SUPPLIER WEB UI
SETUP GUIDE

StiboSystems

STEP Trailblazer 8.2

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Introduction

This super user guide explains how to set up a STEP Supplier Web UI.

Prerequisites

A STEP Supplier Web UI configuration and a matching workflow must exist on the system.

Setup of STEP Supplier Web UI

Prior to STEP Trailblazer 8.2, users could choose between a number of Web UI templates when creating a Web UI. While these templates are now legacy functionality and not applicable to 8.2+ systems, the information in the sample Web UI topics may benefit current users.

See the **Web User Interfaces** documentation for more information on current Web UI functionality, which may not reflected in this topic / section.

Supplier Web UI Principles

The STEP Supplier Web UI differs from other STEP portals by allowing external data suppliers to create and maintain data. Each supplier can only see data that is created / maintained by them. This solution requires three main things to be setup on the system.

1. A Supplier User Group for each supplier.

The individual Supplier Users must be created below a Supplier User Group. When the Supplier User Group is created, the supplier's classification structure is automatically created.

2. A Classification structure for each supplier.

This will be created automatically when the Supplier User Group is created. The classifications will be used to collect the supplier's items, assets and batches. Only the supplier's users can see these objects. The Supplier Classification structure looks like this:
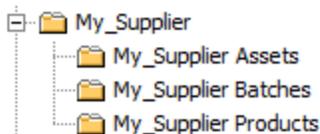

3. A Product to Classification link type.

This link type is used to link the supplier's items into the supplier's classification structure (i.e. to the Products folder and the Batch folders).

How it works

When a supplier user creates a new item through the STEP Supplier Portal, the item will be created in the blue Product Hierarchy and then linked to the supplier's classification structure:
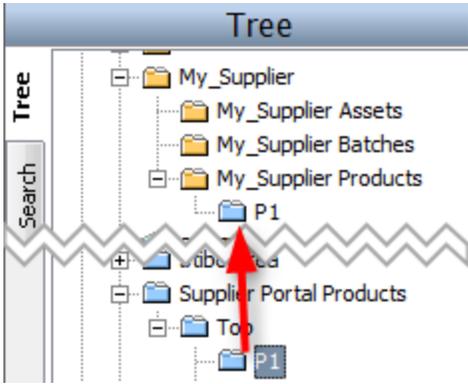
When a supplier user uploads a new asset through the STEP Supplier Portal , the asset will be placed in the supplier's classification structure (the Asset folder):
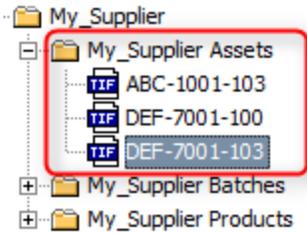
When a supplier user creates a new batch through the STEP Supplier Portal, a classification folder will be created, representing the new batch. These batch folders will be placed below the supplier's Batches folder:

When a supplier user adds an item to a batch through the STEP Supplier Portal, the item will be linked to the corresponding batch classification folder:

Disabling Batches Folder (Optional)

If the user chooses not to use the Batches folder they must disable it manually.

1. In **System Setup**, click the **Users & Groups** node.
2. Navigate to the **Portal Settings** area.

3. Clear the values for the 'Batches classification object type' and 'Batch classification object type' fields.

Note: Supplier nodes do not require the Batches folder so long as they have both Asset and Product child folders.


Setting the Classification Object Types Used to Auto-generate the Supplier Classification Structure

In order to have the supplier classification structure automatically created, a number of classification object types must be provided:

1. In [System Setup] click the **Users & Groups** node.

2. Scroll down to the **Portal Settings** area.

3. The object types that must be provided are these:
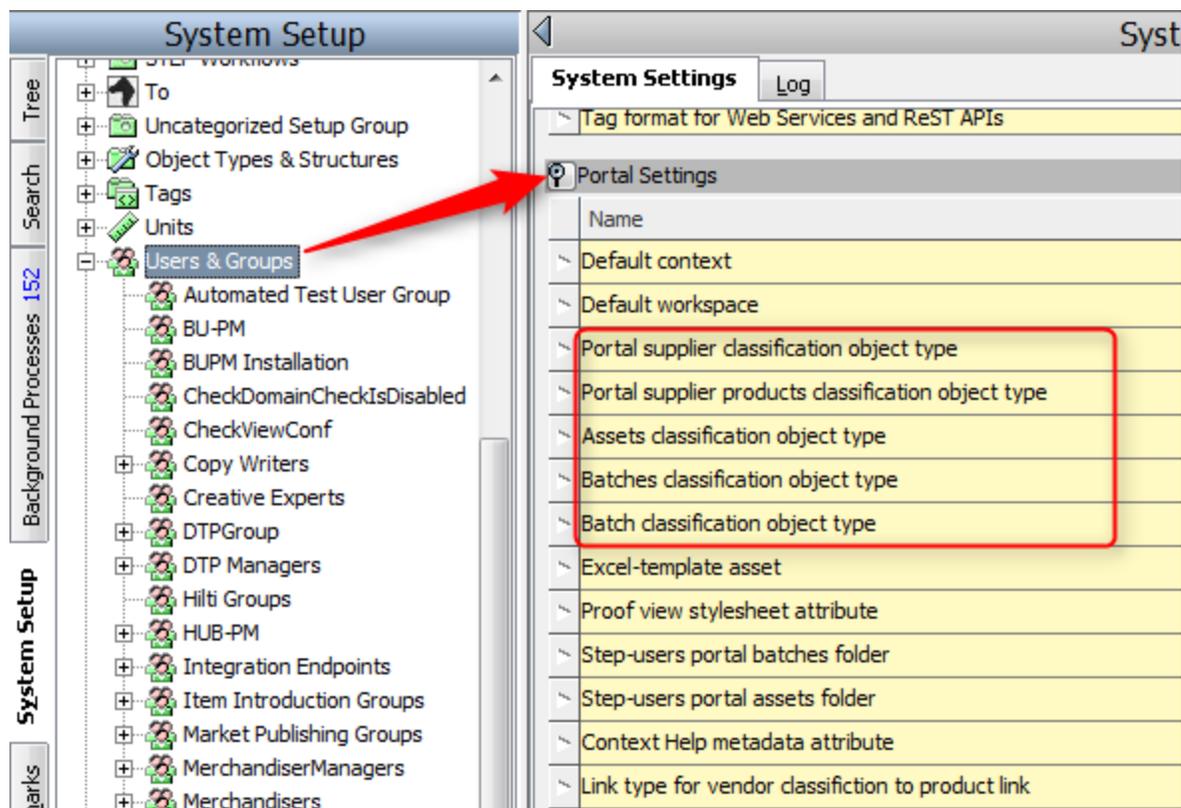
The standard classification object types used for this are these:
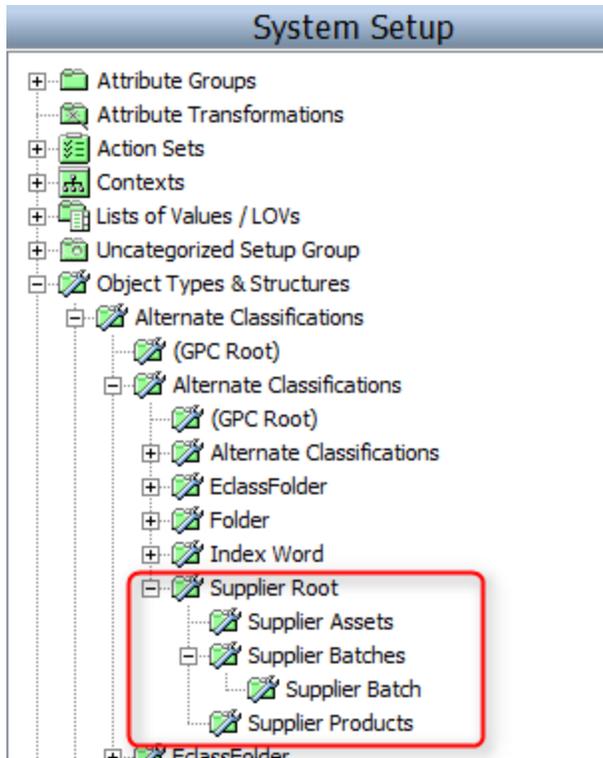
Setting the Product to Classification Link Type

Products created through the STEP Supplier Portal automatically get linked to the suppliers classification structure. This is done by using a Product to Classification link type, thus this link type needs to be set.

1. In [System Setup] click the **Users & Groups** node.
2. Scroll down to the **Portal Settings** area.
3. Enter the ID of the link type here:
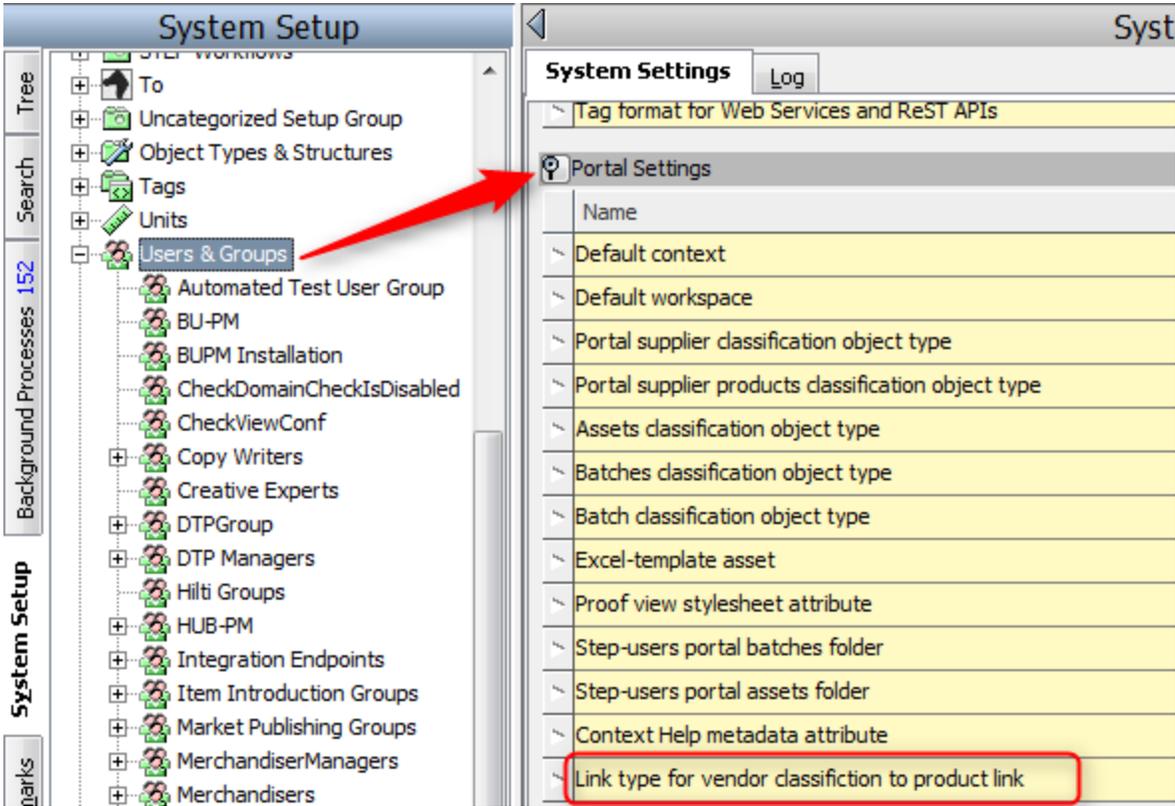
All-View Across Multiple Suppliers

If a supplier user is a member of more than one supplier group and wants to have a view across these when looking at tasks, the setting "Enable all-view for users that are a member of multiple suppliers" should be set to (Y)es:

Related Components

After having changed this setting in workbench to Y(es) some changes must be made to the portal setup to take advantage of this all-view across multiple suppliers functionality. The following components are the ones which can be used in the portal in order to do so:

- SupplierField
- SupplierProductAssets
- CreateSupplierProductAction (available in the blue hierarchy only)
- CreateSupplierProductToolbarAction (available in the blue hierarchy only)
- CreateSupplierAssetToolbarAction (available in the blue hierarchy only)

SupplierField:

To be able to create products for a specific supplier group, a new component called SupplierField must be added to the initiate screen. With this component, all accessible supplier groups can be chosen among when creating a product. Else, a new product will be added to the first in a list of available supplier groups:

SupplierProductAssets

To be able to upload an asset to a specific supplier group or to all accessible supplier groups, the SupplierProductAssets action should be used to support all-view across multiple suppliers functionality.


On the component the reference type is set for the component. The component gets its name from the reference type, or you can fill out a label field to customize it.

CreateSupplierProductAction (available in the blue hierarchy only)

To be able to create new products for a specific supplier, standing in the blue hierarchy, the CreateProductAction must be replaced by the CreateSupplierProductAction to support all-view across multiple suppliers functionality.
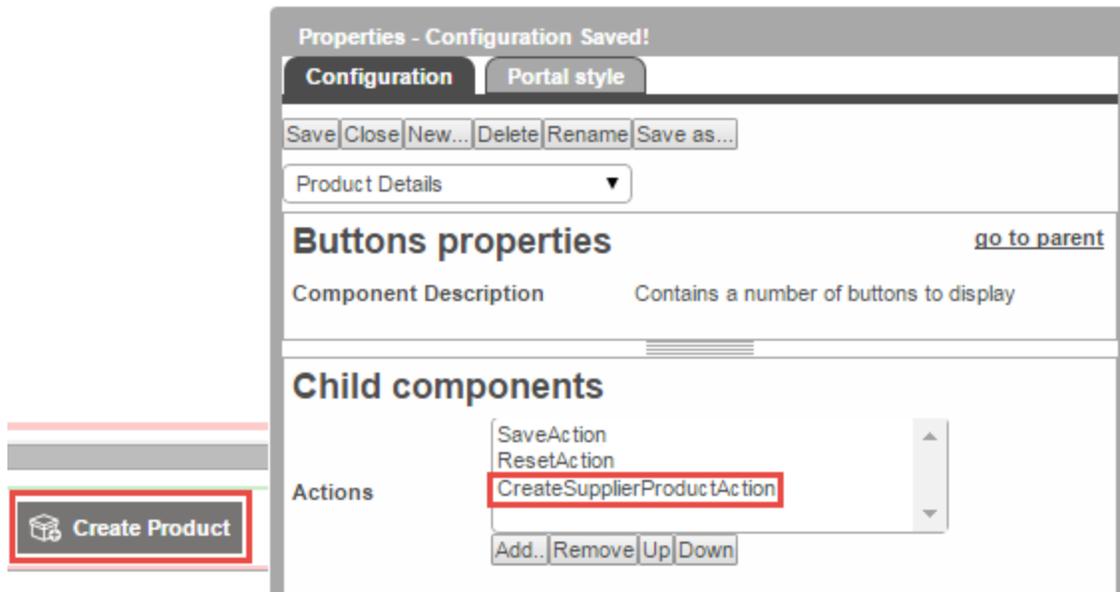
CreateSupplierProductToolbarAction (available in the blue hierarchy only)

With this toolbar action, applied products can be created in the blue hierarchy. It is not available in the yellow hierarchy.

On this component there is no configuration needed when adding it to a screen.

CreateSupplierAssetToolbarAction (available in the blue hierarchy only)

With this toolbar action, applied assets can be applied to products in the blue hierarchy. It is not available in the yellow hierarchy.

This component is only available on the multi-reference editor from which it picks up valid reference types.

On this component there is no configuration needed when adding it to a screen.

Creating a Supplier User Group

Once the classification object types are set, a Supplier User group can be created. A Supplier User Group is a special user group where a supplier can have each supplier user created below. Each supplier must have their own Supplier User group.
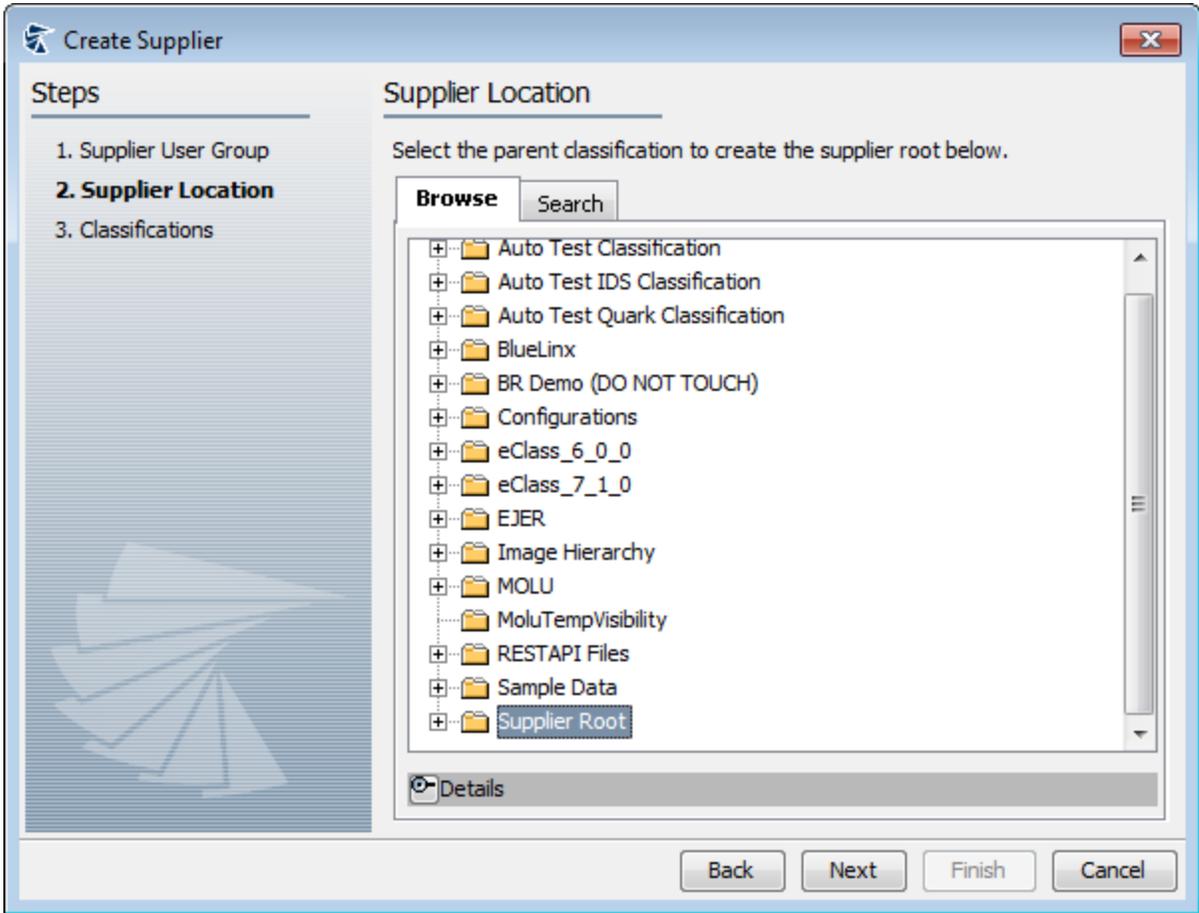
1. In [System Setup] right click the **Users & Groups** node.

2. Select **New Supplier**.

A **Create Supplier** wizard appears.

3. In step 1, enter the ID and the name of the supplier
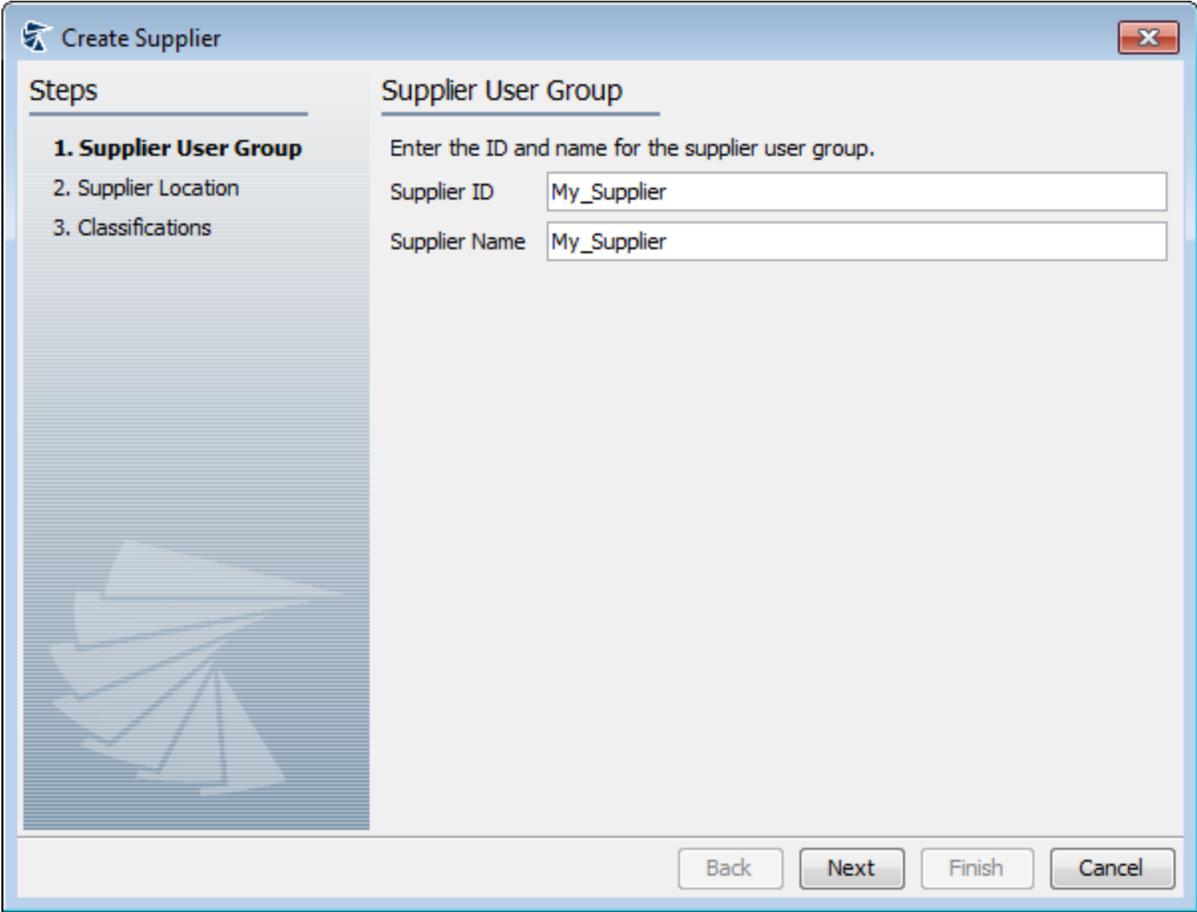
4. In step 2, pick the position in the Classification hierarchy where the Suppliers classification structure should be created.

5. In step 3, enter the ID and Name of the classification folders that forms the supplier's classification structure.

6. Click the **Finish** button.

The Supplier User Group is now created and the supplier's classification structure is also created. Users can be added to the supplier user group.

Note: You must provide privileges the supplier user group once it is created.

Setting Up Smartsheets

Smartsheets are an excel format that can be used to initiate and maintain products via the Supplier Web UI. For more information, see the **Excel Smartsheet Format** section of the **Smartsheets** documentation.