SUPPLIER WEB UI

USER GUIDE

STEP Trailblazer 8.2

Table of Contents

Introduction

About This Guide

The guide contains information about how to use the STEP Supplier Web UI.

Accessing the Web UI

The STEP Supplier Web UI can be accessed via an internet browser.

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.

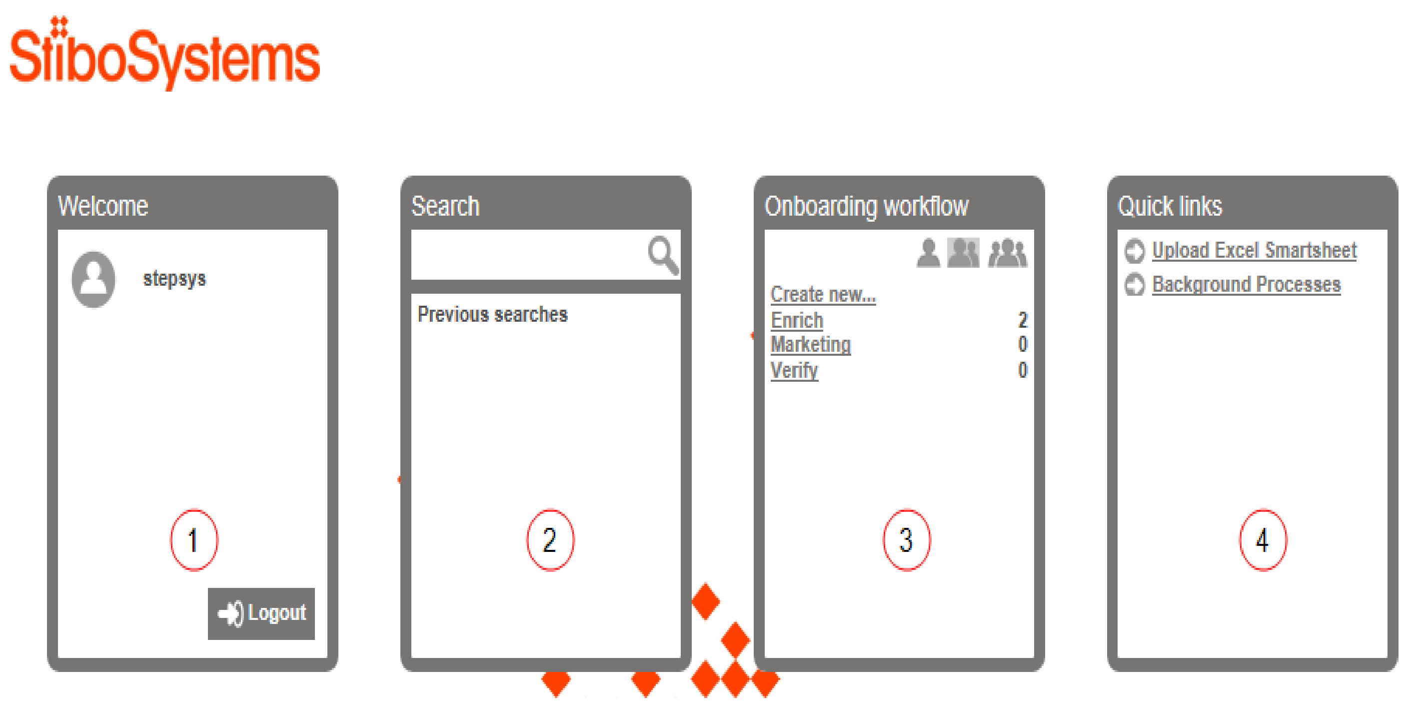
See the **Web User Interfaces** documentation for more information on current Web UI functionality, which may not reflected in this topic / section.

Introduction

The purpose of the STEP Supplier Web UI is to enable users to initiate and maintain products through a STEP Workflow. The users could be external supplier users or internal users. Each state has a dedicated screen with selected fields that can be maintained.

User interface

The home page screen has 4 widgets:

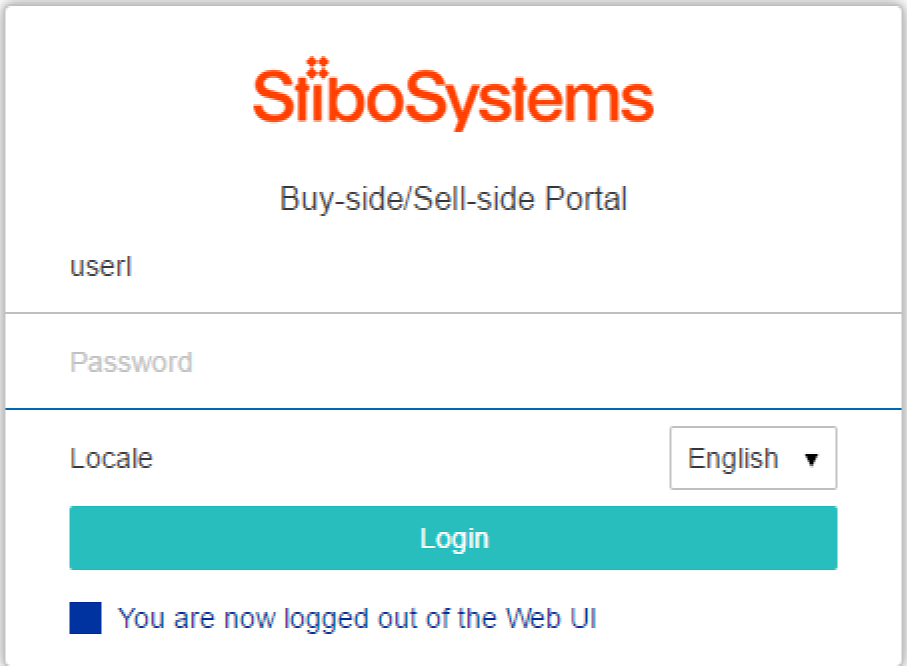


1. Welcome: Information about what user is logged into the Web UI plus a button to log out.
2. Search: Finds nodes with an ID or name matching the search phrase.
3. Onboarding workflow: Shows task count for a STEP Workflow, which is automatically generated, when creating a user Web UI.

4. Quick links: This provides quick navigation to Excel import that navigates to an import screen to see info about asset download / download background processes.

Logging in

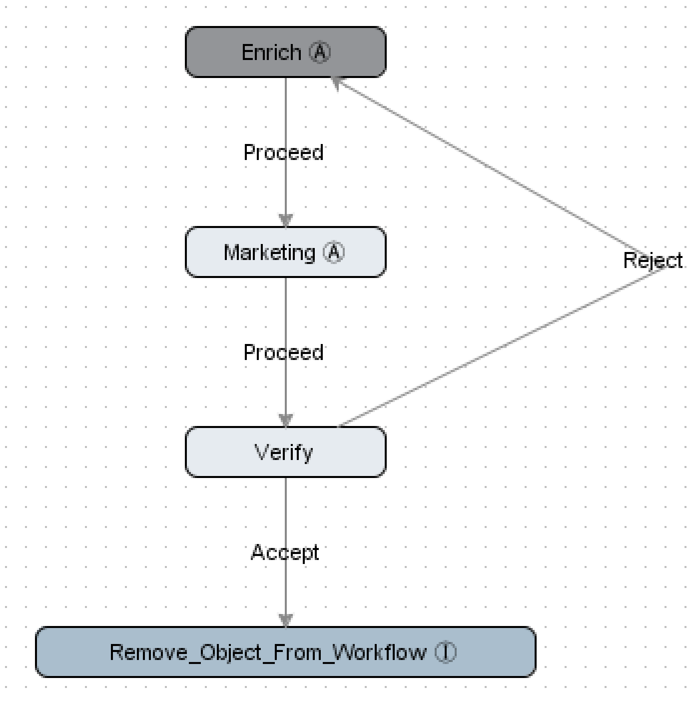
To log in to the STEP User Portal you must enter a valid username and password. Then click the Login button.



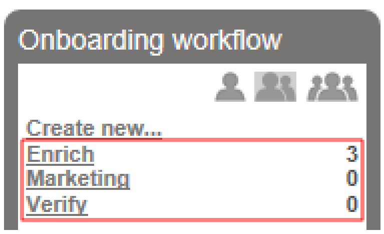
You will now be logged in to the STEP Supplier Portal and be able to view, edit, and save product information based on the privileges applied to you by your administrator.

STEP Workflow and states

The Supplier Portal is based on a STEP Workflow that lets the users select products in a particular state, maintain products and subsequently submit products to another state. The example STEP Workflow provided per default is:



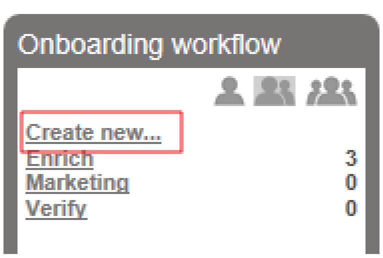
The State Selector widget on the home page screen shows the number of products for each state.



The idea is that a supplier user initiates a product, another (possibly internal) user enriches the product with additional information, a third user (internal marketing employee) updates marketing relevant information. The final state is "Remove_Object_From_Workflow" meaning that the product has successfully been transitioned and maintained through the STEP Workflow using the STEP Supplier Portal.

Each state can be restricted to a specific User Group meaning that only this User Group can view and maintain products in that state.

Initiating Products



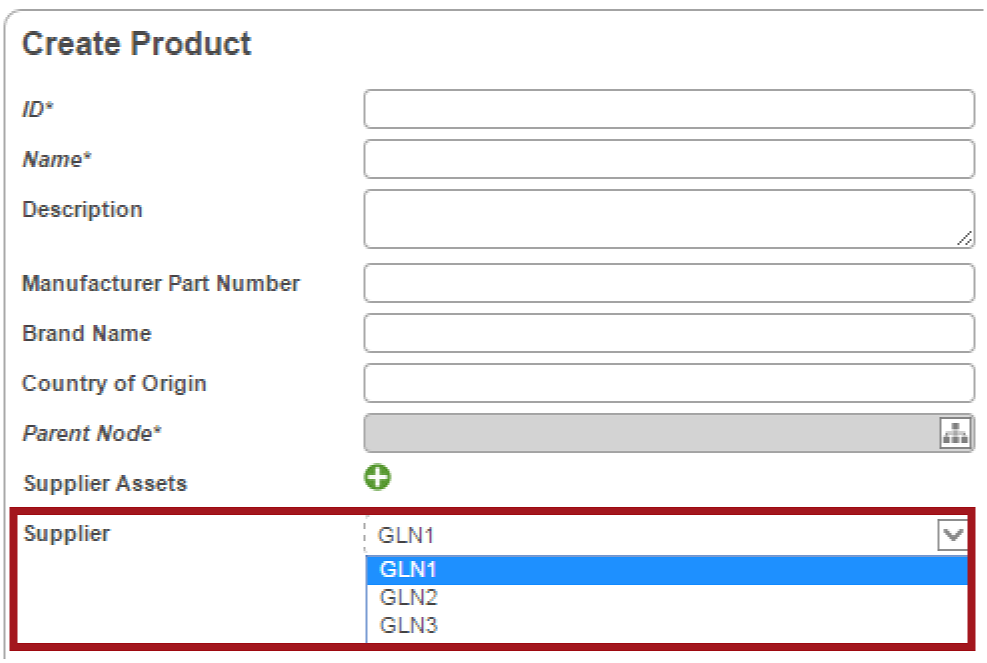
To initiate a new product, click "Create new..." in the state selector box. This will give you an edit screen where you must supply some basic information such as ID, Name and placement of the product. Optionally you can also enter some descriptive text and/or add the product to a batch.

Save

Clicking the Save button saves the product in the data base and the product is submitted into the first state in the STEP Workflow.

All-View Across Multiple Suppliers

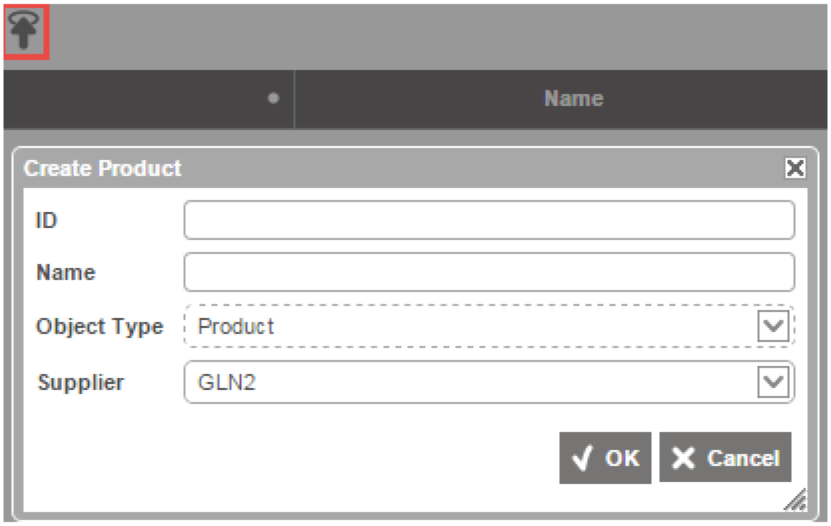
If a supplier user is a member to more than one supplier group and the setting "Enable all-view for users that are a member of multiple suppliers" is set to Y(es) the supplier user will have to choose to which supplier group the created product should be created to. See the **Setup of STEP Supplier Web UI** documentation.



When adding images the supplier user will have to choose to which supplier group the image should be added to or if the asset should be added to all accessible supplier groups.

Note: If a supplier user witch access to more than one supplier adds an asset to a product only supplier users with access to the same product AND access to the same asset also will be able to the asset on the product.

It is also possible for a supplier user to create products when standing in the blue hierarchy using CreateSupplierProductToolbarAction:



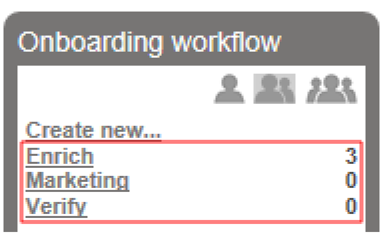
In the object type selector it is possible to choose among all valid object types for where in the blue hierarchy the user is invoking this toolbar action.

And supplier users having access to more than supplier group will have to choose to which supplier group it should be made available.

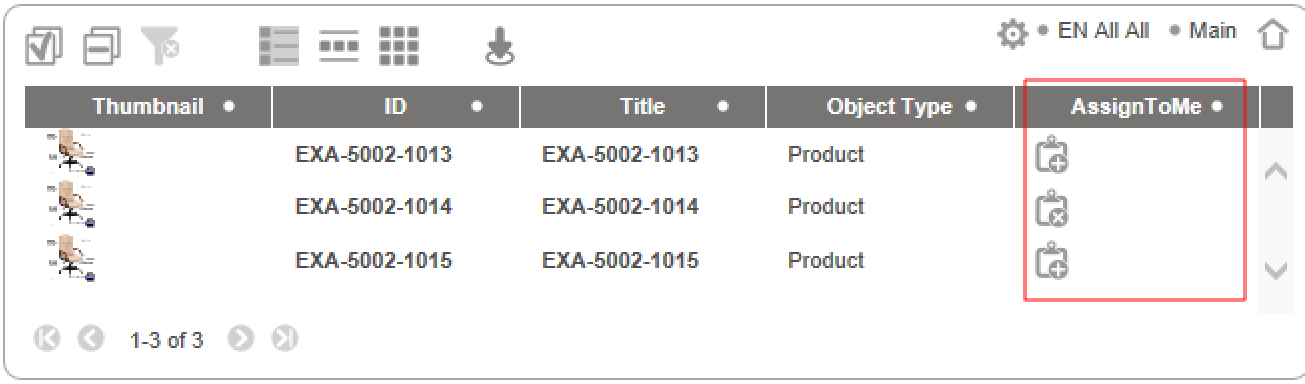
Likewise it is possible to add assets to a supplier group when standing in the blue hierarchy with the CreateSupplierAssetToolbarAction component.

Maintaining products

To maintain products within the STEP Supplier Portal you must first select a state in the State selector box



This will give you the list of products currently in the selected state.

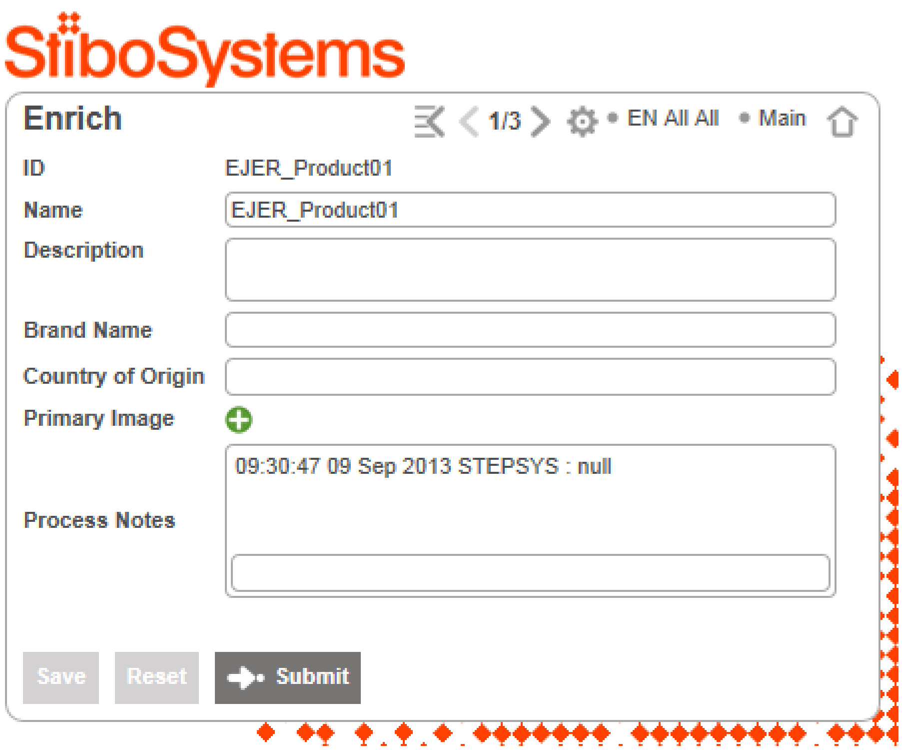


Notice the column "AssignToMe". Each task has an icon that allows the user to assign the task to himself ( ) or assign it back to the previous task owner or default group ( ), if the icon is clicked.

Click the ID of one of the products to get the maintenance screen for that state.

Example of a maintenance screen

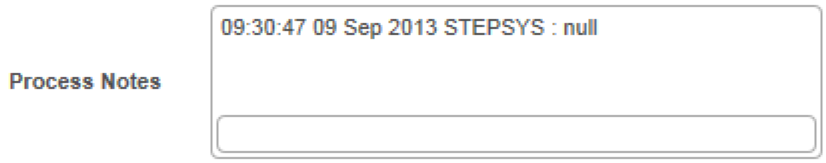
Maintenance screens are highly configurable and are explicitly designed for a specific state. The following example of a maintenance screen for the Enrich state illustrates the idea of the maintenance screens.



Here you can change the name of the product and optionally add a Process Note

Process Notes

A Process note is a text that you can enter to describe or explain something that you find relevant for the current product in the current state. The Process note can be viewed in the following states in the STEP Workflow and can thus be used to give a message to users that will maintain the product in following state.



1. Enter some text in the text field.
2. Click the Save button
3. The text entered will now be displayed in the message area tagged with date, time and user.

You can also click the Save and Submit button to save the Process Note.

Primary Image

One or more images can be uploaded and/or referenced to a product.

To reference an image from your hard drive:

1. Click the green plus icon. A pop up box with two choices appear.
2. Select 'Upload and Insert Image(s)'.

A file chooser appears that lets you browse to the image(s) on your hard drive.

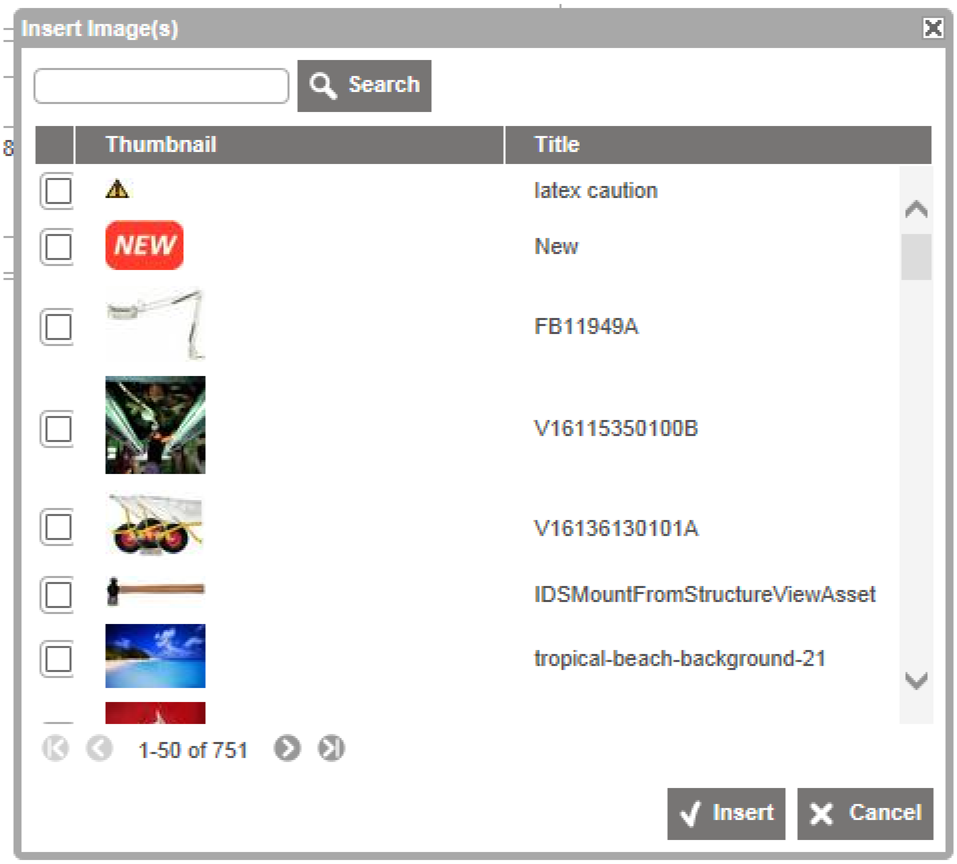
3. Browse to the image you want to upload, select it and click the ' Open' button.
4. Repeat step 3 if you want to upload more than one image.
5. Click insert.

The select image(s) will now be uploaded from your hard drive to the screen.

To reference an image from the data base:

1. Click the green plus icon. A pop up box with two choices appears.
2. Select 'Insert'.

A dialog appears showing you the available images in the data base.



3. Select one or more images
4. Click insert.

The select image(s) will now be inserted to the screen.

To view the image in full size, click the magnifying icon next to the image thumbnail.

To delete the image, click the red cross icon next to the image thumbnail.

To view and edit details on the image click the pen icon next to the image thumbnail. This will take you to a separate image screen.

Buttons

Save button

Clicking the Save button will save the values of the current product to the data base.

In the Initiate screen it will submit the product into the first state in the STEP Workflow.

Reset button

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

Submit button

This button is placed within screens tied to states in a STEP Workflow. Clicking the button will save the values of the current product to the data base and move the product to the next state in the STEP workflow.

Excel Integration

The supplier Web UI enables you to initiate and maintain products in a Smartsheet for Excel. This can be very useful when you have to maintain or initiate many products at a time. You can download multi-level product data to an interactive Excel file, maintain or add new product data in Excel, and then upload the Excel file to the Supplier Web UI again. You can also use the Smartsheet component to initiate multiple new products using a pre-defined template in Excel to set up the products.

Important: Though still available, the Quicksheet concept has been deprecated. The use of Smartsheets is recommended.

Using Excel Smartsheet

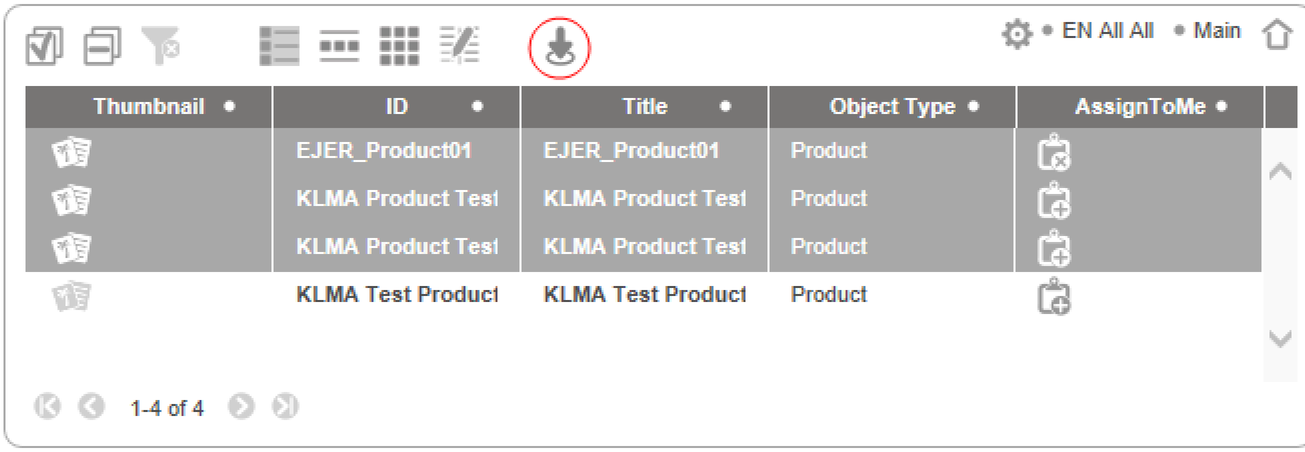
To be able to use Smartsheet, you have to specify the export configurations in the Export Manager, and then associate them with the relevant template widgets and export actions in the Supplier Web UI. From the Export Manager, you can either export data to a Smartsheet or you can export a template that you can use when you want to initiate new products.

For more information, see the **Smartsheet Data and Template Configurations** section of the **Smartsheets** documentation.

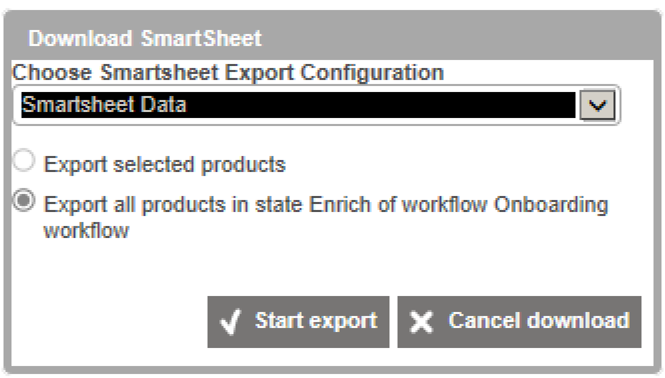
For information on how to configure Smartsheets in the Supplier Web UI, see the **Smartsheets in Web UI** section of the **Web User Interfaces** documentation.

Download a Smartsheet with Data

1. In the workflow widget, click the relevant state. A table containing the products that are currently in the selected state appears.



2. Select the products you want to export to the Smartsheet file.
3. Click the **Download Smartsheet** icon . If more download icons are available, hover the mouse over the icons to locate the appropriate icon.

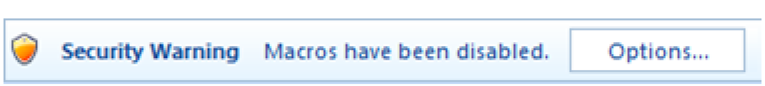


4. In the **Download Smartsheet** dialog, choose the relevant export configuration and then select the relevant products for export.
5. A download job starts and you are taken to the download job page
6. When the download job is finished, click **Download**, and then save the file to your hard drive.

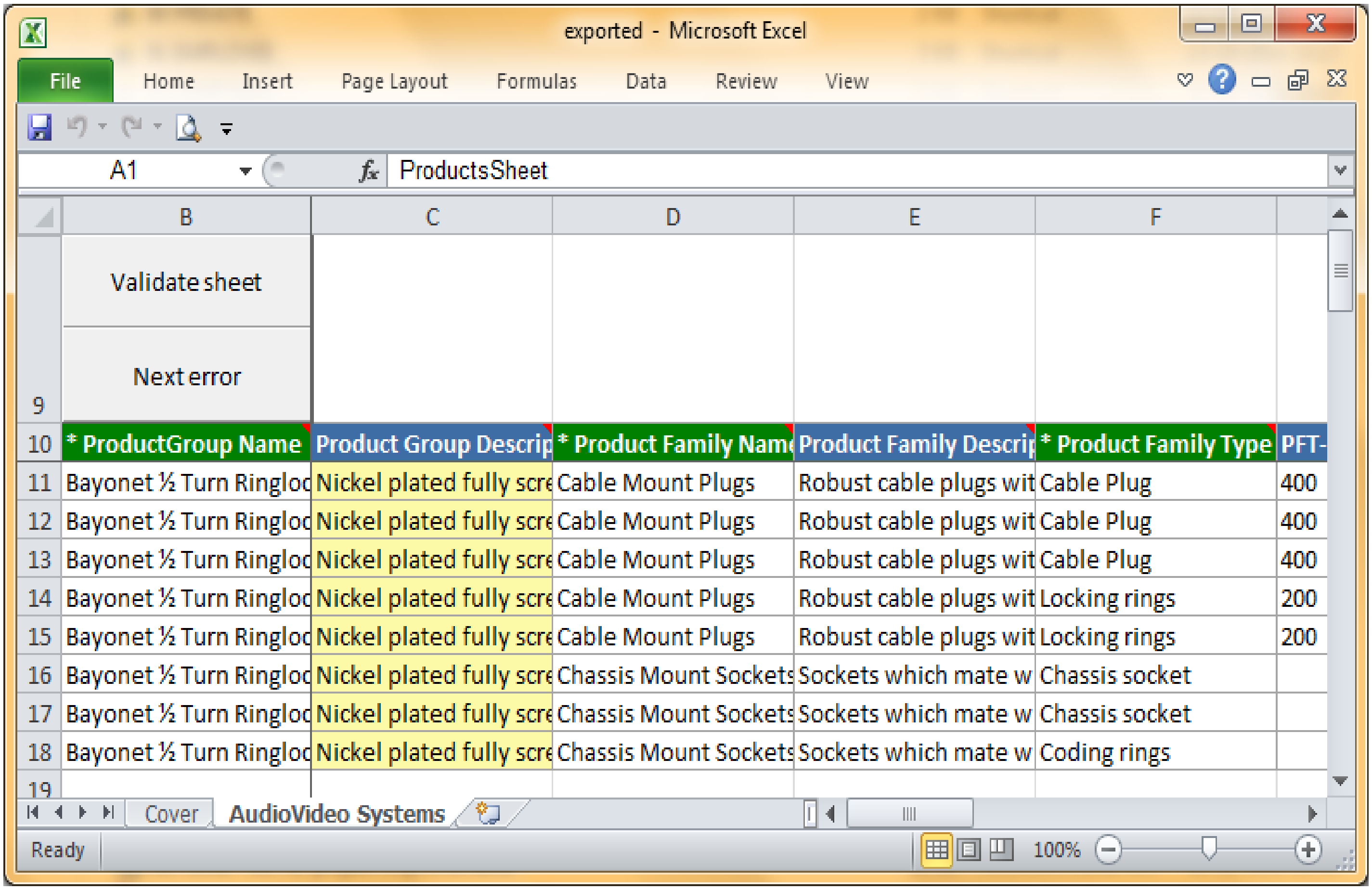
When you have downloaded the file with data, you can start maintaining the data.

Enter Data in a Smartsheet

1. In **Excel**, open the Smartsheet that will be edited. The Smartsheet opens on the **Cover** tab, which contains information about the download date and the color codes used in the Smartsheet. A **Security Warning** is displayed saying that macros have been disabled. However, macros must be enabled for the Smartsheet to work properly.



2. Click **Options**, then select **Enable Macros**.
3. On the workbook, click the second tab, which has the name of the node selected during the export process.



4. Enter the product data.
5. Click **Validate sheet** in the top left corner. The **Serverside validation** dialog opens.
6. Select whether changed products only or all products should be validated, then click **Start**.
7. In the **Login** dialog, enter the relevant STEP user name and password.

   The system validates the changes. The **Serverside Validation** window will display if the validation succeeded or if there are errors that need to be corrected. Errors can be located via **Next Error** to locate and them fix them.

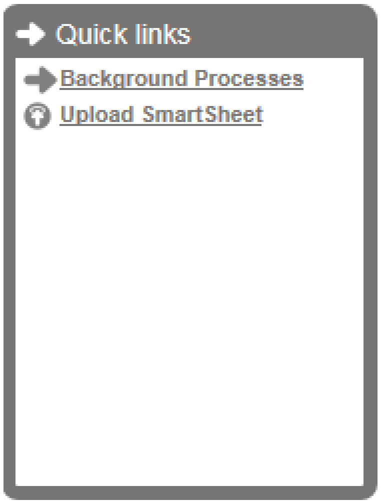
8. Save the file.

Note: Some fields, such as node pickers, will prompt the user for a STEP user name and password. The system will only prompt for these credentials once.

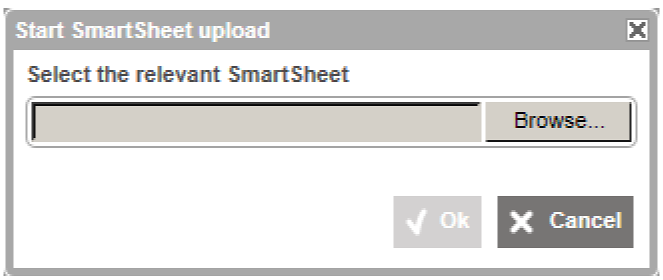
You can now upload the data to the Supplier Web UI.

Upload a Smartsheet to the Supplier Web UI

1. On the home page screen, in the **Quick links** widget, click **Upload Smartsheet**.



2. In the **Smartsheet upload** dialog, click **Browse**, navigate to the relevant Smartsheet file, click **Open**, and then click **OK**.



3. The upload process starts and the upload process screen is displayed.
4. When the upload process is completed, the products in the Smartsheet file have been uploaded to the Supplier portal, saved, and submitted to the first state in the STEP Workflow.

Note: If errors occur during an import, a Smartsheet file with the products that failed from the import process page can be downloaded. The error messages are displayed as screen tips in the Smartsheet file when the pointer is rested on an error cell. **Next Error** can be used to work a set of errors. When the errors have been corrected, the file can be imported again. However, there is limited support for this type of re-import. Some cells will be locked and consequently skipped during import.

Using Excel Quicksheet

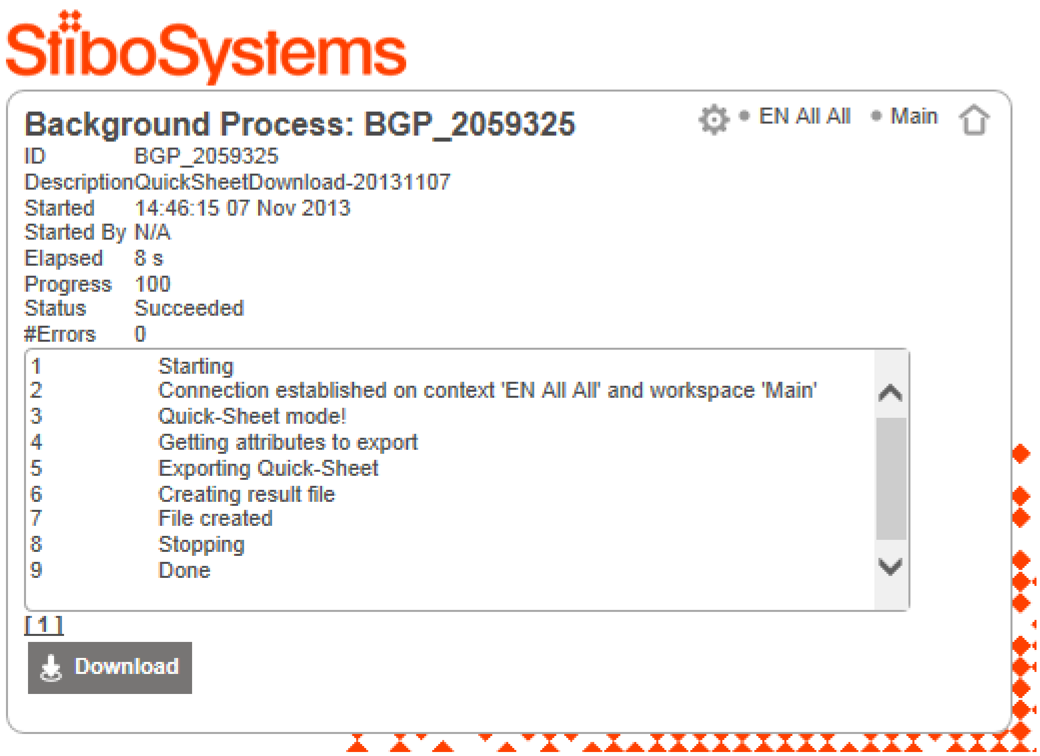
Initiate products using Excel

In the case where you want to initiate many products at a time, it can be feasible to use Excel Quicksheet for this. First you must download a Quicksheet Excel file from the Web UI. The Quicksheet is a "template" that includes the attributes from the initiate screen.

Download Quicksheet

1. Click 'Create new...' in the State selector box.
2. Click the Download Quicksheet button

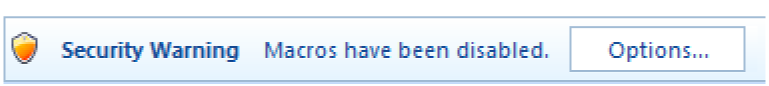
A download job starts and you are taken to the download job page



3. Once the download job is finished you can click the Download button.
4. Save the file to your hard drive.

Enter data in Excel

1. Open the saved Quicksheet.
2. Notice the warning about macros in Excel. You must allow macros for this sheet.



3. Notice the first tab called 'Cover'. This sheet contains useful information such as date and legend used in the excel file.
4. Click the sheet number three ("Products").

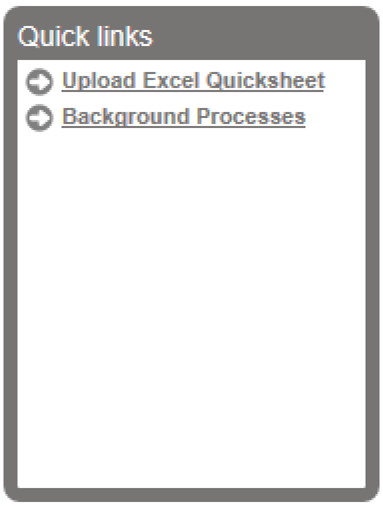
5. You can now start entering data for the products you want to initiate.
6. Save the file once you are finished entering data.

Note: For some fields, such as node pickers, you will be asked to log in using your STEP username and password. You will only be prompted for these credentials once.

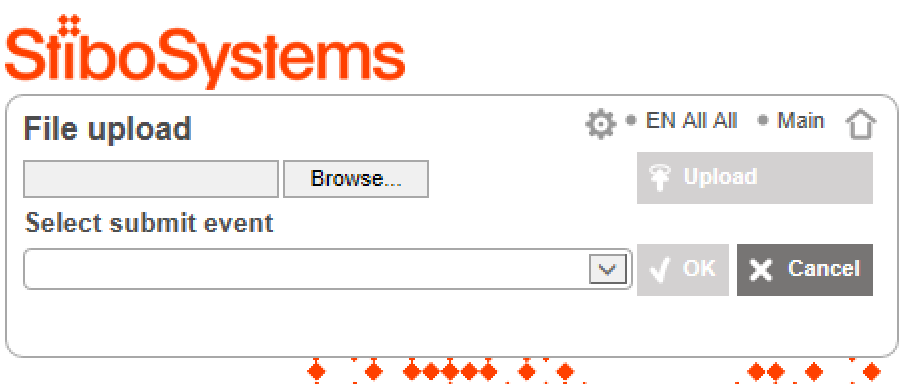
You can validate the entered product data by clicking the Validate button in the top left of the excel sheet. This give you a Validate editor. Click the Start button to start the validation. You will be prompted to enter your STEP username and password.

Upload Quicksheet to Web UI

1. On the hope page screen click on "Upload Excel Quicksheet" in the Quick links widget.



2. The File Upload screen appears.

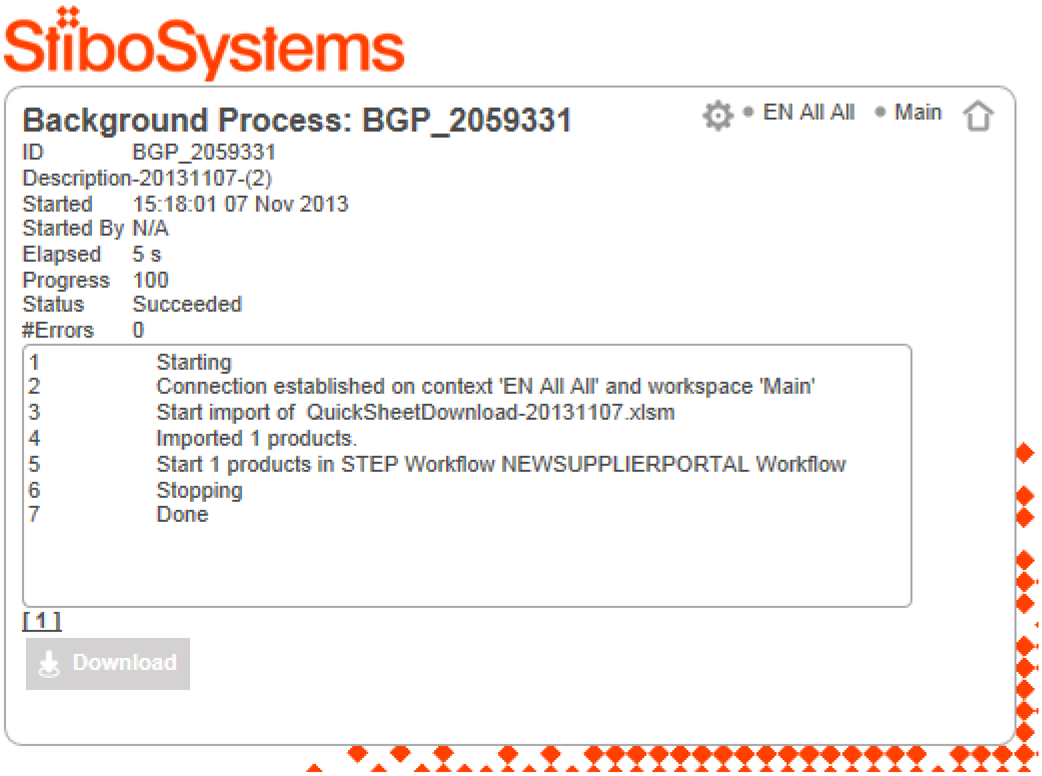


3. Click the Browse button

A file chooser appears

4. Browse to the saved Quicksheet file and click Open.
5. Click the Upload button

6. Click the OK button
7. An Upload job starts and you are taken to the upload screen



8. Once the upload is finished the products from the Quicksheet file have been uploaded, saved and submitted to the first state in the STEP Workflow (in this case the state called 'Enrich').

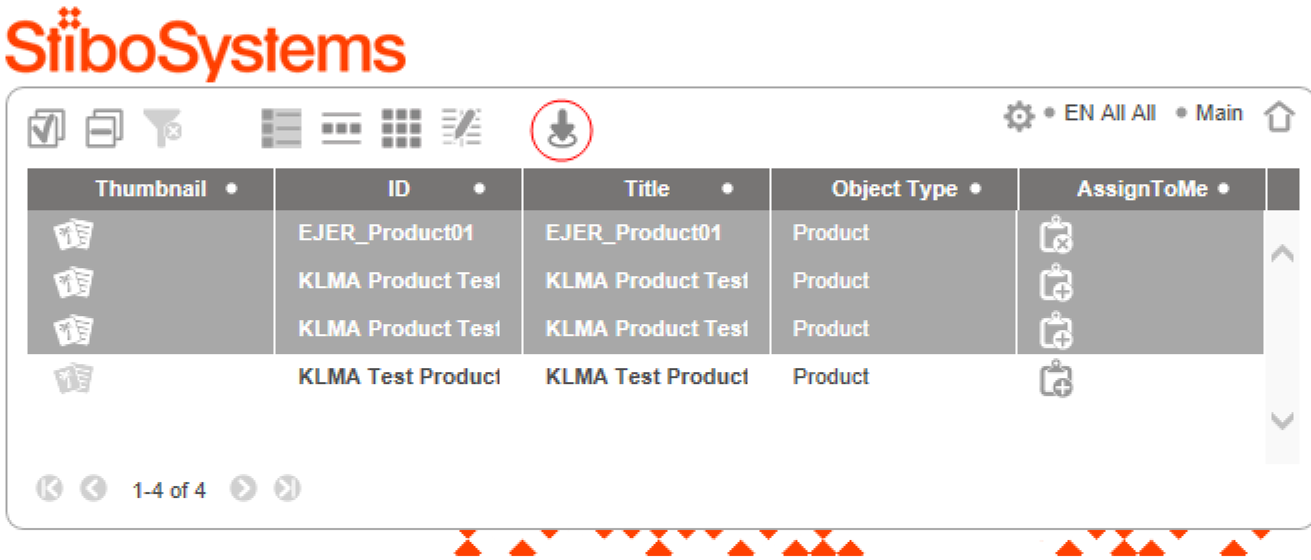
Note: The 'Select submit event' list shows possible available events defined in the STEP Workflow. The list is empty for the Quicksheet file because the products from this file will just go into the first state of the STEP Workflow.

Maintain products using Excel

In the case where you want to maintain many products at a time, it can be feasible to use Excel for this. First you must download an Excel file from the Web UI. This file includes the products you wish to maintain for a given state. The Excel file will contain the same attributes as the ones that are present on the screen for the particular state.

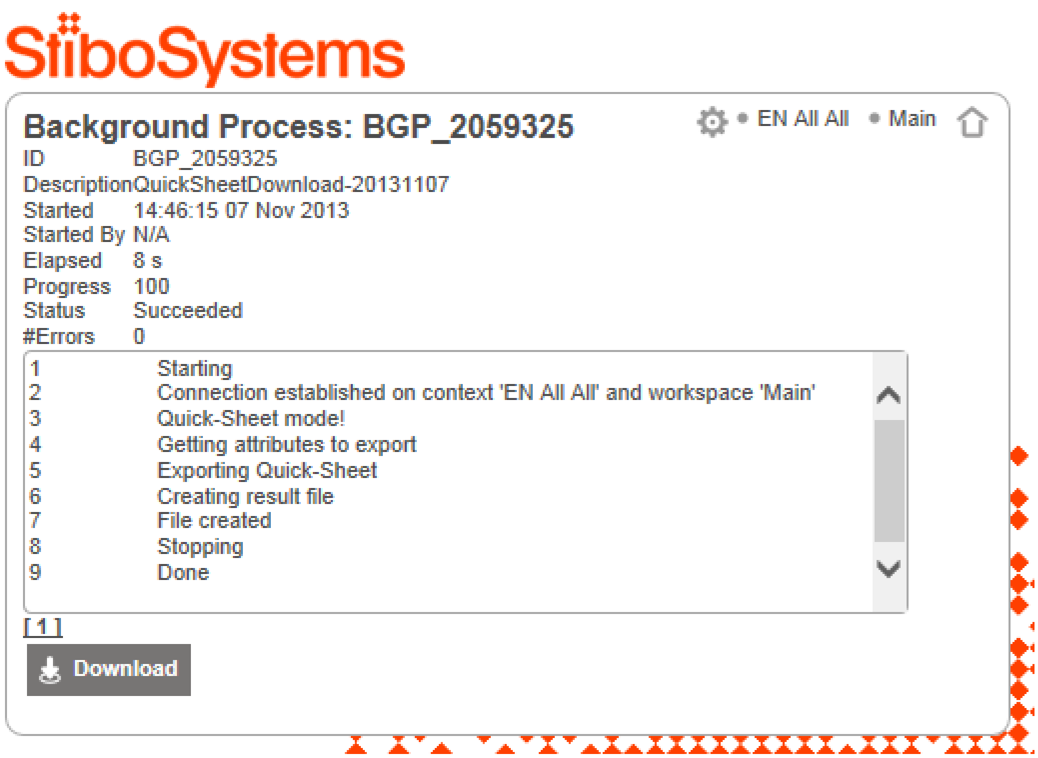
Download Excel file

1. Click a state in the state selector box in Onboarding workflow widget.
2. A list of the products that are currently in the selected state appears.



3. Select the products you want to export to the Excel file.
4. Click the 'Download as Excel spreadsheet' icon ( ).

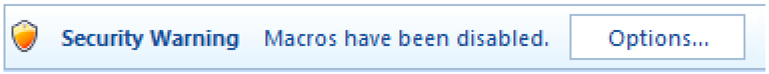
A download job starts and you are taken to the download job page



5. Once the download job is finished you can click the Download button.
6. Save the file to your hard drive.

Maintain data in Excel

1. Open the saved Excel spreadsheet.
2. Notice the warning about macros. You must allow macros for this sheet.



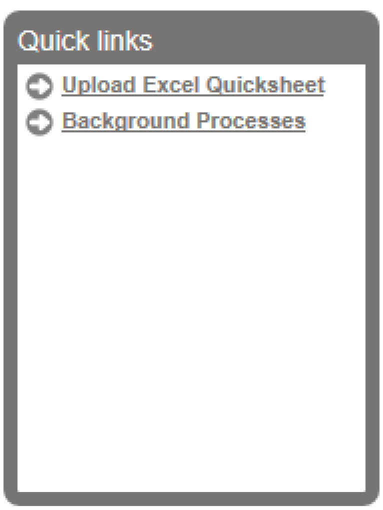
3. Notice the first tab called 'Cover'. This sheet contains useful information such as date and legend used in the Excel file.
4. Click the sheet number two ("Supplier Products").
5. You can now start maintaining data for the products.
6. Save the file once you are finished maintaining the data.

Note: For some fields, such as node pickers, you will be asked to log in using your STEP username and password. You will only be prompted for these credentials once.

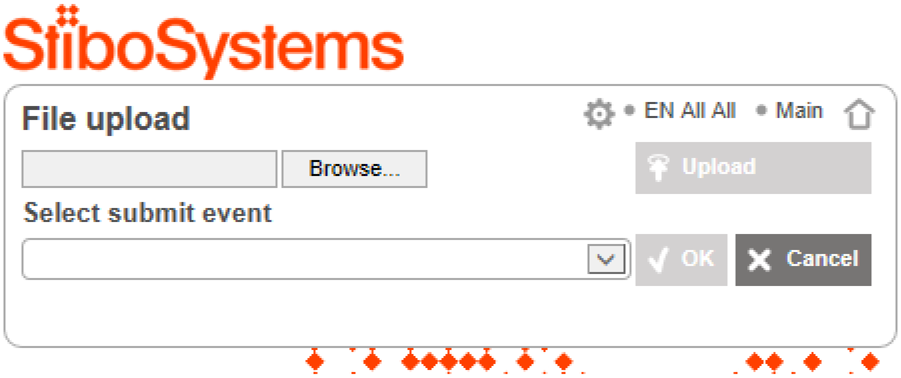
You can validate the entered product data by clicking the Validate button in the top left of the excel sheet. This gives you a Validate editor. Click the Start button to start the validation. You will be prompted to enter your STEP username and password.

Upload Excel file

1. On the home page screen click "Upload Excel Quicksheet" in the Quick links widget.



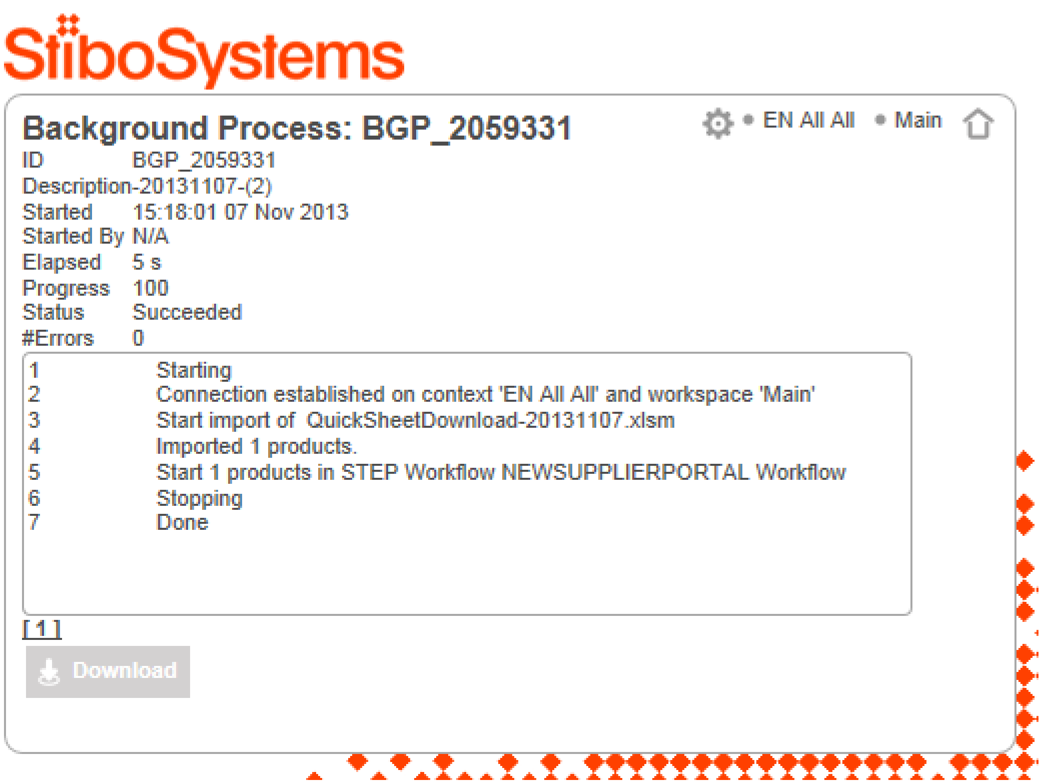
2. The File Upload screen appears.



3. Click the Browse button

A file chooser appears

4. Browse to the saved Excel spreadsheet and click Open.
5. Click the Upload button
6. Optionally select an event in the 'Select submit event' list. This list shows the available events as defined in the STEP Workflow. Selecting [none] will make the products stay in the same state they were before the export to Excel.
7. Click the OK button
8. An Upload job starts and your taken to the upload screen

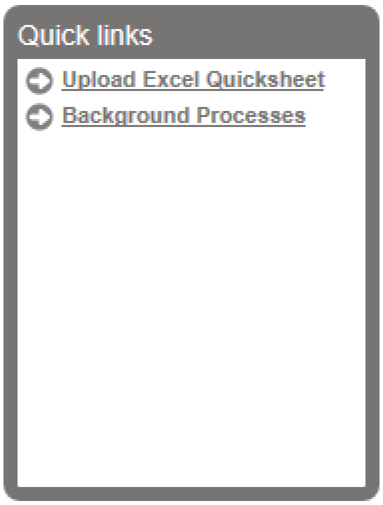


9. Once the upload is finished the product values from the Excel spreadsheet have been uploaded, saved and optionally the products have been submitted to a new state (if an event was selected in 6).

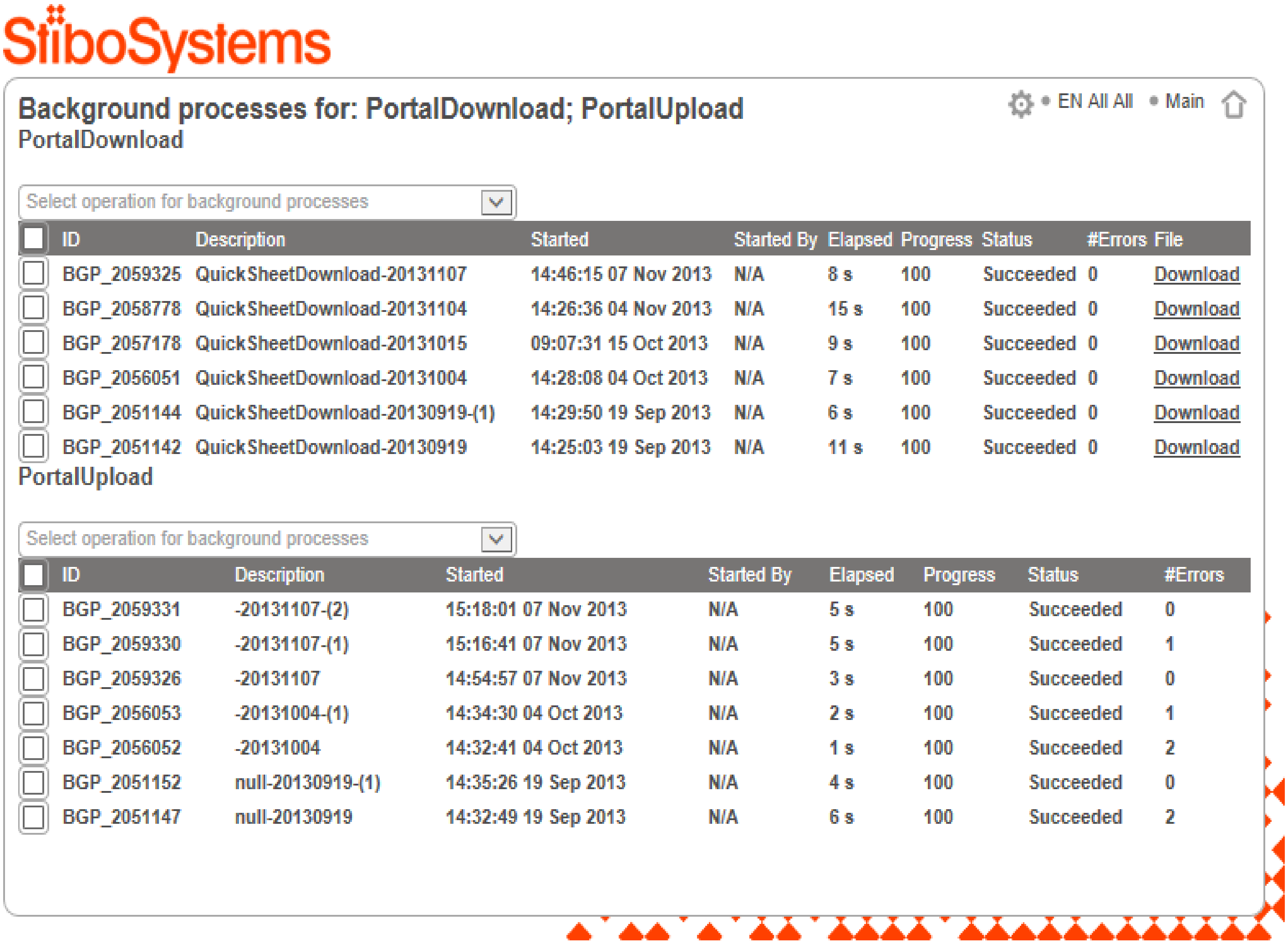
Show Queues

Show Download list

All your download and upload jobs are placed in lists in the Web UI. To display the lists select the 'Background Processes' in the Quick links widget on the home page screen.



This will display the list of your download and upload jobs.


StiboSystems

Background processes for: PortalDownload; PortalUpload

EN All All • Main

PortalDownload

Select operation for background processes

	ID	Description	Started	Started By	Elapsed	Progress	Status	#Errors	File
☐	BGP_2059325	QuickSheetDownload-20131107	14:46:15 07 Nov 2013	N/A	8 s	100	Succeeded	0	Download
☐	BGP_2058778	QuickSheetDownload-20131104	14:26:36 04 Nov 2013	N/A	15 s	100	Succeeded	0	Download
☐	BGP_2057178	QuickSheetDownload-20131015	09:07:31 15 Oct 2013	N/A	9 s	100	Succeeded	0	Download
☐	BGP_2056051	QuickSheetDownload-20131004	14:28:08 04 Oct 2013	N/A	7 s	100	Succeeded	0	Download
☐	BGP_2051144	QuickSheetDownload-20130919-(1)	14:29:50 19 Sep 2013	N/A	6 s	100	Succeeded	0	Download
☐	BGP_2051142	QuickSheetDownload-20130919	14:25:03 19 Sep 2013	N/A	11 s	100	Succeeded	0	Download

PortalUpload

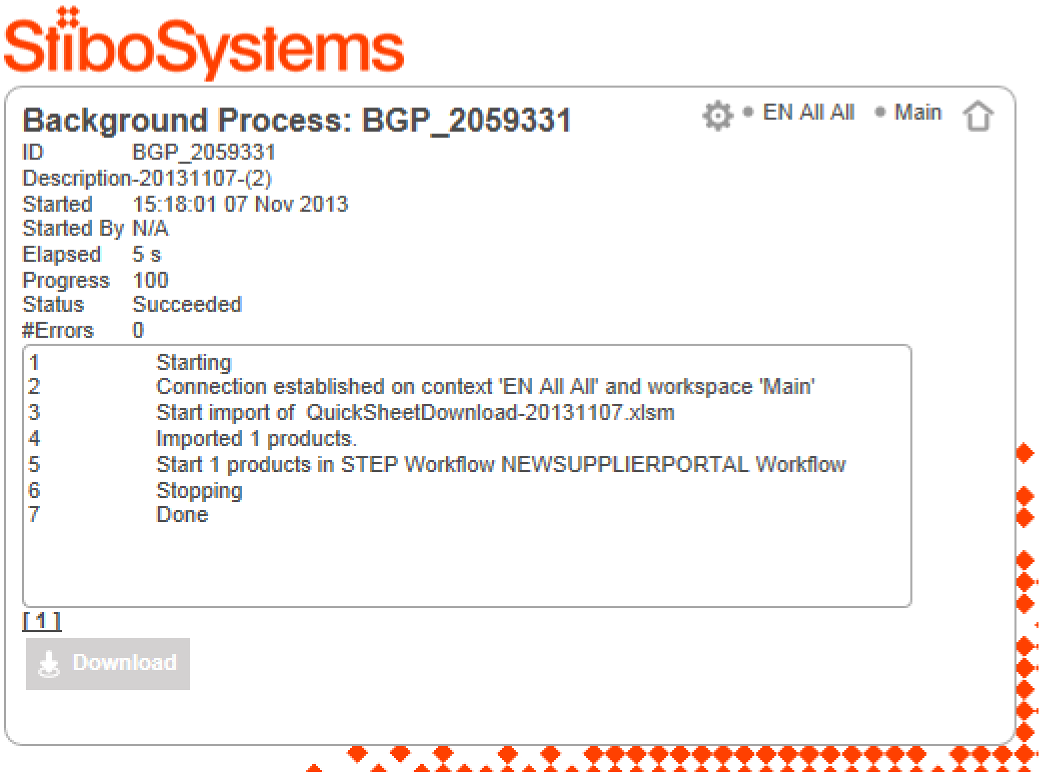
Select operation for background processes

	ID	Description	Started	Started By	Elapsed	Progress	Status	#Errors
☐	BGP_2059331	-20131107-(2)	15:18:01 07 Nov 2013	N/A	5 s	100	Succeeded	0
☐	BGP_2059330	-20131107-(1)	15:16:41 07 Nov 2013	N/A	5 s	100	Succeeded	1
☐	BGP_2059326	-20131107	14:54:57 07 Nov 2013	N/A	3 s	100	Succeeded	0
☐	BGP_2056053	-20131004-(1)	14:34:30 04 Oct 2013	N/A	2 s	100	Succeeded	1
☐	BGP_2056052	-20131004	14:32:41 04 Oct 2013	N/A	1 s	100	Succeeded	2
☐	BGP_2051152	null-20130919-(1)	14:35:26 19 Sep 2013	N/A	4 s	100	Succeeded	0
☐	BGP_2051147	null-20130919	14:32:49 19 Sep 2013	N/A	6 s	100	Succeeded	2

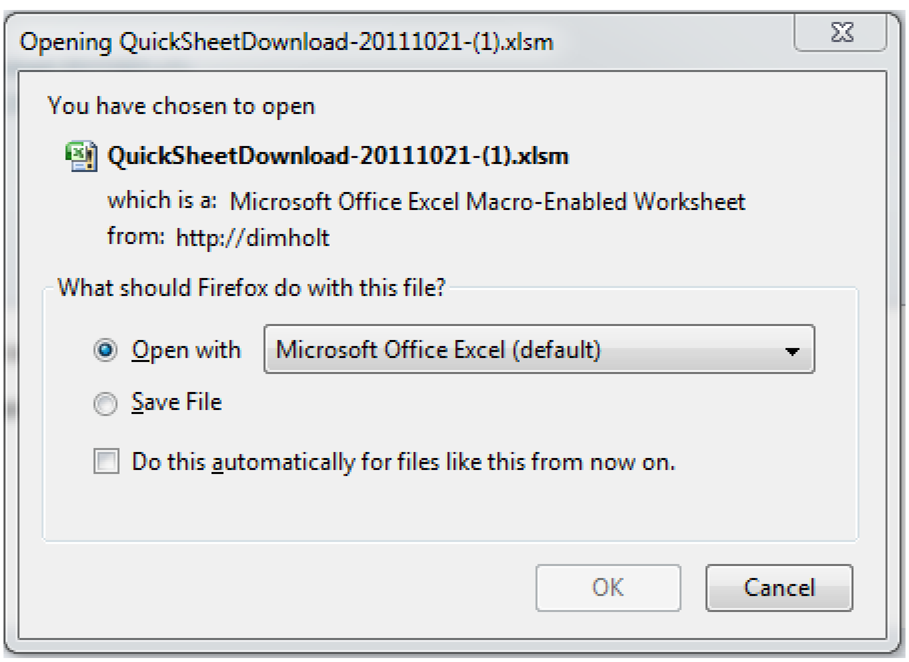
Downloading a file from the Download list

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

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



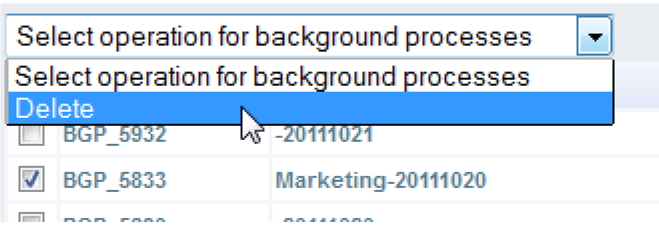
3. Click the Download button
4. A File Download dialog appears



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

Deleting download/Upload jobs

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



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

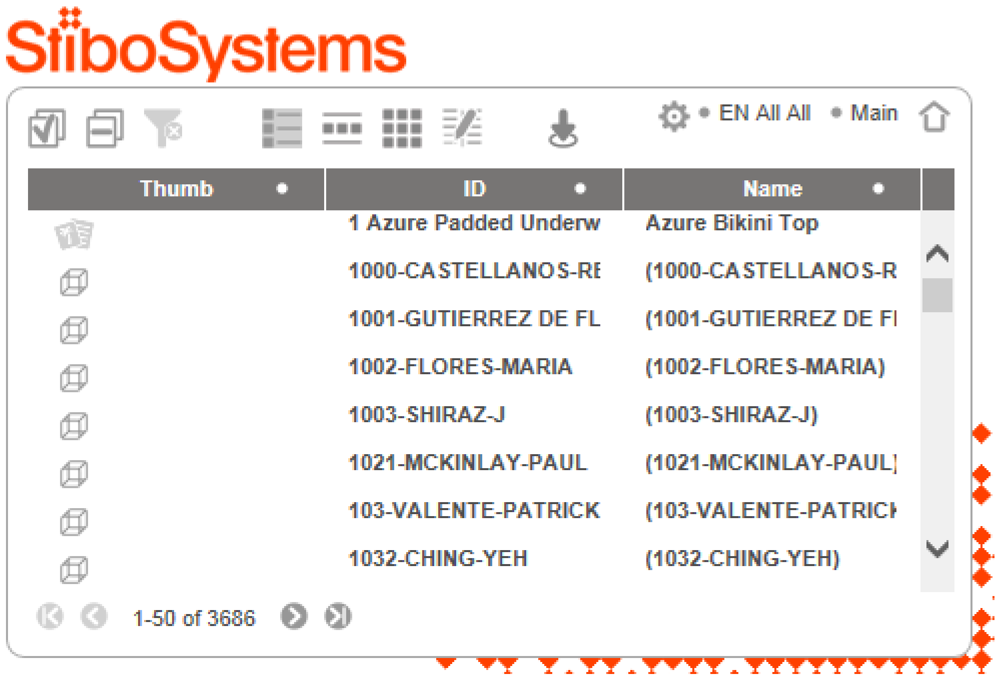
Searching

You can search for products that currently are in a state within the STEP Workflow.

1. Go to the 'Search' widget on the home page screen.

2. Here you can enter the ID or the Name of the product you want to find.

The search result will be displayed on the right hand side:

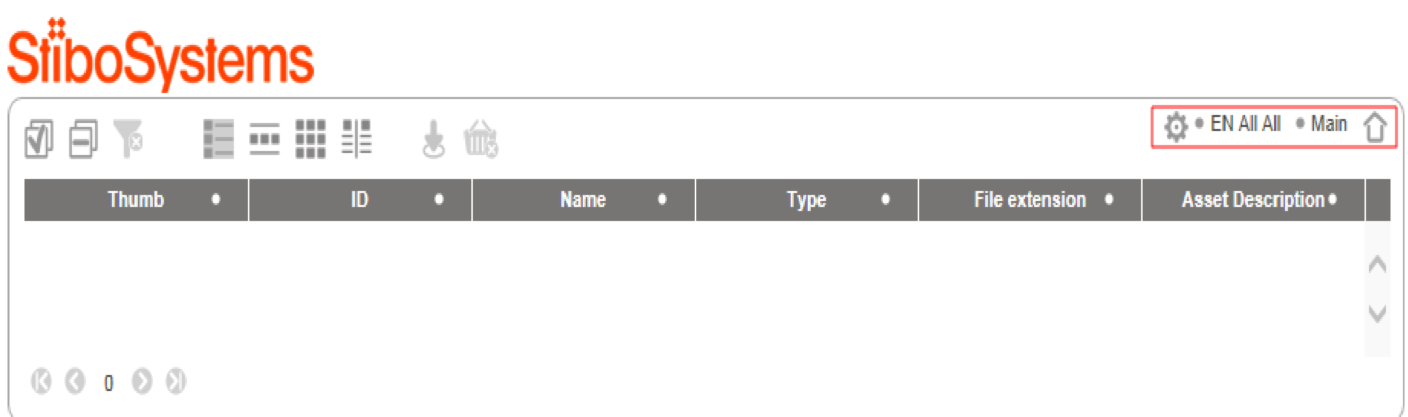


3. Select a product in the search result list by clicking the workflow in the column to the right

This will take you to the product in its current state.

Corner Bar

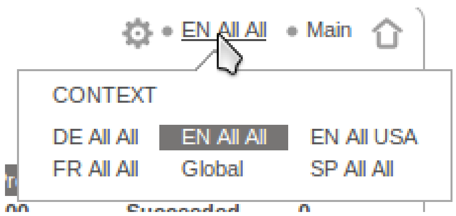
On all screens (except for the home page screen), there is a menu in the top right corner. This can be used to enter the Web UI designer, change context/workspace or navigate to the home page screen.



Changing context

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

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

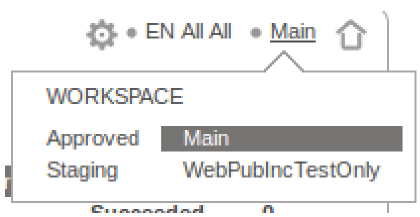


Clicking on one of the contexts will make the panel slide up again and the name of the current selected context will be displayed on the button.

Changing workspace

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

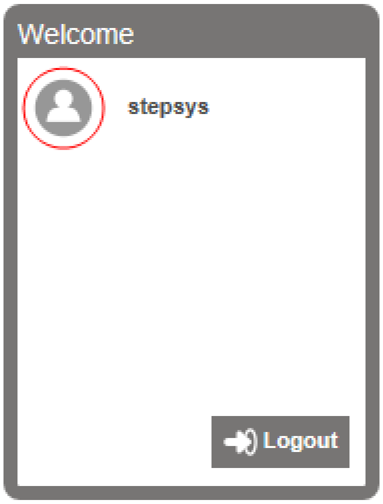
The panel will slide down and you can now select the workspace you want.



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

User details

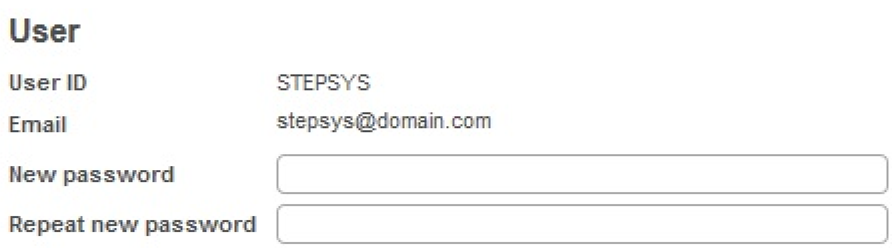
The user ID and e-mail address of the current user can be found by clicking on the user icon in the Welcome widget on the home page screen.



This makes the User detail screen appear.

Change password

In the User detail screen you can change your password.



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

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

Log out

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

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