Category^{fx} Products | Party Supplies | Party Hats | Paper Hats | Pet H.

Name

Approved ✗ Never been approved.

Product Name

Short Item Description

Long Item Description

Brand Name

Save Reset Proceed

Note: It is recommended that the Create Object in Workflow screen only be used for workflows that have a single start state. If, for example, business rules pass an object into parallel states upon entry to the workflow, users cannot be routed to a specific state and have the potential to see the object in either of the states in which a current task exists.

Using a Template to Create and Initiate an Object in a Workflow

When bypassing the Initiate Item screen and using Create Object in Workflow, users are able to create and initiate new objects without having to enter attribute values prior to creation. By enabling the Create From Template functionality, users can further simplify things by selecting a template object to use when creating a new one. Using a template is advantageous to the end user, tasked with updating the object data, since the template's attribute values and reference targets are copied into the new object. The end user needs only to populate the subset of data the differs between the template and the new object.

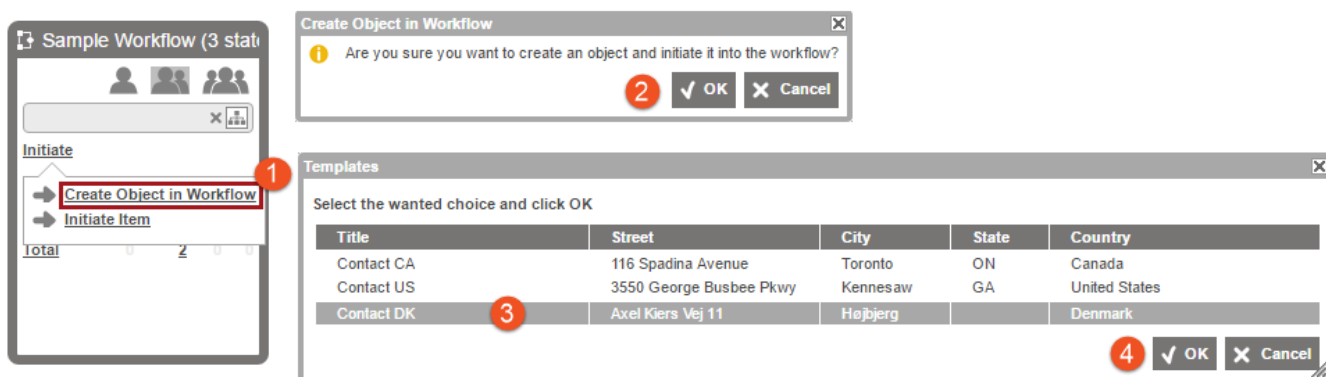
Using Templates with Create Object in Workflow

If configured properly, end users can click on the Initiate option in a Status Selector Homepage / Sidebar widget to create a new object using a Create Object in Workflow screen type. The object will be created with an autogenerated ID, under the parent specified by the configuration, and of the object type specified by the configuration. If 'Show Create Warning' is enabled, end users will see the confirmation 'Create Object in Workflow' dialog (as shown) and must click OK to move ahead.

If using the Create From Template functionality, then once the warning is shown and creation is confirmed (if applicable), the 'Templates' Dialog List will display with available templates. The display shown below is configured to show Title (Name) and then the Street, City, State, and Country attributes. The end user selects a template by clicking on a row within the list, then selects OK. A new object is created and initiated into the applicable workflow.

Upon creation, users are taken directly to the first screen mapping that meets the conditions applicable to the object created. Users can begin work on the object, using the attribute values and reference targets from the template that now populate the empty attributes and any attributes that differ from the template (i.e., Name).

An example of the process is shown below:



Node Details 5

English USMain

Contact Information

Potential Duplicates

Confirmed Non Matches

Revisions

Data Visualization

Title

Name

Contact DK

City

Højbjerg

Contact Name

Country

Denmark

Data Source

Fax Number

Phone Number

45 89 39 11 11

State

Street

Axel Kiers Vej 11

Zip

8270

Select all

Clear filter

Add Reference

Add Reference

	ID	Contact Name	Object Type
Jasper Jensen	CON 184225	Jasper Jensen	Contact
Patty Smith	CON 184241		Contact
Larry Sanderson	CON 184308		Contact

Number of items : 3

Configuring the Create Object in Workflow Properties

See the **Bypassing the Initiate Item Screen** topic for information regarding preconditions to using a Create Object in Workflow screen and how to configure its use.

The first five steps are repeat steps outlined in the Bypassing the Initiate Item Screen topic. If you have previously set up the Create Object in Workflow Properties and just want to enable the Create From Template functionality, skip to Step 6.

Steps 1 and 2 must be completed before the Create Object in Workflow Properties can be saved.

Properties - INVALID (Create Object in WF)

Configuration
Web UI style

Create Object in Workflow
Save
Close
New...
Delete
Rename
Save as...

Create Object In Workflow Properties

Component Description Create object screen. Enables users to create new objects. These objects are always created in the context of a workflow.

Object Type ID*

Root*

Show Create Warning

☒

Disable Auto Vendor

☐

► Create From Template Tab

Child Components

Create From Template List

<Select a child compo

go to component

1. Enter design mode and access the Create Object in Workflow screen ID via the dropdown. The **Create Object in Workflow Properties** will display.
2. Select an **Object Type ID**. This selection specifies the object type that will be applied to all new objects created via the Create Object in Workflow screen. Note that the object type selected here must use an autogenerated ID.
3. Select a **Root**. This selection specifies the common parent under which all new objects created via the Create Object in Workflow screen will be placed.
4. Enabled by default, **Show Create Warning** means that end users will be presented with a dialog that requires them to confirm the creation and initiation of an object upon clicking the Create Object in Workflow designated link within the Status Selector. Disable if no message should display to the user.
5. **Disable Auto Vendor** can be used to prevent automatic object linking to a vendor classification. This parameter is unchecked by default.

Note: All objects created using the Create Object in Workflow screen type are initially created under the same parent. It is therefore recommended that a subsequent workflow state require reparenting of the newly created objects, unless a flat hierarchy structure is desired. In addition, care should be taken in configuration to ensure that

the selected object type and parent root are compatible (and valid for the workflow), else the end user will receive an error when attempting to create / initiate.

- Click the **Create From Template Tab** heading to display additional parameters.

Properties (edited)

Configuration Web UI style

Create Object in Workflow Save Close New... Delete Rename Save as...

Create Object In Workflow Properties

Component Description Create object screen. Enables users to create new objects. These objects are always created in the context of a workflow.

Object Type ID* CD_Contact ...

Root* step://entity?id=ContactsRoot ...

Show Create Warning ☒

Disable Auto Vendor ☐

▼ Create From Template Tab ←

Show Create From Template ☐

Template Root ... Clear

Child Components

Create From Template List <Select a child compo ▼ go to component

- Enable **Show Create From Template**.
- Click the ellipsis button (...) for **Template Root** to select the node from which child objects can be used as templates. It is recommended that the template set remain fairly small for manageability and to limit the templates that the end user has to choose from.
- Under **Child Components > Create From Template List**, select **List Dialog** from the dropdown menu.
- When presented with the **List Dialog Properties**, click the **Add** button to the right of the **Dialog List Screen** field.

11. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
12. If a **Dialog List Screen** already exists, skip the previous two steps and simply select the screen using the dropdown.
13. Back on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Create From Template Use Selected Item Action**. Click **Add**, and then click **Save** in the designer window.

14. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is 'Dialog List Screen - Address.'
15. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to select the attributes, attribute groups, IDs, and/or Titles that will display within columns in the 'Templates' dialog for the results list.
16. Make a component selection and fill in any required parameters (e.g., attribute / attribute group, where applicable). For each component, edit the **Label** text if the column headers should read something different than the object Title (name), ID, or the applicable attribute name / group name.
17. Edit **Help Text**, if desired. This text displays at the top of the 'Templates' results list.

Properties

Configuration | **Web UI style**

Dialog List Screen - Address | Save | Close | New... | Delete | Rename | Save as...

Dialog List Screen Properties

Component Description | Screen with a list which can be used in a popup dialog

Help Text | Select the wanted choice and click OK

Child Components

Headers

- Title List Header
- Attribute List Header (Street)
- Attribute List Header (City)
- Attribute List Header (State)

Add.. | Remove | Up | Down

18. Click **Save** and **Close** design mode to return to normal Web UI mode.

Considerations and Limitations

- Create From Template functionality is available for Product and Entity object types only.
- Care must be taken in the configuration of the Create From Template option to ensure that end users are provided with valid selection options. The selections for object type of the template (if used), object type of the object being created, parent, and any references must all align to yield valid results based on the data model and configurations.
- It is recommended that the Create Object in Workflow screen only be used for workflows that have a single start state. If, for example, business rules pass an object into parallel states upon entry to the workflow, users cannot be routed to a specific state and have the potential to see the object in either of the states in which a current task exists.

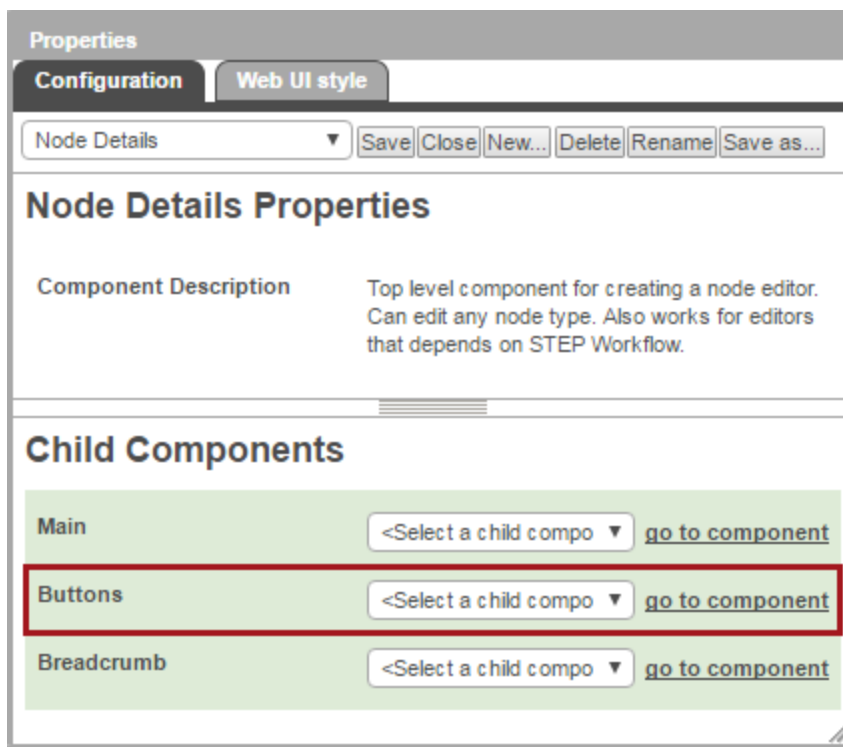
Start Workflow Action

When working with objects in Web UI, a **Start Workflow Action** button can be added to any Node Details screen. This allows users to work with object data and then initiate the object into a workflow with a click of a button.

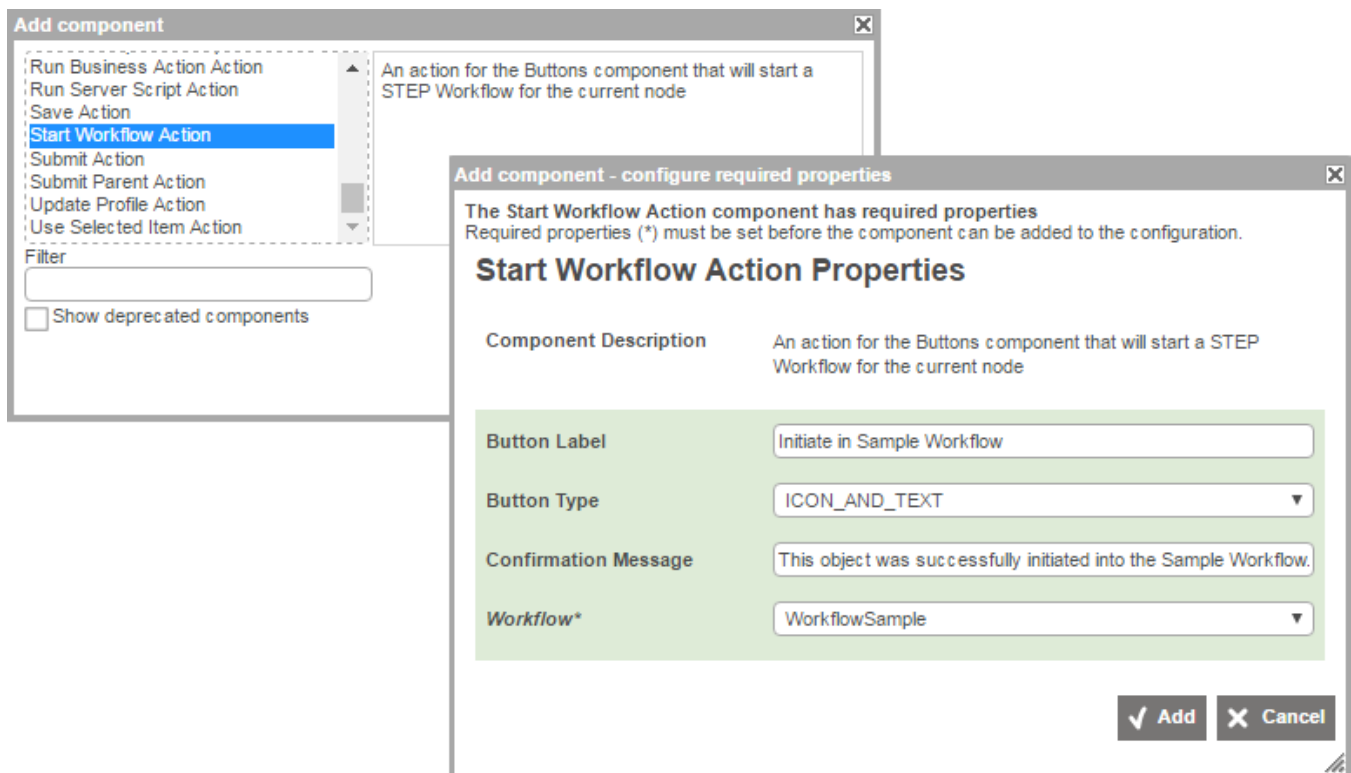
Detailed information about how to set up a Node Details screen is outlined in the **Node Details Component** topic.

Here are the steps to add / configure the button:

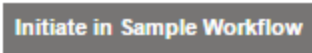
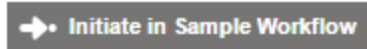
1. Enter the Web UI designer and selected the screen ID for the applicable Node Details screen.
2. Within Node Details Properties, select **Buttons** from the Buttons parameter dropdown, then click **go to component**.



3. On **Buttons Properties**, click the Add button below the **Actions** field, then select **Start Workflow Action** from the 'Add component' list and click **Add**.



4. Within the **Start Workflow Action Properties**, all parameters are initially blank except for Workflow (defaults to first existing workflow in STEP). Make your selections and click **Add**.
- **Workflow*** is the only required setting. This is the workflow that you want to initiate items into.
 - The **Button Label** is the text you want to appear in the button displayed on screen.
 - Select from ICON_AND_TEXT, ICON, and TEXT using the **Button Type** dropdown. If you select TEXT or ICON_AND_TEXT and the Button Label parameter is empty, the default text 'Start STEP Workflow' will display.

Button Types	Button Displayed As
ICON	
TEXT	
ICON_AND_TEXT	

- The **Confirmation Message** will display to the user once a successful initiation of the object is complete. If the parameter is left blank, a 'STEP Workflow "Sample Workflow (3 states) with Variables" has been started' message will display, with the name of the workflow displaying within the quotation marks.

2. Click the **Save** button in the designer and **Close**.

See **Initiating Objects in a Workflow using Web UI** for information regarding how to use initiate an object in to a workflow using the Start Workflow Action.

Task List

A **Task List** is used for displaying total objects in a selected workflow, objects within a specific workflow state, and if applicable, tasks by Status Flag. To use a Task List, it must be configured as a results screen for a **Status Selector (Homepage / Sidebar) Widget** and be configured with a **Node List**.

This topic gives you information regarding how to set up a Task List. Information regarding how to use a Task List is included in the **Moving Tasks Through a Workflow in Web UI** topic.

Note: If you are using an Advanced Search Screen as a task list, then setup is similar when it comes to the Node List component (starting with Step 7 under Configuring Task List Properties). The only major difference is the absence of the Status Flag Header and Workflow Variable Header as options available within the Multi Edit Display Mode Properties. For more information about Advanced Search Screen setup, so the **Advanced Search** section in the **Using a Web UI** documentation.

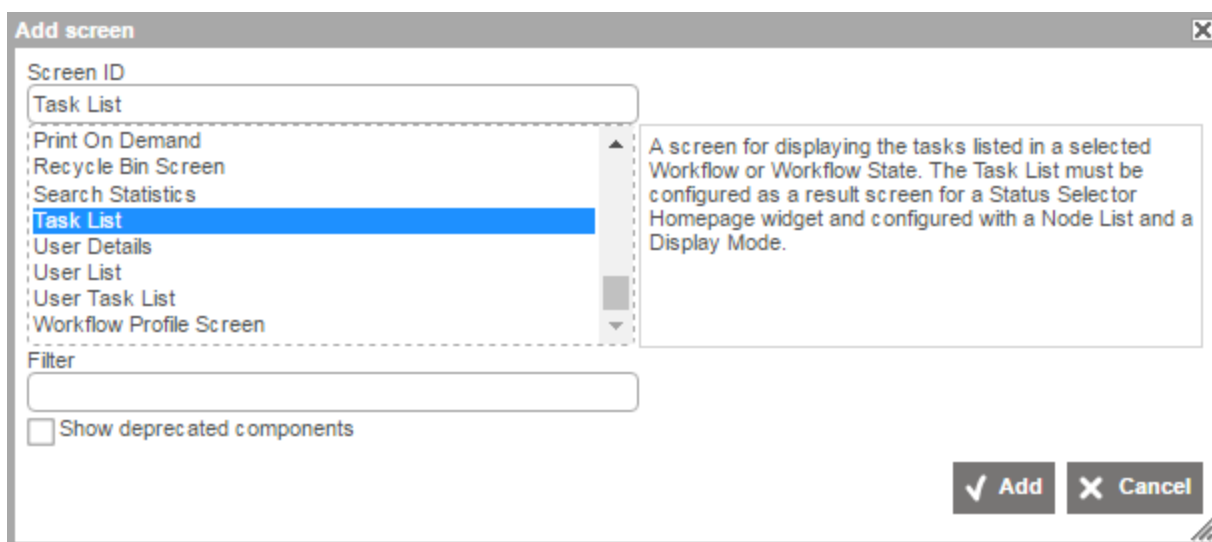
Prerequisites

It is expected that anyone configuring the Task List screen is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. The user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web UI Getting Started** documentation.

Additionally, to follow the use-case examples in any of the workflow topics, the STEP user should have all workflow related privileges.

Adding a New Task List Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Select 'Task List' as the screen type (shown in the screenshot below).



Configuring Task List Properties

Once a new screen is created, you can configure it. If you are not already seeing the properties for the screen you just created, then select the screen ID from the designer dropdown list. In the example below, the screen ID is 'Task List.'

The screenshot shows the 'Properties' window for a 'Task List' screen. It has two tabs: 'Configuration' (selected) and 'Web UI style'. Below the tabs is a dropdown menu showing 'Task List' and buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Task List Properties' and contains a 'Component Description' and a checkbox for 'Auto Navigate On Assignment'. Below this is an 'Advanced' section with 'Css Class' and 'Title Formatter' fields. At the bottom is a 'Child Components' section with a 'Node List' field and a 'go to component' link.

Properties

Configuration | **Web UI style**

Task List [Save] [Close] [New...] [Delete] [Rename] [Save as...]

Task List Properties

Component Description A screen for displaying the tasks listed in a selected Workflow or Workflow State. The Task List must be configured as a result screen for a Status Selector Homepage widget and configured with a Node List and a Display Mode.

Auto Navigate On Assignment ☐

▼ **Advanced**

Css Class stibo-UserTaskList

Title Formatter i18n.stibo.UserTaskList.TitleFormatter

Child Components

Node List <Select a child compo ▼ [go to component](#)

1. The **Auto Navigate On Assignment** parameter is disabled by default. If enabled, when a task is claimed by a user in the Task List (e.g., when a user makes an 'Assign to Me' selection), the user is automatically navigated to the editor screen at the time of assignment so that they can continue working with the task.
2. Click the **Advanced** heading to display the **Title Formatter** parameter.
3. **Title Formatter** can be left as-is to display the default 'Task List' title on the screen, or placeholders can be used in conjunction with (or in place of) static text to automatically insert workflow information within the screen title. These placeholders can be used individually or together. These placeholders are useful, for example, when mapping screens based on status flag or workflow state since this information is dynamically reflected in the screen title.

- {0} displays the Workflow ID
- {1} displays the Workflow State
- {2} displays the Workflow Name
- {3} displays the Status Flag

The Status Flag displays within the title only if applicable. If the user clicks on a link in the Status Selector that takes them to a results set that includes objects with a mix of different Status Flags, then the {3} placeholder will not populate within the screen title.

A screenshot showing the default title is displayed at the beginning of this section. A screenshot showing the placeholders within the Title Formatter parameter field is shown below along with a screenshot showing an example of an auto-populated Task List screen title (workflow ID, workflow state, workflow name, and the status flag).

▼ Advanced

Css Class

stibo-UserTaskList

Title Formatter

{0} - {1} - {2} - {3}

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Critical
English US • Main

ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow Navigation	Workflow status	Released By
121183	Pink & Blue Giraffe Party	Critical	☐	Super Users	8/26/16 11:54:34 AM	121183	Sample Workflow (3 states) with Variables:Start	
121193	Pink & Green Pom-Pom Hat	Critical	☒	User 8		121193	Sample Workflow (3 states) with Variables:Start	
27224	27224	Critical	☐	Super Users	8/26/16 11:56:51 AM	27224	Sample Workflow (3 states) with Variables:Start	

5. Under **Child Components > Node List**, select **Node List** from the dropdown.
6. Click **Save** in the designer window to save all changes made up to this point.

Properties

Configuration

Web UI style

Task List

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

Task List Properties

Component Description

A screen for displaying the tasks listed in a selected Workflow or Workflow State. The Task List must be configured as a result screen for a Status Selector Homepage widget and configured with a Node List and a Display Mode.

Auto Navigate On Assignment

☒

▼ Advanced

Css Class

stibo-UserTaskList

Title Formatter

{0} - {1} - {2} - {3}

Child Components

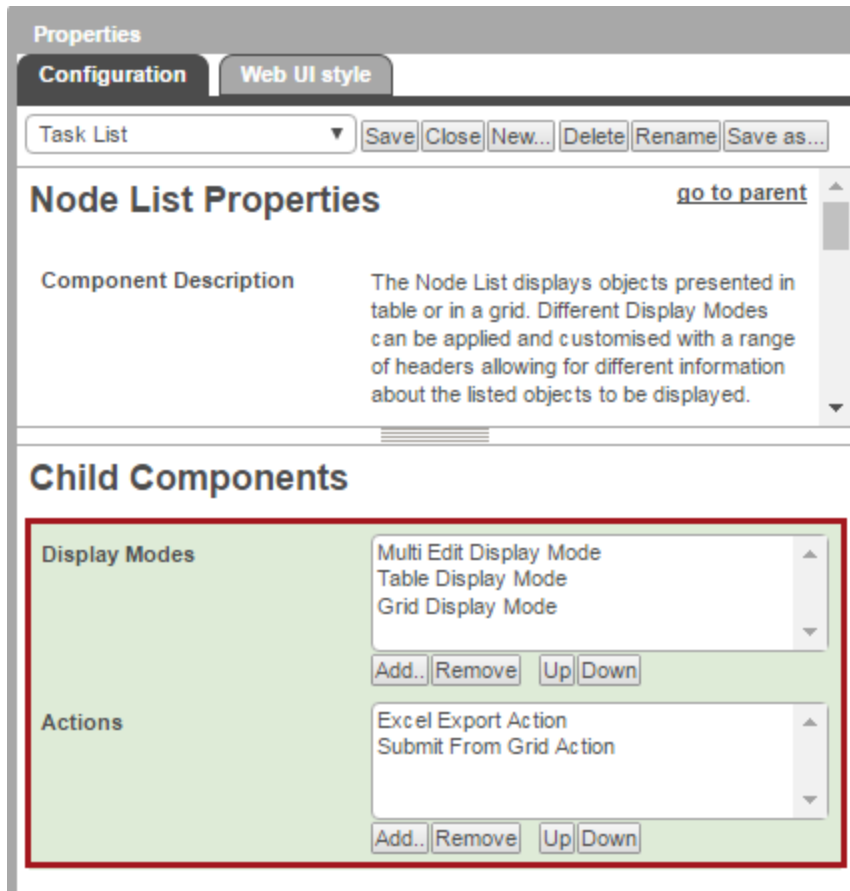
Node List

Node List

go to component

7. After saving, click **go to component** to the right of the **Child Components > Node List** dropdown. This opens the Node List Properties.
8. Under **Child Components > Display Modes**, you must add at least one display mode. Typically, **Multi Edit Display Mode** is used with workflows / Task List screens so that bulk updates can be made and submitted. While other display modes (e.g., Table) may be used and any number of them can be added, it is best practice to add only those truly needed to work with objects on a Task List screen. If multiple modes are configured, users are able to toggle between the different views. The name of each display mode must then be double-clicked to be configured for use.

See the next section, **Configuring Multi Edit Display Mode for a Task List Screen**, for more information.



9. For **Child Components > Actions**, any applicable actions can be added. On a Task List, it is common to add the **Excel Export Actions**, **Excel Export All Action** and **Submit From Grid Action**. These action buttons will be used by end users to work with and submit tasks. Again, each of these Actions can be double-clicked and configured / customized (e.g., button titles, process description templates) according to user needs.

The Submit From Grid Action is highly customizable. This is true for the Submit Action that can be added to a Node Details screen, when working with single tasks. If any business rules logic is configured and applied, those will run when a user submits the task.

10. Click **Save** in the designer window to save all changes made up to this point.

Configuring a Multi Edit Display Mode for a Task List Screen

To work with objects in a workflow, **Multi Edit Display Mode** offers users the opportunity to bulk edit / update objects in the workflow. While this topic does not go into great detail on how to configure the Multi Edit Display Mode Properties in its entirety, it does touch on the parameters and components you will mostly likely use when working from a Task List screen.

Here are the basic steps to configure Multi Edit Display Mode within a Task List. If a particular parameter is not explained below, or you want more details, you can access help text by mousing over the area to the right of a parameter name within the properties dialog, and then clicking on the yellow icon that appears.

1. Double-click on 'Multi Edit Display Mode ' within the Node List > Child Components > Display Modes field. The **Multi Edit Display Mode Properties** will open.
2. Click on the **Add** button under the **Headers** value field and click on each header shown in the 'Add Component' dialog to view details about each header. Make a selection and then click Add. Continue this process to add all the desired Headers. They can then be edited, removed, and reordered as needed.

The following list is not an all-inclusive list of the headers you may use to populate the Node List table, but these give you an idea of what workflow-related headers you can use. These are in addition to standard headers like ID Header / ID Shared Target Header, Name Header, Attribute Value Header, and the Attribute Value Group Header.

- Assign to Me Header
- Assignee
- Status Flag Header
- Workflow Deadline Header
- Workflow Navigation Header
- Workflow Status Header
- Workflow Variable Header

While configuring the headers in display mode properties, a user can choose to set up the table sort order based on a specific header. By editing a particular header's properties, sorting order (ascending or - descending) can be designated using the drop down next to **Table Sorting**.

2. When adding a header, the header properties all have some sort of optional configuration that can be done. Workflow Navigation and Workflow Variable will automatically display their own properties when selected, requiring you to populate required parameters before being able to use the header. Fill in any required information (indicated by an asterisk next to the parameter name), and then click the Save button.

Important: While ID is the only parameter that indicates it is required within the Workflow Navigation Header Properties, you need to enter text into the Label parameter field. If you do not, then the header will show as 'Not Configured' within the Node List.

2. Back on Multi Edit Display Mode Properties, select the **Property Direction** of the table using the dropdown.
3. Enable **Use Immediate Save** if you prefer that any edits made within the table be saved immediately without user intervention. This lessens the risk of losing unsaved data when navigating away from the Task List screen. If disabled, the user must manually click the save button after making any object edits.
4. Click the **Group Options** and **Advanced** headings to display additional parameters that determine the behavior of the data in the table.

If using another display mode, the configuration will be similar to the steps above. Auto-save functionality is only available as an option within Multi Edit Display Mode since this is the only mode available to use when editing data.

Information regarding how to use a Task List is included in the **Moving Tasks through a Workflow in Web UI** topic.

Workflow State Component

The Workflow State component allows users to see the current status of a selected object in a given workflow or in multiple workflows.

This component can also show if an object is in multiple states in the same workflow, e.g., in a marketing state where an object needs to be enriched with both text and photos.

Configuring the Workflow State Component

The Workflow State component can be added to a screen with a Node Editor. It can be added to a screen that is configured with other components or within a tab by itself.

1. Enter Web UI designer and navigate to the Node Details screen that you will ultimately configure. In the examples below, the Node Detail screen ID selected is 'Item detail,' and the Node Editors used are child components of configured tab pages.
2. When you are at the Node Editor you want to edit, go to Node Editor Properties > Child Components > Rows, click Add and select **Workflow State** from the 'Add component' dialog.

In this step, the Workflow State is being added as a row by itself. It can also be added to a Value Section, too (as shown in the example screenshots below).

The screenshots illustrate the configuration process for the Workflow State component. The top left shows the 'Item detail' screen with a 'Workflow states' table. The top right shows the 'Node Editor Properties' dialog with the 'Child Components' section. The bottom shows the 'Add component' dialog with 'Workflow State' selected.

Item detail

Basic Information and references | Category Information | Add...

Product Category *fx* | Products | Party Supplies | Party Hats

ID | 121171

Name | Pink & Green Party Hat

Primary Product Image

Approved | ✖ Never been approved.

⚠ The object is shared with 0 objects

Workflow Information

Workflow states	Workflow name	Workflow state
	Workflow with Deadlines	State 1
	Item Creation	Supplier Enrichment
	Sample Workflow (3 states) ...	Do Work

Node Editor Properties [go to parent](#)

Component Description | The Node Editor can be configured with a range of components for displaying different information and details about a selected object.

Child Components

Rows

- Asset Thumbnail (Primary Product Image)
- Approval Status (Approved)
- Shared Target Information
- Value Section

Add... Remove Up Down

Add component

- Workflow Assignee
- Workflow Attachment
- Workflow Deadline
- Workflow Historical Line Dashboard
- Workflow Profile Chart Dashboard
- Workflow State**
- Workflow Variable
- Workflow Variable User List

Filter

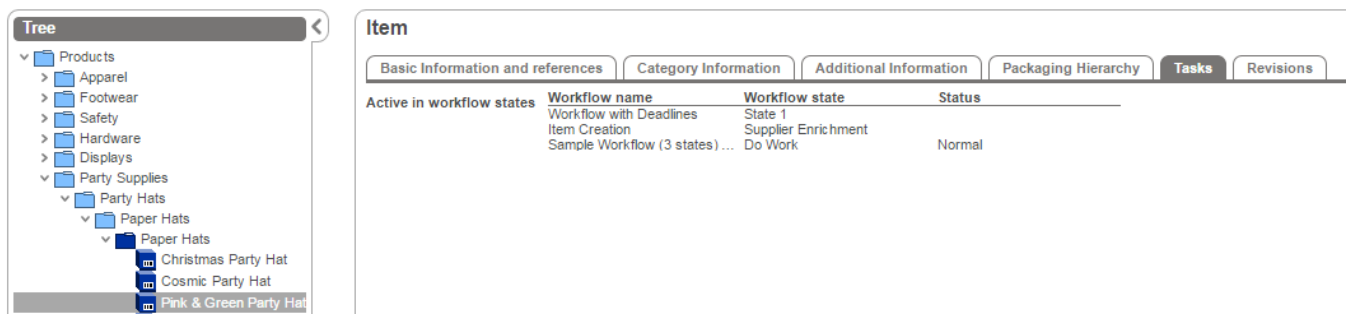
☐ Show deprecated components

Displays workflow state of the current selected node

✓ Add ✖ Cancel

- 3. Add the **Workflow State** component. Double click on the title to open up **Workflow State Properties**.
- 4. The Label (Workflow states), State Title Label (Workflow state), Status Flag Title Label (Status), and Workflow Title Label (Workflow name) parameters are optional. Use the default labels (shown in parenthesis in the previous sentence), or replace them by typing in descriptive info in the value fields.
- 5. No additional configuration is required unless you want to narrow down the workflows displayed. Using the Workflows parameter dropdown, make a workflow selection, and then click Add. Reorganize the order the workflows will display on the screen by selecting a workflow, and then clicking the Up and/or Down buttons.

Here is an of a Workflow State component used on a tab page dedicated to show workflow states.



Note that the tasks displaying in Web UI are active tasks. The Web UI does not display historic task information. Users may access that information through the workbench.

Mapping Workflow States in Web UI

When creating a screen in Web UI and configuring the components on that screen (the view), you need to tell the system how users access that view. Some screens are accessed through widgets; however, access is usually set up using Web UI mapping.

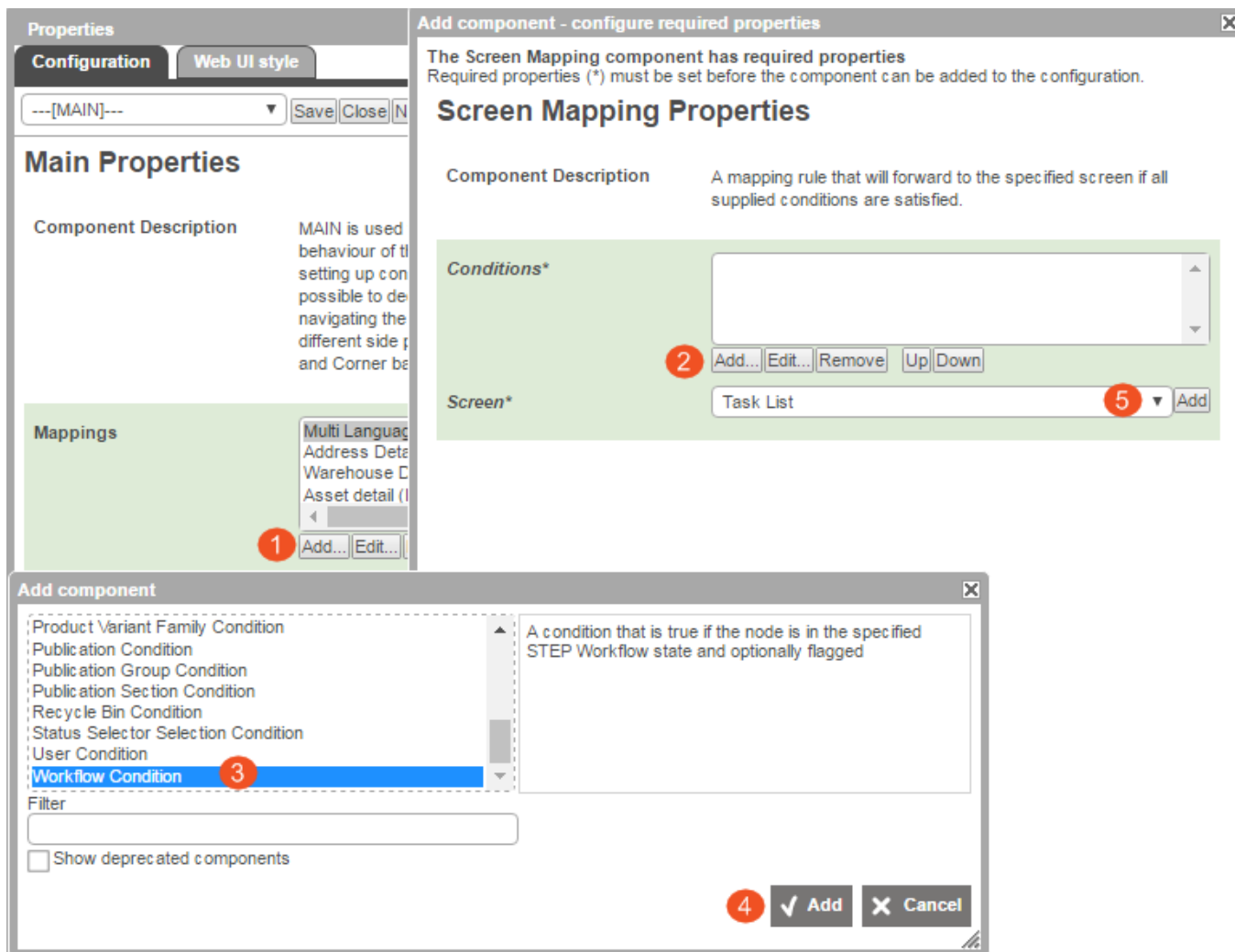
Through mapping configurations, a user can click on a task within a Node List (one configured within a Task List and/or an Advanced Search Screen), and be taken to a specific screen designated for display of objects in the particular workflow and state that the object is currently in.

As a very basic example:

1. You have a workflow with three states.
2. You click on the 'State A' name within the Status Selector Sidebar Widget.
3. A Task List displays.
4. You click on one of the tasks in that Task List, and you are taken to 'Screen A.'
5. Begin again, clicking on 'State B' within the Status Selector.
6. The same Task List displays.
7. You click on one of the tasks and are taken to 'Screen B.'

Continuing on, you could conceivably set up a different destination screen for tasks that you click on for 'State C' when displayed within a Task List (or Advanced Search Screen used as a task list).

The screenshot below gives you a simplified look at the steps to take to add a mapping for a Workflow Condition. To get a thorough understanding of how mapping works and how you might use this feature, see the **Main Properties** topic in the **Using a Web UI** documentation.



Also, there is a step-by-step example that a user can utilize as a starting point to complete their own mappings configuration for when they are using Advanced Search as a task list (instead of a standard Task List screen type). This example can be found in the **Mapping Task List to Workflow State** topic that can be found within the Web UI Advanced Search documentation.

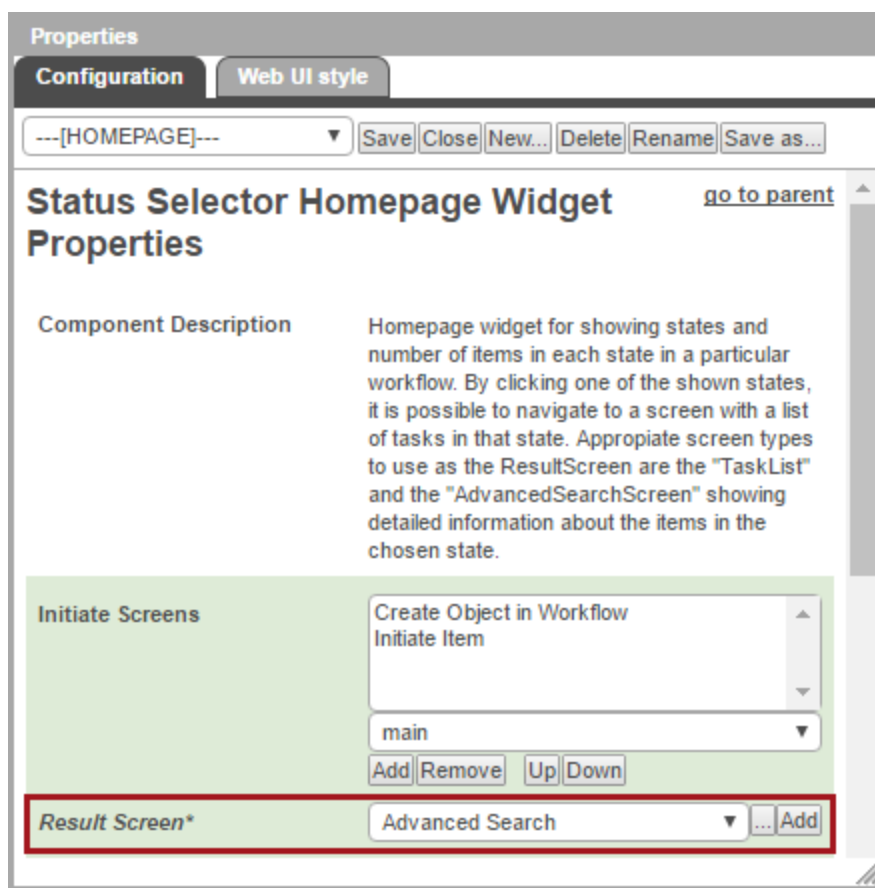
An important point to remember when using Workflow Condition mapping with Advanced Search, regardless of the mapping method, is to make sure the Enable Workflow Selection parameter is enabled within Advanced Screen Properties.

Using Advanced Search with Workflow Tasks

When clicking on a workflow task within a Status Selector Homepage / Sidebar Widget, most Web UI s are set up to take a user to a Task List screen, which is used for displaying the tasks listed in a selected workflow or workflow state.

Alternatively, the Status Selector Homepage Widget can be configured so that the Advanced Search screen is used as the results screen. Both the Advanced Search screen and Task List use a Node List component to display information.

Configuration of the **Status Selector Homepage Widget** and the **Status Selector Sidebar Widget** are also described in separate topics found within the **Getting Started with Workflows in Web UI** section of the documentation.



If using a saved search, click on the ellipsis button to the right of the Results Screen value field to make a selection.

Advanced Search as a Results Screen

When accessing the Advanced Search screen via a workflow task selection, the default screen behavior varies depending on whether or not the Workflow search criterion has been added to the Search Criteria tab / panel.

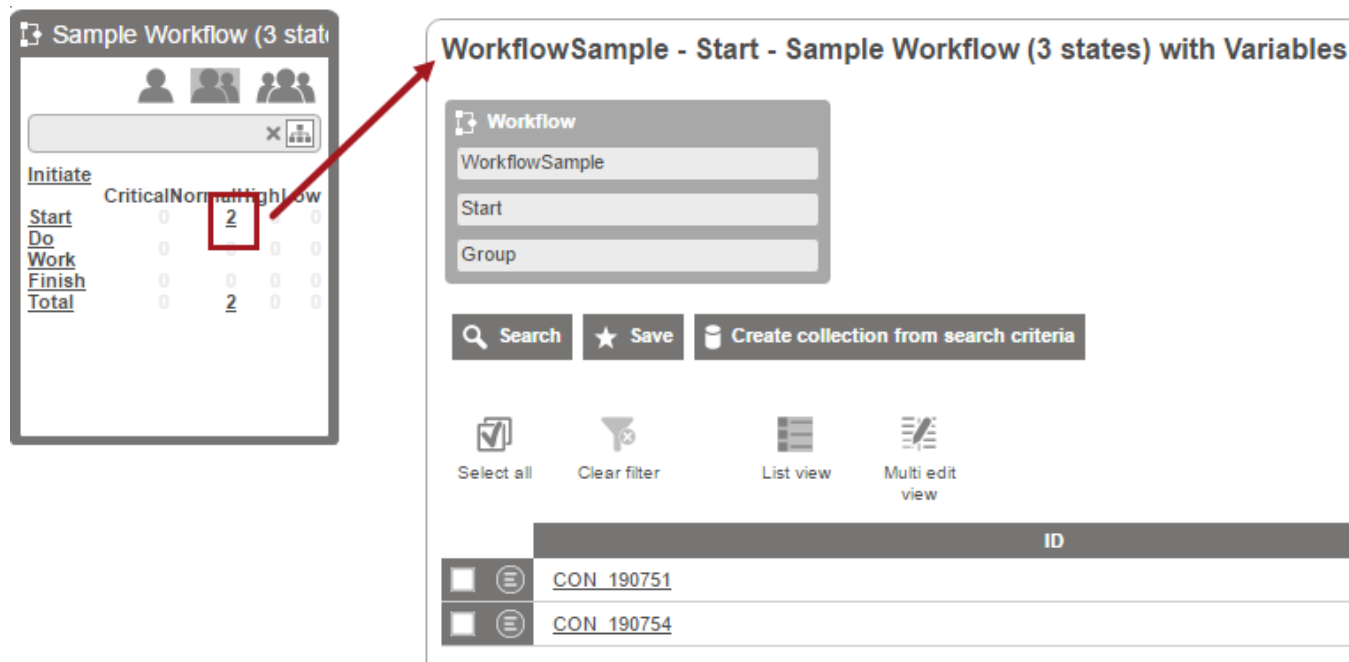
Other factors also impact the behavior depending on all the other Advanced Search screen configurations (e.g., collapsed search canvas, title configuration). Before working with either scenario below, users should be familiar with how to set up and use Advanced Search. Information can be found in the **Advanced Search** section of the **Using a Web UI** documentation.

Example Scenarios

Scenario #1 (with the third bullet below being key to this functionality):

- The Advanced Search screen is configured as the result screen for a Status Selector (Homepage / Sidebar) widget
- A Status Selector task selection has been made
- The Workflow criteria is removed from, or not initially configured as one of, the valid Search Criteria selections through the Advanced Search Screen Properties

When users make a task selection in the widget operating under this scenario, the workflow criteria fields display on the screen (as long as the search canvas is not collapsed). The search criteria values are read-only, and the workflow criteria cannot be removed from the search area. Privileged users can add / remove additional criteria to do more focused searches, but the user is always left with the original workflow search criteria that they began with. This allows for end users to focus on their tasks without any concern that they may inadvertently take action on tasks that they do not own.



The screenshot displays the Advanced Search interface. On the left, a table titled "Sample Workflow (3 states)" shows workflow criteria. A red box highlights the value "2" in the "Normal" column for the "Start" row. A red arrow points from this box to the "WorkflowSample - Start - Sample Workflow (3 states) with Variables" panel on the right.

Sample Workflow (3 states)

	Critical	Normal	High	Low
Initiate				
Start	0	2	0	0
Do	0	0	0	0
Work	0	0	0	0
Finish	0	0	0	0
Total	0	2	0	0

WorkflowSample - Start - Sample Workflow (3 states) with Variables

Workflow

WorkflowSample

Start

Group

Search Save Create collection from search criteria

Select all Clear filter List view Multi edit view

ID
CON 190751
CON 190754

Scenario #2 (with the third bullet below being key to this functionality):

- The Advanced Search screen is configured as the result screen for a Status Selector (Homepage / Sidebar) widget
- A Status Selector task selection has been made

- The Workflow criteria is configured as one of the valid Search Criteria selections within Advanced Search Screen Properties

When users make a task selection in the widget operating under this scenario, the workflow criteria fields display on the screen (as long as the search canvas is not collapsed). The search criteria values are NOT read-only so the workflow criteria can be removed from the search area. Privileged users can add / remove additional criteria to do more focused searches, and it is possible for the user to remove the original workflow search criteria that they began with. This presents the possibility for end users to inadvertently take action on tasks that they do not own.

The screenshot displays the 'Sample Workflow (3 states)' search results. A red box highlights the '2' in the 'Normal' column for the 'Start' task. A red arrow points from this box to the 'WorkflowSample - Start - Sample Workflow (3 states) with Variables' panel. This panel shows the workflow criteria configuration, including the 'Workflow' dropdown set to 'Sample Workflow (3 states) with Variables', the 'Start' task, and the 'My group' filter. Below the configuration are buttons for 'Search', 'Save', and 'Create collection from search criteria'. At the bottom, there are icons for 'Select all', 'Clear filter', 'List view', and 'Multi edit view'. The search results table shows two entries with IDs 'CON 190751' and 'CON 190754'.

WorkflowSample - Start - Sample Workflow (3 states) with Variables				
Workflow	Sample Workflow (3 states) with Variables			
Start	Start			
My group	My group			
Search Save Create collection from search criteria				
Select all Clear filter List view Multi edit view				
ID				
CON 190751				
CON 190754				

Additional Settings Applicable to Workflows

Users will find more information on how to further customize the Advanced Search screen when it is to be used as a results screen for workflow task selections in the **Advanced Search Initial Configuration** topic within the **Advanced Search** section of the **Using a Web UI** documentation.

A few options to be aware of:

The Advanced Search Screen Properties > **Title** parameter can be customized to display information specific to a workflow by using placeholders, which can be used in conjunction with, or in place of, that text to automatically insert workflow-specific information into the screen title. These placeholders ({WorkflowID}, {WorkflowState}, {WorkflowName}, and {StatusFlag}) can be used individually or together and display exactly what the name implies.

Also, there is an optional **Enable Workflow Selection** parameter. If enabled, when a search contains one or more workflow criteria, clicking on a single node in the search results will take the user to a Node In State selection. The selection can then be matched by a Workflow Condition in a Screen Mapping configuration, either on the Main screen or on a Forwarding Switch Screen.

Working with Tasks in Workflows

This set of topics focuses on the end user, e.g., the user working with tasks in a workflow in the Web UI, rather than the screen / component configuring and/or designing a workflow. They are written under the assumption that the configurations described in the **Getting Started with Workflows** in Web UI section have been completed and all options described are available to the end user.

After reading these topics, a user should be able to access workflow tasks, edit data on objects in a workflow, and submit tasks through the assigned states in a workflow.

Topics covered in this section are:

- Initiating objects into a workflow using Web UI
- Progressing tasks through a workflow in Web UI
- Monitoring what states a task is in

While concepts remain the same across workbench and Web UI, the interfaces differ. For general workflow information that also includes some materials specific to workbench, see the **Workflows** section of the **Workflows / STEP Workflow Designer User Guide** documentation. Furthermore, to follow the examples, the STEP user should have all workflow related privileges.

Initiating Objects in a Workflow using Web UI

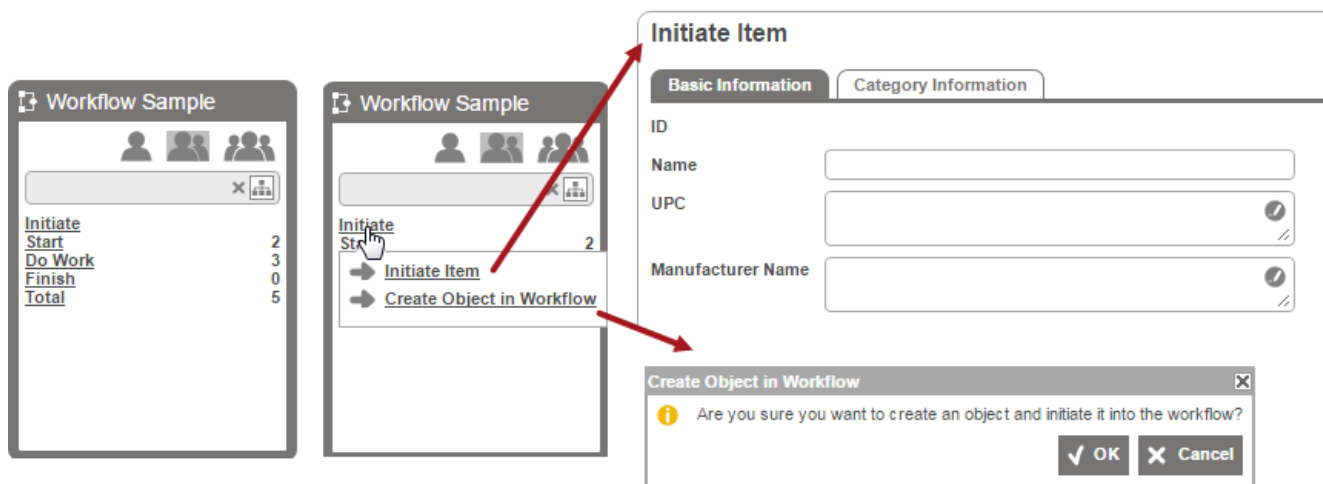
The below process describes two ways to initiate an object into a workflow using Web UI. However, it is important to note that oftentimes workflows will be configured to automatically initiate objects of a certain type or types into the workflow upon creation of the object. In addition, workflows can be initiated by a variety of other actions or processes (both automated and manually initiated), such as business rules, imports, and bulk updates.

Note: It is important to be aware that link names, screen names, and button text referred to in the examples / steps in this topic may differ from what is shown on your own system.

Initiating New Objects

Users can initiate objects into a workflow using a Status Selector Homepage Widget or a Status Selector Sidebar Widget configured to display a link or links to screens used to create and initiate objects into a designated workflow. This functionality uses Initiate Item and/or Create Object in Workflow screen types. Each option is described in greater detail below.

Once created using either method, the objects are automatically initiated into the workflow designated by the Status Selector.



Create Object in Workflow

When creating new objects that use auto-generated IDs, users can create and initiate objects into a workflow in a single step using a Create Object in Workflow screen type as the Status Selector initiate screen. This allows for a more streamlined object creation process since the user is able to bypass the Initiate Item screen, which means that attribute values do not need to be filled in prior to object creation, and users are automatically taken to an editor screen (determined by the overall Web UI mappings) where they can easily start working with the object data.

1. Click on the initiate link, which is the top link within the Status Selector. This link is shown as 'Initiate' in the example above.
2. Select the 'Create Object in Workflow' link.

3. Choose OK when presented with the 'Create Object in Workflow' dialog.
4. Work with the object to fill in attribute value and/or progress the task through the workflow.

Initiate Item

Using an **Initiate Item** screen, users fill in attribute values then submit to create and initiate an object. Upon a successful submission, the end user will be navigated to a designated screen configured as part of the Initiate Item Properties setup.

1. Click on the initiate link, which is the top link within the Status Selector. This link is shown as 'Initiate' in the example above.
2. Select the 'Initiate Item' link.
3. On the object details screen, fill in the attribute values and then click Save at the bottom of the screen to create and initiate the object.
4. Your next step will depend on the screen you are taken to after clicking Save. You can continue working with the object to fill in attribute value and/or progress the task through the workflow.

Initiating Existing Objects

When working with objects in Web UI, a **Start Workflow Action** button can be added to any Node Details screen. This allows users to work with object data and then initiate the object into a workflow with a click of a button. You simply click the 'Start STEP Workflow' button at the bottom of the screen.

The button will only activate when initiation is possible. If deactivated, the object may already exist as a task in the designated workflow.

The screenshot displays the 'Initiate Item' screen in the Stibo Systems Web UI. On the left, a 'Browse' tree shows a hierarchy of categories, with 'Party Supplies' expanded to show 'Paper Hats', 'Balloon Hats', and 'Pet Hats'. The 'Dog Party Hats Assortment' is selected. On the right, the 'Item' details form is shown with tabs for 'Basic Information and references', 'Category Information', 'Additional Information', 'Packaging Hierarchy', and 'Status'. The 'Basic Information and references' tab is active, showing fields for Product Category, Name, Approved, Product Name, Short Item Description, Long Item Description, Brand Name, Brand Owner, Supplier Name, Supplier Part Number, and Provider GLN. The 'Start STEP Workflow' button is highlighted with a red box at the bottom.

Once initiated, you will see a confirmation message displayed at the top of the screen, and the 'Start STEP Workflow' button will deactivate for that particular workflow.

STEP Workflow "Sample Workflow (3 states) with Variables" has been started

Item

Basic Information and references

Category Information

Additional Information

Packaging Hierarchy

Status

Product Category^{fx}

Products | Party Supplies | Party Hats | Paper Hats | Pet H

Name

Dog Party Hats Assortment

Approved

✖ Never been approved.

Product Name

Dog Party Hats Assortment

Short Item Description

It's your dog's birthday - raise the "woof!"

Long Item Description

Brand Name

Brand Owner

Supplier Name

Party Dawgs

Supplier Part Number

Provider GLN

Save

Reset

Start STEP Workflow

To work with the object that you just placed in the workflow, continue on with the topics found in the **Working with Tasks in Workflows** section.

Moving Tasks through a Workflow in Web UI

Once an object is initiated in a workflow, it is available in one or more states of the workflow. Each instance of an object in a state represents a task to be completed. Each state is assigned to a particular user or group who has the responsibility of completing the tasks in that state. Because of this, tasks are most often accessed via the states themselves, rather than via the objects in the states. Using a Status Selector widget, users can click on a state within a specific workflow to view a Task List. Using a Task List allows, users can view and then work with tasks in the states to which they have privilege to access.

Processing Tasks in a Workflow

The Status Selector is the primary interface for working with tasks in the Web UI. A Status Selector shows all tasks assigned to the current user (either directly to the user or to a group of which the user is a member). A list of the configured states is displayed, with an object count displaying the number of tasks in the state that the user has access to. Additionally, depending on a user's privileges, a user may see tasks assigned to any user. Click the icons shown at the top right of a Status Selector Homepage / Sidebar Widget to change the view.

In the example below, you see that there are three (3) tasks assigned directly to the user. There are five (5) tasks assigned to a group in which the user is a member (including the current user's tasks), and thirteen (13) tasks total within the states showing the specific workflow.

Workflow Sample		
Initiate		
Start	0	
Do Work	3	
Finish	0	
Total	3	

Workflow Sample		
Initiate		
Start	2	
Do Work	3	
Finish	0	
Total	5	

Workflow Sample		
Initiate		
Start	2	
Do Work	11	
Finish	0	
Total	13	

To work with tasks via the Status Selector (Homepage / Sidebar) Widget:

1. Navigate to the widget applicable to the workflow and select the appropriate view. There are three options to choose from (as shown in the screenshots above):
 - **Single user button:** Only tasks assigned directly to the current user are displayed.
 - **Double user button:** Tasks assigned directly to the current user or to a User Group of which he /she is a member are displayed.
 - **Triple user button:** All tasks are displayed. This button is only available if the user has 'STEP Workflow Administrator' privileges for the workflow.

Additionally, a user can further refine the task view by using the 'Filter by Collection' option. If a collection has been previously set up, selecting that collection using the Node Picker icon () will filter the task list to display

only tasks for objects contained in the collection. For more on creating collections, see the **Collections** documentation.

- With the appropriate view selected, click the link for the state in which tasks should be accessed or, if shown, click the number of the tasks displayed in the Status Flag columns for a specific state. This will display the tasks according to the view configured by the workflow administrator, allowing users to review and/or edit data as needed. The Task List is typically configured to use to work with tasks. However, the Advanced Search Screen may also be used since both screens use a Node List component when working with the task sets. In the examples in this topic, the **Task List** will be used.

WorkflowSample - Do Work - Sample Workflow (3 states) with Variables - Normal

	ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121171	121171	Pink & Green Party Hat	Normal	☐	Brand Managers	8/29/16 8:53:01 AM	121171	Sample Workflow (3 states) with Variables:Do Work	USER8	
121178	121178	Purple & White Party Hat	Normal	☐	Brand Managers	8/29/16 8:53:01 AM	121178	Sample Workflow (3 states) with Variables:Do Work	USER8	
121183	121183	Pink & Blue Giraffe Party Hat	Normal	☐	Brand Managers	8/29/16 8:53:01 AM	121183	Sample Workflow (3 states):Start, Sample Workflow (3 states) with Variables:Do Work	USER8	
121190	121190	Dog Party Hats Assortment	Normal	☐	Brand Managers	8/29/16 8:53:01 AM	121190	Sample Workflow (3 states) with Variables:Do Work	USER8	
121193	121193	Pink & Green Pom-Pom Hat	Normal	☐	Brand Managers	8/29/16 8:53:01 AM	121193	Sample Workflow (3 states) with Variables:Do Work	USER8	

Gray cells are read-only, while white cells can be edited. Cells that have a column header with an asterisk after it (e.g., UPC*) are considered mandatory and should be populated prior to submission, though the system may or may not prevent transition of the task if they are not populated (based on how the designer has configured the workflow).

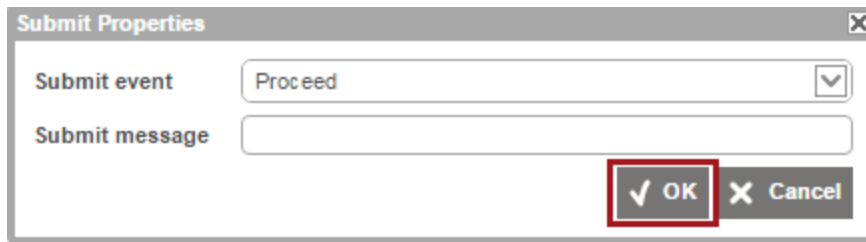
- Submitting a task to a subsequent state indicates that work on the task is complete. Unless the user has access to a subsequent task for that object, it will no longer be accessible for them in the workflow. To submit a task, select the task (multi-select is enabled using Ctrl + click), choose the appropriate row or column (depending on the table orientation), and then click Submit. The available options for selection are configurable based on the design of the workflow. In some cases only a single selection will be present and therefore it is not required for the user to select a specific transition.

If applicable, any business rules applied to the Submit action will run.

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

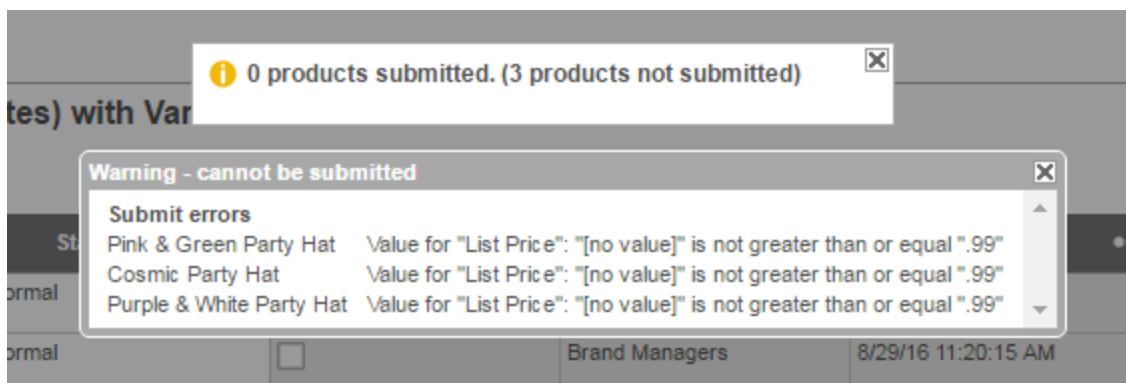
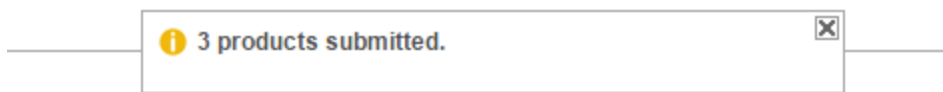
	ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121177	121177	Cosmic Party Hat	Normal	☒	User 8	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work, Sample Workflow (3 states) with Variables:Start		
121179	121179	Yellow & Pink Party Hat	Normal	☐	Super Users	8/30/16 8:47:29 AM	121179	Sample Workflow (3 states) with Variables:Start		
121184	121184	Christmas Party Hat	Normal	☒	User 8	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample Workflow (3 states) with Variables:Start		
121192	121192	Politics Party Hats	Normal	☐	Super Users	8/30/16 8:47:29 AM	121192	Sample Workflow (3 states) with Variables:Start		
121218	121218	Pink & Blue Owl Party Hat	Normal	☒	User 8	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with Variables:Start		

- A dialog will appear, allowing the user to input a comment, which will be recorded within the background processes details. Note that if multiple objects were selected, the same comment will be applied to all. From the dialog, click the OK button to complete the task, or click Cancel to return to the Task List.



The 'Submit Properties' dialog box contains two input fields: 'Submit event' with a dropdown menu showing 'Proceed', and 'Submit message' with an empty text box. At the bottom right, there are two buttons: 'OK' (with a checkmark icon) and 'Cancel' (with an 'X' icon). The 'OK' button is highlighted with a red rectangular box.

- Review submission message at the top of the screen. This message will tell you if the workflow submission was successful or not. And, if not, additional details should be provided. Examples follow:



- Refreshing your browser screen will update the Status Selector. However, if the admin configured the Auto Refresh Internal, the Status Selector will update automatically after a set number of seconds.

Tree

- System Setup
- Status Selector**

Sample Workflow

	Critical	Normal	Error	High
Initiate				
Start		3		
Do Work				
Finish				
Total		3		

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

ID	Name	Status flag	Assigned to me	Assignee
121177	Cosmic Party Hat	Normal	☒	User 8
121184	Christmas Party Hat	Normal	☒	User 8
121218	Pink & Blue Owl Party Hat	Normal	☒	User 8

Note: An alternate way to submit tasks is by clicking on the object ID link (if enabled) within the task list. If an object details (Node Details) screen has been configured to display upon object selection and a Submit button has been configured to display within that screen, then the user can go directly to the object and submit it. The submit button is only active when coming directly from a Task List. It is important to note that this functionality is only available if the admin has allowed for this scenario.

Tree

Products

Apparel

Footwear

Safety

Hardware

Displays

Furniture

Automotive

Building Products

Electrical & Electronics

Food and Beverage

Kitchen

Party Supplies

Party Hats

Paper Hats

Christmas Party Hat

Cosmic Party Hat

Cosmic Party Hat(2)

Pink & Green Party Hat

System Setup

Status Selector

Item

Basic Information and references

Category Information

Additional Information

Packaging Hierarchy

Tasks

Revisions

Product Category

Products | Party Supplies | Party Hats | Paper Hats | Paper

ID

121171

Name

Pink & Green Party Hat

Approved

Never been approved.

Workflow Information

Workflow states	Workflow name	Workflow state	Status
	Workflow with Deadlines	State 1	
	Item Creation	Supplier Enrichment	
	Sample Workflow (3 states) ...	Start	Critical

Save

Reset

Submit

Tasks Tab on an Object

When viewing an object in Workbench via the Tree, a Tasks tab displays all tasks across all workflows for that object, subject to the user's privileges. Only tasks that the user has rights to address are visible.

There is not a pre-configured Tasks tab in Web UI; however, it is easy to set one up or add the task info to an existing screen / tab. Consult with your admin how best to do this.

An example / way to view the workflow states for an object is provided in the preceding screenshot. The information is configured to display within a Node Editor on a Node Details > Tab Page. Another example is provided below in the form of a Tasks tab dedicated to show workflow states.

Tree

Products

Apparel

Footwear

Safety

Hardware

Displays

Party Supplies

Party Hats

Paper Hats

Christmas Party Hat

Cosmic Party Hat

Pink & Green Party Hat

Item

Basic Information and references

Category Information

Additional Information

Packaging Hierarchy

Tasks

Revisions

Active in workflow states

Workflow name	Workflow state	Status
Workflow with Deadlines	State 1	
Item Creation	Supplier Enrichment	
Sample Workflow (3 states) ...	Do Work	Normal

Note that the tasks displaying in Web UI are active tasks. The Web UI does not display historic task information. You may access that information through the workbench.

Claiming / Releasing Workflow Tasks in Web UI

When using the **Assigned to Me** workflow component, or the 'Task Assignment Action' button on a Node Details, users with the proper privileges can claim tasks for themselves. The user may be claiming a task that currently belongs to a group that they belong to—or a group they do not belong to.

Claiming / Releasing tasks using an Assign to Me Header

If using Assigned to Me within a Node List on a Task List or Advanced Search Screen, then clicking the Assigned to Me checkbox claims the task for (assigns the task to) the current user logged in to Web UI. Upon clicking the checkbox, depending on the settings that the admin has set, a user may be auto-navigated to an object details screen so that they can work with the object that they just claimed.

Below is an example of a Task List that originally displayed 'Super Users' as the Assignee for all five tasks. Upon clicking 'Assigned to Me,' the Assignee changed to User 8. User 8 is the user currently logged in to the Web UI.

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121177	Cosmic Party Hat	Normal	☐	Super Users	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work,		
121184	Christmas Party Hat	Normal	☐	Super Users	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample		
121218	Pink & Blue Owl Party Hat	Normal	☐	Super Users	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with		

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121218	Pink & Blue Owl Party Hat	Normal	☒	User 8	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with Variables:Start		
121177	Cosmic Party Hat	Normal	☒	User 8	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work, Sample		
121184	Christmas Party Hat	Normal	☒	User 8	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample		

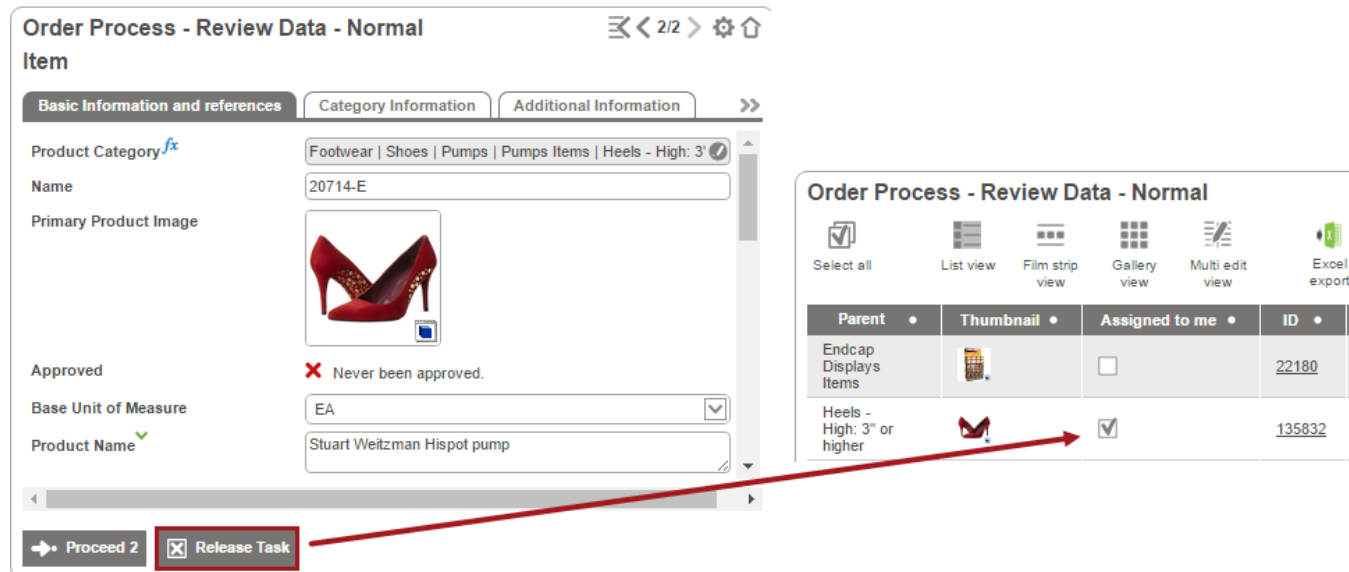
Similarly, to release a task, uncheck the 'Assigned to me' box and the Assignee column changes back to the user group the user is a part of, and another individual in the same user group can now see the task and claim it, if needed.

For full details regarding the benefits of claiming a task and information on how this works in workbench, see the **Claiming / Releasing Tasks in Workflows** section of the **Workflows** documentation.

Claiming / Releasing Workflow Tasks in Node Details

While it is very convenient to have the Assign To Me header on Task Lists and Advance Search screens, sometimes it is necessary for a user to click on a task in a Task List to see if it is something they should claim. If the user decides it is something they should claim, instead of going back out to the Task List or Advance Search screen, finding the task again, and claiming it, they may claim it directly from the Node Details screen using the 'Task Assignment Action' button. This option will only appear if the Node Details was accessed through a Task List.

Similar to the Assign To Me header component, when a user selects the 'Task Assignment Action' button on the Node Details screen, the task will be assigned to the current user who is signed into the system. When the button is clicked, it not only reflects on that view of Node Details, but it also reflects on the Task List under the 'Assign To Me Header' component, if configured.



Order Process - Review Data - Normal

Item

Basic Information and references | Category Information | Additional Information

Product Category *fx*: Footwear | Shoes | Pumps | Pumps Items | Heels - High: 3"

Name: 20714-E

Primary Product Image: 

Approved: ✗ Never been approved.

Base Unit of Measure: EA

Product Name: Stuart Weitzman Hispot pump

Buttons: ➔ Proceed 2 ✗ Release Task

Order Process - Review Data - Normal

Select all | List view | Film strip view | Gallery view | Multi edit view | Excel export

Parent	Thumbnail	Assigned to me	ID
Endcap Displays Items		☐	22180
Heels - High: 3" or higher		☒	135832

The new button 'Task Assignment Action' is customizable with two labels, one for claiming the task and the other for releasing the task. A user can also choose to show just the button, just the icon, or the button and the icon.

Configuring the 'Task Assignment Action' Button

To configure the 'Task Assignment Action' button, navigate to a Node Details. Once on the Node Details, navigate to Child Components > Buttons field > select 'Button' from dropdown > click **'go to component'**.

Properties (edited)

Configuration
Web UI style

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

Node Details Properties

Component Description

Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title

Item Details

Css Class

Main

Tab Control

go to component

Buttons

Buttons

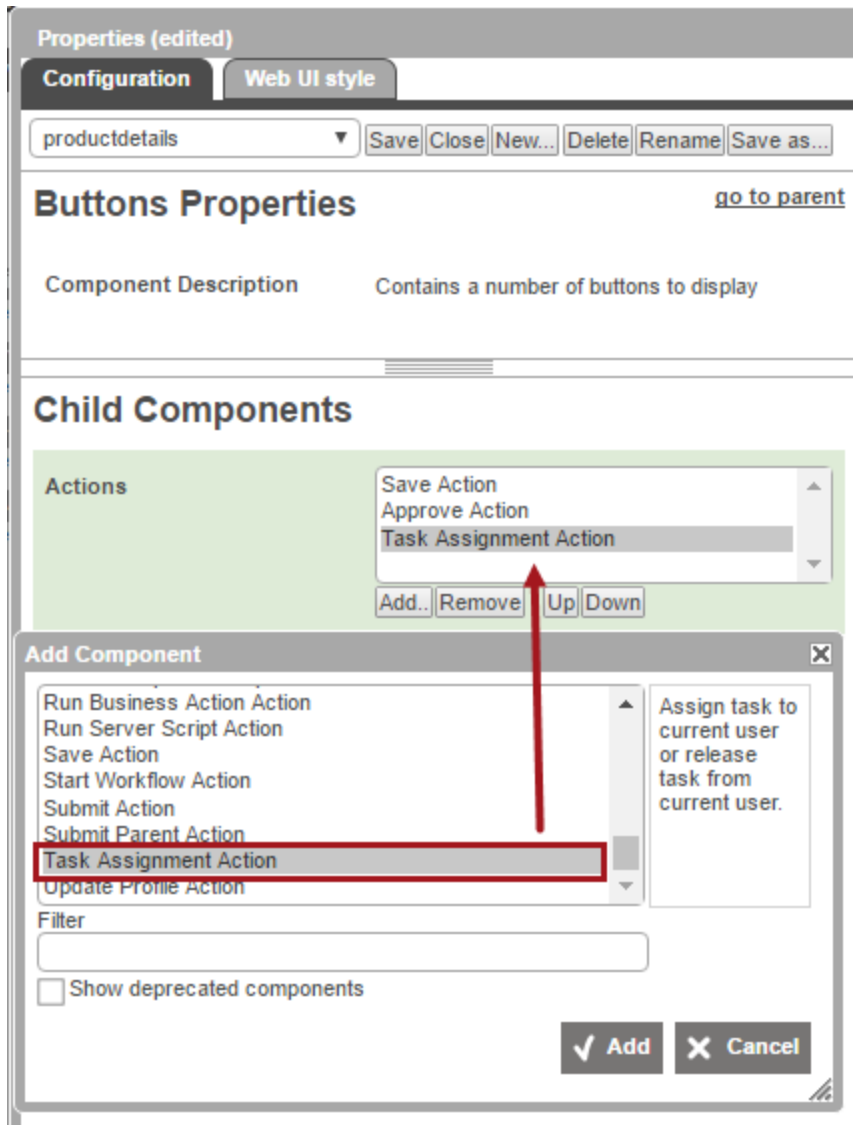
go to component

Breadcrumb

<Select a child compc

go to component

On Button Components under Child Components, add the 'Task Assignment Action' button.



Double click on the Task Assignment Action button and configure the Assign Task Button Label and the Release Task Button Label as desired, or leave the default labels. In the Button Type dropdown field, select to show the icon, text, or icon and text. Once all fields are configured as desired, save and close the designer.

Properties (edited)

Configuration
Web UI style

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

Task Assignment Action Properties

[go to parent](#)

Component Description

Assign task to current user or release task from current user.

Assign Task Button Label

Assign To Me

Button Type

ICON_AND_TEXT

Release Task Button Label

Release Task

The 'Task Assignment Action' button should now appear on Node Details when accessed through a Task List.

Dun & Bradstreet Integration in Web UI

Dun & Bradstreet (D&B) integration allows customers to use the Web UI for matching and detailed company profile enrichment once all setup is complete.

- For matching, the Web UI must be configured with a Status Selector (Homepage / Sidebar) Widget for the D&B Match Candidate workflow. Also, a D&B Candidate Matching screen must be created, configured, and made accessible. This setup / process is used when an organization entity (customer record) has multiple D&B organization entity (D&B record) match candidates.
- For detailed company profiling, it is not necessary to create a Status Selector. Best practice is to initiate objects into the D&B Detailed Company Profile workflow using a bulk update, an automated business action rule, or by placing an action button on a node editor screen.

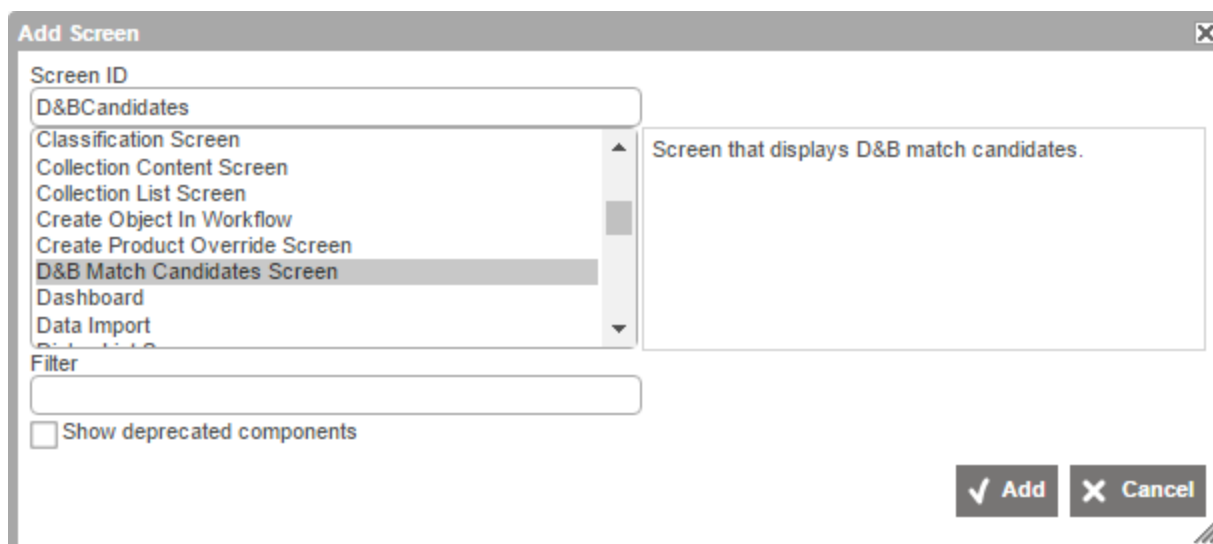
Prerequisites

This section of the D&B integration requires an understanding of the Web UI, how to create screens and widgets, and the necessary user permissions to do so. Please see the **Web User Interfaces** documentation for more information on these topics.

Additionally, users should be familiar with the D&B integration setup and processes. For more information, see the **Dun & Bradstreet Integration** section.

Creating a New D&B Match Candidates Screen

1. From the Web UI designer, select **New**.
2. From the Add Screen prompt, select the **D&B Match Candidates Screen** option from the list then select **Add**.



3. On the **D&B Match Candidates Screen Properties** configuration, select the desired attributes for both the Displayed Attributes and Organization Attributes parameters by choosing **Add**.

- The Displayed Attributes are the titles of the attribute columns that will be included with the Confidence Score and Name of the Customer record within the task list on the screen.
 - The Organization Attributes are for the current organization entity and appear above the task list.
4. Click the ellipsis button (...) to make an **Organization Title Attribute** selection.
 5. When configured as desired select **Save** then **Close** to exit design mode.

If configured correctly, the attributes selected in step 3 will appear on the screen as shown in the next image.

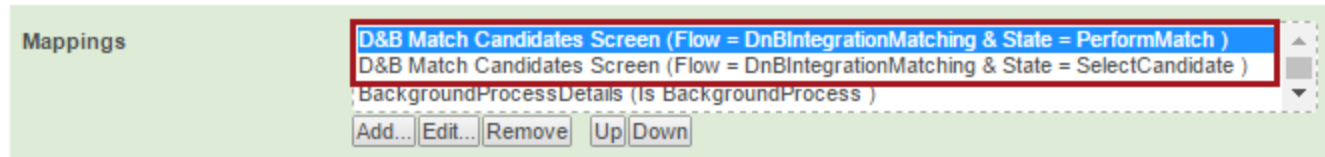
	Confidence	ID	Name	D&B Match
☐	8	D&B000002	Stibo A/S Stibo Systems	586239436
☐	8	D&B000003	Stibo Systems A/S	305507186

Before you can use the D&B Match Candidates Screen, you need to configure how a user will access the screen. This is done by mapping a Workflow Condition within the mapping field in Main Properties. Details on how to do this can be found in the **Mapping Workflow States in Web UI** topic of the **Workflows in Web UI** documentation.

Main Properties

Component Description

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



Each state of the D&B workflow will have a Workflow Condition, and the screen that you are selecting within the Screen Mapping Properties is the screen you just created.

Adding and Configuring a D&B Workflow Status Selector Widget

To process a customer record for matching to D&B data, the record must go through the D&B Integration Matching workflow. To access tasks for this workflow, a Status Selector Homepage /Sidebar widget is needed.

The directions for setting up a Status Selector widget are outlined in **Getting Started with Workflows in Web UI > Screen / Component Configuration and Mappings for Workflows** documentation.

For this example, we are adding the D&B Integration Matching workflow to the Web UI Homepage via a Status Selector Homepage widget. Configure the widget as desired. The next screenshot is an example of how this implementation may look. Select add when the widget is configured as desired.

Required parameters that must be selected to save the Widget Properties and use the functionality:

- **Results Screen:** select the screen ID for the Task List screen to be used.
- **States:** add the states for the applicable workflow.
- **Workflow:** select the ID of the applicable workflow. For D&B integration, select DnBIntegrationMatch Candidate.

Properties

Configuration

Web UI style

---[HOMEPAGE]---

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

Status Selector Homepage Widget Properties

go to parent

Auto Refresh Interval

0

Component Title

D&B Integration Matching

Initiate Label

Initiate Screens

main

Add Remove Up Down

Result Screen*

Tasklist

... Add

Show Collection Filter

Collection Top Nodes

Add... Remove Up Down

Show Initiate

Status Flags Enabled

Show Status Flag Headers

Show Total

States*

SelectCandidate

ApplicationDataImport | Conversion

Add Remove Up Down

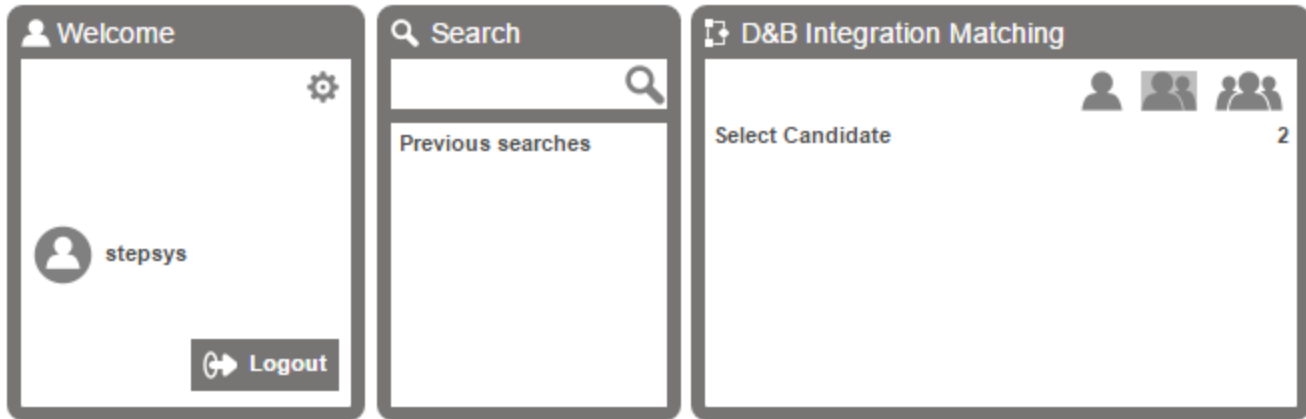
Total Label

Workflow*

DnBIntegrationMatch Candidate

Select **Save** and then **Close** to exit the Web UI designer.

After the Web UI refreshes, the widget will now appear on the home screen of the Web UI.



Using Web UI for Dun & Bradstreet Integration Matching

Customer records enter the D&B Match Candidate workflow via standard methods. An individual customer objects can be initiated in bulk or individually via Web UI or Workbench. You may want to add a business action button on a Node Details screen to initiate objects when looking at the details of the customer record. Initiating records is not covered in this topic but is a necessary step before you are able to work with tasks in the workflow.

Node Details

D&B Confidence	
D&B DUNS Number	
D&B Match Country Code	DK 
D&B Match Organization Address Line 1	Axel Kiers Vej 11 
D&B Match Organization Name	Stibo Systems 
D&B Match Organization Postal Code	8270 
D&B Match Organization Primary Town	HØJBJERG 
CustomerToD&B	<u>Stibo A/S Stibo Systems (DUNS586239436)</u>  
	
CustomerToD&BCandidate	

D&BAddressContainer

D&BAddressLine	
D&BCountryGroupName	
D&BCountryISOAlpha2Code	
D&BCountryOfficialName	

➡ Start D&B Matching
➡ Start D&B Profiling

Here is a basic example of how a STEP user would use the D&B Integration Matching functionality. True functionality depends on the customer setup.

Perform Match

1. A user clicks the Select Candidate task within the D&B Match Candidate status selector.
2. Upon arriving at the Task List, the user selects a customer by clicking on the ID or Title link within a row.
3. A search is performed. The results list shown, determined by a D&B algorithm used to match the D&B records to the customer. If no candidates are found, a message will display, and users can click the 'Modify search' icon on the screen to edit the search.

i No candidates found with the given search criteria
Use the Search action to make a new search with different criteria

D&B Match Candidate - Perform Match - Available

Current Organization: Stibo Systems, DK, Axel Kiers Vej 11, 8270, HØJBJERG



Modify search

Modify Search

Search Type ☐ SBRI ☐ Basic ☒ Advanced

Organization Name

Country Code

DUNS Number

Registration Number

Phone Number

Address Line 1

Address Line 2

City

Postal Code

Territory/State

Reason Code

Match Confidence

Exclude
☐ Non-Headquarters
☐ Non-Marketable
☐ Out of Business
☐ Undeliverable
☐ Unreachable

Select Candidate

1. A user clicks the Select Candidate task within the D&B March Candidate status selector. If doing a search above, the Select Candidate button should be available without switching screens.
2. Upon arriving at the Task List, the user selects a customer by clicking on the ID or Title link within a row.

3. The D&B Match Candidates screen is displayed, and the user can compare customer record information with the D&B records list shown.
 - The customer record information will display above the results list. The information displayed is determined by the Displayed Attributes selected on the D&B Match Candidates Screen Properties.
 - The D&B records are shown in a table with the Confidence, ID, and Name columns displayed by default. Any other columns are determined by the attributes designated within the Organization Attributes field of the D&B Match Candidate Screen Properties.
4. A candidate selection is made by clicking the checkbox at the beginning of the D&B record row, and then, clicking the 'Select candidate' button above the table. Only one candidate can be selected.

D&B Match Candidate - Select Candidate - Available

Current Organization: A-1 VISUAL SYSTEMS, US, 2856 S VAIL AVE, 90040, COMMERCE, CA

 Modify search
  Select candidate

	Confidence	ID	Name	D&B Match
☒	8	DUNS1	ENGRAVEX, INC	151583861
☐	8	DUNS6	ENGRAVEX, INC	621439934

5. Users will see a message on the screen confirming a candidate selection:

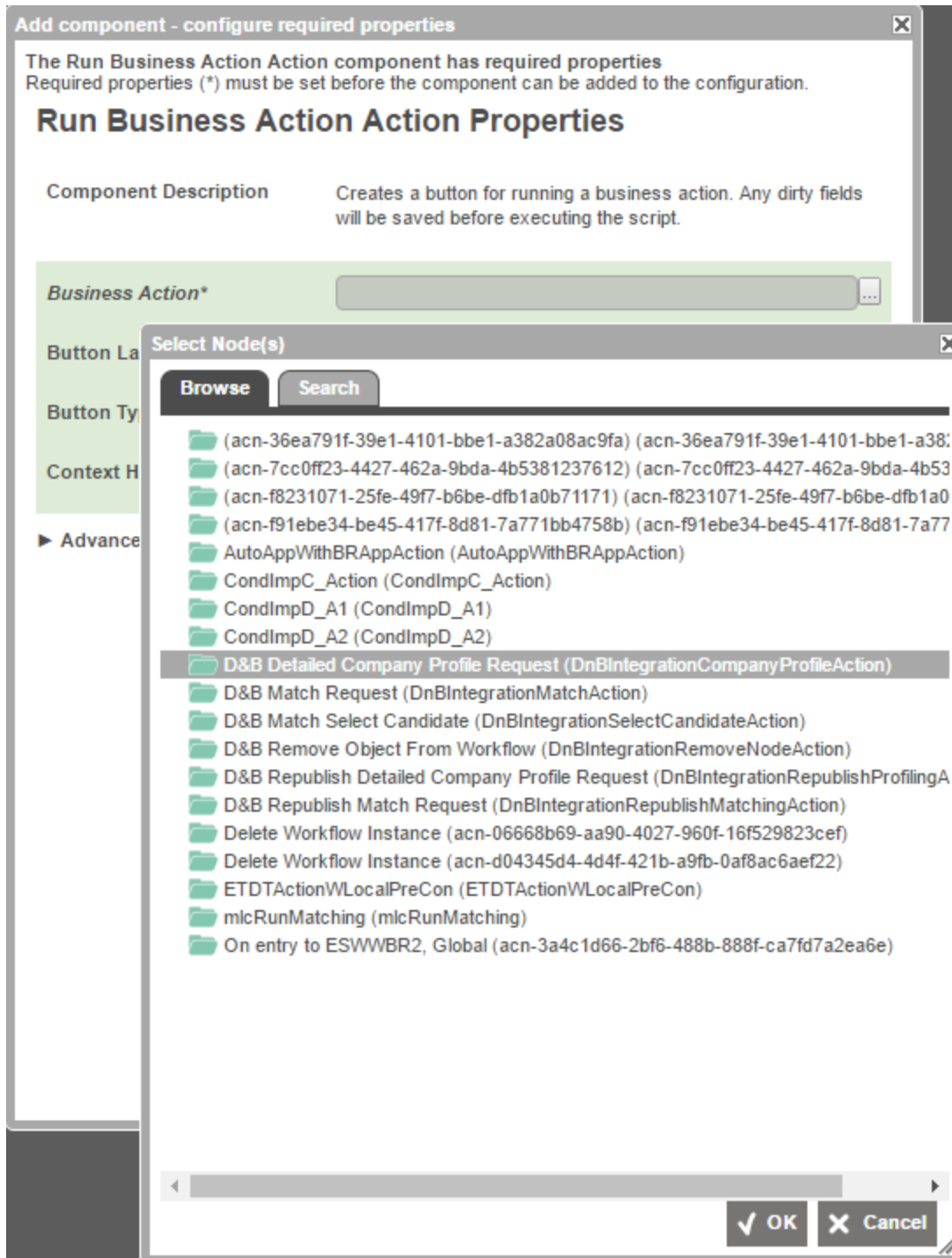
 **Candidate selected**


The candidate has been selected as a match for the current customer

Using Web UI for Dun & Bradstreet Detailed Company Profile

Once a customer entity is linked to a D&B record, detailed company profiling can take place if you have the API license key and password from Stibo and have input it in the easy setup wizard in the workbench.

If you are doing detailed company profiling via the Web UI, you can add a button to a Node Details screen that runs the D&B Detailed Company Profile Request business action. This allows users to simply click a button to start the profiling process.



Alternatively, you can push the task through the workflow with the submit action within a Task List.

For more details about workflows, see the entire suite of topics in the **Workflows in Web UI** documentation. You will find information about widget setup, moving tasks through workflows, and initiating objects in a workflow.

Advanced Web UI Workflow Topics

This portion of the material covers more advanced workflow configurations, going beyond the basic setups described in the introductory material. Users should be familiar with all material in the **Getting Started with Workflows in Web UI** documentation before attempting to configure and/or utilize more advanced workflow functionality.

Most real-world workflows will utilize the functions described in the advanced topics, but none are required in any particular workflow. The topics generally do not build on one another and completing one configuration typically does not require knowledge of any other, outside of the basic workflow setup and how Web UI screens and components work together. In other words, the advanced workflow documentation is function and topic based, meaning that each topic describes a particular function a user may wish to carry out or a particular topic a user may wish to read about. Therefore, there is no suggested reading order and users should approach the material in the order that seems most relevant for their workflow.

Status Flags in Web UI

When working with workflows in Web UI, it is important to be able to view status flags should there be any. By configuring the **Status Selector Homepage Widget** and/or the **Status Selector Sidebar Widget**, users can see the task count for selected states in workflows, as well as any status flags defined in the workflow.

Workflow 6

Initiate

	Critical	Error	Normal
Initial	0	0	0
Review data	0	2	3
State-3	0	0	3
End State	0	0	2
Total	0	2	8

Additionally, it allows the user to navigate to a **Task List** showing just the tasks having the chosen status flag.

Workflow 6

Initiate

	Critical	Error	Normal
Initial	0	0	0
Review data	0	2	3
State-3	0	0	3
End State	0	0	2
Total	0	2	8

Order Process - Review data - Error

Parent	Thumbnail	Assigned to me	ID	Title	Object Type	State	Deadline
Beds Items		☐	134892	Comfy Bed twin	Item	134892	
Beds Items		☐	134894	Comfy Bed double	Item	134894	

1-2 of 2

In a **Task List** in **Table Display Mode** or **Multi Edit Display Mode**, a user can add a **Status Flag Header**, which enables viewing of status flags.

Order Process - Review data -

Parent	Thumbnail	Assigned to me	ID	Title	Object Type	State	Status flag
Beds Items		☐	132499	Rustic Bed Frame	Item	132499	Normal
Beds Items		☐	132500	sheets	Item	132500	Normal
Beds Items		☐	134892	Comfy Bed twin	Item	134892	Error
Beds Items		☐	134894	Comfy Bed double	Item	134894	Error
Beds Sales Items		☐	22163	Bed Frame Set	SalesItem	22163	Normal

1-5 of 5

This header, like other column headers in the **Table Display Mode** or **Multi Edit Display Mode**, can have a filter applied to it to show only the status flags of interest.

The **Status Flag Header** values are also editable when utilizing the **Multi Edit Display Mode**.

Order Process - Review data -

	Thumbnail	ID	Object Type	Path	Title	Status flag
Bed Frame Set		22163	SalesItem	Primary Product Hierarchy/Products/f	Bed Frame Set	Normal (Normal)
sheets		132500	Item	Primary Product Hierarchy/Products/f	sheets	Critical (Critical)
Comfy Bed twin		134892	Item	Primary Product Hierarchy/Products/f	Comfy Bed twin	Error (Error)
Comfy Bed double		134894	Item	Primary Product Hierarchy/Products/f	Comfy Bed double	Normal (Normal)
EVN-06		136089	Item	Primary Product Hierarchy/Products/f	EVN-06	Error

Number of items : 5

Users can double-click on a table cell and use the dropdown to select between the different status flags that have been configured for the Workflow. If editability of status flags is not desired, it can be disabled by checking the 'ReadOnly' option in the component configuration.

Order Process - Review Data - Error

Thumbnail

Assigned to me

134894

Task List Properties

Component Description

A screen for displaying the tasks listed in a selected Workflow or Workflow State. The Task List must be configured as a result screen for a Status Selector Homepage widget and configured with a Node List and a Display Mode.

Auto Navigate On Assignment

Advanced

Css Class

Title Formatter

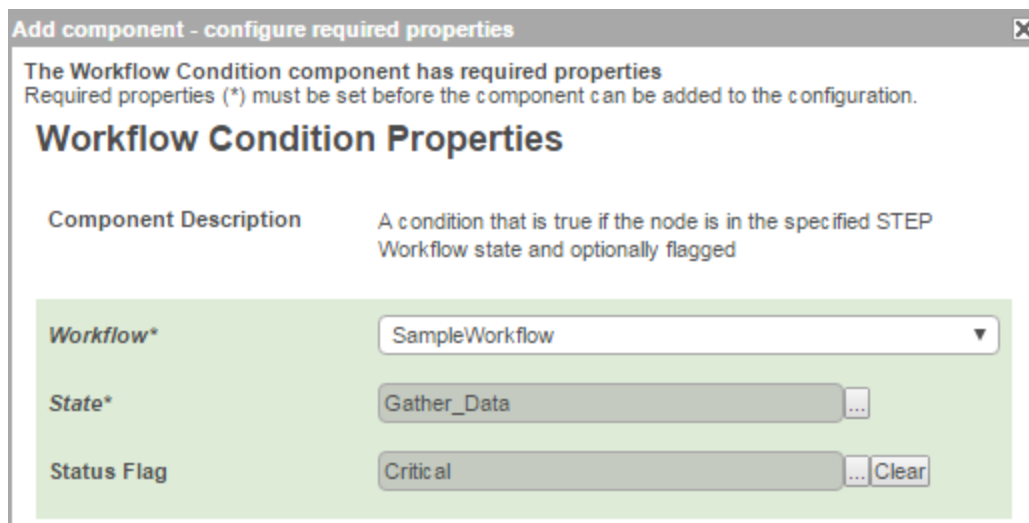
703

- {0} – Workflow ID
- {1} – State Name
- {2} – Workflow Name
- {3} – Status Flag

For more on how to configure the Status Selector Homepage Widget, see **Status Selector Homepage Widget** in the **Getting Started with Workflows in Web UI** section. For more on a Task Lists screen, see **Task List**.

Status Flags in Screen Mapping Conditions

Adding status flag values is also available for screen mapping conditions on the **Workflow Condition** and **Status Selector Condition**. This makes it possible for tasks that have a status flag of one type, such as 'Normal', to bring the user to one screen when selected, while tasks that have a status flag of a different type, such as 'Error', to bring the user to a different screen. This helps users to isolate and address high priority tasks in the appropriate way, as Web UI designers have the option to present different data and/or instructions to the end user based on task status.



Add component - configure required properties

The Workflow Condition component has required properties
Required properties (*) must be set before the component can be added to the configuration.

Workflow Condition Properties

Component Description	
A condition that is true if the node is in the specified STEP Workflow state and optionally flagged	
Workflow*	SampleWorkflow
State*	Gather_Data
Status Flag	Critical

Only status flags that are relevant to the selected workflow are available for selection in the **Status Flag** parameter.

For more on Screen Mapping, see **Mapping Workflow States in Web UI** in the **Getting Started with Workflows in Web UI**.

Monitoring Workflows Using Web UI

Workflows can be monitored in Web UI via the Workflow Profile Screen. Profiles can be viewed with the 'View STEP Workflow Profile' privilege.

A profile can contain a wealth of information about workflows, such as number of exceeded deadlines, how long the tasks have been assigned to the assignees, what is the workflow throughput this month versus the last six months, and much more. Initial configuration is done through the STEP Workflow Profile Wizard, and detailed instructions can be found in the **Monitoring Workflows** section of the **Workflows > Advanced Workflow Topics** documentation.

Workflow Profiles can be monitored via Web UI in a number of ways:

- Workflow Profile Screen
- Workflow Profile Live Data Widget
- Workflow Profile Historical Data Widget

Workflow Profile Screen

Workflows can be monitored in Web UI via the Workflow Profile screen. A profile can contain a wealth of information about workflows, such as number of exceeded deadlines, how long the tasks have been assigned to the assignees, what is the workflow throughput this month versus the last six months, and much more.

Workflow Profiles

Sample Workflow Profile

Live DataHistorical Data

	State	Workflow	Objects in state
⊟	Enrich Data (Enrich_Data)	Sample Workflow with Parallels	14
⊟	Enrich Data Complete (Enrich_Dat	Sample Workflow with Parallels	8
⊟	Gather Data (Gather_Data)	Sample Workflow with Parallels	3
⊟	Review	Sample Workflow with Parallels	0
⊟	Review Data (Review_Data)	Sample Workflow with Parallels	3
⊟	Review Images (Review_Images)	Sample Workflow with Parallels	0
⊟	Start	Sample Workflow with Parallels	72

Prerequisites

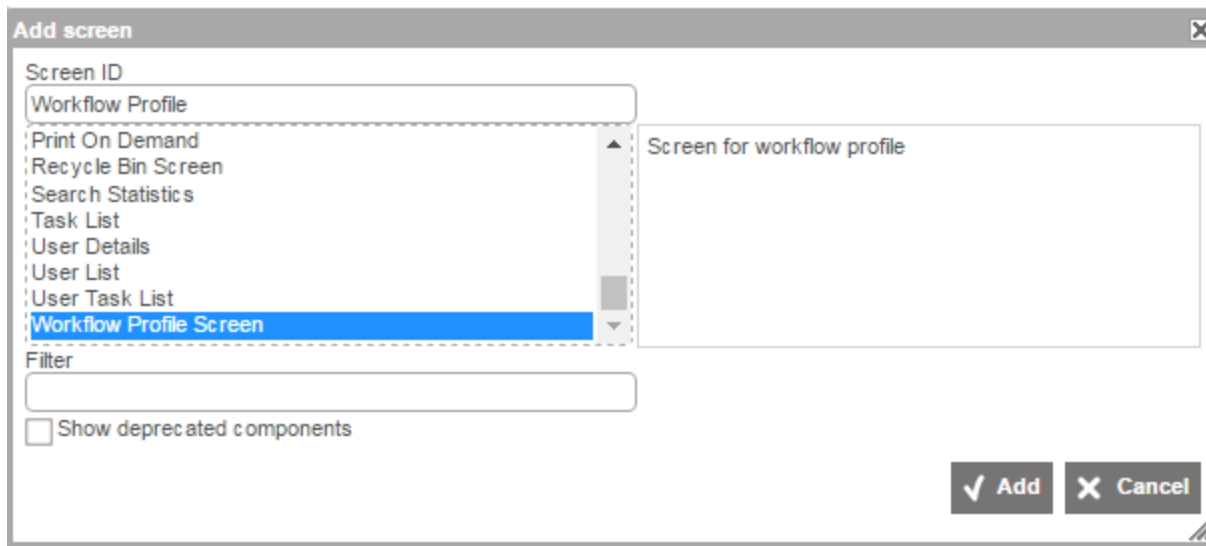
It is expected that anyone configuring the Workflow Profile Screen is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. The user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Profiles are maintained in workbench on the Step Workflow tab within the Profile sub-tab. Profiles are available to users with the 'View STEP Workflow Profile' and/or 'Maintain STEP Workflow Profile' privileges. Initial configuration is done through the STEP Workflow Profile Wizard, and detailed instructions can be found in the **Monitoring Workflows** section of the **Workflows > Advanced Workflow Topics** documentation.

Adding a New Workflow Profile Screen

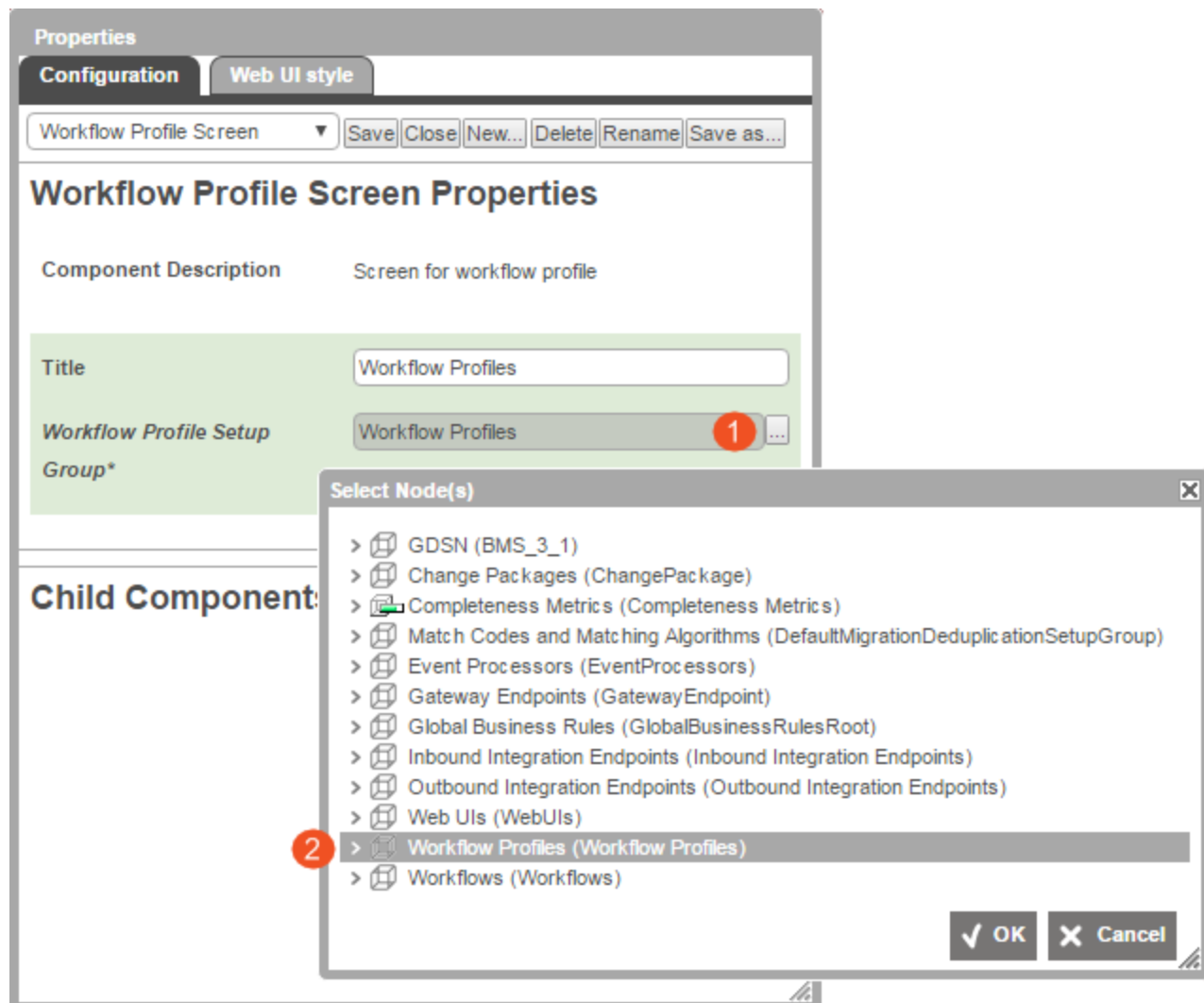
Steps for creating a new screen using the Workflow Profile screen type are below.

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



4. Click **Add**.
5. At this point, either close the designer and configure the screen at a later time or continue on with the **Workflow Profile Screen** configuration. You must do Step 1 of the next section before you can successfully save Workflow Profile Screen Properties.

Configuring Workflow Profile Screen Properties

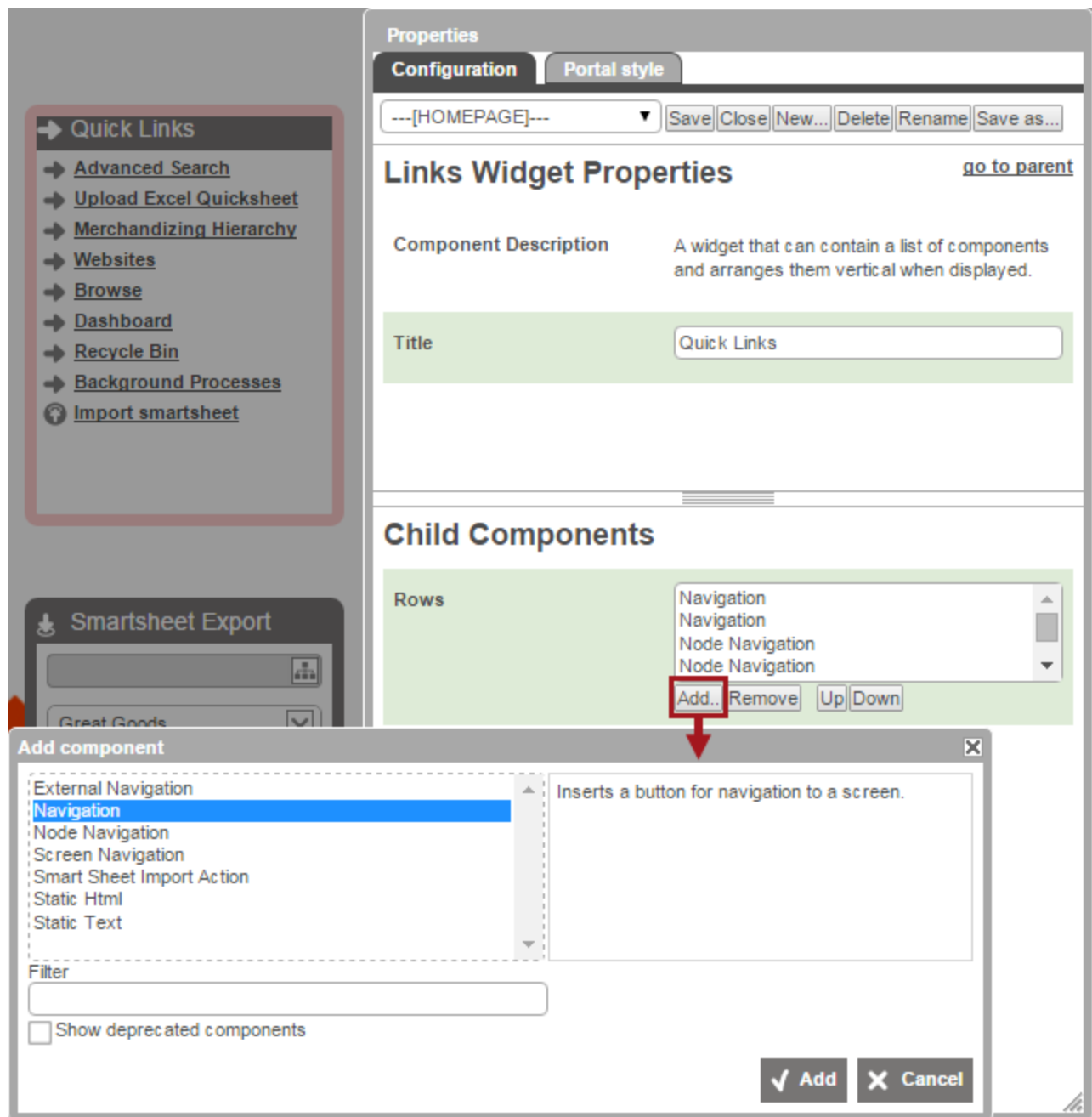


1. The **Title** parameter is blank by default. A descriptive title can be typed into the field.
2. To the right of the **Workflow Profile Setup Group**, click the ellipsis button (...).
3. Select **Workflow Profiles** from the 'Select Node(s)' dialog.
4. Save the screen properties.
5. Determine where the screen should be displayed. To display it on the homepage of the Web UI, see the next section.

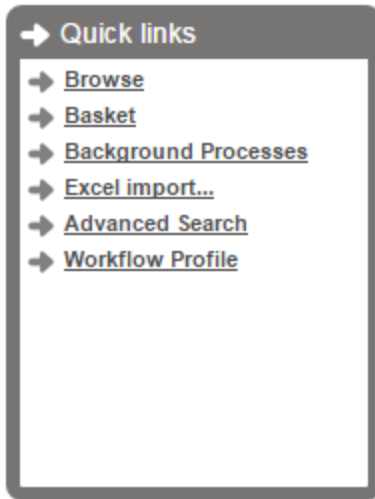
Adding the Workflow Profile Screen to the Homepage

To add an easily accessible link to the Workflow Profile screen on the homepage:

1. With ---[HOMEPAGE]--- as the screen selection in designer, click the links widget (titled Quick Links).
2. Go down to the Child Components section, and click the **Add** button.



3. Choose the Navigation component, and click **Add**.
4. On the Navigation properties screen, select your workflow profiles screen ID from the Screen dropdown (it is 'Workflow Profile' in the screenshot examples).
5. Fill in the Label field with the name that will show on the links widget, then click **Add**.
6. You can move the Links widget Child Components up and down based on your preference for how they show on the homepage.
7. Click **Save** in the Properties Configuration dialog box.
8. The Workflow Profile link will now show in the Quick links widget.



Linking the Workflow Profile Screen from a Homepage Widget

The Workflow Profiles screen can also be accessed through the Workflow Profile Historical Data and Workflow Profile Live Data homepage widgets. Once linked, clicking on the graph within the widget will bring you to the Workflow Profile screen.

To link a widget the Workflow Profile screen:

1. With ---[HOMEPAGE]--- as the screen selection in designer, click the Workflow Profile Historical Data or Profile Live Data widget.
2. In the Screen parameter, select the Workflow Profile screen from the dropdown, then click **OK**.

Properties

Configuration

Web UI style

---[HOMEPAGE]---

Save

Close

New...

Delete

Rename

Save as...

Workflow Profile Chart Dashboard Properties

[go to parent](#)

Component Description

A dashboard component for displaying STEP Workflow profile data as a bar chart.

Aspect

Items in State

Chart Type

Pie

Legend

State

Profile*

SampleWorkflowProfile

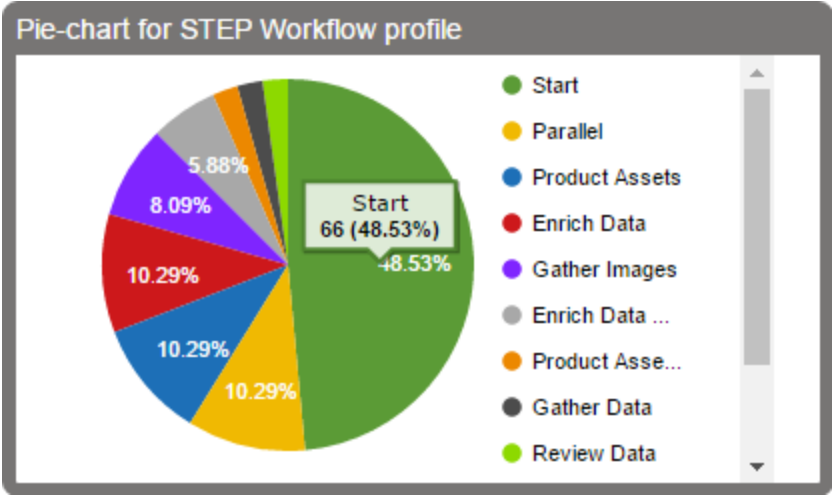
Screen

Workflow Profiles

Add

Title

3. Save the changes.



For more information on the Workflow Profile Live Data widget, see the **Workflow Profile Live Data Widget** section of the **Web User Interfaces / Web UI Getting Started** documentation.

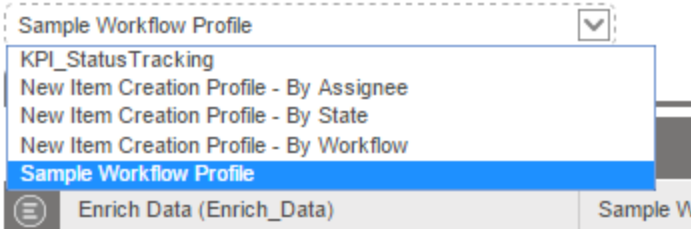
For more information on the Workflow Profile Historical Data widget, see the **Workflow Profile Historical Data Widget** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Using the Workflow Profile Web UI Interface

The Workflow Profile screen functions in a similar fashion as its workbench counterpart.

To select a Workflow Profile to view, use the dropdown above the profile table.

Workflow Profiles



The displayed profile data is split into two tabs: Live Data and Historical Data.

Live Data Tab

The Live Data tab displays workflow information as it currently exists. For the 'States' and 'Assignees' domains, the view is divided into a master table at the top and a details table at the bottom. Data on the details table is populated based on what is selected in the master table. For all domains, any columns displayed are based on the profile definition. To view individual the details of the workflow, click the Details icon on the left of the State name of the desired workflow.

Workflow Profiles

Sample Workflow Profile

Live Data
Historical Data

1	State	Workflow	Objects in state
	Enrich Data (Enrich_Data)	Sample Workflow with Parallels	14
	Enrich Data Complete (Enrich_Dat	Sample Workflow with Parallels	8
	Gather Data (Gather_Data)	Sample Workflow with Parallels	3
	Review	Sample Workflow with Parallels	0
	Review Data (Review_Data)	Sample Workflow with Parallels	3
	Review Images (Review_Images)	Sample Workflow with Parallels	0
	Start	Sample Workflow with Parallels	72

2	Object	Workflow	Assignee
	(111777)(2) (188279)	Sample Workflow with Parallels	Super Users (Super user)
	(179653) (179653)	Sample Workflow with Parallels	Super Users (Super user)
	(181939) (181939)	Sample Workflow with Parallels	Super Users (Super user)
	(181940) (181940)	Sample Workflow with Parallels	Super Users (Super user)
	(181942) (181942)	Sample Workflow with Parallels	Super Users (Super user)

1. **The Live Data master table** - Populated based on the workflow profile selection.
2. **The Live Data details table** - Populated based on the master table selection.

Historical Data Tab

Unlike the Live Data tab, the Historical Data tab is updated on-demand and displays historical information about the workflow(s).

Workflow Profiles



Sample Workflow Profile

Live Data

Historical Data

1	State	Workflow	Throughput this month
	End	Sample Workflow with Parallels	0
	Enrich Data (Enrich_Data)	Sample Workflow with Parallels	0
	Enrich Data Complete (Enrich_Data_Complete)	Sample Workflow with Parallels	0
	Gather Data (Gather_Data)	Sample Workflow with Parallels	1
	Gather Images (Gather_Images)	Sample Workflow with Parallels	1
	Parallel	Sample Workflow with Parallels	0
	Product Assets (Product_Assets)	Sample Workflow with Parallels	0
	Product Assets Complete (Product_Assets_Complete)	Sample Workflow with Parallels	0
	Review	Sample Workflow with Parallels	0
	Review Data (Review_Data)	Sample Workflow with Parallels	1
	Review Images (Review_Images)	Sample Workflow with Parallels	0

Information last updated by user USER3 (User 3) 5 days ago

2

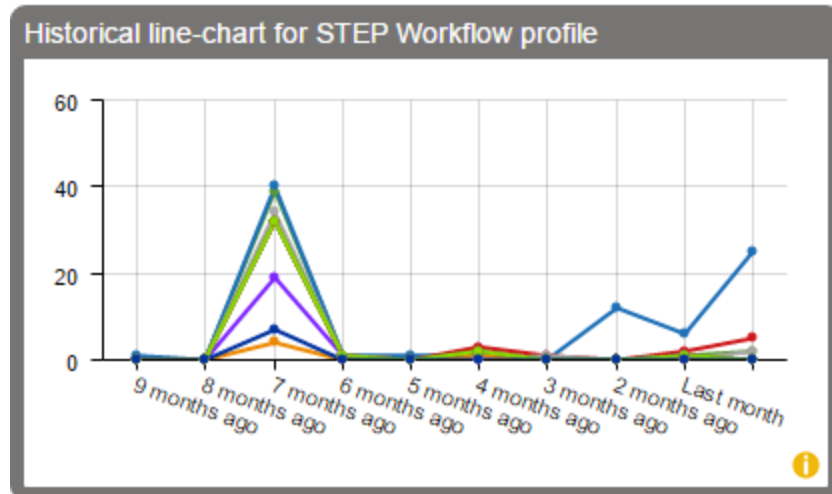
Update historical data

1. **Historical Data table** - Populated based on the workflow profile selection.
2. **Update historical data button** - Click to update the workflow profile's historical data.

For more information on configuring what data appears on this screen, see the **Monitoring Workflows** section of the **Workflows** documentation.

Workflow Profile Historical Data Widget

Historical workflow profile data can be displayed as a line graph on the Web UI homepage via the Workflow Profile Historical Data widget.



The graph data is populated based on the workflow profile specified in the configuration and must be manually updated in order to get the most up-to-date historical data. The data can be updated via the **Update historical data** button found on the Workflow Profile screen in Web UI.

For more information on Workflow Profiles, see the **Monitoring Workflows** section of the **Workflows** documentation.

Configuration

It is expected that anyone configuring the Workflow Profile Historical Data Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer.

For information on adding a widget to a homepage, please see the **Homepage Widgets** section of the documentation.

1. When configuring the Workflow Profile Historical Data Widget for the Homepage, there are six parameters to consider: Aspect, Chart Type, Legend, Profile, Screen, and Title.

Properties

Configuration

Web UI style

---[HOMEPAGE]---

Save

Close

New...

Delete

Rename

Save as...

Workflow Historical Line Dashboard Properties [go to parent](#)

Component Description

A dashboard component for displaying historical data for a STEP Workflow.

Aspect

Average time in Workflow/State

Chart Type

Line

Legend

State

Profile*

SampleWorkflowProfile

Screen

Workflow Profiles

Add

Title

i18n.StateflowProfileHistoricalLineChartWidget.DefaultTitle

- In the 'Aspect' parameter, use the dropdown to select which aspect of the workflow profile to display in the graph.

Average time in Workflow/State

<Select a value>

Throughput

Average time in Workflow/State

Number of completed tasks

Average task completion time

- In the 'Chart Type' parameter, ensure 'Line' is selected from the dropdown.
- In the 'Legend' parameter, determine how the entries in the chart should be represented via the dropdown.

State

<Select a value>

STEP Workflow

STEP Workflow + State

State

Assignee

Note: The legend can be accessed via the additional information button () on the widget.

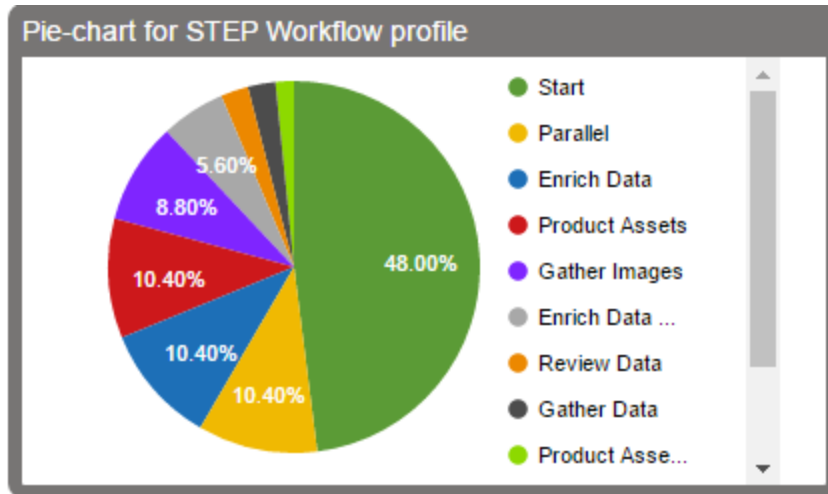
5. In the 'Profile' parameter, Click the ellipsis button (...) and select which workflow profile to display. Click **OK**.

Note: The 'Profile' parameter is mandatory.

6. In the 'Screen' parameter, select a screen to link the widget to from the dropdown. Typically, this screen should be a Workflow Profile screen.
7. In the 'Title' parameter, enter a title for the widget.

Workflow Profile Live Data Widget

Live workflow profile data can be displayed on the Web UI homepage via the Workflow Profile Live Data widget. This data can be displayed as either a pie or line graph.



The graph data is populated based on the workflow profile specified in the configuration.

For more information on Workflow Profiles, see the **Monitoring Workflows** section of the **Workflows** documentation.

Configuration

It is expected that anyone configuring the Workflow Profile Live Data Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer.

For information on adding a widget to a homepage, please see the **Homepage Widgets** section of the documentation.

1. When configuring the Workflow Profile Live Data Widget for the Homepage, there are six parameters to consider: Aspect, Chart Type, Legend, Profile, Screen, and Title.

Properties

Configuration

Web UI style

---[HOMEPAGE]---

Save

Close

New...

Delete

Rename

Save as...

Workflow Profile Chart Dashboard Properties [go to parent](#)

Component Description

A dashboard component for displaying STEP Workflow profile data as a bar chart.

Aspect

Items in State

Chart Type

Pie

Legend

State

Profile*

SampleWorkflowProfile

Screen

Workflow Profiles

Add

Title

- In the 'Aspect' parameter, use the dropdown to select which aspect of the workflow profile to display in the graph.

Items in State

<Select a value>

Average deadline exceed time

Average time in State

Average time in Workflow

Items in State

Items in STEP Workflow

Max time in State

Number of exceeded deadlines

Throughput, period 1

Average assignment time

Max assignment time

Tasks

- In the 'Chart Type' parameter, select which type of chart to use from the dropdown. Options include pie charts and bar charts.
- In the 'Legend' parameter, determine how the entries in the chart should be represented via the dropdown.



5. In the 'Profile' parameter, Click the ellipsis button (...) and select which workflow profile to display. Click **OK**.

Note: The 'Profile' parameter is mandatory.

6. In the 'Screen' parameter, select a screen to link the widget to from the dropdown. Typically, this screen should be a Workflow Profile screen.
7. In the 'Title' parameter, enter a title for the widget.

Workflow Mandatory Attributes in Web UI

It is often necessary that attributes or whole groups of attributes are mandatory for a state or transition in a STEP Workflow. This means that the object can only pass further in the workflow if the indicated attributes have values. To facilitate this, the relevant mandatory attribute groups and/or attributes can be indicated directly in the STEP Workflow Designer, with mandatory indications being enforced in both the workbench and Web UI.

This simplifies the configuration within the workflow itself, enabling business users to steer the Web UI and Smartsheets behavior for end-users without requiring use of the Web UI Designer.

For more information on how to setup these attributes in a workflow, see **Mandatory Attributes in Workflows** in the **STEP Workflows** documentation.

For information about how conditionally mandatory attributes are handled in Web UI, see the **Conditionally Mandatory Workflow Attributes** section of the **STEP Workflows** documentation.

Handling Workflow State and Transition Mandatory Attributes in Web UI

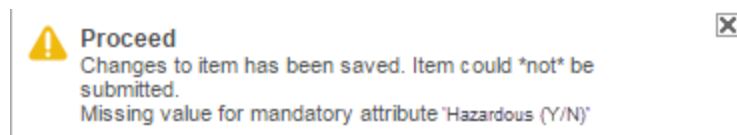
Web UI screens must be configured to include all mandatory attributes. If not, end users will receive errors that they cannot correct. Mandatory attributes set on a Web UI screen are only honored if the 'Submit Action' has 'Enforced Validity' checked within the component properties.

State mandatory attributes are checked prior to transition mandatory attributes. In the case that both are used, end users will first have to correct state mandatory attributes before transition mandatory attribute errors are displayed.

Note: References listed in attribute groups are not supported for use in workflow state and transition mandatory attributes (e.g. selecting an attribute group that includes a reference will not cause that reference to be considered mandatory).

Web UI support of mandatory attributes requires the use of Value, ValueGroup, ValueGroupHeader, ValueHeader or ValueLinkHeader portal components

Enforcement of the mandatory attributes occurs in the Web UI, with errors being displayed to the user if an attempt to transition the attribute is made without all mandatory attributes being populated.



Any mandatory attributes are indicated in the Web UI with an asterisk. Those that are mandatory on transitions, rather than states, do not show an asterisk until the user has attempted to submit the object to the next state in the workflow.

Additionally, when using tab pages within a Node Details screen type, if there is any kind of error that impacts the data displayed on a tab (a validation error or missing mandatory value), then a yellow line is displayed directly under the tab name. The underline serves as an easy notification to users that attention is required on a particular tab page or on multiple tab pages. No configuration is needed to turn on this feature.

Important: It is important to consider how mandatory attributes interact with conditional attributes.

Working with Data Containers in Web UI

When working with entity objects in Web UI, there are components you can use to work with and maintain data containers. This topic provides a summary of components available. Users are encouraged to incorporate these components into their Web UI in a way that best fits their needs.

Data Container / Attribute Maintenance

Using the **Data Container Editor** component, users can edit attribute values for data container attributes as well as add and delete data containers on an entity object.

The following examples use the Data Container Editor set up as a Node Editor child component, set up to display on a Tab Page within a Node Details screen. For information regarding Data Container Editor configuration in Web UI, see the **Data Container Editor** topic in the **Web User Interfaces** documentation.

Node Details

Data Containers

Main Address

City

Højbjerg

Country

Denmark

Country ISO Code

DK

State

Street

Axel Kiers Vej 11

Zip

8270

Shipping Address

	City	Country		State	Street	Zip
☐ ShippingAddre...	Toronto	Canada	CA	ON	116 Spadina Ave	M5V 2K6
☐ ShippingAddre...	Paris	France	FR	Île-de-France	43 Boulevard Haus...	75009
☐ ShippingAddre...	Kennesaw	United States	US	GA	3550 George Busb...	30144

To work with data containers in the Data Container Editor:

- Add data containers using the green + button and remove data containers with the red x button. The buttons will only be applicable if the action is valid.

Using the example in the previous screenshot, the Main Address data container type is set up to only allow one data container of its type, while Shipping Address is set up to allow multiple data containers. The green button is active for Shipping Address, but it is not for Main Address. Similarly, because Main Address is a single data container, the red x is active. To delete a Shipping Address, a checkbox selection must be made and the red x will become available.

- Users can choose between 'Multi edit view' and 'Single edit view' when viewing a data container type with multiple data containers. The icon will have a gray background when the data containers are displayed using that view. Below is an example of a data container viewed in single edit view. Within this view, the data container can be deleted, new data containers can be added, attribute values can be edited, and the view can be reset to multi edit view. Also, there are buttons below the attribute values that allow you to go navigate through all data containers within a particular data container type.

Shipping Address    

City	Toronto
Country	Canada
Country ISO Code	CA
State	ON
Street	116 Spadina Ave
Zip	M5V 2K6

  1 of 3  

- All changes to data container attribute values as well as creation / deletion of data containers, on an entity, is saved via the Node Details Save, Approve, or Submit action buttons. If the desired buttons are not displayed on the screen, users need to work with their STEP admin to have them added.

It is important to consider the following:

- Rich Text Editor is not supported for the editing of data container attribute values.
- The Data Container Editor component cannot be used on the Initiate Item screen.
- When making use of multiple data containers per Data Container Type (Allow multiple data containers = Yes) in the Data Container Editor, then there is no support for Date Range in the sorting and filtering functionality of the table view for multi-valued data containers.

Additional Web UI Functionality

There are other areas of Web UI in which users can view data containers and their associated attributes as read-only. It is expected that working with entities that have data containers is like working with any other entity, keeping in mind the functionality list and the limitations outlined in the **Data Containers** introduction in the **System Setup / Super User** documentation.

Depending on the screen / component you are working with, there are Data Container components that can be used when you look at entities in various situations. Additional functionality may be described in greater detail in relevant topics and the bullets below do not represent an all-inclusive list nor do they show end-user functionality.

- Data Container Value Header and Data Container Value Group Header (to be used within a Node List in Multi Edit or Table display modes; read only)

The screenshot shows a dialog box titled "Add Component". On the left, there is a list of components: CIC Status Header, Child Count Header, Data Container Attribute Value Group Header, **Data Container Attribute Value Header** (highlighted in blue), Deduplication Header, Description header, Finished Date Header, and ID Header. Below the list is a "Filter" input field and a checkbox labeled "Show deprecated components". On the right, a text box contains the description: "The Data Container Attribute Value Header can be configured to display data container attributes values for a selected object. Used in combination with a Node List." At the bottom right, there are two buttons: "Add" (with a checkmark icon) and "Cancel" (with an X icon).

The screenshot shows a dialog box titled "Add Component". On the left, there is a list of components: CIC Status Header, Child Count Header, **Data Container Attribute Value Group Header** (highlighted in blue), Data Container Attribute Value Header, Deduplication Header, Description header, Finished Date Header, and ID Header. Below the list is a "Filter" input field and a checkbox labeled "Show deprecated components". On the right, a text box contains the description: "The Data Container Attribute Value Group Header can be configured to display data container group of attributes values valued for a selection of objects. Attributes added to a selected Attribute Group will automatically be included and displayed in the Node List. Used in combination with a Node List." At the bottom right, there are two buttons: "Add" (with a checkmark icon) and "Cancel" (with an X icon).

- Data Container Attribute List Header and Data Container Attribute Group List Header (to be used within a Dialog List Screen used to display a list of results for template selection and finding similar objects using Find Similar / Find Existing actions).

Attribute Group List Header

Attribute List Header

Data Container Attribute Group List Header

Data Container Attribute List Header

Id List Header

Referenced Attribute Group List Header

Referenced Attribute List Header

Title List Header

List header for showing an attribute on a data container type for a selection of objects.

Filter

☐ Show deprecated components

✓ Add

✕ Cancel

Attribute Group List Header

Attribute List Header

Data Container Attribute Group List Header

Data Container Attribute List Header

Id List Header

Referenced Attribute Group List Header

Referenced Attribute List Header

Title List Header

List header for showing group of attributes on a data container type for a selection of objects.

Filter

☐ Show deprecated components

✓ Add

✕ Cancel

See the **Web User Interfaces** documentation for more information regarding how to configure and use Web UI screens and components.

Data Container Editor

To maintain data container attribute values and to add / remove data containers using Web UI, the Data Container Editor component can be used. For details regarding how the editor is used, see the **Working with Data Containers in Web UI** topic.

Prerequisites

It is expected that anyone configuring the Data Container Editor component is familiar with the Web UI designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

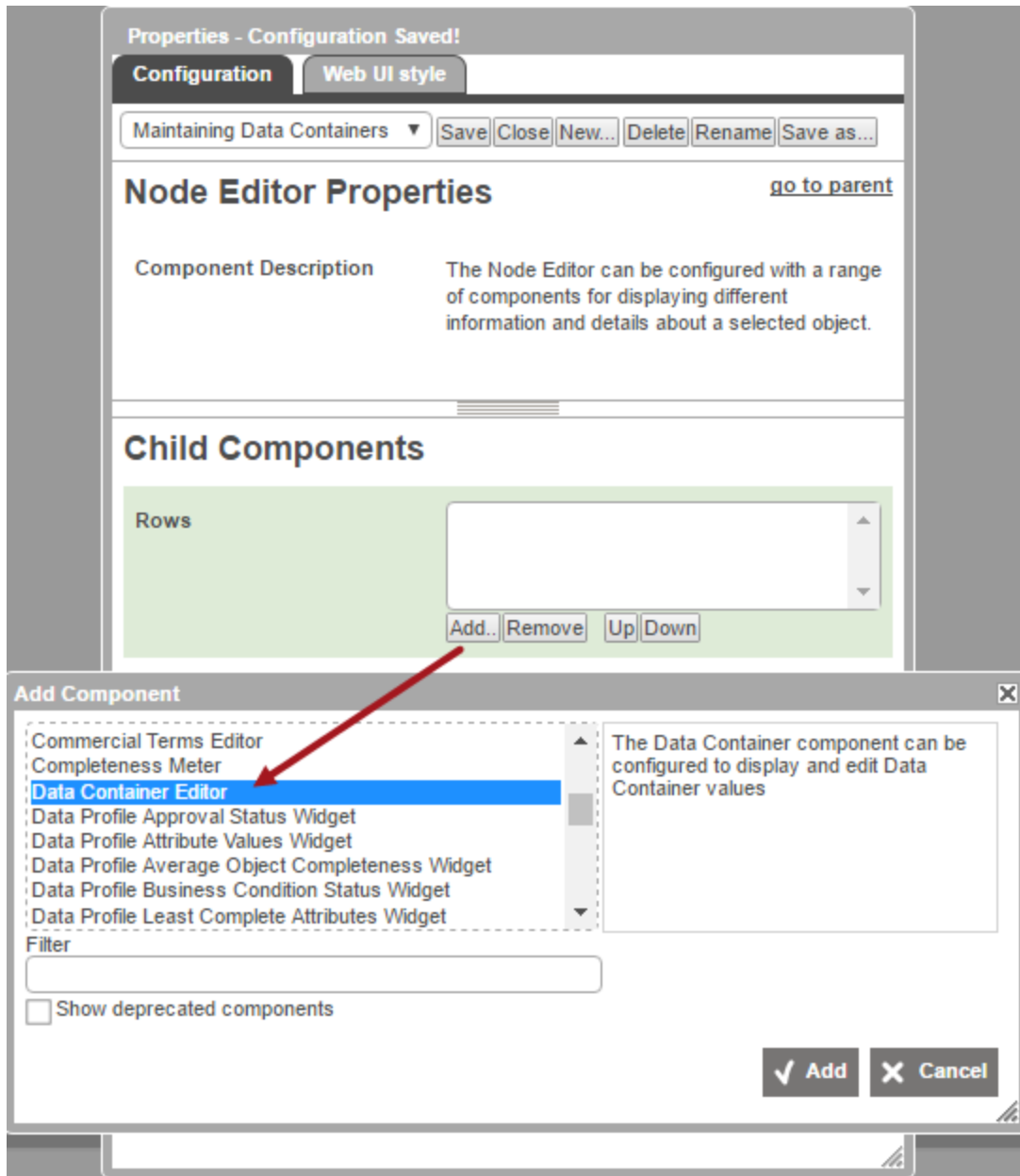
Also, before adding the Data Container Editor component, it is expected that Data Containers and their associated attributes are already set up. For details, see **Setting up Data Containers in Workbench** in the **System Setup / Super User** documentation.

Adding a Data Container Editor

The Data Container Editor component must be created on a Node Details screen type, and more specifically, on a Node Editor child component. The first step in configuring this component is to select an existing Node Details screen to add the component to or to create a new screen. The examples in this topic show a Node Editor alone (as a tab page) on a Node Details screen; however, a Node Editor that has other attribute values and information may be a better placement for the end users.

Additionally, the Save action button needs to be added to the Node Details screen so that users may save any changes they make to the data containers and attribute values.

1. Once set up, navigate to the applicable Node Editor.
2. Enter design mode to access Node Editor Properties.
3. In Child Components > Rows, click Add.
4. Select **Data Container Editor** from the Add Component dialog and click Add.



Configuring a Data Container Editor

1. Back in Node Editor Properties > Child Components > Rows, double click on the Data Container Editor just added (or any that you want to edit).

2. In Data Container Editor Properties, selecting the **Data Container Type** is mandatory. Click the ellipsis button (...) next to the value field and make a selection from the Select Node(s) dialog. Click OK.
3. The optional **Attribute Group** parameter can be used in a few different ways.
 - If you want to limit the number of attributes displayed on screen, make an Attribute Group selection. The data container attributes within that group will be what is shown to the end user.
 - If data container attributes should be displayed in Web UI in a certain order (whether or not you are limiting the attributes to display), then the attributes can be manually sorted within their attribute group and that attribute group should be designated via the Attribute Group selection. Attributes will then display in the order they are within the attribute group.
 - If no selection is made, then all valid attributes associated with the data container will be displayed, and they will be displayed in alphabetical order.
4. Enter a Label, if desired. If nothing is entered, then the data container's name will display by default.
5. Under Advanced, the Display Value History is enabled by default. Uncheck if the attribute value history should not be displayed. See **Attribute Value History** for more details.

As an example, here are two Data Containers Editor Properties, configured.

Properties

Configuration

Web UI style

Address Detail with Data Coi ▾

Save

Close

New...

Delete

Rename

Save as...

Data Container Editor Properties

go to parent

Component Description

The Data Container component can be configured to display and edit Data Container values

Attribute Group

... Clear

Data Container Type*

MainAddress

...

Label

Main Address

▼ Advanced

Display Value History

☒

Properties

Configuration

Web UI style

Address Detail with Data Coi ▾

Save

Close

New...

Delete

Rename

Save as...

Data Container Editor Properties

go to parent

Component Description

The Data Container component can be configured to display and edit Data Container values

Attribute Group

... Clear

Data Container Type*

ShippingAddress

...

Label

Shipping Address

► Advanced

Here is the resulting screen and how it looks to the end user:

Node Details

Data Containers

Main Address

City

Højbjerg

Country

Denmark

Country ISO Code

DK

State

Street

Axel Kiers Vej 11

Zip

8270

Shipping Address

	City	Country		State	Street	Zip
ShippingAddre...	Toronto	Canada	CA	ON	116 Spadina Ave	M5V 2K6
ShippingAddre...	Paris	France	FR	Île-de-France	43 Boulevard Haus...	75009
ShippingAddre...	Kennesaw	United States	US	GA	3550 George Busb...	30144

For information on how to use the Data Container Editor in Web UI, see the **Working with Data Containers in Web UI** topic in the **Web User Interfaces** documentation.