STEP

DATA INTEGRATION SETUP AND USER GUIDE

Release 9.1-MP6 (July 2019)

StiboSystems
MASTER DATA MANAGEMENT

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Data Integration

The topics in this section detail STEP data integration with other systems.

It is important to have a solid understanding of how STEP works before working through the topics in this section. It also helps to be familiar with the third-party systems and their functionality.

- Asynchronous SDL Translations
- Dun & Bradstreet Integration
- Experian Email Validation Integration
- Loqate Integration
- Product Data Syndication

Asynchronous Translations

This topic focuses on setting up and using the automatic service capabilities in STEP for translations so that translatable data can be sent to and from your translation service via their REST API, without human intervention. STEP supports Asynchronous Translations for SDL and Lionbridge translation services, with the differences in setup being only in the connection details.

Users who manage a local Across Language Server (referred to as 'Across' below) are working with a translation software, rather than a translation service agency. Translations done in Across can also use the asynchronous translations functionality to track the STEP data translation process. For more information on Across, search the web.

Using an asynchronous translation configuration, translations are initiated via a business action and the jobs are monitored in the 'Translation Status Widget' in the Web UI.

Note: If you are new to translations in STEP, it is suggested that you read the high-level overview in the **Translations** documentation.

Asynchronous Translations can be configured using the following topics:

- Create the Asynchronous Services Object Type
- Configuring an Asynchronous Translation Service
- Setting Up a Translation Configuration
- Business Rules for Asynchronous Translations
- Translation Status Widget

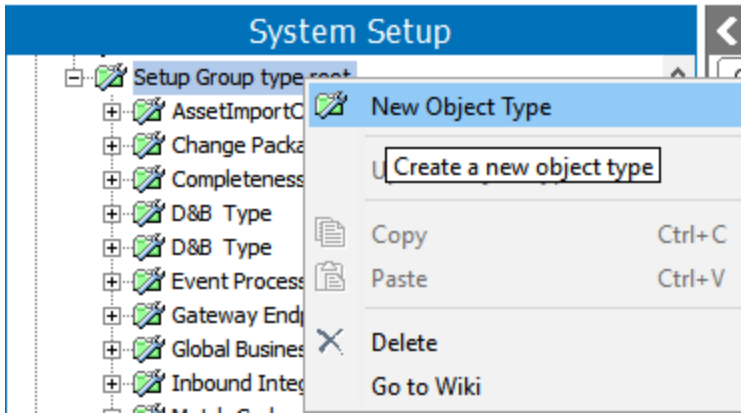
To access and use the Across, SDL, or Lionbridge components, they must first be activated as add-on components on your system and implemented with their corresponding framework. See your Stibo Systems representative for more information.

Create the Asynchronous Services Object Type

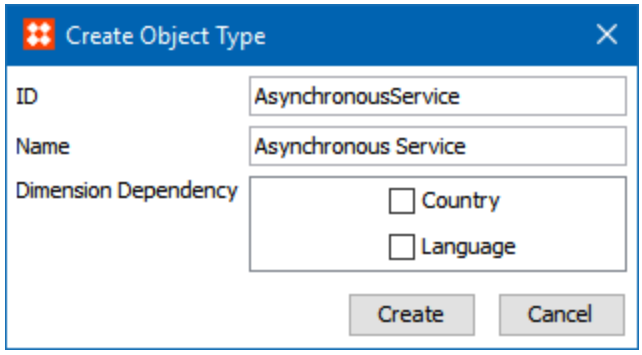
Before an asynchronous service can be set up and configured, an Asynchronous Services setup group root node and object type must be created. For more information about creating Setup Groups in general, see the **Setup Groups** section of the **System Setup** / **Super User Guide**.

Use the following steps to create the object type.

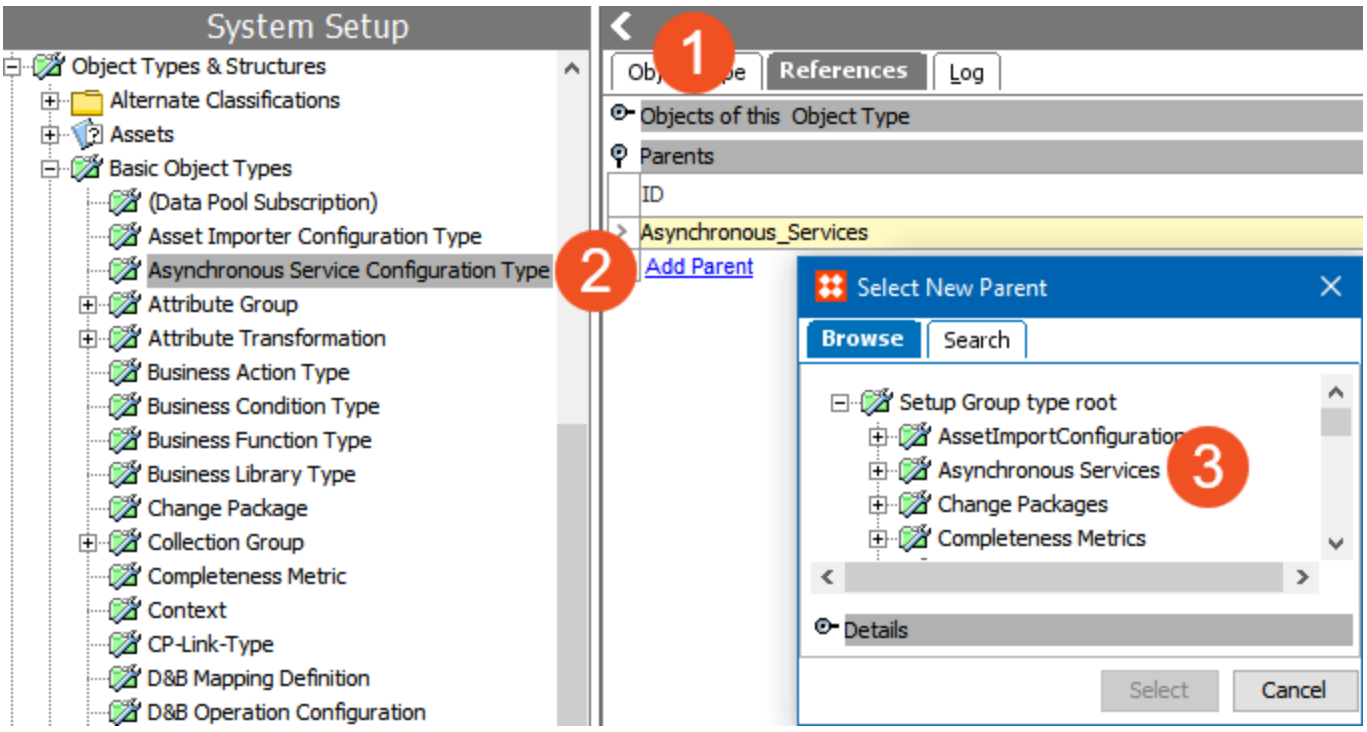
1. From 'System Setup', expand 'Object Types and Structures' and right click **Setup Group type root**. Select **New Object Type**.



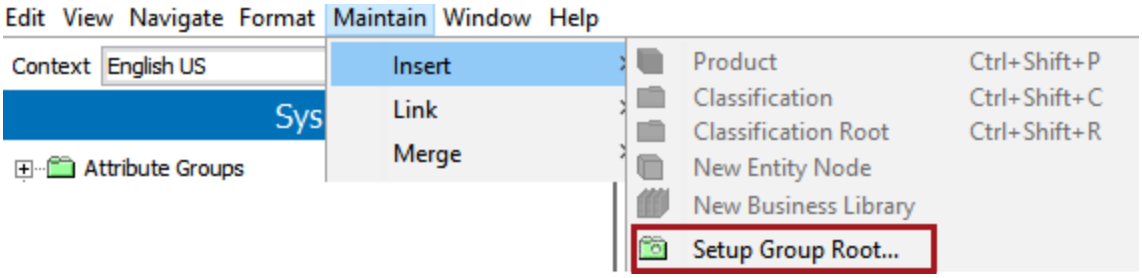
2. Enter a Name and ID in the **Create Object Type** dialog box.



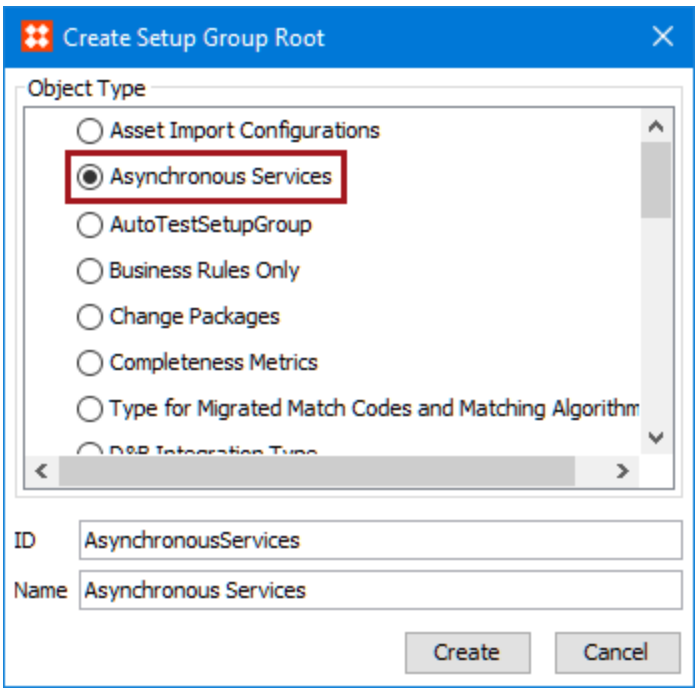
3. Remaining in 'Object Types & Structures', navigate to and expand 'Basic Object Types.' Select the 'Asynchronous Service Configuration Type.' Click on the References tab and select 'Add Parent.' In the **Select New Parent** dialog box, select the setup group root that was created in step two, and click the Select button to add it as a Parent.



4. Now the Asynchronous Service can be added as a root node under the 'System Setup' structure. In 'System Setup', select the **Maintain** menu, **Insert**, and **Setup Group Root**.



5. Select the Asynchronous Services root node that was created and give it an ID and a Name, and click **Create**.



The Asynchronous Services setup group root and object type have been created

6. Configure an asynchronous service as defined in the **Configuring an Asynchronous Translation Service** topic.

Configuring an Asynchronous Translation Service

This section covers setting up a new Asynchronous Translation Service. All steps in this section are applicable to Across, SDL, and Lionbridge services except in the **Server Connection Details**, which have been broken out by service.

Prerequisites

1. For the Across Translation Server software only, before performing the Configuration below in STEP, create a 'STEP' document template on the Across server using the 'Tagged XML v2' option. This template enables Across to read STEPXML files. For more information, contact Across support.
2. For any asynchronous service option, prior to configuration, clicking the **Server URL** dropdown parameter displays the required property name. Provide a selection for the dropdown parameter via the sharedconfig.properties file on the STEP application server using the appropriate case-sensitive property:

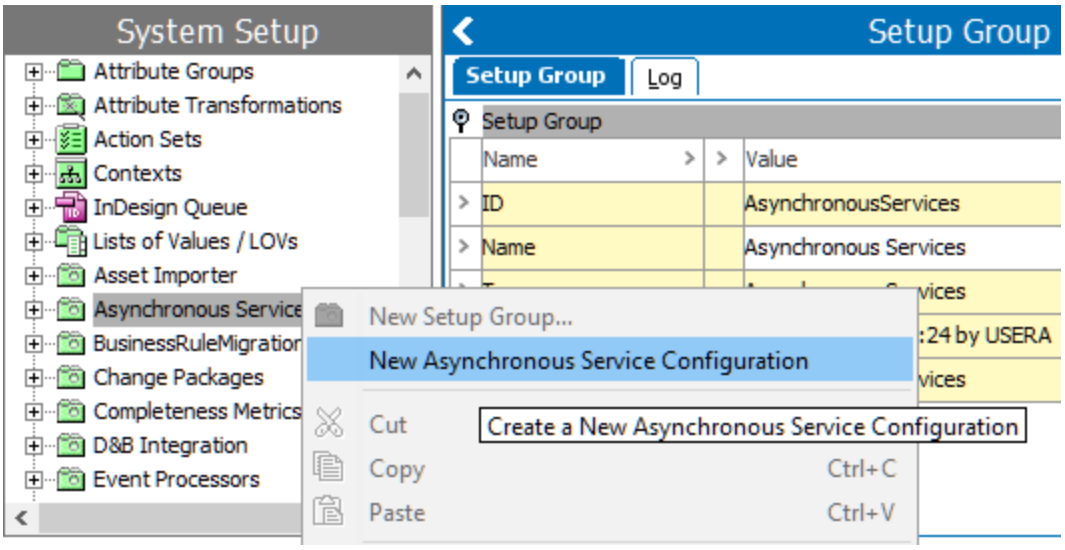
- **Async.Kernel.Config.Across.ServerURL**
- **Async.Kernel.Config.LionBridge.ServerURL**
- **Async.Kernel.Config.SDL.ServerURL**

  The following is an example of a complete property entry for two Across systems that are separated by only a semi-colon (no spaces):

```
Async.Kernel.Config.Across.ServerURL=1=http://across.scloud.com/crossAPI/crossA
PI.wsdl;2=http://across.scloud2.com/crossAPI/crossAPI.wsdl
```

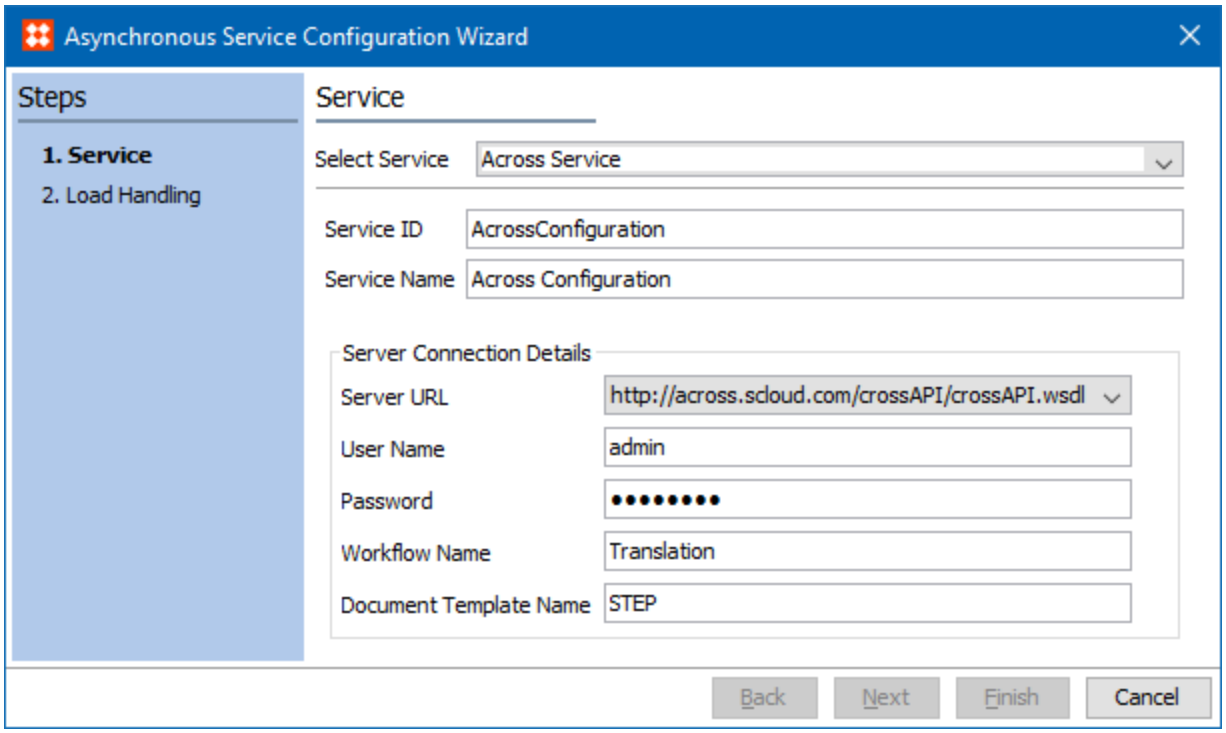
Configuration

1. In System Setup, right-click the Asynchronous Services root node and select **New Asynchronous Service Configuration**.

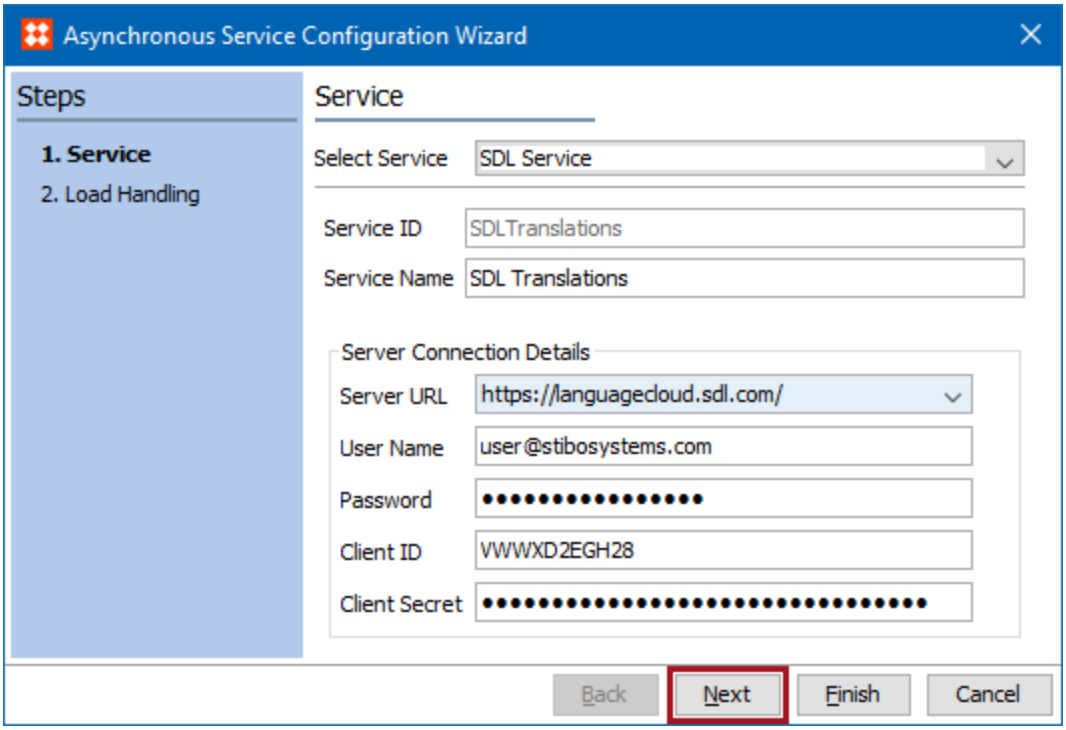


2. In the **Asynchronous Service Configuration Wizard**, complete the parameters on the **Service** step based on the required service:

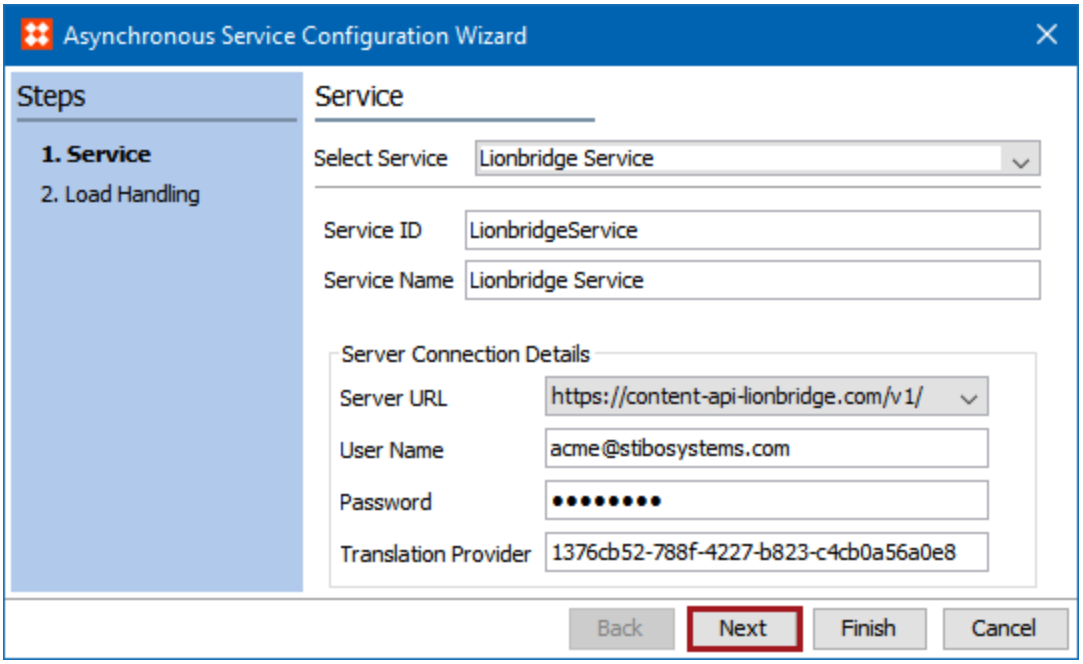
- For a local **Across** translation server, enter your own values for the parameters as shown in the example below.



- **Select Service** - Select the **Across Service**
- **Service ID** - Enter the service ID
- **Service Name** - Enter the service name for your Across server
- **Server URL** - Select the Across server URL from the dropdown
- **User Name** - Enter the user name to communicate with Across
- **Password** - Enter the password for Across
- **Workflow Name** - Enter the name of the workflow in Across that will be used for the configuration. In this example the name of the Across workflow is 'Translation.'
- **Document Template Name** - Enter the name of the Across document template you created in the Prerequisites section. In the image above, the Across document template is named 'STEP.'
- For **SDL** translation service, most of the information in the Server Connection Details of the Service step is provided by SDL. Enter your own values for parameters as illustrated in the image below.

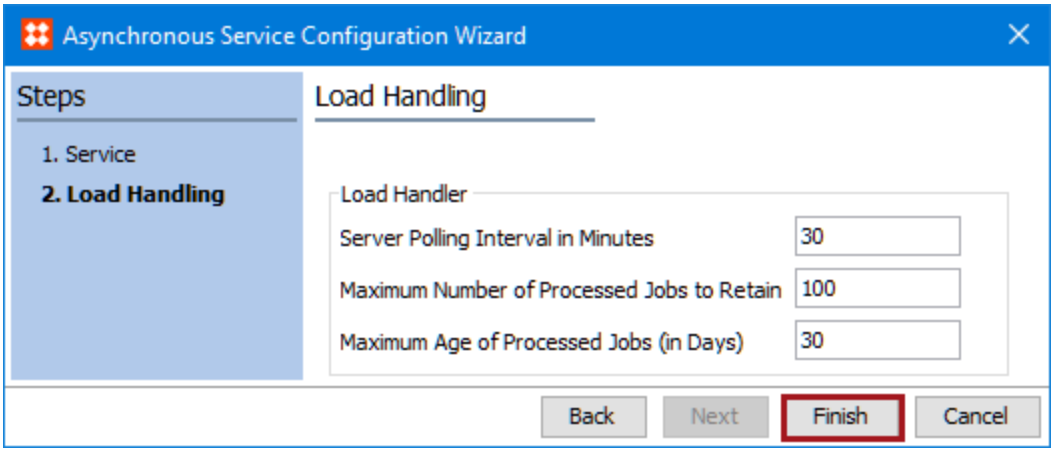


- **Select Service** - Select the **SDL Service** for SDL translations
- **Service ID** - Enter a service ID
- **Service Name** - Enter the service name for your SDL service
- **Server URL** - Select the server URL for SDL from the dropdown
- **User Name** - Enter the user name that will be used to communicate with SDL
- **Password** - Enter the password provided by SDL
- **Client ID** - Enter the client ID assigned to your application from SDL
- **Client Secret** - Enter the client secret assigned to your application from SDL
- For **Lionbridge** translation service, most of the information in the Server Connection Details of the Service step is provided by Lionbridge. Enter your own values for parameters as demonstrated in the image below.



- **Select Service** - Select the **Lionbridge Service** for Lionbridge translations
- **Service ID** - Enter a service ID
- **Service Name** - Enter the service name for your Lionbridge service
- **Server URL** - Select the server URL for Lionbridge from the dropdown
- **User Name** - Enter the user name that will be used to communicate with Lionbridge
- **Password** - Enter the password provided by Lionbridge
- **Translation Provider** - Enter the translation provider key provided by Lionbridge

3. Click **Next** to move on to the Load Handling step.
4. For **Load Handling**, provide the following data:



- **Server Polling Interval in Minutes** - The length of time, in minutes, the asynchronous service will poll the asynchronous translation service.
- **Maximum Number of Processed Jobs to Retain** - The maximum number of processed translation jobs to retain.
- **Maximum Age of Processed Jobs (in Days)** - The maximum number of days to retain a processed translation job.

Note: The processed jobs are retained until either the maximum number of processed jobs or the maximum age of processed jobs limit has been met, whichever comes first.

5. Click **Finish** to close the wizard.
6. Continue with the setup as defined in **Setting Up a Translation Configuration** topic.

Setting Up a Translation Configuration

Configuration of an asynchronous service can be used to communicate translation data outside of STEP.

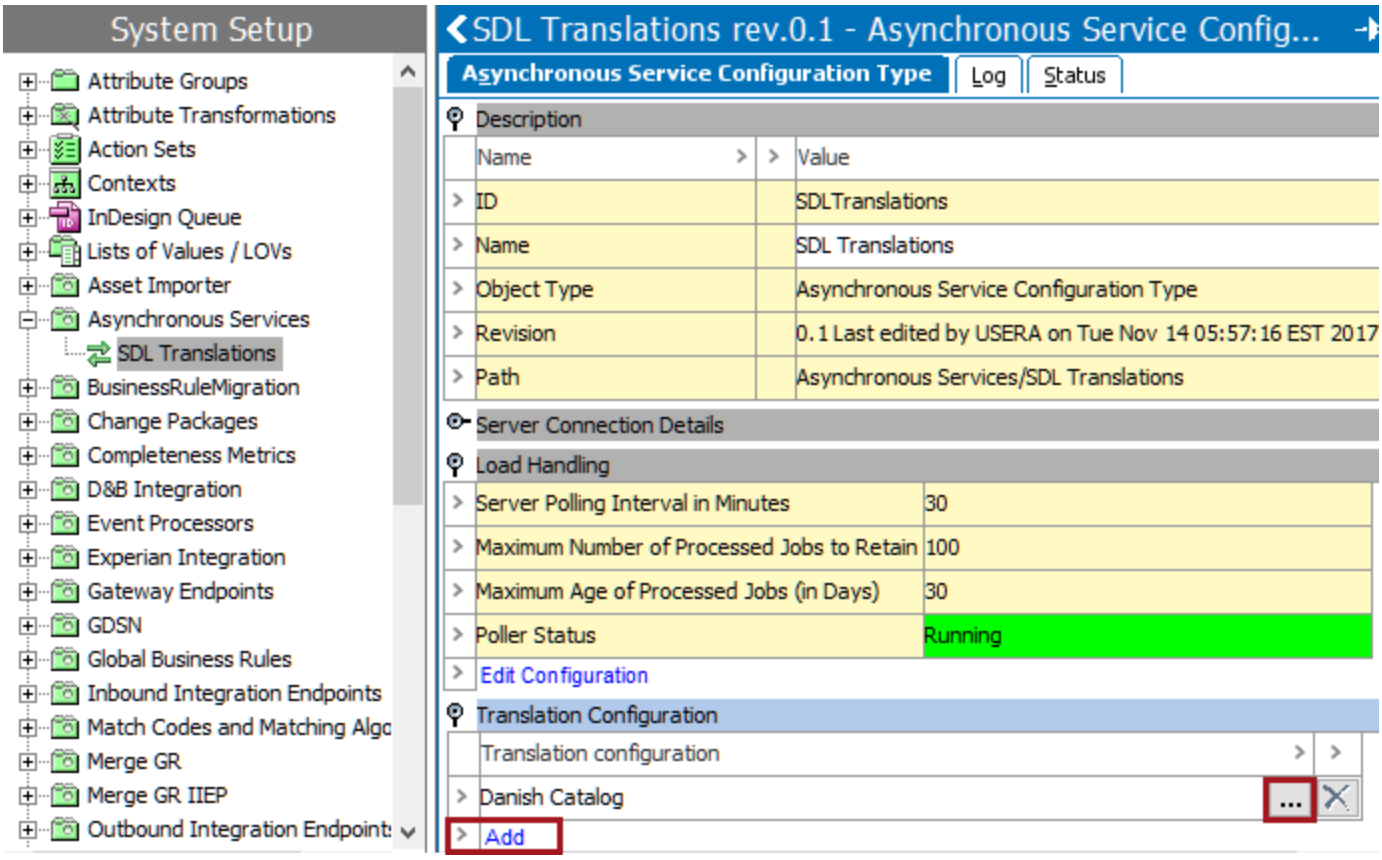
Prerequisites

1. Create an asynchronous service object type as described in the **Create the Asynchronous Services Object Type** topic.
2. Run the Asynchronous Service Configuration Wizard as described in the **Configuring an Asynchronous Translation Service** topic.

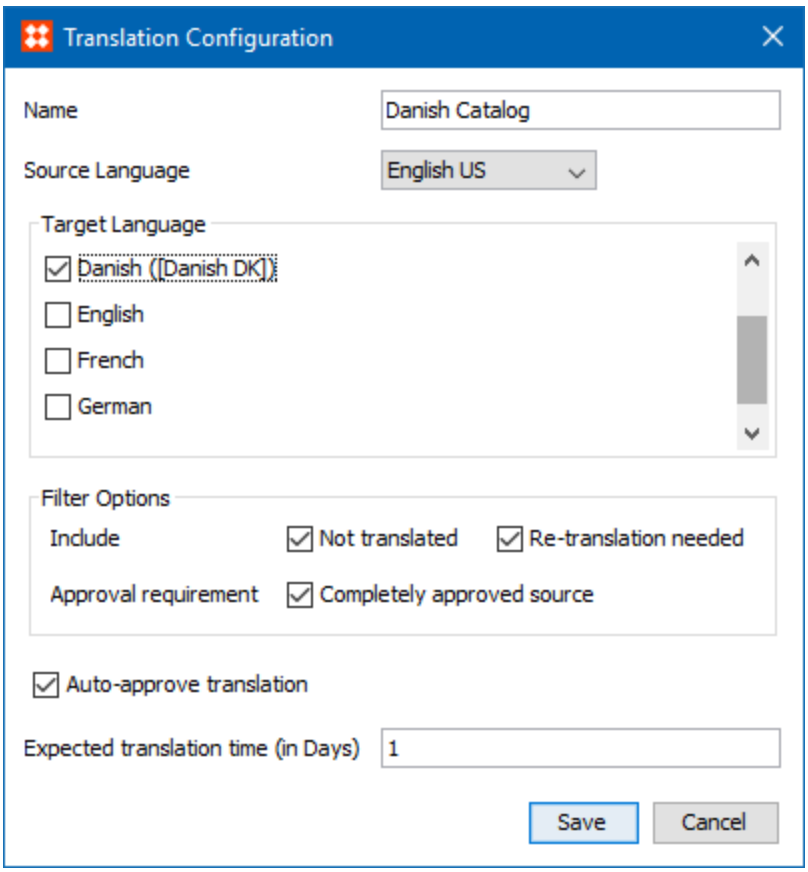
Set Up a Translation Configuration

After the wizard has been run, the **Translation Configuration** needs to be set up as described below.

1. In System Setup, select the asynchronous service configuration (named 'SDL Translations' in the image below), and on the first tab open the Translation Configuration flipper.



2. Click the 'Add' link for a new configuration, or click the ellipsis button (...) for an existing configuration to display the Translation Configuration dialog.



3. Set the options in the dialog as follows:

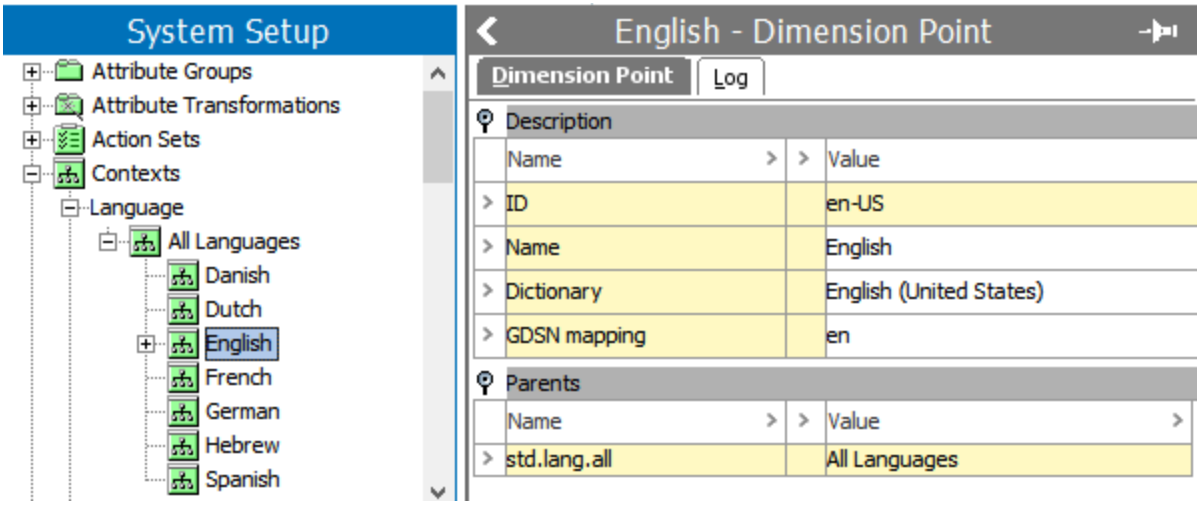
- **Name** - Enter the name of the Translation Configuration.
- **Source Language** - Select the context from the dropdown to indicate the source language.
- **Target Language** - Check the language(s) that the content should be translated into.
- **Filter Options: Include** - select at least one option to enable the **Save** button:
- 'Not translated' includes untranslated values in the filter
- 're-translation needed' includes values that have been amended and are thus designated as needing re-translation
- **Filter Options: Approval Requirement** - Uncheck the 'Completely approved source' box to waive the requirement that all objects must be fully approved prior to being translated.
- **Auto-approve translation** - By default, this option is checked and inbound translation updates are automatically approved and moved to the Approved workspace. When unchecked, inbound translation updates remain in the Main (maintenance) workspace.
- **Expected translation time (in Days)** - Used to communicate the number of days the translation is expected back from the service. This is usually populated based on the service level agreement, assuming there is one, between the translation service and the partner.

4. Click the **Save** button to complete the translation configuration.
5. Right-click the asynchronous service configuration and select **Start Polling** to activate the process.
6. Continue with the required setup, creating a business rule to trigger the translation as defined in the **Business Rules for Asynchronous Translations** topic.

Language Codes for Asynchronous Services

When sending files to be translated, some services require that the ISO-639 language code needs to be sent, followed by the ISO-3166 country code. For example, if a file was being translated from English US to Danish Denmark for SDL Translation, the required language codes would be 'en-US' and 'da-DK.' As shown below, the language dimension point IDs follow the required format, so a transformation lookup table is not required.

Note: When the language and country codes are not in the correct format in the IDs of the language dimension points, a Transformation Lookup Table is required.



For Across translation, since the Windows language 'LCID' (Language Code Identifier) is required for the language code, a Lookup Table must be used.

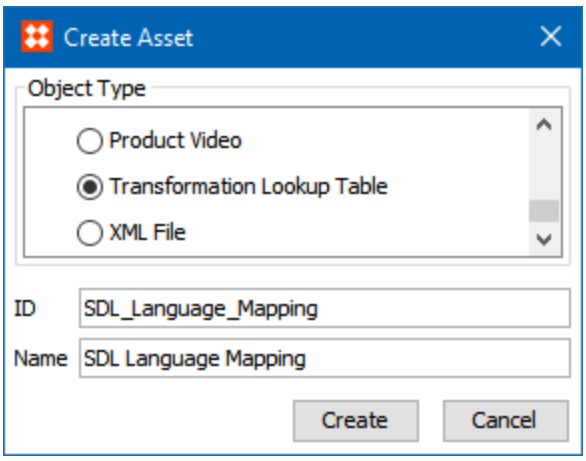
Transformation Lookup Table for Language Codes

Use the following steps to create a Transformation Lookup Table that will convert the language ID in the language dimension point into ISO language / country qualifiers.

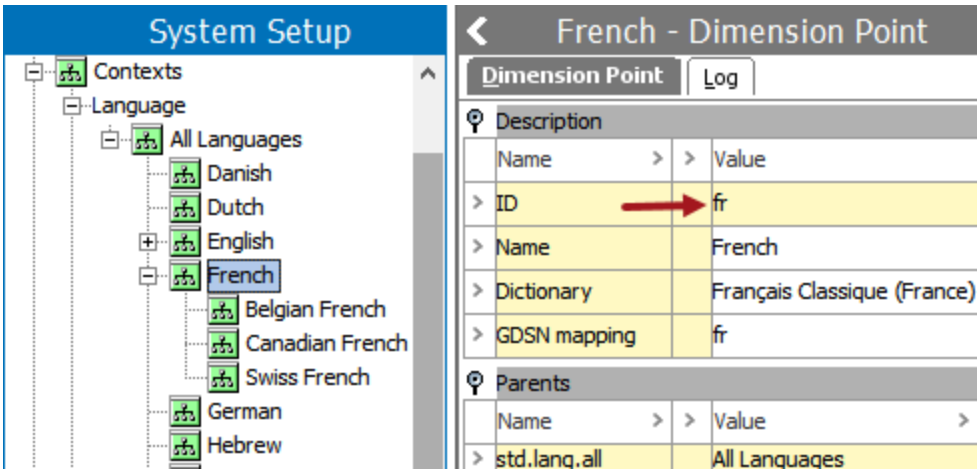
Important: Allowed languages are determined by the translation service or software. Attempting to translate for a language that is not allowed, even when both the target and source languages exist in the lookup table, results in an error in the BGP Execution Report. For example, this error is reported by Across when the target language was not allowed by the software: 'Failed to find target LCID: 1030. Supported target LCIDs are 10249, 10252, 1031, 1033, 1036, 11273, 11276...'.

---

1. Create a Transformation Lookup Table. For more information, see the **Transformation Lookup Tables** topic in the **Resource Materials** online help.

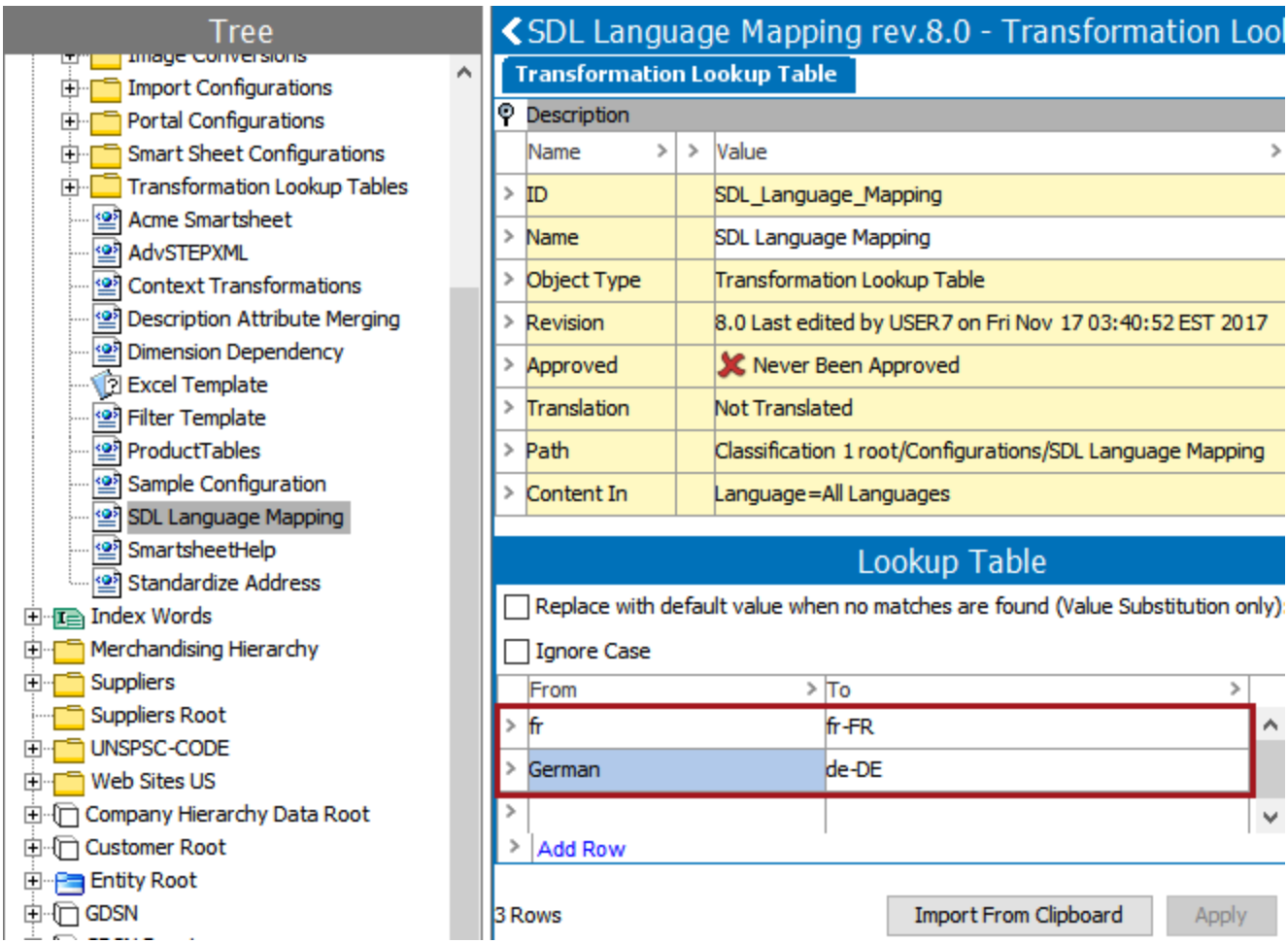


2. Find the dimension IDs for the languages that need qualifiers set up.

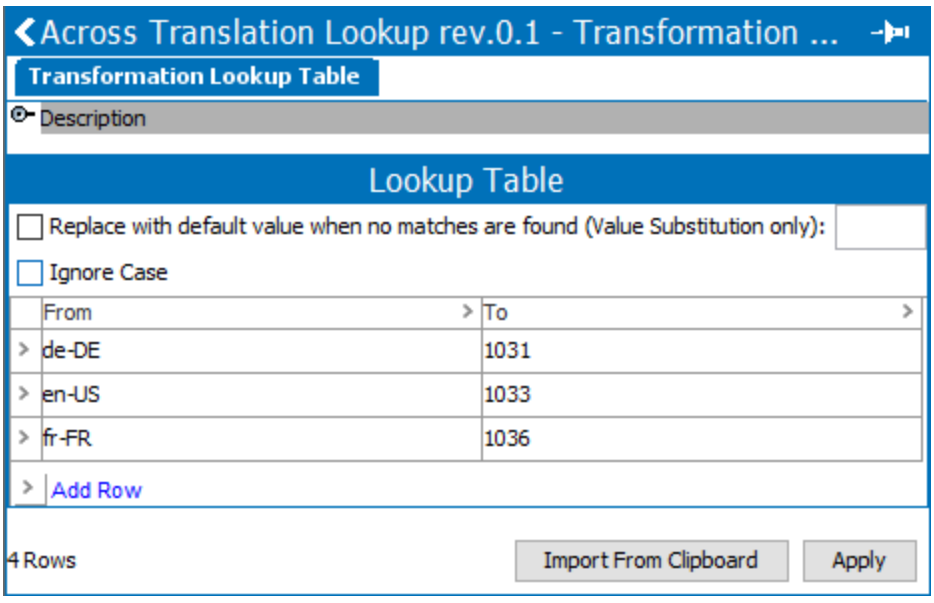


3. In the Transformation Lookup Table, determine the type of transformation needed to convert the language ID in the language dimension point to:

- **ISO language / country qualifiers** - Enter the language IDs in the 'From' column and the corresponding ISO language / country qualifier in the 'To' column as shown below.



- **Windows Language Code Identifier (LCID)** - Enter the language IDs in the 'From' column and the corresponding ISO language / country qualifier in the 'To' column as shown below.



4. Add one or more of the following case-sensitive properties to the sharedconfig.properties file on the STEP application server to identify one or more lookup tables for translations, and stop / start the server to apply the change.

- **AsyncTranslation.TargetLanguageLookupTable.Across**
- **AsyncTranslation.TargetLanguageLookupTable.Lionbridge**
- **AsyncTranslation.TargetLanguageLookupTable.SDL**

```
AsyncTranslation.TargetLanguageLookupTable.Across=AcrossLanguageMapping
```

In this property example, 'AcrossLanguageMapping' is the ID of the lookup table.

- **AsyncTranslation.TargetLanguageLookupTable** - This original property only allowed a single lookup table, even when multiple translation processes were used. Although it is deprecated, it still functions.

```
AsyncTranslation.TargetLanguageLookupTable=SDL_Language_Mapping
```

In this property example, 'SDL_Language_Mapping' is the ID of the lookup table.

Business Rules for Asynchronous Translations

Asynchronous translations can be initiated via a business rule which can be triggered in different ways, for example, from within a STEP workflow.

This section assumes that users are familiar with business rules. Most of the information about setting up and managing business rules can be found in the **Business Rules** section of the online help. However, this topic addresses the one business action that is required to initiate an asynchronous translation in a workflow.

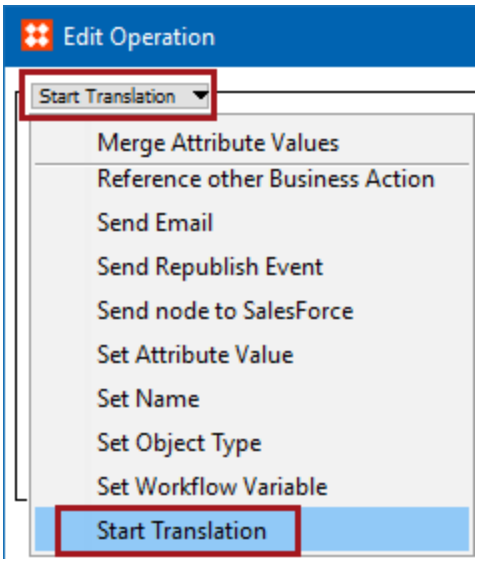
Use the following steps to configure a business action that will start a translation job for asynchronous translation.

Prerequisites

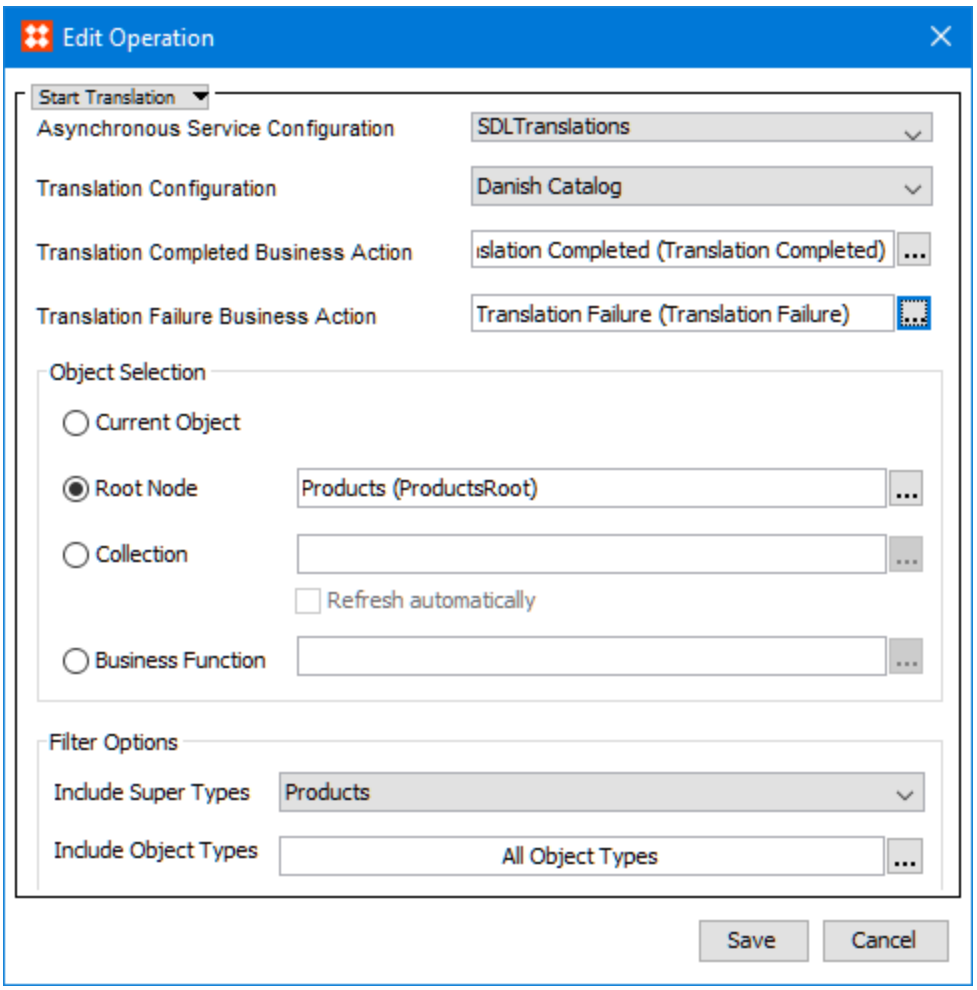
- The 'Translation Completed Business Action' and 'Translation Failure Business Action' can be created prior to being selected for the **Start Translation** Business Action. These actions can move the translation job through the workflow.
- The **Start Translation** Business Action only displays if the functionality for asynchronous translations has been activated on your system. See your Stibo Systems account representative about adding the functionality, if desired.

Configuration

1. Create a business action in System Setup, then right-click and select Edit Business Rule.
2. In the Business Rule Editor, give the rule an ID and Name, then click **Add new Business Action** to open the Edit Operation dialog.
3. In the Edit Operation dialog, select the **Start Translation** business operation, as shown in the image below.



4. Supply the Start Translation operation parameters shown below as required:



- For **Asynchronous Service Configuration** - Use this dropdown to select the Service Configuration you want to initiate.
- For **Translation Configuration** - Select the Translation Configuration to which the business rule applies. There can be many Translation Configurations for the same Service Configuration but the business action must be configured to use just one translation configuration.
- For **Translation Completed Business Action** - Select the business action that must be executed once a translation job is completed. If the translation was initiated in a STEP workflow task, you can use the Trigger STEP Workflow Event business action to move the workflow task to the next state.

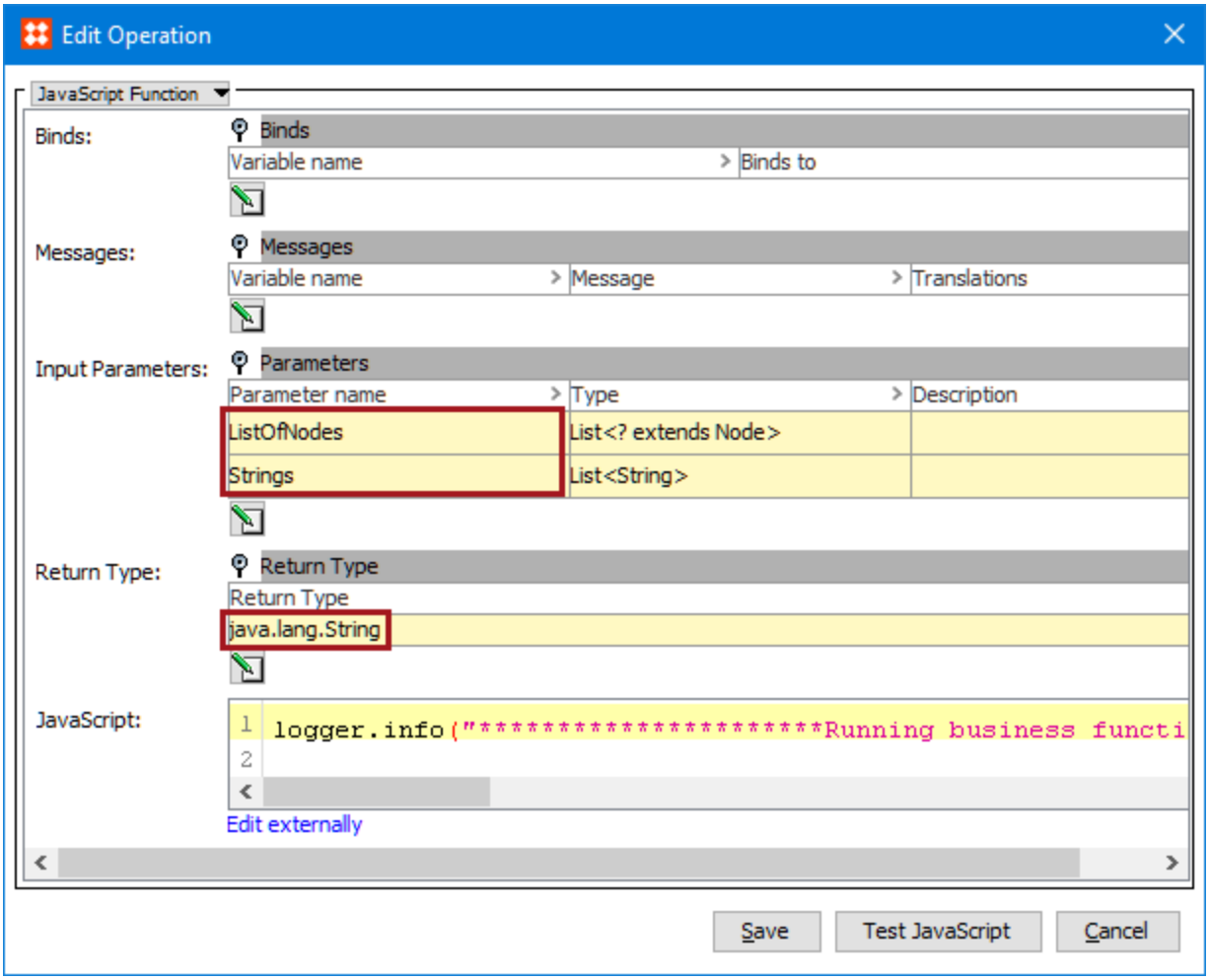
  The Filter Options 'Approval requirement' parameter on the Translation Configuration is considered when determining the nodes used in the background process during the Asynchronous Translation process. For more information, see the **Setting Up a Translation Configuration** topic.

- For **Translation Failure Business Action** - Select a business action that will be executed when a translation job fails.

The Filter Options 'Approval requirement' parameter on the Translation Configuration is considered when determining the nodes used in the background process during the Asynchronous Translation process. For more information, see the **Setting Up a Translation Configuration** topic.

- For **Object Selection Options** - Choose one of the following options:
  - **Current Object** - For accessing the STEP object that the business rule is being evaluated or executed against.
  - **Root Node** - For selecting objects directly from the Tree. These can include products, assets, classifications, attributes, and LOVs. Click the ellipsis button (...) to either browse the Tree or search for a specific root node. When this option is chosen, the selections in the **Filter Options** section of the dialog are activated. See the 'Filter Options' subsection below for more details.
  - **Collection** - For selecting a manually selected grouping of various object types (which can, potentially, be from multiple super types) grouped in a collection. In the Collection field, click the ellipsis button (...) and either browse to or search for the collection to be translated. If the collection is based on a search and you want to ensure that new or amended values in the collection are captured prior to exporting for translation, click the box beside **Refresh Automatically**. Choosing this option activates the selections in the **Filter Options** section of the dialog. See the 'Filter Options' subsection below for more details.
  - **Business Function** - For creating output from STEP to send to the translation service. Click the ellipsis button (...) to browse to or search for the relevant business function. For more detailed information about how to use business functions, see the **Business Functions** section of the **Business Rules** documentation.

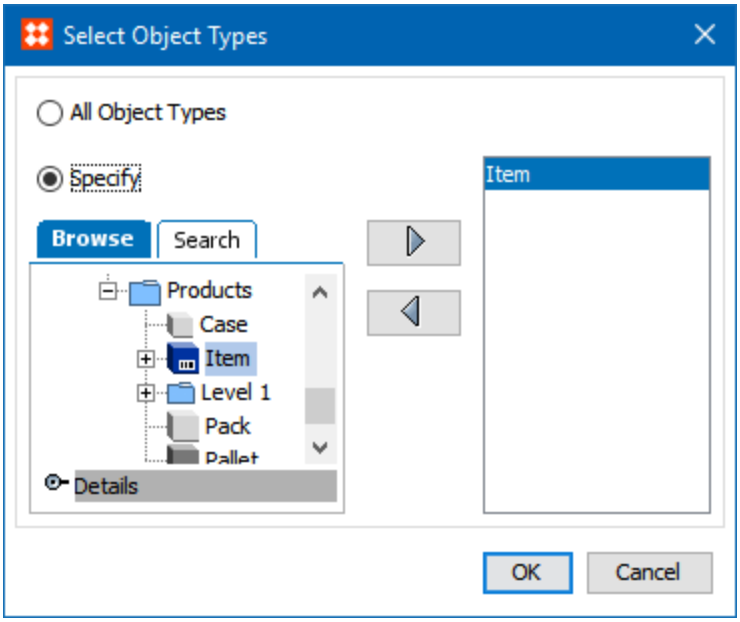
    As shown in the following image, to use the Business Function feature for asynchronous translations, two input parameter types are required: **List<? extends Node>** and **List<String>**. The Return Type **java.lang.String** must also be used.



- For **Filter Options** - set the parameters as required:
  - **Include Super Types** - From the dropdown list, select which super types should be translated. This field is only activated if **Root Node** or **Collection** was chosen for Object Selection. The super type options are Products (default), Classifications, Assets, or All.
  - **Include Object Types** - Click the ellipsis button (...) to display the **Select Object Types** dialog and select the object types to be included in the translation export. This field is only activated if **Root Node** or **Collection** was chosen for Object Selection.

    In the dialog, click the **Specify** radio button to enable the Browse and Search tabs for the Tree window. Select the relevant object type(s), then click the right-facing arrow ( ) to add the object type(s) to the filter. To remove an object type from the filter, select it and click the left-facing arrow ( ).

    Click **OK** to close the dialog.



11. Click the **Save** button to close the Edit Operation dialog and add the operation to the business rule.

Running the Start Translation Business Rule

After setup of the business action is complete, testing or running the business rule starts a background process that is displayed on the BG Processes tab under the Async Job Runner node. The job displays a status of 'suspended' until the translation job is complete.

Translation Status Widget

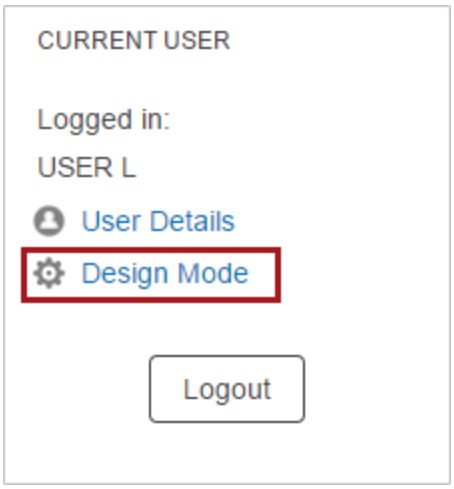
The Translation Status Widget is a Homepage widget that, once configured, enables users log in to Web UI to see the number of translation jobs that are in certain states for a selected asynchronous configuration. Similar to the Status Selector widgets, it is possible to navigate to a screen showing detailed information about job nodes for each state upon clicking. It is recommended that users are familiar with and have followed the steps to setting up a translation configuration and asynchronous service prior to configuring the widget. For more information, refer to the **Asynchronous Translations** topics in this guide.

After an admin user adds the widget, configuration can begin.

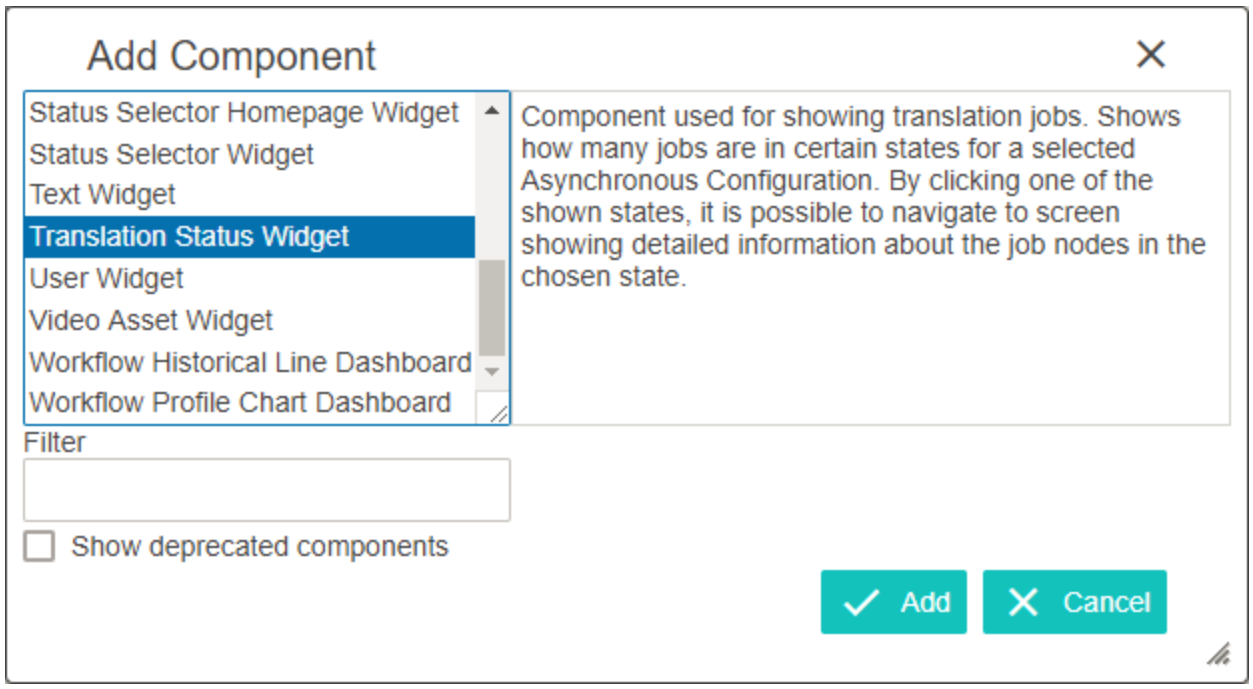
Adding a Translation Status Widget

Use the following steps to add a Translation Status Widget to the Web UI home page.

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 Home page (in the current user widget).

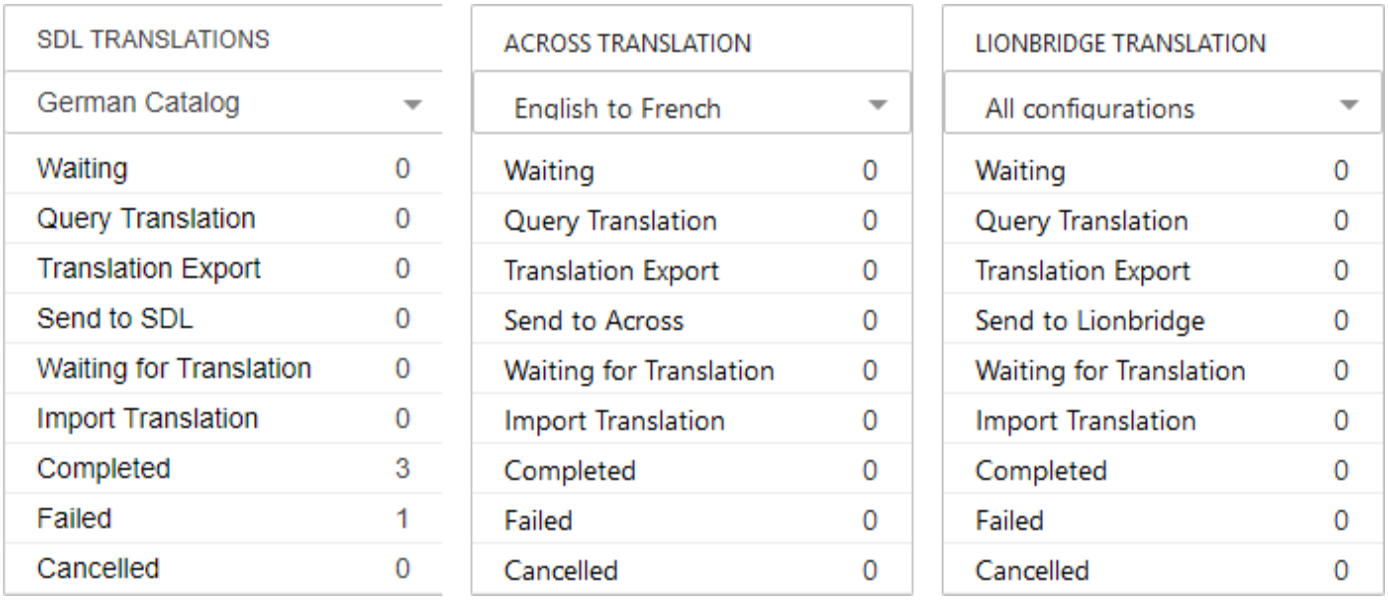


3. In the Designer, if the Home Page Properties are not automatically shown, choose **---[HOMEPAGE]---** from the screen dropdown list.
4. Add the Translation Status Widget to a Widget Grid:
   - If adding it to an existing Widget Grid, double-click the desired Widget Grid listed in the Child Components > Content parameter field. Click Add, choose **Translation Status 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 **Translation Status Widget** from the 'Add component' dialog, and then click Add again.



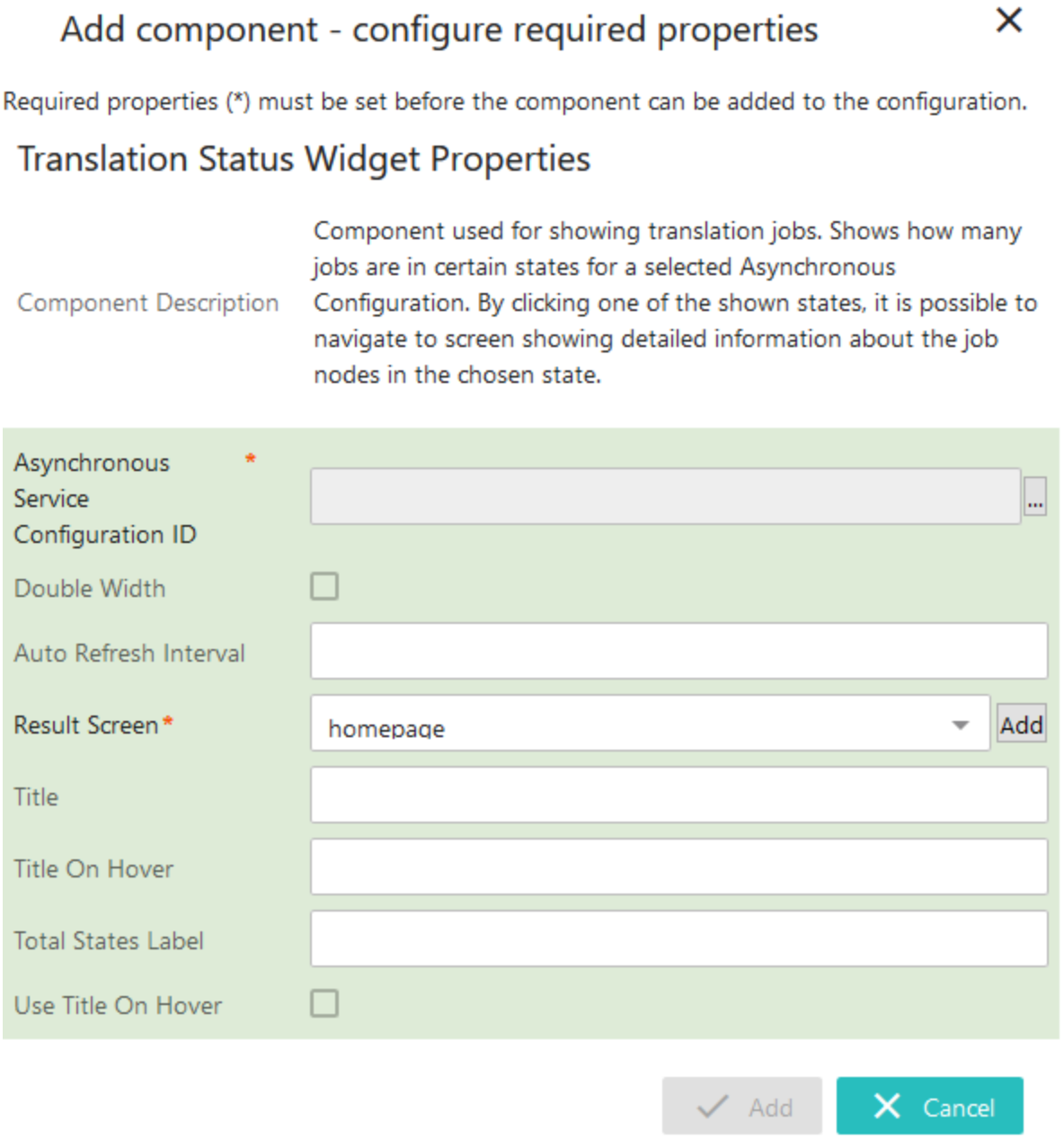
Widgets can be reordered as needed. Either reorder the individual widgets inside a Widget Grid by clicking on a widget name and then clicking the Up and Down buttons in the **Widgets Child Component** of the **Widget Grid Properties** screen. Or, as an alternative, select a **Widget Grid** in the Child Components > Content field of the Home Page Properties and click Up and Down to reorder the entire Widget Grid. Details on how to add a widget to a homepage can be found in the **Adding Widgets to a Homepage** topic in the **Getting Started** documentation.

5. At a minimum, enter an **Asynchronous Service Configuration ID** and a **Result Screen**, then click the Add button to add the widget. Further configuration can be done if needed as described in the following section.



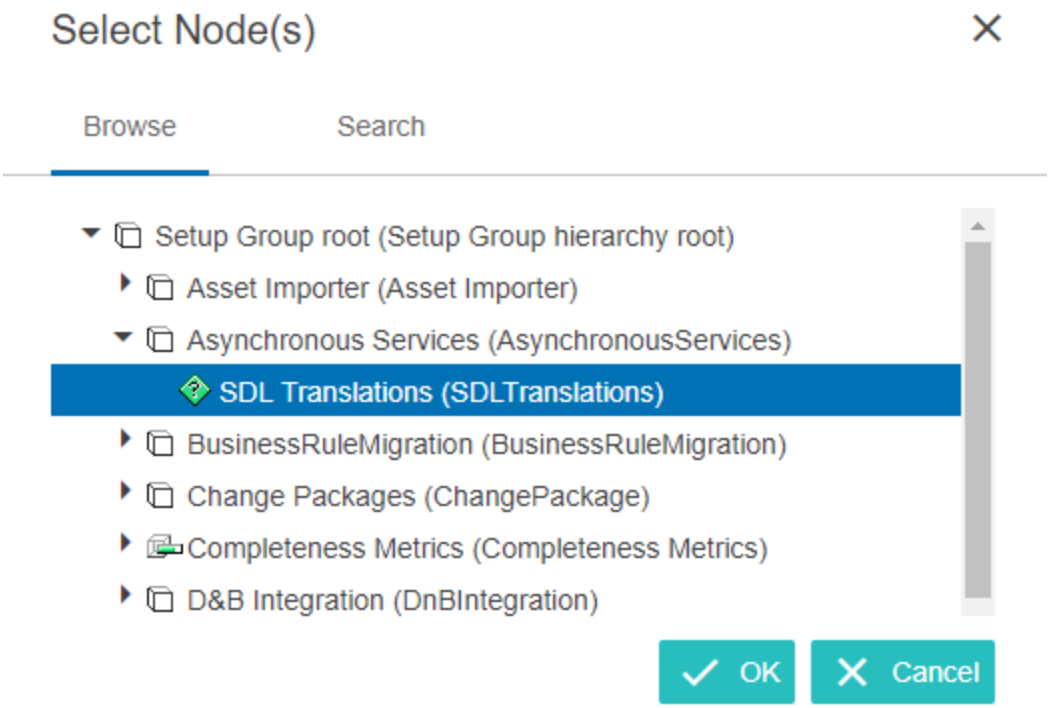
Configuring a Translation Status Widget

An image of the default properties screen follows. Each parameter should be configured as needed. Help text is accessed by clicking the info icon to the right of each parameter name. The parameters marked with an asterisk are mandatory. The sections directly after the image explain what each parameter does and the steps / options for configuring them.



Asynchronous Service Configuration ID

Click the ellipsis button (...) to display the Node Picker Dialog (below) and select the required **Asynchronous Configuration ID** for the Translation Status Widget. Click OK.



Double Width

Select to double the width of the widget on the Home Page.

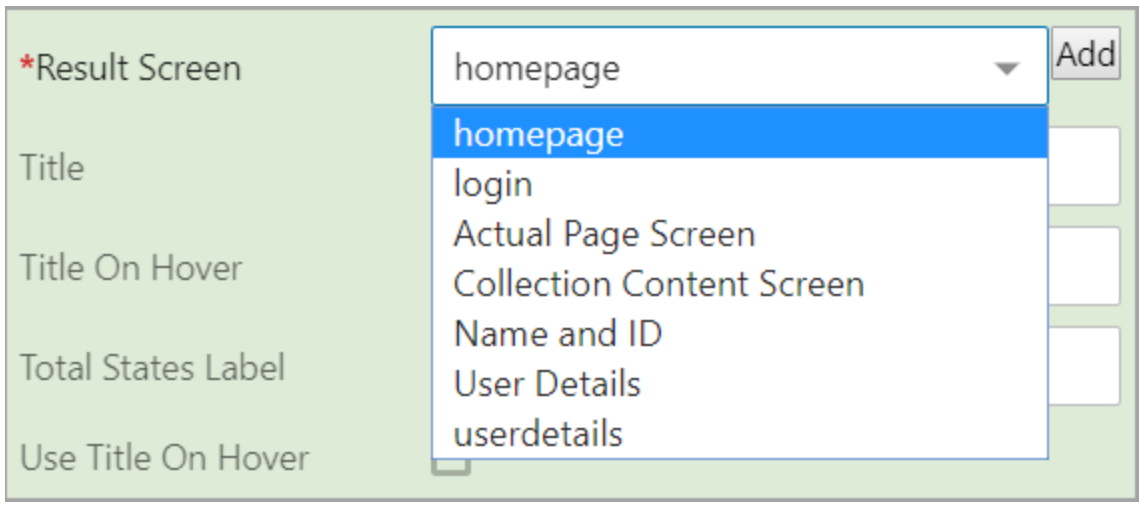
Auto Refresh Interval

If desired, enter the number of seconds that should pass before the widget 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 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 without user intervention.

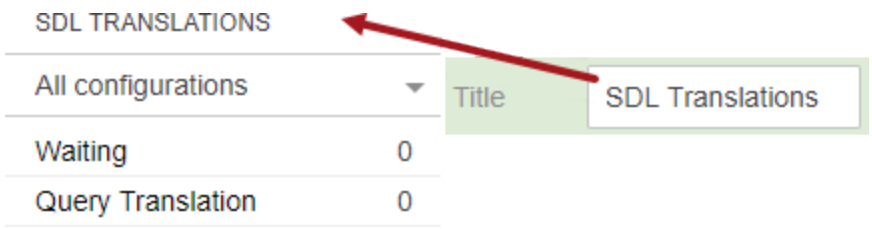
Result Screen

Select the desired screen from the dropdown. In this example, the 'homepage' screen is selected. For more information on creating screens within the Web UI, see the **Design Mode Basics** topic in the **Web UI Getting Started** documentation.



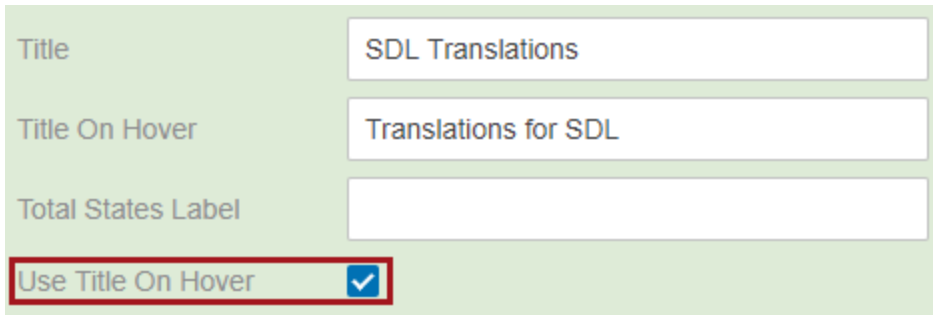
Title

Enter the title you want to appear for the **Translation Widget**. For example, with 'SDL TRANSLATIONS' in this field, the widget displays as follows:



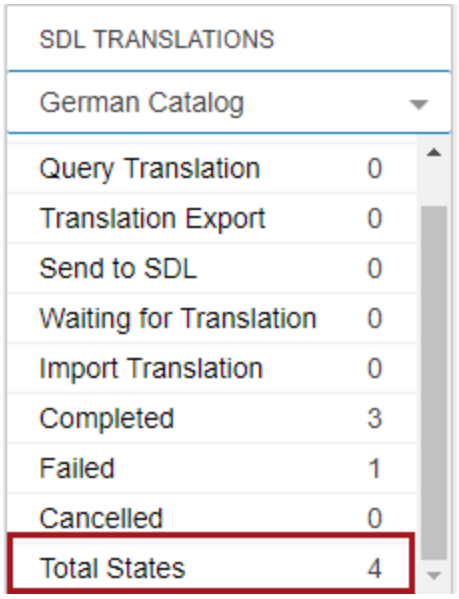
Title On Hover

Enter the title that appears when hovering the mouse over the Title area of the Translation Widget. The **Title On Hover** text option will only work when the **Use Title On Hover** option is checked as shown in the image below.

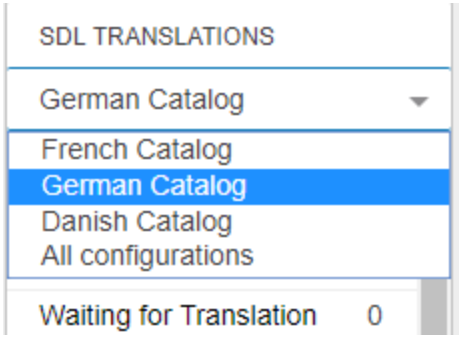


Total States Label

If given a value, this will include the total Translations States, as shown below.



The **Total States Label** works based on the configuration selected from the dropdown in the **Translation Widget**. When a single configuration is selected, the total for that configuration is displayed. When the 'All configurations' option is selected, the total for all configurations is displayed.



Use Title on Hover

When this text box is checked, text from the **Title On Hover** parameter is displayed when hovering over the widget title.

Dun & Bradstreet Integration

Both STEP Workbench and Web UI support matching data from the Dun & Bradstreet (D&B) database and then allow for enriching customer information in STEP with this data. These records, brought in either manually or through inbound integrations, can be matched using confidence scoring and enriched automatically through the use of new processors and workflows.

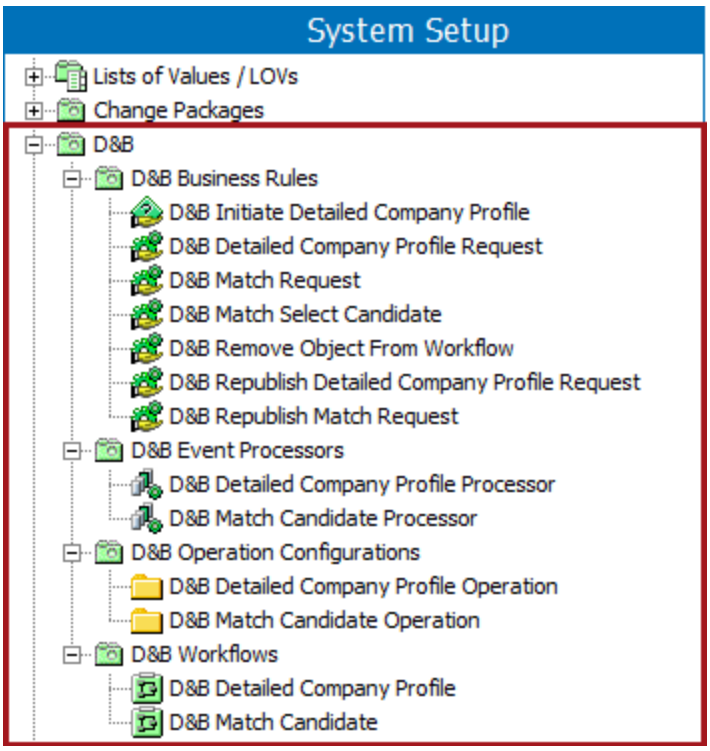
The integration to D&B services is implemented following an asynchronous integration pattern, using the following STEP components

- Event processors for matching and detailed company profile enrichment
- Business actions that enable matching, company profile enrichment, removal, republishing, and candidate selections
- Workflows for D&B integration
- D&B Integration component model

To assist with proper configuration, an easy setup is available that creates all of the D&B mapping configurations, workflows, business rules, and event processors. STEP will create a D&B (STEP ID: DnBIntegration) setup folder in System Setup that contains the following:

- **D&B Business Rules** - Business actions that enable the D&B functionalities to process. Each one is named according to its function.
- **D&B Integration Event Processors** - Event processors used to request changes from third-party services.
- **D&B Operation Configurations** - There is a node for each D&B operation with a configuration specific to each operation.
- **D&B Integration Workflows** - There is one workflow for each D&B Service: D&B Match and D&B Detailed Company Profile. The workflows are used for controlling the information flow.

This easy setup is referred to as 'automatic setup' throughout the rest of the Dun & Bradstreet documentation.



In addition to the D&B System Setup folder, attribute groups, attributes, and data containers are created as part of the automatic setup. There are over 200 attributes / data containers, and they are separated out between the ones used for candidate matching and the ones used for enriching company profiles. For a full list of attributes, see the **Dun & Bradstreet Attributes and Data Containers** topic.

Note: If you need to change any of these generated D&B tools, it is recommended practice to duplicate the supplied instance, then modify that business rule, workflow, event processor, etc. This method is advised because whenever D&B integration is updated, any values that were changed may be overwritten.

Prerequisites

Important: To use the D&B functionality, the applicable license must be in place and the installation recipe applied. Also, it is important for customers to note that D&B Direct API calls must be made using Secure Sockets Layer (SSL), and the URL of the D&B endpoint is https://direct.dnb.com/.

Configuring the component model requires users to be familiar with the System Setup tab in 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.

Also, users should be familiar with business rules, workflows, event processors, and it is expected that anyone configuring Web UI components is familiar with Web UI designer. If not, the users should search online help to understand these concepts and processes.

Anyone configuring or using the D&B setup package needs to have the proper privileges and understand how all the pieces work together. The automatic setup is designed to make it so that users have very little to do configuration-wise to get up and running as soon as possible and most of these concepts are not covered in this D&B documentation.

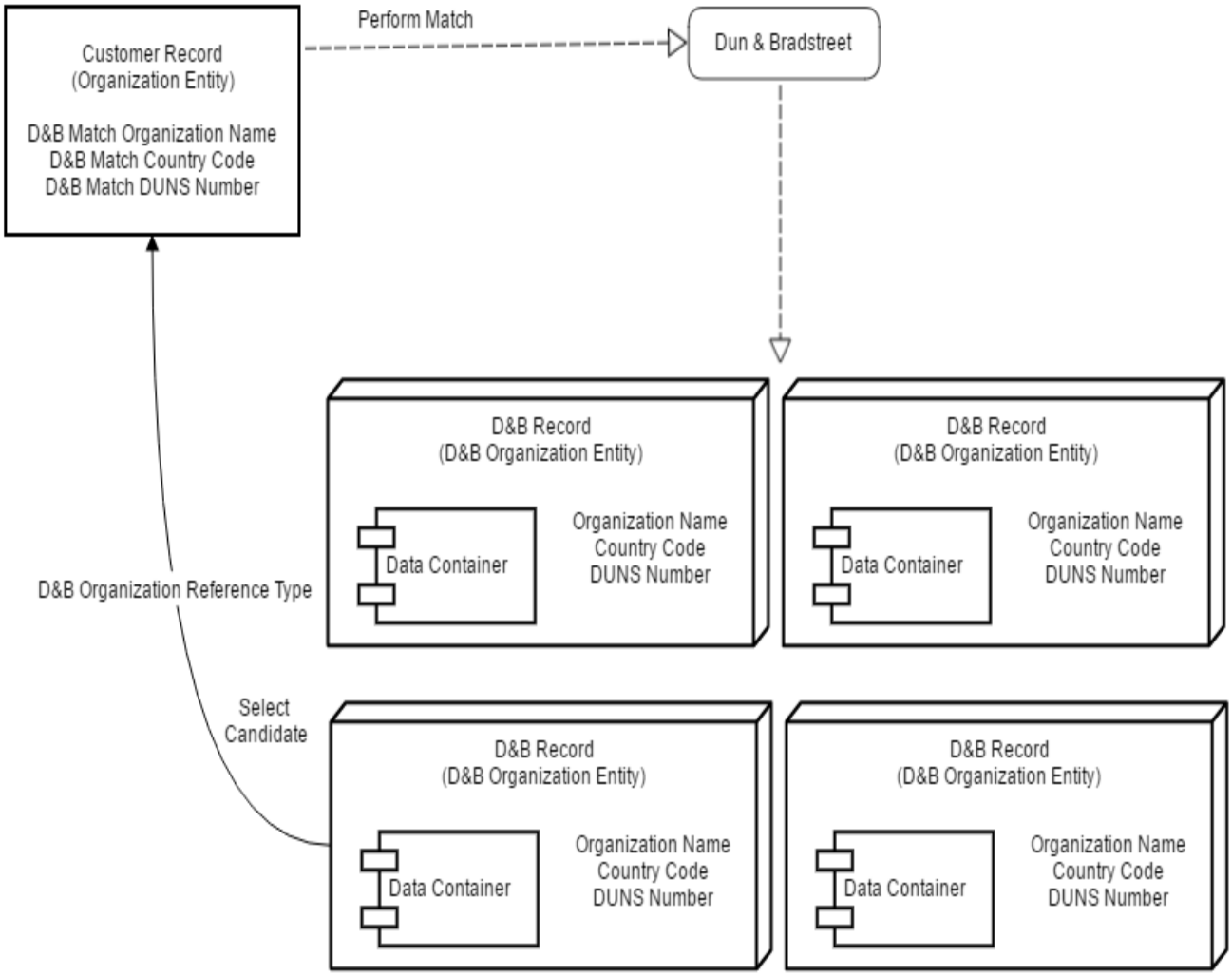
Customer Data Model

Before starting the D&B setup, the relevant data structures need to be defined. The proper entity object types should be created and the entity root for where the system will create new D&B organization entity records as returned from D&B. The D&B records will be referenced by a customer record, so the proper reference types and links also need to be configured prior to starting the D&B automatic / easy setup process. More information about the data model and what is required can be found by reading through the next section in this topic, so it is a good idea to read through that information to verify that your data model is setup as needed for D&B integration to function.

Note: As part of the D&B Integration Easy Setup (described in the Configuring Dun & Bradstreet Integration section that follows), the user must define already configured references for the component model to be considered valid. The references for D&B Match Candidate Reference Type and D&B Organization Reference Type must have specific Sources and Targets. The record which holds the information to be compared should be the Valid Source Type and the D&B record which will hold the D&B results should be the Valid Target Type. These references must have only **one** Valid Source Type and one Valid Target Type.

This is an outline of the D&B process that shows why the setup is so important:

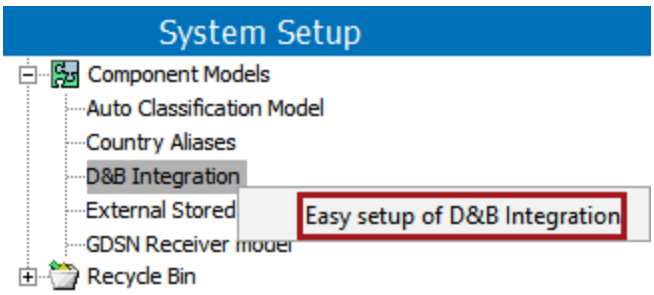
- Input for D&B Match requests is taken from a configurable set of attributes on the organization record
- Data returned from D&B is stored in an entity, in a fixed data model comprised of data containers and attributes that is created by the easy setup
- D&B Matching will create the D&B organization entities and a reference from the organization record to the D&B organization record



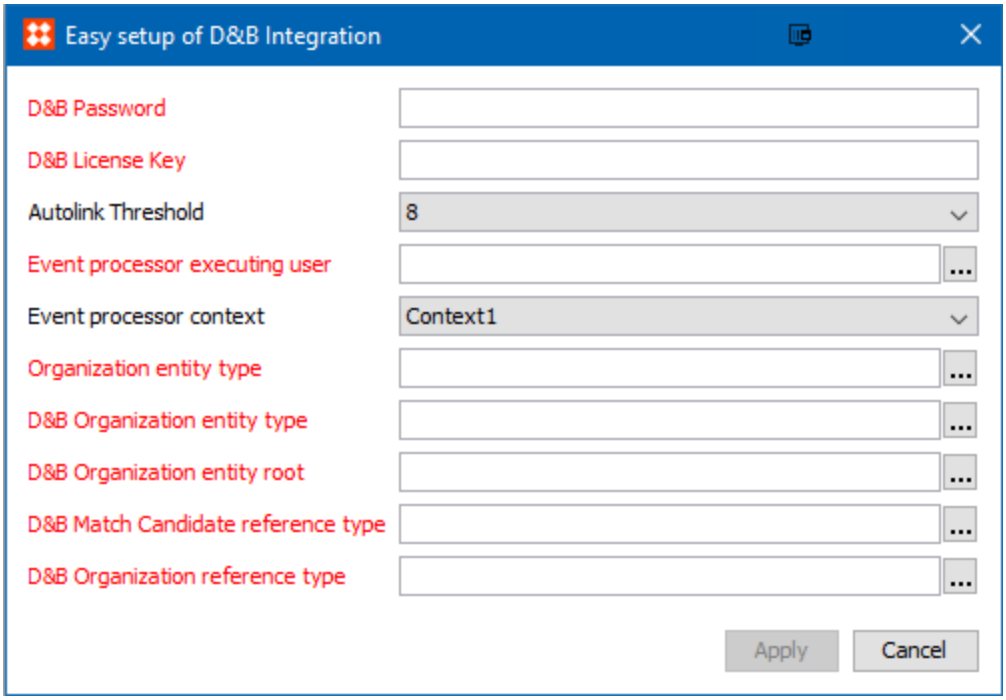
Configuring Dun & Bradstreet Integration

As mentioned, D&B Integration includes an automatic setup that will create all the setup files and needed attributes and data containers. To start the automatic configuration:

1. Go to System Setup > Component Models > Select **D&B Integration**.
2. Right-click the component model name (D&B Integration) and select 'Easy setup of D&B Integration.'



3. When this menu option is selected, the 'Easy setup of D&B Integration' dialog will display. The dialog requires a bit of setup to create the appropriate connections with D&B.



- **D&B Password** and **D&B License Key**: By default, customers can access up to 500 free D&B 'match' transactions. Simply request a license key from your Stibo Systems representative.

  When the 500 'match' transactions are used, customers may purchase 'match' and 'profile' licenses directly from Stibo.

  Note: The 'profile' license includes access to both 'match' and 'profile' transactions. One transaction of 'profile' gives you the ability to do a match first and then obtain a detailed company profile. Regardless of which license you buy, only one license key will be provided to cover both 'match' and 'profile' transactions. Contact your Stibo Systems account manager or partner manager for more information.

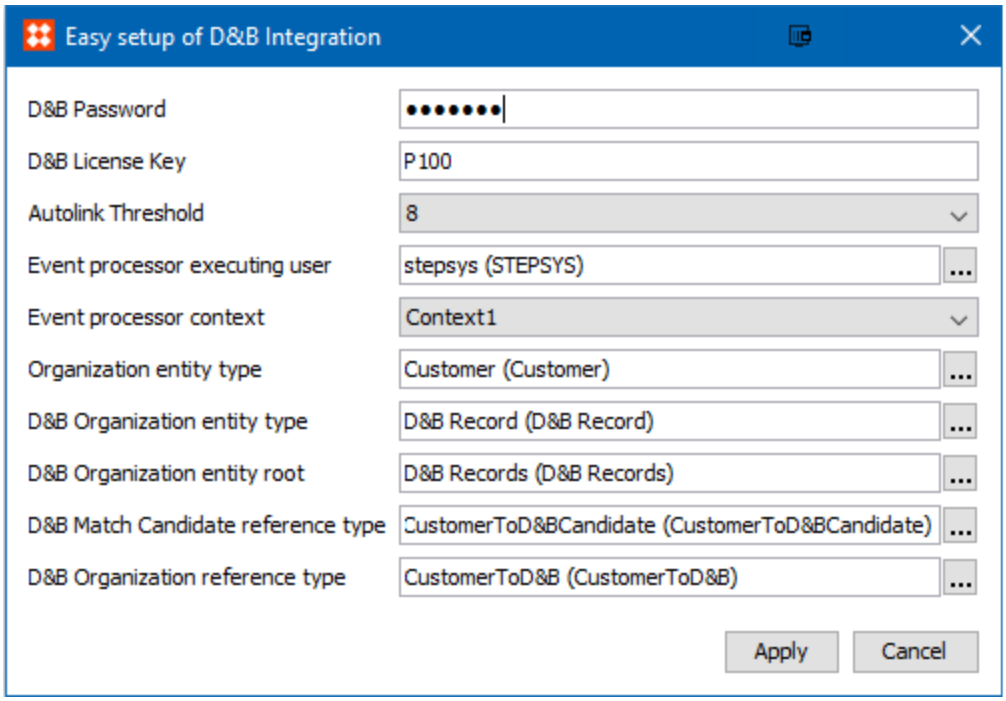
- Select a **Autolink Threshold** (integers 6 through 10) from the dropdown. This is a D&B-determined auto-linking threshold used for matching customer records to D&B record candidates. For example, if you set it at 6 and get one match candidate at that threshold, the D&B record auto-links to the customer record. The numbers are labeled in the dropdown with 6 being a very low (match) threshold and 10 being a very high (match) threshold. The default is 8.
- **Event processor executing user** tells the system which user will be associated with all of automatic event processing done as part of the D&B processes. Click the ellipsis button (...) to select the user.
- **Event processor context** is the STEP Context the event processors will be configured to operate in. You can make an alternate selection via the dropdown.

- The rest of the values need to be populated before moving forward and the data modeling setup must be created prior to running the easy setup. The objects, roots, and reference types created for the modeling are the ones to be selected in the 'Easy setup of D&B integration' dialog.

  Click the ellipsis button (...) for each parameter to set the entity roots, entity types, and entity-to-entity reference types as indicated within the dialog.

  - **Organization entity type** - Entity object type for the customer records.
  - **D&B Organization entity type** - Entity object type for the D&B records.
  - **D&B Organization entity root** - Root where D&B records will be saved
  - **D&B Match Candidate reference type** - Reference type for D&B match candidates. A reference is made from each candidate to the applicable customer record; once a match is made, all the non-matched records are removed from the system and this reference is no longer needed for that particular customer record since matching is complete.
  - **D&B Organization reference type** - Reference type for D&B matches. Once a match candidate selection is made, the D&B record is then linked to the customer record with this reference type.

This is an example of what an 'Easy setup of D&B Integration' dialog may look like filled out. Your setup will differ depending on your data model. Also, the D&B License Key shown is just an example and not representative of how an actual key would look when populated.



4. After completing this configuration, select 'Apply.' The component model will populate with the information provided, the setup folders will be created, and candidate matching can begin.

Dun & Bradstreet Component Model

After running the automatic setup, the Dun & Bradstreet component model will map the component model names (D&B data fields) to STEP attributes, entity object types, and entity reference types. A completed component model will appear like the following image:

Component Model Configuration

Name	Value	Description
D&B Organization Entity Type	D&B Record	Used to set the entity type used for the D&B Organization Records.
Organization Entity Type	Customer	Used to set the entity type used for Organization Entities.
D&B DUNS Number	D&B DUNS Number	Attribute on the D&B record to hold DUNS number. Used when running Detailed Company Profile.
D&B Match Address Line 1	D&B Match Address Line 1	Attribute on the customer record to hold first address line used for matching.
D&B Match Address Line 2	D&B Match Address Line 2	Attribute on the customer record to hold second address line used for matching.
D&B Match Confidence	D&B Match Confidence	Attribute on the D&B candidate references to hold confidence value on candidate references.
D&B Match Country Code	D&B Match Country Code	Attribute on the customer record to hold country code used for matching.
D&B Match DUNS number	D&B Match DUNS Number	Attribute on the customer record to hold DUNS number used for matching.
D&B Match Organization Name	D&B Match Organization Name	Attribute on the customer record to hold the organization name used for matching
D&B Match Phone Number	D&B Match Phone Number	Attribute on the customer record to hold the phone number of a company.
D&B Match Postal Code	D&B Match Postal Code	Attribute on the customer record to hold the postal code used for matching.
D&B Match Reason Code	D&B Match Reason Code	Attribute on the customer record to hold the reason code if searching for a company located in Germany.
D&B Match Registration Number	D&B Match Registration Number	Attribute on the customer record to hold the registration number used for matching.
D&B Match State/Territory	D&B Match Territory/State	Attribute on the customer record to hold the state or territory name used for matching.
D&B Match Town Name	D&B Match Primary Town	Attribute on the customer record to hold the primary town name used for matching.
D&B Match Candidate Reference Type	CustomerToD&BCandidate	Reference type used to link candidates to a D&B Organization record.
D&B Organization Reference Type	CustomerToD&B	Reference type used to link organization records to their D&B Organization Records.

Edit

If there are any issues with the automatic setup and not all values could be mapped, then you will be able to see what the issues are within the component model. If any of the object types, reference types, or attributes / data containers being mapped are unclear, the Description column will provide context for how these fields are to be used.

These attributes in the component model will map to the following corresponding D&B attributes:

Request Attributes	D&B Attributes
D&B Match Address Line 1	StreetAddressLine-n
D&B Match Address Line 2	StreetAddressLine-n
D&B Match Country Code	CountryISOAlpha2Code
D&B DUNS Number	DUNSNumber

Request Attributes	D&B Attributes
D&B Match Organization Name	SubjectName
D&B Match Organization Postal Code	FullPostalCode
D&B Match Registration Number	OrganizationIdentificationNumber
D&B Match Organization Territory/State	TerritoryName
D&B Match Organization Primary Town	PrimaryTownName
D&B Match Phone Number	TelephoneNumber
D&B Match Reason Code	OrderReasonCode

Note: The D&B Match Confidence is a candidate reference attribute that is set by the D&B response based on the quality of the matched record.

Once the setup is complete, users can begin matching existing customer records. More information can be found in the **Dun & Bradstreet Matching** topic.

Errors during setup, matching, and detailed company profiling

The table below outlines different errors that are possible during the D&B process. Outlined is the type of error, if the system should retry the process, if the error stops the event processor, and if the error is recorded within the workflow.

Type of error	Retry	Stop event processor	Report to workflow (to data steward)
Connection timeout	Y	N	N
Invalid license	N	Y	N
D&B finds no results (company profile)	N	N	Y
Invalid match request	N	N	Y
Internal unknown service error	N	Y	N
STEP internal error	N	Y	N
Response parse error	N	N	Y
Data model errors	N	Y	N
Other errors from D&B service	N	N	Y

When errors are sent to the workflows, a transition is made to an error state. A user must access those tasks and handle the errors.

Dun & Bradstreet Matching

The Dun & Bradstreet (D&B) data integration allows for users to do a matching request on a customer record. The D&B Match Candidate Workflow allows users to keep track of the tasks, described below.

Prerequisites

Prior to starting the matching process, the setup for D&B integration must be complete. See the **Dun & Bradstreet Integration** topic.

The D&B Integration Component Model is where you complete the setup and decide what data (i.e., attribute, object types, and reference types) you will use when performing a match. You are using values from your customer record to match against D&B records. If so desired, these attributes may be changed to calculated attributes based on other attributes in the organization entity. The Perform Match / Select Candidate tasks are described below.

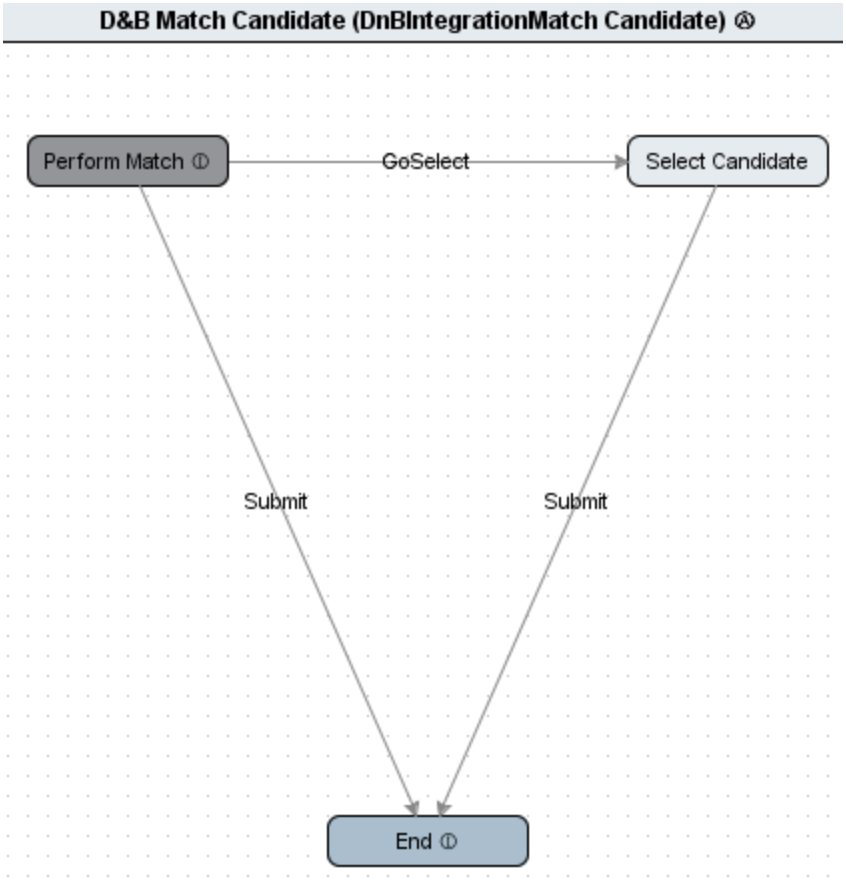
D&B Match Candidate Workflow

Matching is initiated by initiation of the organization entity (as designated in the D&B Integration component model) in the D&B Match workflow. Initiation is done via standard methods, including upon entity creation or through manual initiation, or initiated by a variety of other actions or processes such as business rules, imports, and bulk updates.

Initiating customer records triggers an event that is then processed via an event processor. A business action tells the system to make a call to D&B and try to match the customer record data (determined during setup) to D&B records. A response is received and sent back to STEP to write into a D&B record or records. At this time, if multiple candidates are found and returned from D&B, then the customer record moves to the Select Candidate task. If only one match candidate is returned from D&B, then the customer record transitions through the D&B Match workflow seamlessly, with the D&B Organization reference being made at the end.

When multiple match candidates are returned, and a Select Candidate task needs to be completed, users evaluate the D&B records based on designated criteria to make a best-match choice, and select one of those candidate D&B records to reference. Until a selection is made, D&B Match Candidate references are made from the customer record to the possible D&B Record candidates. When the event processor picks up the event asynchronously, it uses a business action to call D&B and matches via an entity-to-entity reference. These references and non-match candidates are deleted once a match is selected, and the D&B record selected then becomes a reference of the customer record via an D&B Organization reference. The Select Candidate process is best done in Web UI and described below.

Important: The processes described above are performed asynchronously, creating a queue of actions. Users must allow time for each match request to process.



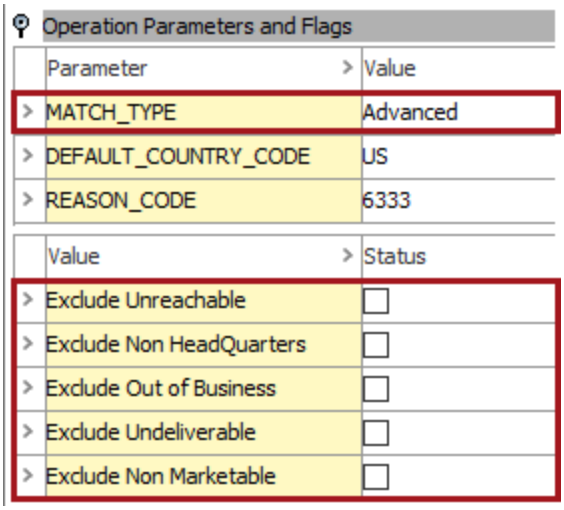
Perform Match

Matching can be done in the Web UI or in workbench. It does not matter where the initiation process begins.

A matching request is comprised of attributes mapped in the D&B Integration component model. As explained in the **Dun & Bradstreet Integration** topic, input for D&B Match requests is taken from a configurable set of attributes on the organization record. Those attribute values are part of the request sent to D&B, and each attribute has a match response returned from D&B. More details about configuring the component model can be found in that same topic. Each value has a description that describes what it is used for, and all but one attribute (the one mapped to D&B Company Profile DUNS Number) is used in the matching process.

Also, the MATCH_TYPE parameter and exclusion values from System Setup > D&B > D&B Operations Configurations > D&B Match Candidate Operations is pulled into request to D&B.

- The MATCH_TYPE options are SBRI, Advanced, or Basic. When MatchTypeText is set as 'SBRI', this indicates that the match will be performed against the D&B Small Business repository. The difference between basic and advanced matching lies in the level of detail in explanation of why each candidate matches the customer.
- Five exclusions can be enabled. When enabled via workbench, these exclusion options are also honored (but configurable) when doing a 'Modify Search' action in Web UI.

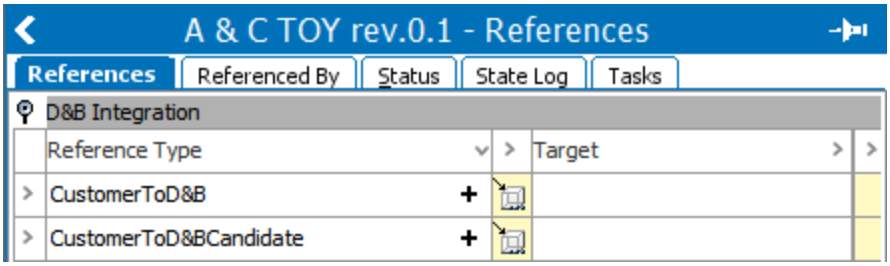


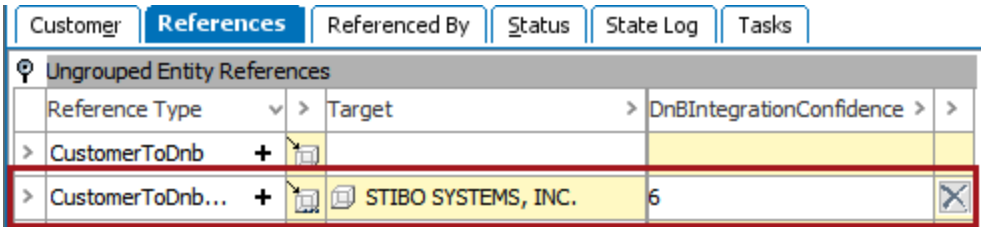
Note: Matching candidates is based on the D&B Integration Matching Processor, found in the D&B folder that is created in the automatic setup. For information on maintaining event processors, see the **Event Processor** documentation.

References and Match Candidates

When one match exists, no selection needs to be made and the D&B organization entity (D&B record) is automatically referenced by the organization entity (customer record). Again, initial setup is done via the D&B Organization Reference Type mapping in the component model.

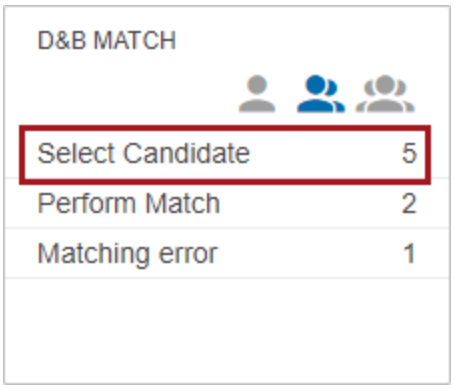
When multiple match candidates are found, a D&B reference is made from the customer record (organization entity) to each candidate record (D&B record / D&B organization entity) based on the D&B Match Candidate Reference Type in the component model.



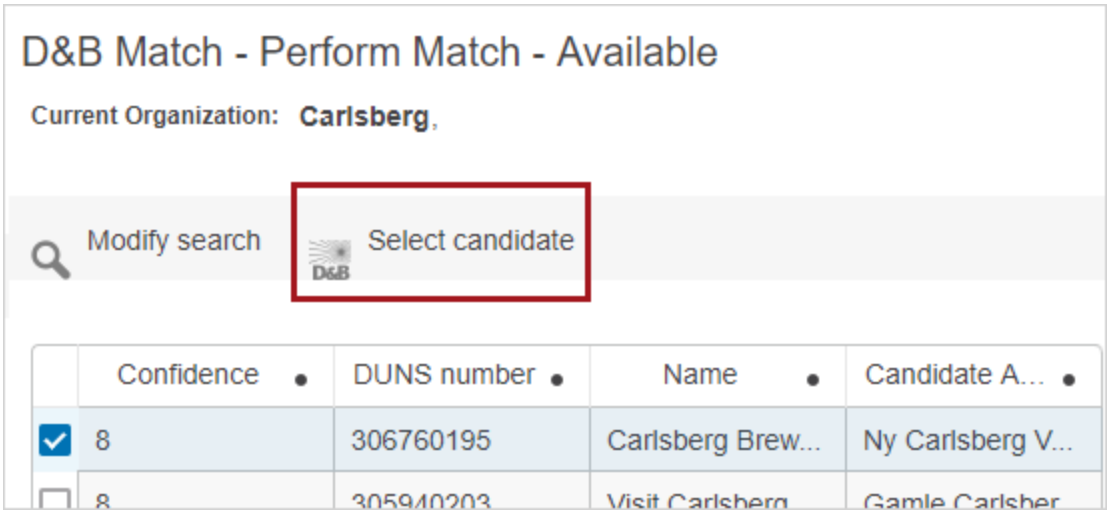


Select Candidate

For organization entities that have multiple match candidates, a single candidate must be selected. This is best done through the Web UI. Detailed information regarding how to configure and use Web UI for D&B purposes can be found in the **Dun & Bradstreet Integration in Web UI** topic in the **Workflows in Web UI** documentation.



Users will make a selection based on the Task List that displays upon making a workflow task selection.



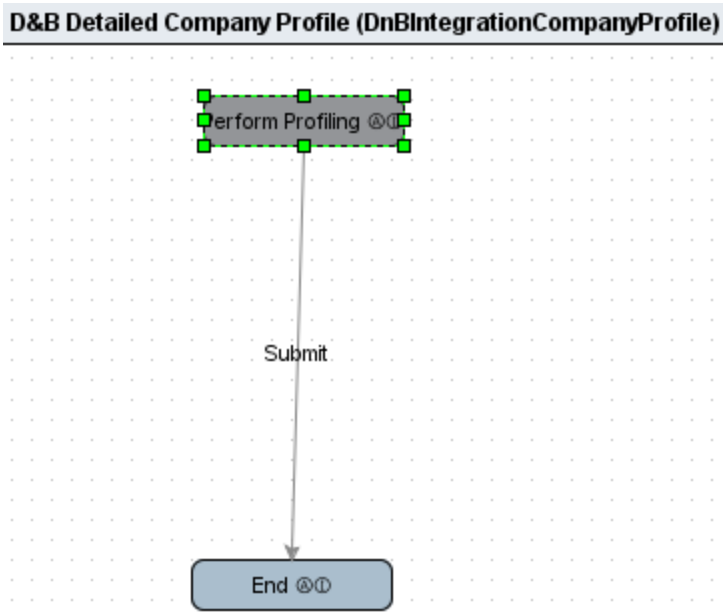
Now, the customer record and D&B record are linked via the D&B Organization Reference Type mapping in the component model.

It is important to note that if any matching errors occur during the process, a user must handle those tasks, accessible via the 'Matching error' state.

Dun & Bradstreet Detailed Company Profile Enrichment

As part of the easy setup, a **Detailed Company Profile** workflow is created. When entities are initiated into this workflow, an event is sent to the D&B Detailed Company Profile Processor. The event processor triggers a business action that will query additional data from the D&B 'Detailed Company Profile' service, write this information back to the D&B Organization entity, and complete the workflow. Initiation can be done through the workbench or Web UI.

To perform detailed company profile enrichment, the customer entity must be linked to a D&B record.



Note: Detailed company profile enrichment is based on the D&B Detailed Company Profile Processor, found in the D&B folder that is created in the automatic setup. For information on maintaining event processors, see the **Event Processor** documentation.

It is important to note that if any profiling errors occur during the process, a user must handle those tasks, accessible via the 'Profiling error' state.

For information on the matching process, see the **Dun & Bradstreet Matching** section of the **Data Integration** documentation.

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. Recommended 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.

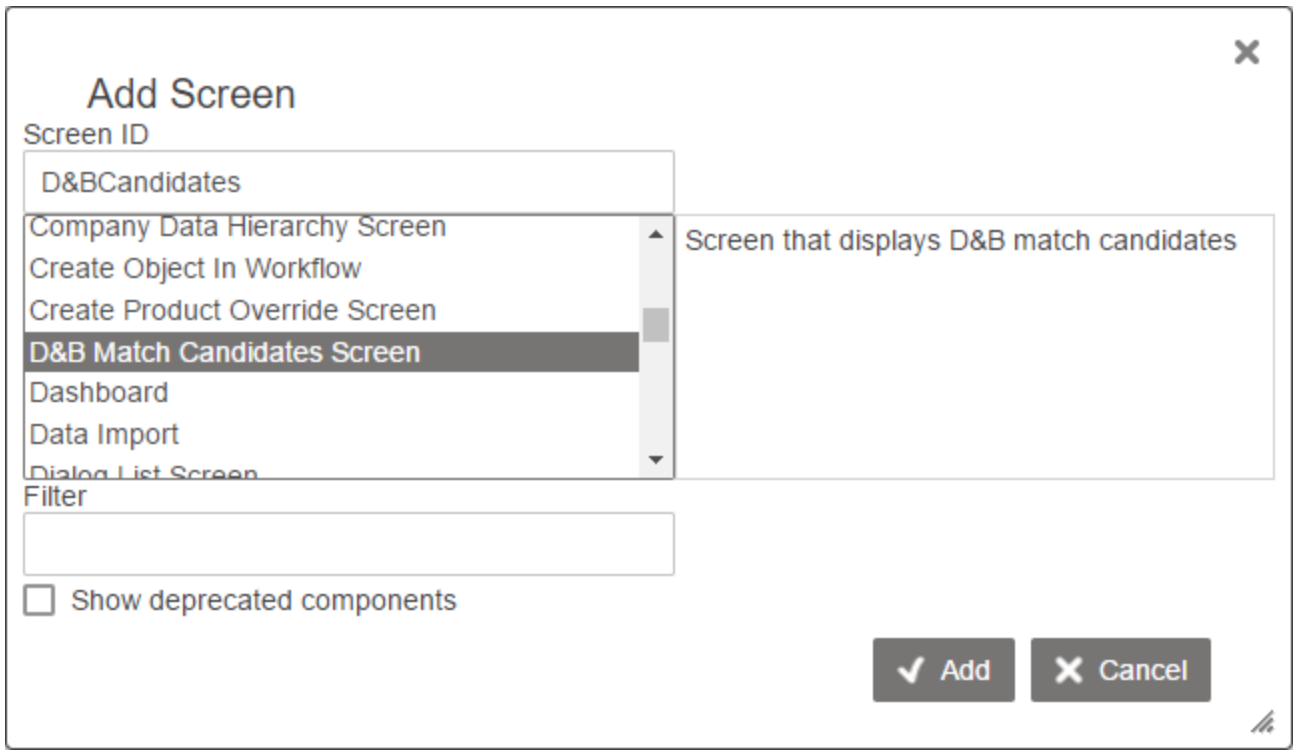
Prerequisites

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. See the **Web User Interfaces** documentation for more information on these topics.

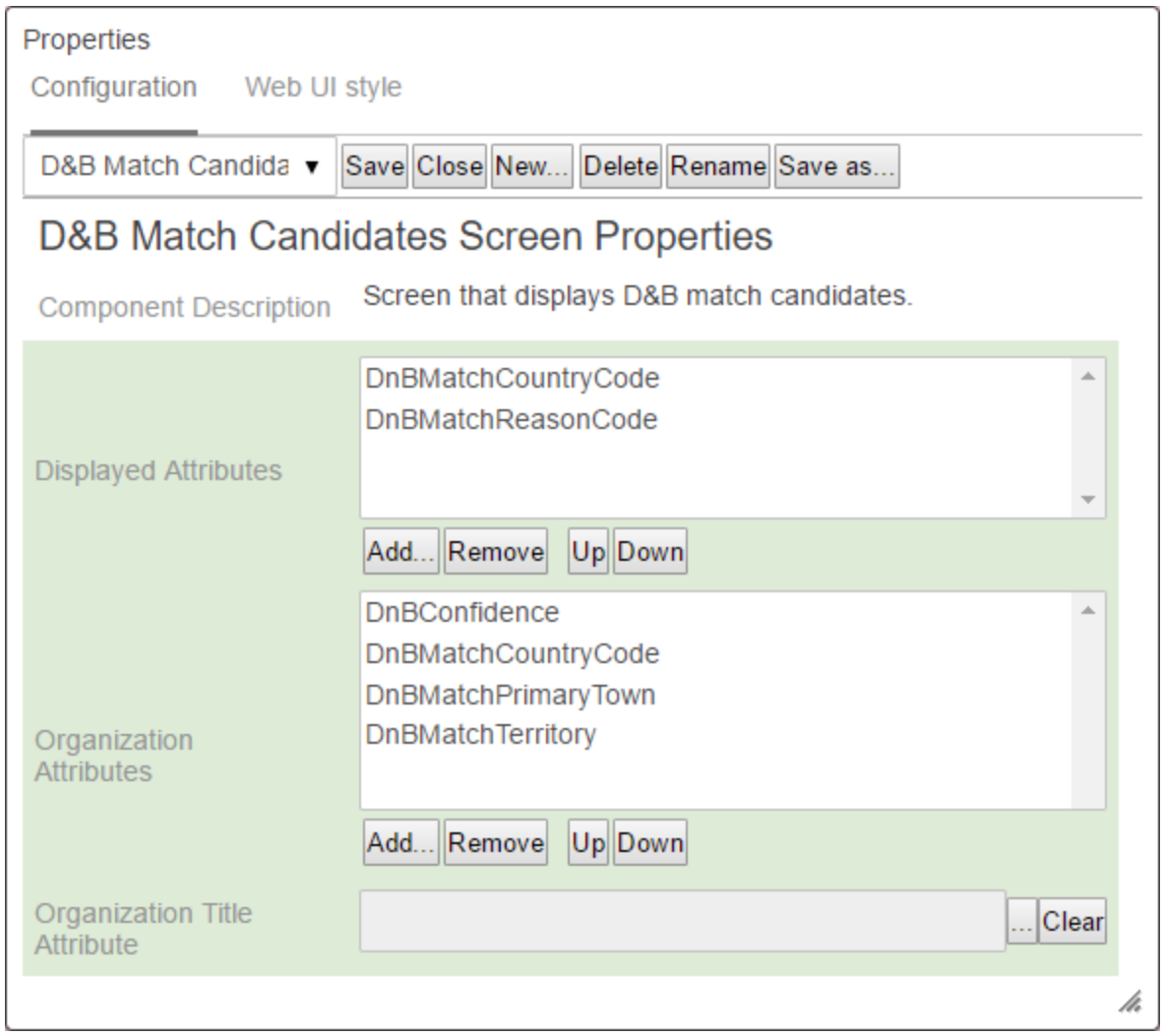
Additionally, users should be familiar with the D&B integration setup and processes. For more information, see the **Dun & Bradstreet Integration** section.

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, DUNS number, and Name of the D&B 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.

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.

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

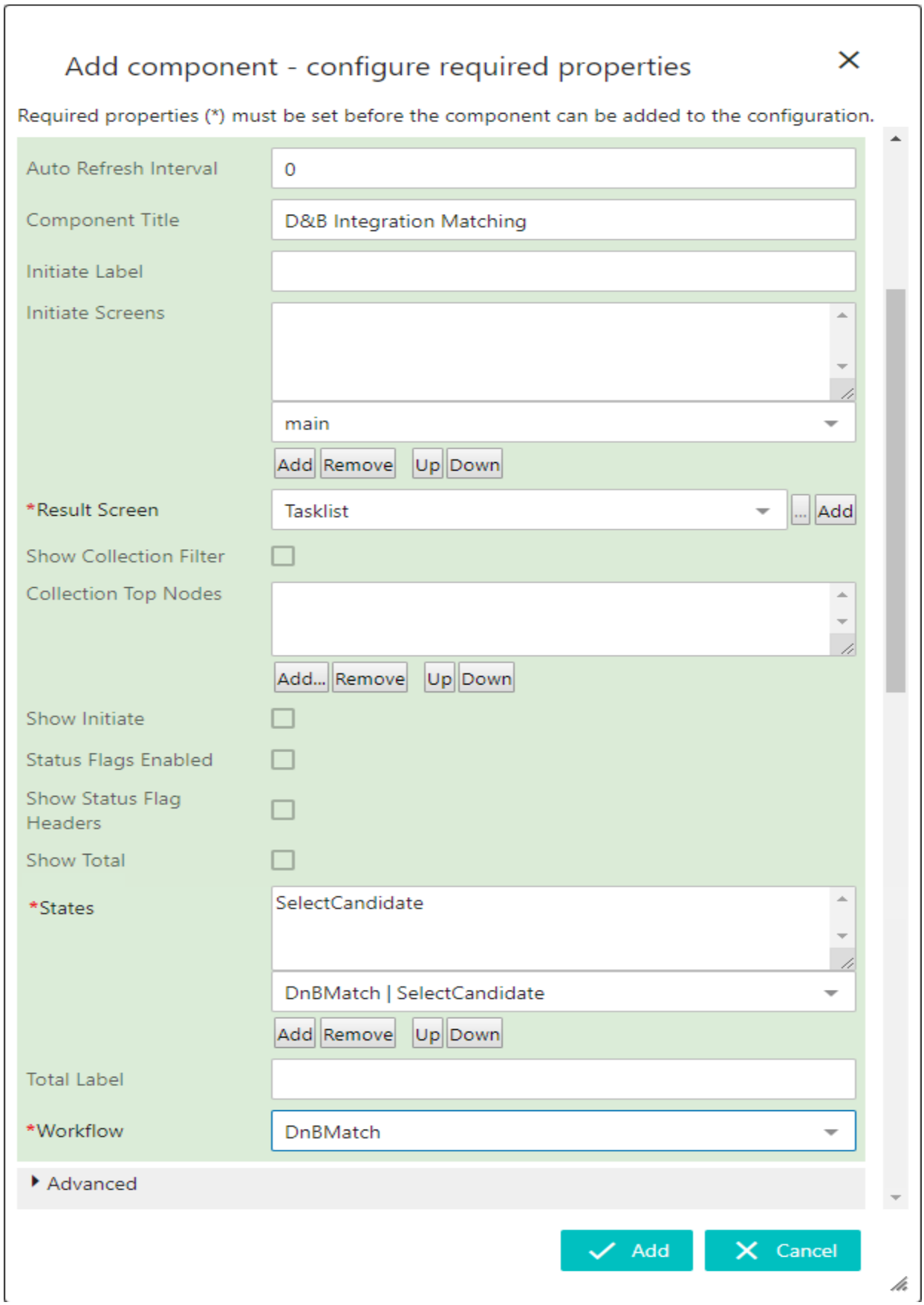
To process a customer record for matching to D&B data, the record must go through the D&B Integration Matching workflow. To access tasks for this workflow, a Status Selector Homepage /Sidebar widget is needed.

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.

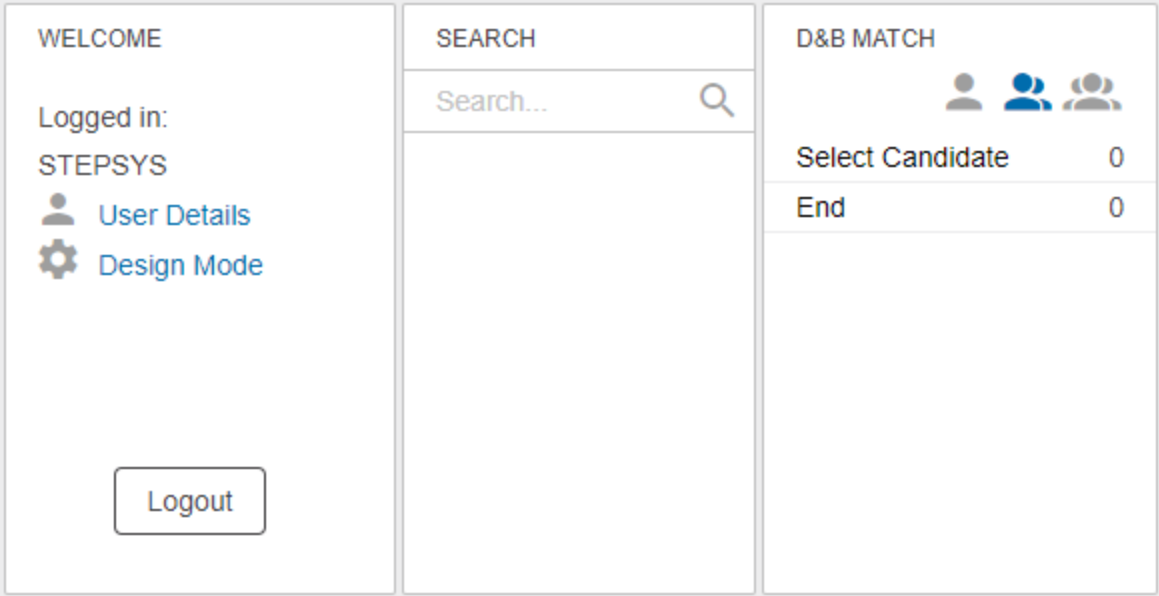
Required parameters that must be selected to save the Widget Properties and use the functionality:

- **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.


Add component - configure required properties
Required properties (*) must be set before the component can be added to the configuration.
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
DnBMatch | SelectCandidate
Add
Remove
Up
Down
Total Label
*Workflow
DnBMatch
Advanced
Add
Cancel

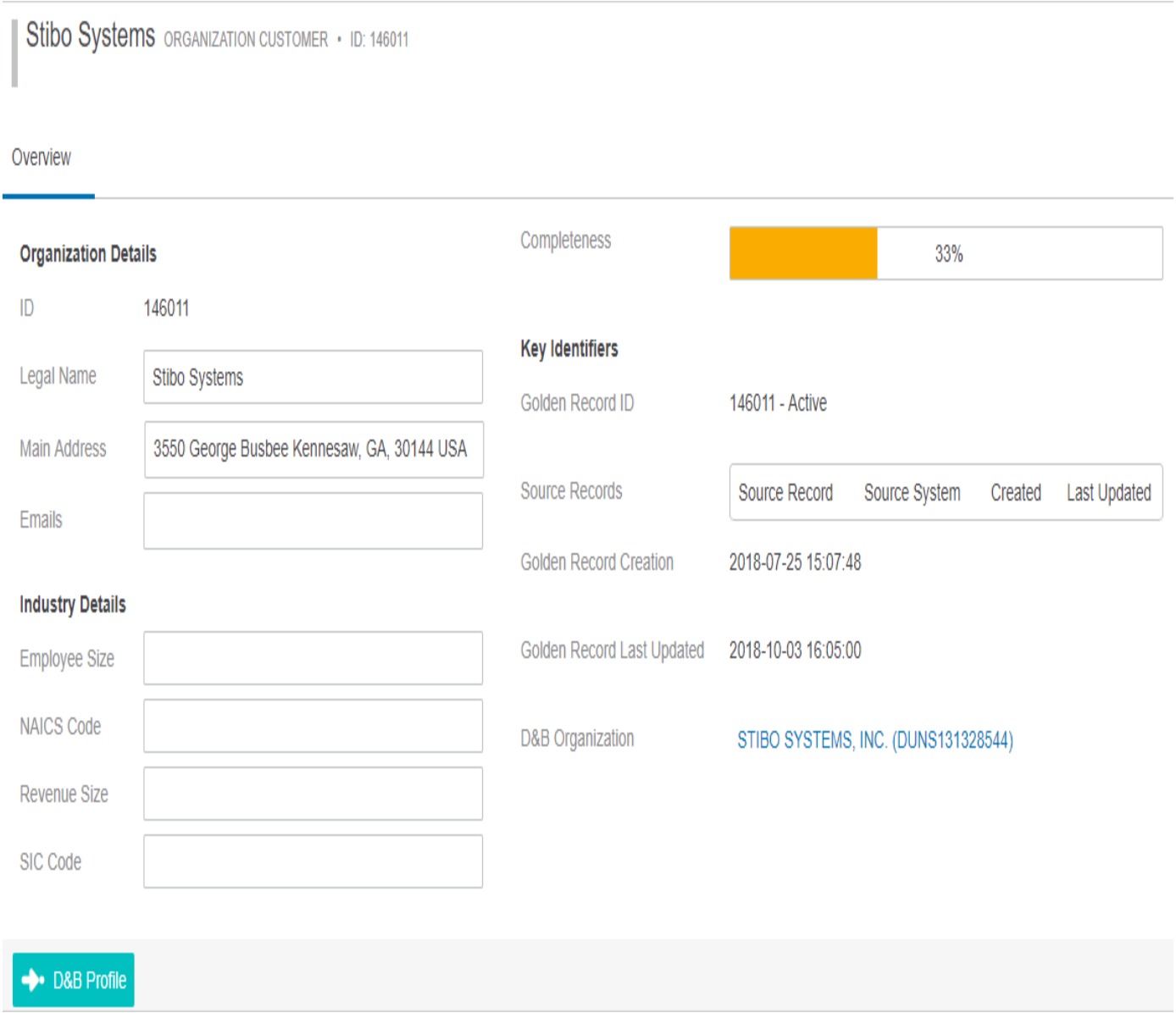
Select **Save** and then **Close** to exit the Web UI designer.

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

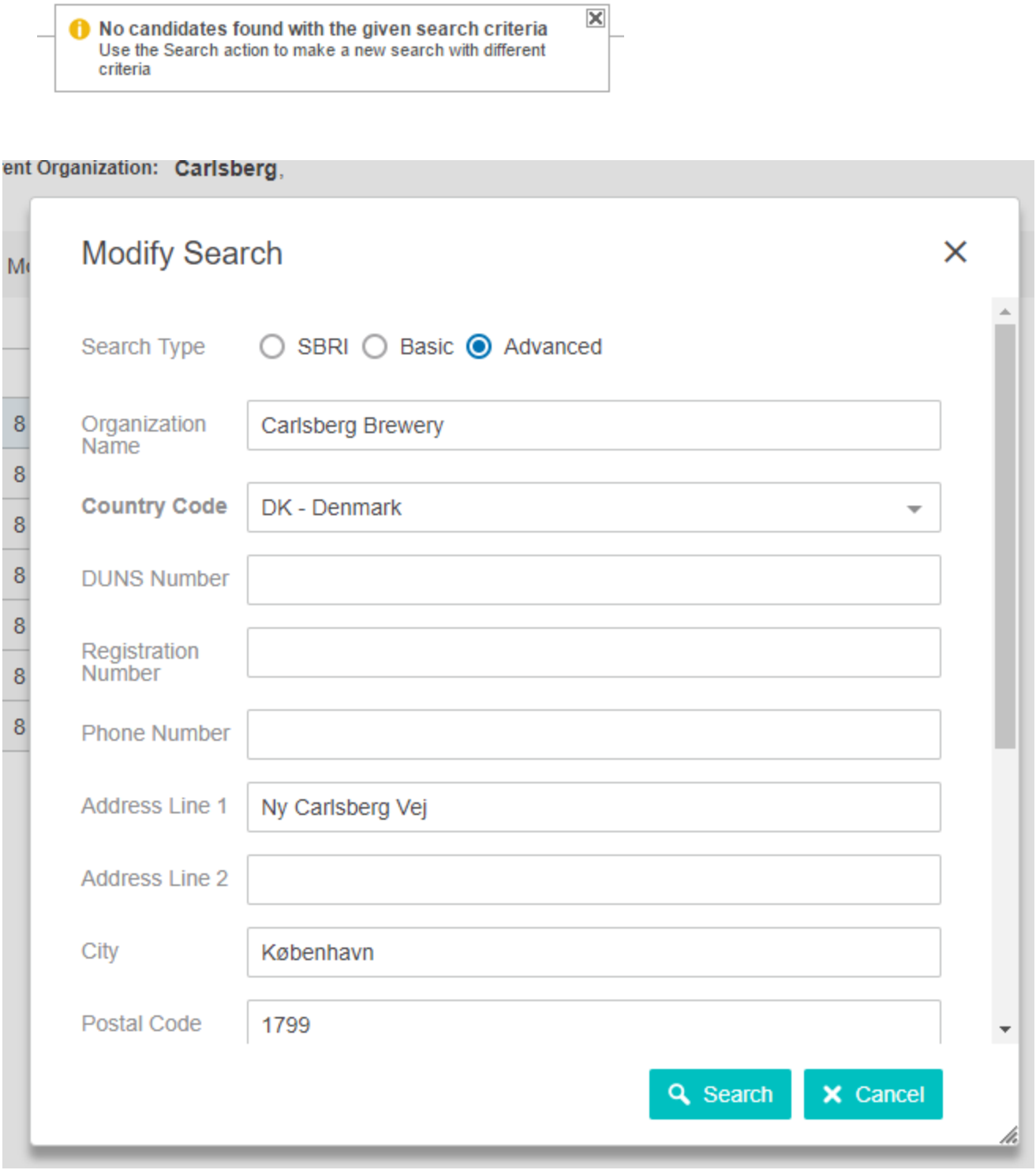
Customer records enter the D&B Match Candidate workflow via standard methods. An individual customer objects can be initiated in bulk or individually via Web UI or Workbench. You may want to add a business action button on a Node Details screen to initiate objects when looking at the details of the customer 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.



This 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

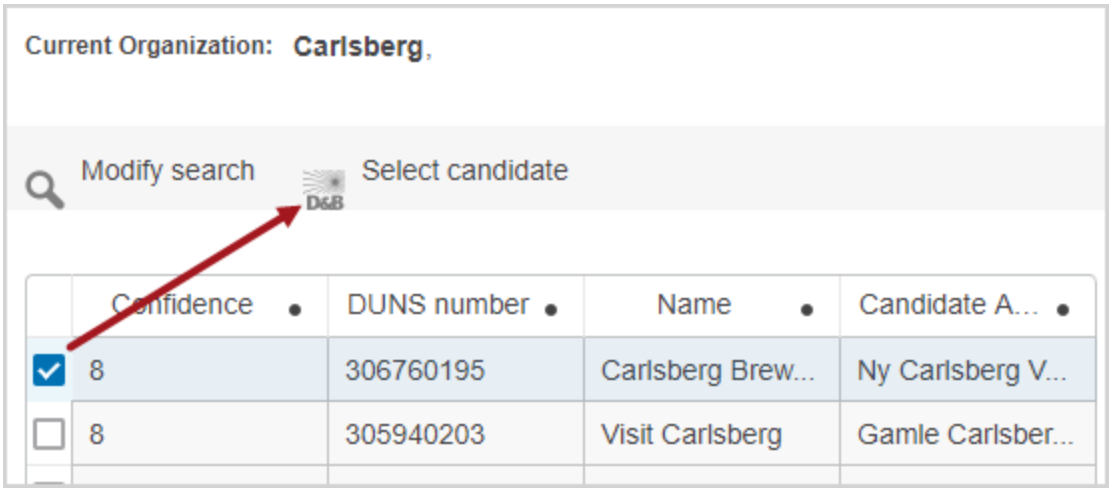
1. A user clicks the Select Candidate state within the D&B Match Candidate status selector.
2. Upon arriving at the Task List, the user selects a customer by clicking on the ID or Title link within a row.
3. A search is performed. The results list shown, determined by a D&B algorithm used to match the 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.



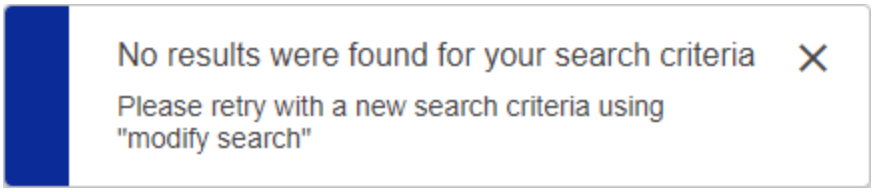
Select Candidate

1. A user clicks the Select Candidate state 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.



5. Users will see a message on the screen confirming a candidate selection:

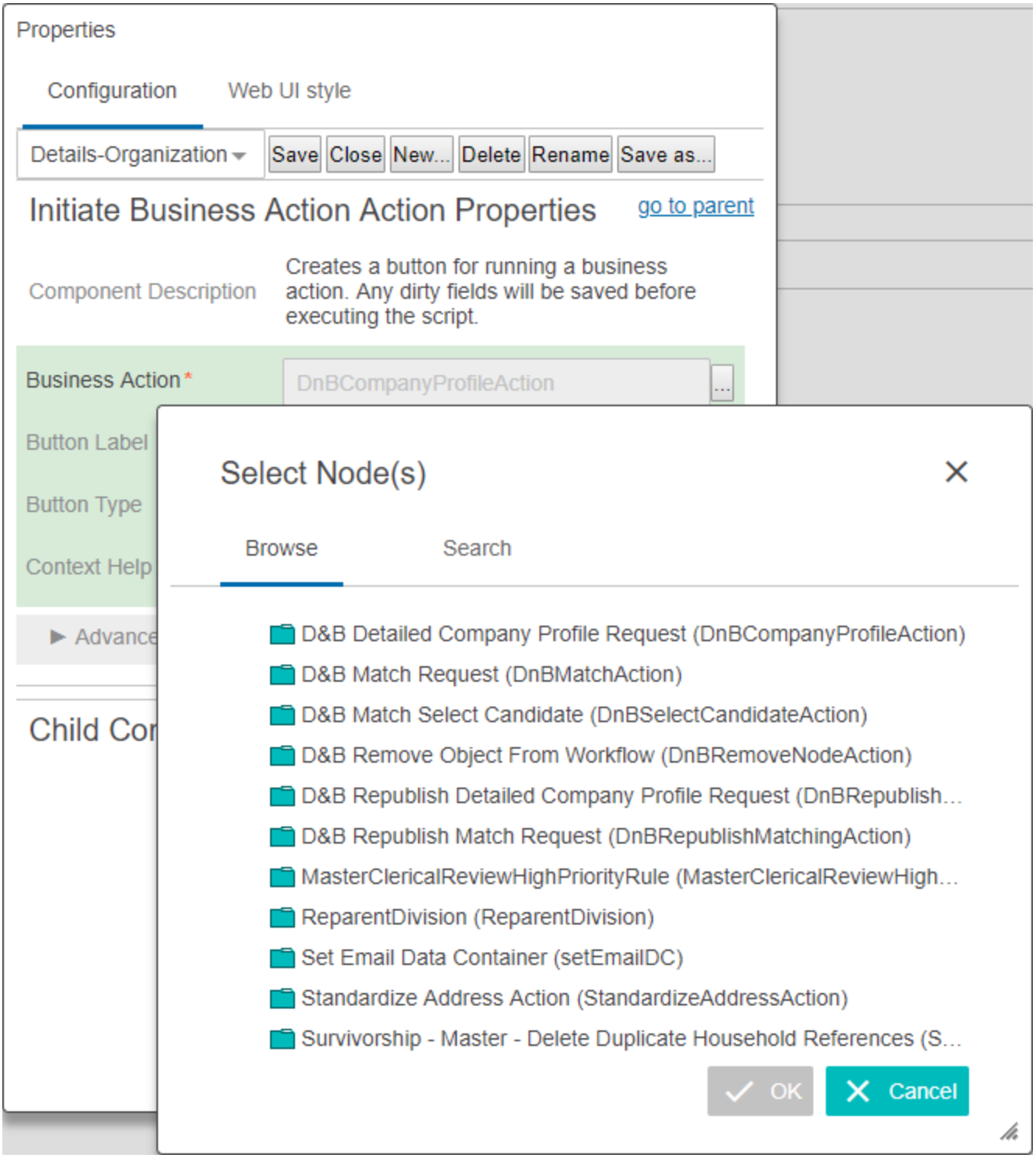


Note: It is important to note that if any matching errors occur during the process, a user must handle those tasks, accessible via the 'Matching error' state.

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 Systems 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.

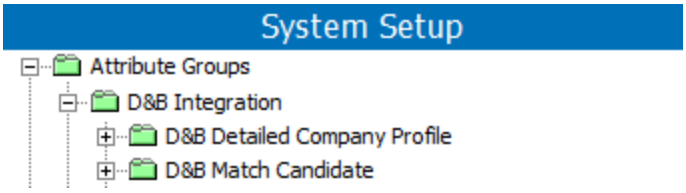


Alternatively, you can push the task through the workflow with the submit action within a Task List.

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.

Dun & Bradstreet Attributes and Data Containers

As part of the automatic setup for Dun & Bradstreet (D&B) integration, D&B-specific attribute groups, attributes, and data containers are created. The attributes and data containers are applicable to everything related to the D&B integration: business rules, event processors, mapping and operations configurations, workflows, component model, D&B records, and STEP customer records.



Attributes and Attribute Mapping

The tables directly below list the attributes added to STEP as part of the 'Easy setup of D&B Integration' under D&B Integration attribute groups. Also shown are the D&B API mappings with applicable Matching information shown in the first table and Profiling mappings shown in the second.

Attribute	JSON Path, Matching
DnBFamilyTreeMemberRole	MatchResponse.MatchResponseDetail.MatchCandidate.FamilyTreeMemberRole.FamilyTreeMemberRoleText
DnBMarketabilityIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.MarketabilityIndicator
DnBStandaloneOrganizationIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.StandaloneOrganizationIndicator
DnBRegisteredNameIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.OrganizationPrimaryName.@RegisteredNameIndicator
DnBSeniorPrincipalName	MatchResponse.MatchResponseDetail.MatchCandidate.SeniorPrincipalName.FullName
DnBOperatingStatusText	MatchResponse.MatchResponseDetail.MatchCandidate.OperatingStatusText
DnBOrganizationIdentificationNumber	MatchResponse.MatchResponseDetail.MatchCandidate.OrganizationIdentificationNumberDetail.OrganizationIdentificationNumber", false)
DnBOrganizationIdentificationNumberType	MatchResponse.MatchResponseDetail.MatchCandidate.OrganizationIdentificationNumberDetail.@TypeText")
DnBCountryISOAlpha2Code	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.CountryISOAlpha2Code", false)
DnBPostalCode	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.PostalCode", false)
DnBPrimaryTownName	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.PrimaryTownName", false)
DnBStreetAddressLine	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.StreetAddressLine.LineText", false)
DnBTerritoryAbbreviatedName	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.TerritoryAbbreviatedName", false)

Attribute	JSON Path, Matching
DnBUndeliverableIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.MailingAddress.UndeliverableIndicator")
DnBCountryISOAlpha2Code	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.CountryISOAlpha2Code", false)
DnBPostalCode	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.PostalCode", false)
DnBPrimaryTownName	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.PrimaryTownName", false)
DnBStreetAddressLine	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.StreetAddressLine.LineText", true)
DnBTerritoryAbbreviatedName	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.TerritoryAbbreviatedName", false)
DnBUndeliverableIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.PrimaryAddress.UndeliverableIndicator")
DnBTelecommunicationNumber	MatchResponse.MatchResponseDetail.MatchCandidate.TelephoneNumber.TelecommunicationNumber
DnBUnreachableIndicator	MatchResponse.MatchResponseDetail.MatchCandidate.TelephoneNumber.UnreachableIndicator
DnBOrganizationName	MatchResponse.MatchResponseDetail.MatchCandidate.TradeStyleName.OrganizationName

Attribute	JSON Path, Profile
DnBAgentIndicator	ActivitiesAndOperations.SubjectIsAgentDetails.AgentIndicator
DnBBankNames	Banking.Bank.OrganizationName.OrganizationPrimaryName.OrganizationName
DnBBoneyardOrganizationIndicator	OrganizationDetail.BoneyardOrganizationIndicator
DnBCommCreditScoreMarketingRiskClass	Assessment.CommercialCreditScore.MarketingRiskClassText@DNBCodeValue
DnBConsolidatedEmployeeBasis	EmployeeFigures.ConsolidatedEmployeeDetails.EmployeeCategoryDetails.DNBCodeValue
DnBConsolidatedEmployeeFiguresDate	EmployeeFigures.ConsolidatedEmployeeDetails.EmployeeFiguresDate
DnBConsolidatedEmplReliabilityText	EmployeeFigures.ConsolidatedEmployeeDetails.ReliabilityText @DNBCodeValue
DnBConsolidatedTotalEmployeeQuantity	EmployeeFigures.ConsolidatedEmployeeDetails.TotalEmployeeQuantity
DnBControlOwnershipDate	OrganizationDetail.ControlOwnershipDate" //TODO
DnBControlOwnershipDatePrecision	OrganizationDetail.ControlOwnershipDate @DatePrecisionDNBCodeValue
DnBControlOwnershipType	OrganizationDetail.ControlOwnershipTypeText @DNBCodeValue

Attribute	JSON Path, Profile
DnBDUNSNumber	SubjectHeader.DUNSNumber
DnBDUNSSelfRequestDate	SubjectHeader.DUNSSelfRequestDate
DnBDUNSSelfRequestIndicator	SubjectHeader.DUNSSelfRequestIndicator
DnBExportIndicator	ActivitiesAndOperations.ExportDetails.ExportIndicator
DnBFamilyTreeHierarchyLevel	Linkage.FamilyTreeHierarchyLevel
DnBFamilyTreeMemberRole	OrganizationDetail.FamilyTreeMemberRole.FamilyTreeMemberRoleText @DNBCodeValue
DnBFormerOrganizationPrimaryName	OrganizationName.FormerOrganizationPrimaryName.OrganizationName
DnBFranchiseOperationType	OrganizationDetail.FranchiseOperationTypeText
DnBFranchiseOperationTypeText	OrganizationDetail.FranchiseOperationTypeText
DnBGlobalUltimateFamilyTreeLinkageCount	Linkage.LinkageSummary.GlobalUltimateFamilyTreeLinkageCount
DnBGroupTotalEmployeeQuantity	EmployeeFigures.GroupEmployeeDetails.TotalEmployeeQuantity
DnBHeadquartersDUNSNumber	RegisteredDetail.IncorporationYear
DnBHistoryRating	Assessment.HistoryRatingText @DNBCodeValue
DnBImportIndicator	ActivitiesAndOperations.ImportDetails.ImportIndicator
DnBIndEntityEmployeeFiguresDate	EmployeeFigures.IndividualEntityEmployeeDetails.EmployeeFiguresDate
DnBIndEntityEmployeeReliabilityText	EmployeeFigures.IndividualEntityEmployeeDetails.ReliabilityText @DNBCodeValue
DnBIndEntityTotalEmployeeQuantity	EmployeeFigures.IndividualEntityEmployeeDetails.TotalEmployeeQuantity
DnBLegalForm	RegisteredDetail.LegalFormDetails.LegalFormText @DNBCodeValue
DnBLineOfBusinessDescription	ActivitiesAndOperations.LineOfBusinessDetails.LineOfBusinessDescription
DnBMarketabilityIndicator	SubjectHeader.MarketabilityIndicator
DnBMarketingSegmentationClusterValue	Assessment.MarketingSegmentationClusterValue
DnBNonMarketableReason	SubjectHeader.NonMarketableReason
DnBOperatingStatus	OrganizationDetail.OperatingStatusCode

Attribute	JSON Path, Profile
DnBOperatingStatusComments	OrganizationDetail.OperatingStatusComment.OperatingStatusFreeFormComment
DnBOperationsText	ActivitiesAndOperations.OperationsText
DnBOrganizationStartYear	OrganizationDetail.OrganizationStartYear
DnBOrganizationSummaryText	SubjectHeader.OrganizationSummaryText
DnBPrimarySICCategory	ActivitiesAndOperations.PrimarySICCategoryValue
DnBStandaloneOrganizationIndicator	OrganizationDetail.StandaloneOrganizationIndicator
DnBSubjectHandling	SubjectHeader.SubjectHandling.SubjectHandlingText @DNBCodeValue
DnBSubjectScopeText	Telecommunication.WebPageAddress.SubjectScopeText
DnBSubjectScopeTextCode	Telecommunication.WebPageAddress.SubjectScopeText.@DNBCodeValue
DnBTotalInquiriesCount	SubjectHeader.TotalInquiriesCount
DnBWebPageAddress	Telecommunication.WebPageAddress.TelecommunicationAddress
DnBGlobalUltimateDUNSNumber	Linkage.GlobalUltimateOrganization.DUNSNumber
DnBParentDUNSNumber	Linkage.ParentOrganization.DUNSNumber
DnBHeadquartersDUNSNumber	Linkage.HeadquartersOrganization.DUNSNumber
DnBEthnicityType	SocioEconomicIdentification.OwnershipEthnicity.EthnicityTypeText @DNBCodeValue
DnBFemaleOwnedIndicator	SocioEconomicIdentification.FemaleOwnedIndicator
DnBLaborSurplusAreaIndicator	SocioEconomicIdentification.LaborSurplusAreaIndicator
DnBMinorityOwnedIndicator	SocioEconomicIdentification.MinorityOwnedIndicator
DnBSmallBusinessIndicator	SocioEconomicIdentification.SmallBusinessIndicator
DnBIndividualEmployeeQuantity	Competitors.Competitor.IndividualEmployeeQuantity
DnBOrganizationPrimaryName	Competitors.Competitor.OrganizationPrimaryName.OrganizationName
DnBRegisteredNameIndicator	Competitors.Competitor.OrganizationPrimaryName@RegisteredNameIndicator
DnBSalesRevenueAmount	Competitors.Competitor.SalesRevenueAmount

Attribute	JSON Path, Profile
DnBCountryISOAlpha2Code	Linkage.DomesticUltimateOrganization.PrimaryAddress.CountryISOAlpha2Code
DnBPostalCode	Linkage.DomesticUltimateOrganization.PrimaryAddress.PostalCode
DnBPrimaryTownName	Linkage.DomesticUltimateOrganization.PrimaryAddress.PrimaryTownName
DnBStreetAddressLine	Linkage.DomesticUltimateOrganization.PrimaryAddress.StreetAddressLine.LineText
DnBTerritoryAbbreviatedName	Linkage.DomesticUltimateOrganization.PrimaryAddress.TerritoryAbbreviatedName
DnBTerritoryName	Linkage.DomesticUltimateOrganization.PrimaryAddress.TerritoryName
DnBOrganizationName	Linkage.DomesticUltimateOrganization.OrganizationPrimaryName.OrganizationName
DnBInternationalDialingCode	Telecommunication.FacsimileNumber.InternationalDialingCode
DnBTelecommunicationNumber	Telecommunication.FacsimileNumber.TelecommunicationNumber
DnBOrganizationName	Linkage.GlobalUltimateOrganization.OrganizationPrimaryName.OrganizationName
DnBCountryISOAlpha2Code	Linkage.GlobalUltimateOrganization.PrimaryAddress.CountryISOAlpha2Code
DnBPostalCode	Linkage.GlobalUltimateOrganization.PrimaryAddress.PostalCode
DnBPrimaryTownName	Linkage.GlobalUltimateOrganization.PrimaryAddress.PrimaryTownName
DnBStreetAddressLine	Linkage.GlobalUltimateOrganization.PrimaryAddress.StreetAddressLine.LineText
DnBTerritoryAbbreviatedName	Linkage.GlobalUltimateOrganization.PrimaryAddress.TerritoryAbbreviatedName
DnBTerritoryName	Linkage.GlobalUltimateOrganization.PrimaryAddress.TerritoryName
DnBCountryISOAlpha2Code	Linkage.HeadquartersOrganization.PrimaryAddress.CountryISOAlpha2Code
DnBPostalCode	Linkage.HeadquartersOrganization.PrimaryAddress.PostalCode
DnBPrimaryTownName	Linkage.HeadquartersOrganization.PrimaryAddress.PrimaryTownName
DnBStreetAddressLine	Linkage.HeadquartersOrganization.PrimaryAddress.StreetAddressLine.LineText
DnBTerritoryAbbreviatedName	Linkage.HeadquartersOrganization.PrimaryAddress.TerritoryAbbreviatedName
DnBTerritoryName	Linkage.HeadquartersOrganization.PrimaryAddress.TerritoryName
DnBDisplaySequence	IndustryCode.IndustryCode.DisplaySequence

Attribute	JSON Path, Profile
DnBIndustryCode	IndustryCode.IndustryCode.IndustryCode
DnBIndustryCodeType	IndustryCode.IndustryCode.@DNBCodeValue
DnBSalesPercentage	IndustryCode.IndustryCode.SalesPercentage
DnBDisplaySequence	RegisteredDetail.OrganizationIdentificationNumberDetail.DisplaySequence
DnBFilingOrganizationName	RegisteredDetail.OrganizationIdentificationNumberDetail.FilingOrganizationName
DnBOrganizationIdentificationNumber	RegisteredDetail.OrganizationIdentificationNumberDetail.OrganizationIdentificationNumber
DnBOrganizationIdentificationNumberType	RegisteredDetail.OrganizationIdentificationNumberDetail.@DNBCodeValue
DnBOrgIdentificationStartDate	RegisteredDetail.OrganizationIdentificationNumberDetail.StartDate
DnBRegistrationIssuerName	RegisteredDetail.OrganizationIdentificationNumberDetail.RegistrationIssuerName
DnBRegistrationLocation	RegisteredDetail.OrganizationIdentificationNumberDetail.RegistrationLocation
DnBCountryISOAlpha2Code	Location.MailingAddress.CountryISOAlpha2Code
DnBCountyOfficialName	Location.MailingAddress.CountyOfficialName
DnBPostalCode	Location.MailingAddress.PostalCode
DnBPrimaryTownName	Location.MailingAddress.PrimaryTownName
DnBStreetAddressLine	Location.MailingAddress.StreetAddressLine.LineText
DnBTerritoryAbbreviatedName	Location.MailingAddress.TerritoryAbbreviatedName
DnBTerritoryOfficialName	Location.MailingAddress.TerritoryOfficialName
DnBUndeliverableIndicator	Location.MailingAddress.UndeliverableIndicator
DnBAddressUsageTenureDetail	Location.PrimaryAddress.AddressUsageTenureDetail.TenureTypeText @DNBCodeValue
DnBCountryGroupName	Location.PrimaryAddress.CountryGroupName
DnBCountryISOAlpha2Code	Location.PrimaryAddress.CountryISOAlpha2Code
DnBCountyOfficialName	Location.PrimaryAddress.CountyOfficialName
DnBGeographicalPrecisionText	Location.PrimaryAddress.GeographicalPrecisionText

Attribute	JSON Path, Profile
DnBLatitudeMeasurement	Location.PrimaryAddress.LatitudeMeasurement
DnBLongitudeMeasurement	Location.PrimaryAddress.LongitudeMeasurement
DnBMetropolitanStatAreaUSCensusCode	Location.PrimaryAddress.MetropolitanStatisticalAreaUSCensusCode
DnBMinorTownName	Location.PrimaryAddress.MinorTownName
DnBPoliticalDistrict	Location.PrimaryAddress.PoliticalDistrict
DnBPostalCode	Location.PrimaryAddress.PostalCode
DnBPremisesFunctionText	Location.PrimaryAddress.PremisesUsageDetail.PremisesUsageFunctionDetail.PremisesFunctionText @DNBCodeValue
DnBPrimaryTownName	Location.PrimaryAddress.PrimaryTownName
DnBRegisteredAddressIndicator	Location.PrimaryAddress.RegisteredAddressIndicator
DnBResidentialAddressIndicator	Location.PrimaryAddress.ResidentialAddressIndicator
DnBStreetAddressLine	Location.PrimaryAddress.StreetAddressLine.LineText
DnBTerritoryAbbreviatedName	Location.PrimaryAddress.TerritoryAbbreviatedName
DnBTerritoryOfficialName	Location.PrimaryAddress.TerritoryOfficialName
DnBUndeliverableIndicator	Location.PrimaryAddress.UndeliverableIndicator
DnBCountryISOAlpha2Code	Linkage.ParentOrganization.PrimaryAddress.CountryISOAlpha2Code
DnBPostalCode	Linkage.ParentOrganization.PrimaryAddress.PostalCode
DnBPrimaryTownName	Linkage.ParentOrganization.PrimaryAddress.PrimaryTownName
DnBStreetAddressLine	Linkage.ParentOrganization.PrimaryAddress.StreetAddressLine.LineText
DnBStreetAddressLineSeq	Linkage.ParentOrganization.PrimaryAddress.StreetAddressLine.DisplaySequence
DnBTerritoryAbbreviatedName	Linkage.ParentOrganization.PrimaryAddress.TerritoryAbbreviatedName
DnBTerritoryName	Linkage.ParentOrganization.PrimaryAddress.TerritoryName
DnBOrganizationName	Linkage.ParentOrganization.OrganizationPrimaryName.OrganizationName
DnBCurrentManagementResponsibility	PrincipalsAndManagement.CurrentPrincipal.CurrentManagementResponsibility.ManagementResponsibilityText @ManagementResponsibilityCode

Attribute	JSON Path, Profile
DnBCurrentManagementResponsibilityText	PrincipalsAndManagement.CurrentPrincipal.CurrentManagementResponsibility.ManagementResponsibilityText
DnBEmploymentBiographyText	PrincipalsAndManagement.CurrentPrincipal.EmploymentBiography
DnBFirstName	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.FirstName
DnBFullName	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.FullName
DnBJobTitle	PrincipalsAndManagement.CurrentPrincipal.JobTitle.JobTitleText
DnBLastName	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.LastName
DnBMiddleName	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.MiddleName
DnBNamePrefix	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.NamePrefix.NamePrefixText
DnBNameSuffix	PrincipalsAndManagement.CurrentPrincipal.PrincipalName.NameSuffix.NameSuffixText
DnBPrincipalAge	PrincipalsAndManagement.CurrentPrincipal.PrincipalAge
DnBCity	RegisteredDetail.OrganizationIdentificationNumberDetail.RegistrationLocation.PrimaryAddress.PrimaryTownName
DnBCountry ISO Code	RegisteredDetail.OrganizationIdentificationNumberDetail.RegistrationLocation.PrimaryAddress.CountryISOAlpha2Code
DnBCountryISOAlpha2Code	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.CountryISOAlpha2Code
DnBPostalCode	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.PostalCode
DnBPrimaryTownName	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.PrimaryTownName
DnBStreetAddressLine	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.StreetAddressLine.LineText
DnBStreetAddressLineSeq	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.StreetAddressLine.DisplaySequence
DnBTerritoryName	RegisteredDetail.OrganizationIdentificationNumberDetail.RegistrationLocation.PrimaryAddress.TerritoryName
DnBTerritoryOfficialName	RegisteredDetail.LegalFormDetails.RegistrationLocation.PrimaryAddress.TerritoryOfficialName
DnBCurrencyISOAlpha3Code	RegisteredDetail.ShareCapitalDetails.CapitalAmount @CurrencyISOAlpha3Code
DnBShareCapitalAmount	RegisteredDetail.ShareCapitalDetails.CapitalAmount
DnBShareCapitalAmountUnitOfSize	RegisteredDetail.ShareCapitalDetails.CapitalAmount @UnitOfSize
DnBSharedCapitalAmountReliability	RegisteredDetail.ShareCapitalDetails.CapitalAmount @ReliabilityText

Attribute	JSON Path, Profile
DnBSharedCapitalStartDate	RegisteredDetail.ShareCapitalDetails.StartDate
DnBSocialMediaPlatform	Telecommunication.SocialMediaDetail.SocialMediaPlatformName @DNBCodeValue
DnBSocialMediaWebPageURL	Telecommunication.SocialMediaDetail.WebPageURL
DnBEthnicityType	SocioEconomicIdentification.OwnershipEthnicity.EthnicityTypeText @DNBCodeValue
DnBFemaleOwnedIndicator	SocioEconomicIdentification.FemaleOwnedIndicator
DnBLaborSurplusAreaIndicator	SocioEconomicIdentification.LaborSurplusAreaIndicator
DnBMinorityOwnedIndicator	SocioEconomicIdentification.MinorityOwnedIndicator
DnBSmallBusinessIndicator	SocioEconomicIdentification.SmallBusinessIndicator
DnBCountryISOAlpha2Code	RegisteredDetail.StockExchangeDetails.CountryISOAlpha2Code
DnBPrimaryStockExchangeIndicator	RegisteredDetail.StockExchangeDetails.PrimaryStockExchangeIndicator
DnBStockExchangeName	RegisteredDetail.StockExchangeDetails.StockExchangeName @DNBCodeValue
DnBInternationalDialingCode	Telecommunication.TelephoneNumber.InternationalDialingCode
DnBTelecommunicationNumber	Telecommunication.TelephoneNumber.TelecommunicationNumber
DnBUnreachableIndicator	Telecommunication.TelephoneNumber.UnreachableIndicator
DnBAssessmentTypeValue	ThirdPartyAssessment.ThirdPartyAssessment.AssessmentTypeValue
DnBAssessmentValue	ThirdPartyAssessment.ThirdPartyAssessment.AssessmentValue
DnBDisplaySequence	OrganizationName.TradeStyleName.DisplaySequence
DnBOrganizationName	OrganizationName.TradeStyleName.OrganizationName
DnBTransferDate	SubjectHeader.TransferDUNSNumberRegistration.TransferDate
DnBTransferReason	SubjectHeader.TransferDUNSNumberRegistration.TransferReasonText @DNBCodeValue
DnBTransferredFromDUNSNumber	SubjectHeader.TransferDUNSNumberRegistration.TransferredFromDUNSNumber
DnBTransferredToDUNSNumber	SubjectHeader.TransferDUNSNumberRegistration.TransferredToDUNSNumber

Data Containers and Associated Attributes

The next table lists the attributes (shown above) and their associated data containers. If an attribute isn't listed, then it is not (by default) valid for any of the data containers listed. The data containers are also set up as part of the 'Easy setup' process.

Data Container	Attribute
DnBCompetitors	DnBIndividualEmployeeQuantity
DnBCompetitors	DnBOrganizationPrimaryName
DnBCompetitors	DnBRegisteredNameIndicator
DnBCompetitors	DnBSalesRevenueAmount
DnBDomesticUltimatePrimaryAddress	DnBCountryISOAlpha2Code
DnBDomesticUltimatePrimaryAddress	DnBPostalCode
DnBDomesticUltimatePrimaryAddress	DnBPrimaryTownName
DnBDomesticUltimatePrimaryAddress	DnBStreetAddressLine
DnBDomesticUltimatePrimaryAddress	DnBTerritoryAbbreviatedName
DnBDomesticUltimatePrimaryAddress	DnBTerritoryName
DnBDomesticUltimatePrimaryName	DnBOrganizationName
DnBFacsimileNumber	DnBInternationalDialingCode
DnBFacsimileNumber	DnBTelecommunicationNumber
DnBGlobalUltimatePrimaryName	DnBOrganizationName
DnBGlobalUltimatePrimaryAddress	DnBCountryISOAlpha2Code
DnBGlobalUltimatePrimaryAddress	DnBPostalCode
DnBGlobalUltimatePrimaryAddress	DnBPrimaryTownName
DnBGlobalUltimatePrimaryAddress	DnBStreetAddressLine
DnBGlobalUltimatePrimaryAddress	DnBTerritoryAbbreviatedName
DnBGlobalUltimatePrimaryAddress	DnBTerritoryName

Data Container	Attribute
DnBHeadquartersPrimaryAddress	DnBCountryISOAlpha2Code
DnBHeadquartersPrimaryAddress	DnBPostalCode
DnBHeadquartersPrimaryAddress	DnBPrimaryTownName
DnBHeadquartersPrimaryAddress	DnBStreetAddressLine
DnBHeadquartersPrimaryAddress	DnBTerritoryAbbreviatedName
DnBHeadquartersPrimaryAddress	DnBTerritoryName
DnBIndustryCode	DnBDisplaySequence
DnBIndustryCode	DnBIndustryCode
DnBIndustryCode	DnBIndustryCodeType
DnBIndustryCode	DnBSalesPercentage
DnBOrganizationIdentification	DnBDisplaySequence
DnBOrganizationIdentification	DnBFilingOrganizationName
DnBOrganizationIdentification	DnBOrganizationIdentificationNumber
DnBOrganizationIdentification	DnBOrganizationIdentificationNumberType
DnBOrganizationIdentification	DnBOrgIdentificationStartDate
DnBOrganizationIdentification	DnBRegistrationIssuerName
DnBOrganizationIdentification	DnBRegistrationLocation
DnBOrganizationMailingAddress	DnBCountryISOAlpha2Code
DnBOrganizationMailingAddress	DnBCountyOfficialName
DnBOrganizationMailingAddress	DnBPostalCode
DnBOrganizationMailingAddress	DnBPrimaryTownName
DnBOrganizationMailingAddress	DnBStreetAddressLine
DnBOrganizationMailingAddress	DnBTerritoryAbbreviatedName

Data Container	Attribute
DnBOrganizationMailingAddress	DnBTerritoryOfficialName
DnBOrganizationMailingAddress	DnBUndeliverableIndicator
DnBOrganizationPrimaryAddress	DnBAddressUsageTenureDetail
DnBOrganizationPrimaryAddress	DnBCountryGroupName
DnBOrganizationPrimaryAddress	DnBCountryISOAlpha2Code
DnBOrganizationPrimaryAddress	DnBCountyOfficialName
DnBOrganizationPrimaryAddress	DnBGeographicalPrecisionText
DnBOrganizationPrimaryAddress	DnBLatitudeMeasurement
DnBOrganizationPrimaryAddress	DnBLongitudeMeasurement
DnBOrganizationPrimaryAddress	DnBMetropolitanStatAreaUSCensusCode
DnBOrganizationPrimaryAddress	DnBMinorTownName
DnBOrganizationPrimaryAddress	DnBPoliticalDistrict
DnBOrganizationPrimaryAddress	DnBPostalCode
DnBOrganizationPrimaryAddress	DnBPremisesFunctionText
DnBOrganizationPrimaryAddress	DnBPrimaryTownName
DnBOrganizationPrimaryAddress	DnBRegisteredAddressIndicator
DnBOrganizationPrimaryAddress	DnBResidentialAddressIndicator
DnBOrganizationPrimaryAddress	DnBStreetAddressLine
DnBOrganizationPrimaryAddress	DnBTerritoryAbbreviatedName
DnBOrganizationPrimaryAddress	DnBTerritoryOfficialName
DnBOrganizationPrimaryAddress	DnBUndeliverableIndicator
DnBParentPrimaryAddress	DnBCountryISOAlpha2Code
DnBParentPrimaryAddress	DnBPostalCode

Data Container	Attribute
DnBParentPrimaryAddress	DnBPrimaryTownName
DnBParentPrimaryAddress	DnBStreetAddressLine
DnBParentPrimaryAddress	DnBStreetAddressLineSeq
DnBParentPrimaryAddress	DnBTerritoryAbbreviatedName
DnBParentPrimaryAddress	DnBTerritoryName
DnBParentPrimaryName	DnBOrganizationName
DnBPrincipal	DnBCurrentManagementResponsibility
DnBPrincipal	DnBCurrentManagementResponsibilityText
DnBPrincipal	DnBEmploymentBiographyText
DnBPrincipal	DnBFirstName
DnBPrincipal	DnBFullName
DnBPrincipal	DnBJobTitle
DnBPrincipal	DnBLastName
DnBPrincipal	DnBMiddleName
DnBPrincipal	DnBNamePrefix
DnBPrincipal	DnBNameSuffix
DnBPrincipal	DnBPrincipalAge
DnBRegLocationPrimaryAddress	DnBCity
DnBRegLocationPrimaryAddress	DnBCountry ISO Code
DnBRegLocationPrimaryAddress	DnBCountryISOAlpha2Code
DnBRegLocationPrimaryAddress	DnBPostalCode
DnBRegLocationPrimaryAddress	DnBPrimaryTownName
DnBRegLocationPrimaryAddress	DnBStreetAddressLine

Data Container	Attribute
DnBRegLocationPrimaryAddress	DnBStreetAddressLineSeq
DnBRegLocationPrimaryAddress	DnBTerritoryName
DnBRegLocationPrimaryAddress	DnBTerritoryOfficialName
DnBShareCapitalDetails	DnBCurrencyISOAlpha3Code
DnBShareCapitalDetails	DnBShareCapitalAmount
DnBShareCapitalDetails	DnBShareCapitalAmountUnitOfSize
DnBShareCapitalDetails	DnBSharedCapitalAmountReliability
DnBShareCapitalDetails	DnBSharedCapitalStartDate
DnBSocialMediaDetail	DnBSocialMediaPlatform
DnBSocialMediaDetail	DnBSocialMediaWebPageURL
DnBSocioEconomicIdentification	DnBEthnicityType
DnBSocioEconomicIdentification	DnBFemaleOwnedIndicator
DnBSocioEconomicIdentification	DnBLaborSurplusAreaIndicator
DnBSocioEconomicIdentification	DnBMinorityOwnedIndicator
DnBSocioEconomicIdentification	DnBSmallBusinessIndicator
DnBStockExchangeDetails	DnBCountryISOAlpha2Code
DnBStockExchangeDetails	DnBPrimaryStockExchangeIndicator
DnBStockExchangeDetails	DnBStockExchangeName
DnBTelephoneNumber	DnBInternationalDialingCode
DnBTelephoneNumber	DnBTelecommunicationNumber
DnBTelephoneNumber	DnBUnreachableIndicator
DnBThirdPartyAssessment	DnBAssessmentTypeValue
DnBThirdPartyAssessment	DnBAssessmentValue

Data Container	Attribute
DnBTradeStyleName	DnBDisplaySequence
DnBTradeStyleName	DnBOrganizationName
DnBTransferDUNSNumberRegistration	DnBTransferDate
DnBTransferDUNSNumberRegistration	DnBTransferReason
DnBTransferDUNSNumberRegistration	DnBTransferredFromDUNSNumber
DnBTransferDUNSNumberRegistration	DnBTransferredToDUNSNumber

For more information regarding the automatic setup for D&B integration, see the **Dun & Bradstreet Integration** topic.

Additionally, more information regarding attributes and data containers, see the **Attributes** section and the **Data Containers** section of the **System Setup / Super User Guide** documentation.

Experian Email Validation Integration

The Experian email validation integration focuses on easily maintaining valid email contact data and providing an overview of email data quality through use of the Experian Data Quality asynchronous Clean Web Service (Experian). The Experian integration provides an email data quality solution that offers more than just syntax validation. Using the Experian Email Validation integration means email account data can be checked for domain existence, identify malicious email addresses (like spam traps), and in some cases (e.g., Gmail) user account existence.

Whenever email data is created, imported, or updated, STEP can asynchronously validate the information in the background. Once email data has been validated it can be assigned a quality rating so data stewards can monitor the overall email data quality. Also, email data (or groups of email data) can be manually selected and sent to Experian for validation. This can be useful when a data steward needs to revalidate email data in preparation of a task such as an email campaign.

Both STEP Workbench and Web UI support validating emails from within STEP using the Experian service, and allow for enriching email address information in STEP with this data.

The integration to Experian services is implemented via an asynchronous integration pattern, using the following STEP components:

- Experian Email Validation Configuration Object Type
- Email Revalidation Business Condition
- Experian Email Validation Processing Plugin
- Web UI Action Button to Validate Emails
- Email Component Model (Featuring an Easy Setup Option)

Prerequisites

This functionality has been developed to work with Experian Data Quality's bulk validation product known as the 'Clean Web Service Version 2.' The purpose of Clean Web Service Version 2 is to provide the ability to clean, enrich, and validate email address details quickly and accurately via a hosted service. Experian Data Quality recommends using the service regularly to ensure that your contact information is always correct and up-to-date.

Stibo Systems acts as reseller of Experian's email data quality web service and customers are able to use the Experian web service for other purposes. Contact your Stibo Systems account manager or partner manager to obtain login information for the Experian Data Quality self-service portal (https://portal.experianmarketingservices.com/content/) where customers can monitor their credit balance, set up an email notification, and see their secure tokens. Customers can access other features provided within the 'Clean Web Service Version 2' product by visiting the following link: https://www.edq.com/documentation/apis/clean-web-service/

Important: To use the Experian Email Validation Integration functionality, the applicable recipe must be applied, and the Experian License must be obtained from Stibo Systems in order to have access to the Experian API key. Contact your Stibo Systems account manager for more information and licensing terms. Additionally, a Secure

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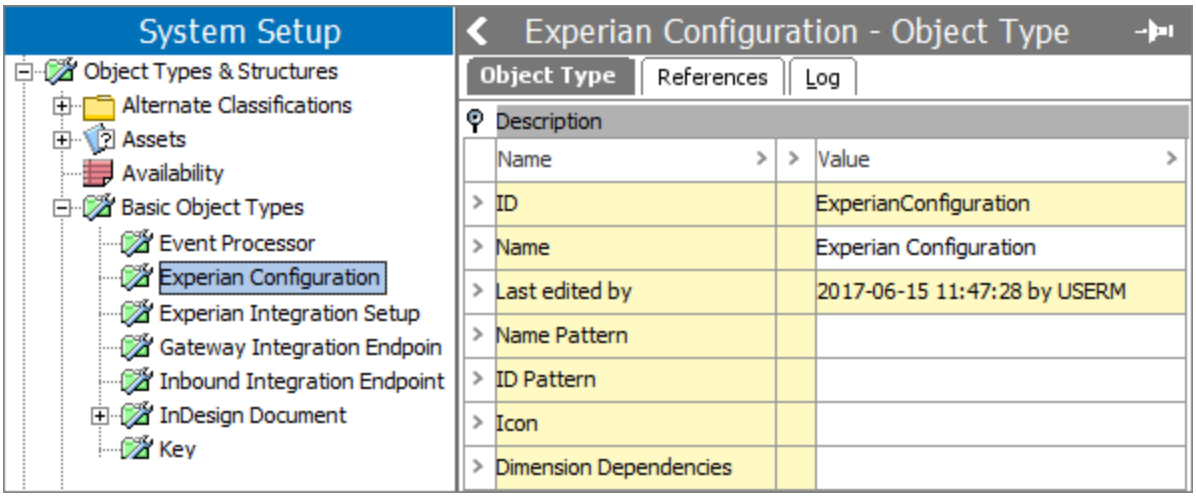
Sockets Layer (SSL) connection must be made to https://api.experianmarketingservices.com and http://www.qas.com.

Configuring the component model requires users to be familiar with the System Setup tab in STEP Workbench and how to configure within this area (e.g., creation and maintenance of object types, attributes, and references). Users should also be familiar with business rules, event processors, and have the privileges required to carry out these tasks. It is expected that anyone configuring Web UI components is familiar with Web UI designer. If not, the users should search online help to understand these concepts and processes.

Experian Email Validation Configuration Object

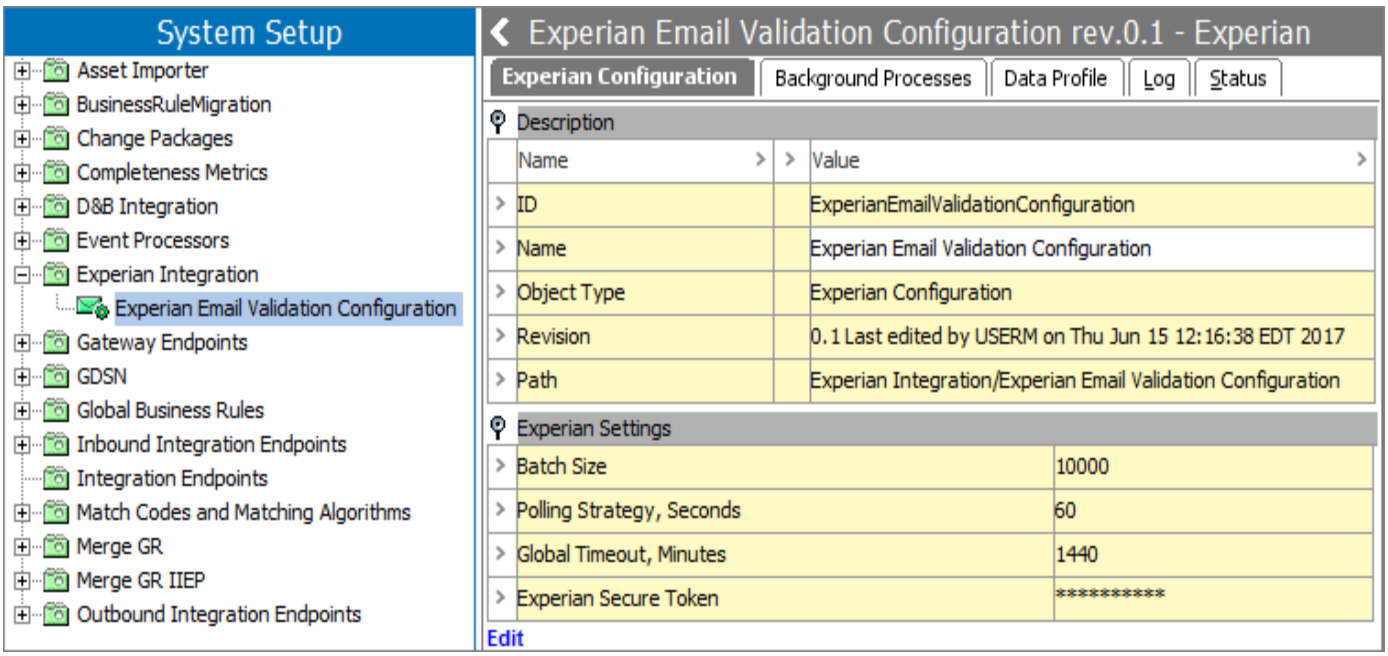
The purpose of the Experian Email Validation Configuration object is to hold the configurations for the different Experian email validation integration parameters. The Experian Email Validation Configuration object can be automatically created (using the Experian Configuration setup entity type) when the Easy Setup for Email Component Model wizard is used.

The Experian Configuration setup entity type can be found within the System Setup > Object Types & Structures > Basic Object Types (as shown in the screenshot below).



Experian Configuration objects are represented within the workbench using the icon, and include the following parameters within the Experian Settings flipper: Batch Size, Polling Strategy in Seconds, Global Timeout in Minutes, and Experian Secure Token. All validate email actions and Experian Email Validation processors must refer to an Experian Email Validation Configuration object.

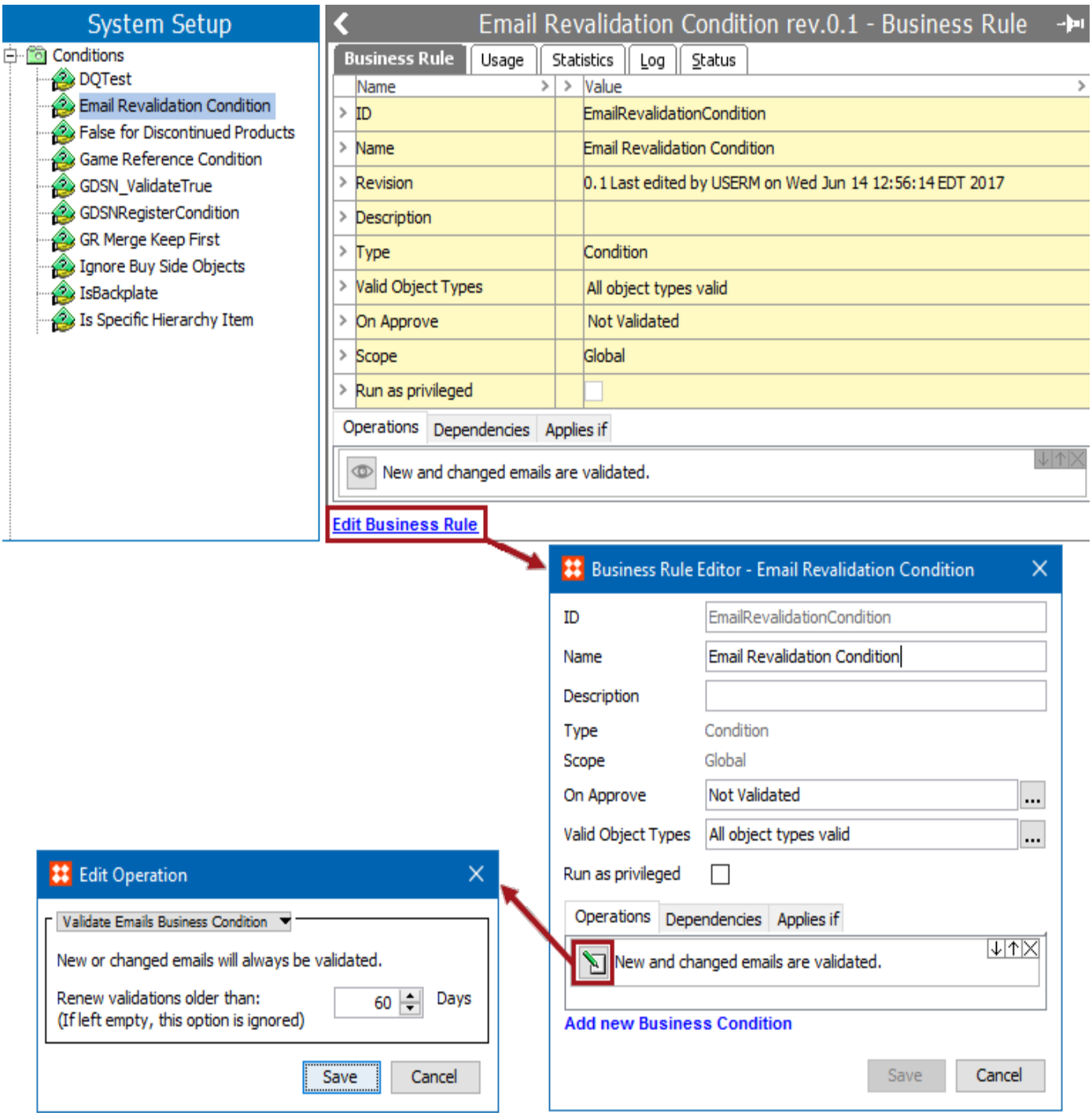
The screenshot below is an example of how the Experian Email Validation Configuration object can be set up. For this example, the optional Setup Group (Experian Integration) was created prior to starting the Easy Setup for Email Component Model wizard, and then selected as the Setup Group during the wizard step 'Create New Experian Email Validation Configuration.'



Note: The Experian Secure Token is encrypted in the database and displays masked within the workbench.

Email Revalidation Business Condition

An event processor using the Experian Email Validation processing plugin can be configured to revalidate emails by using the Revalidation Business Condition plugin along with the Experian Email Validation Configuration object, which can be created / configured automatically when the Easy Setup for Email Component Model wizard is used. The Revalidation Business Condition plugin allows for email objects (across the configured data container types defined by the Email Component Model) that have not been validated for a specified number of days to be sent for revalidation.



The screenshot above is an example of how the Email Revalidation Business Condition can be set up. For this example, the Easy Setup for Email Component Model wizard was used, and during the wizard step 'Create New Email Revalidation Condition,' the Setup Group 'Conditions' was selected.

This makes it possible to define a condition like: 'Validate all billing emails that have changed since the last validation, or have not been validated in the last 2 months.' More than one email revalidation condition can be created, and using JavaScript it is possible to extend the Email Revalidation condition to take properties of the

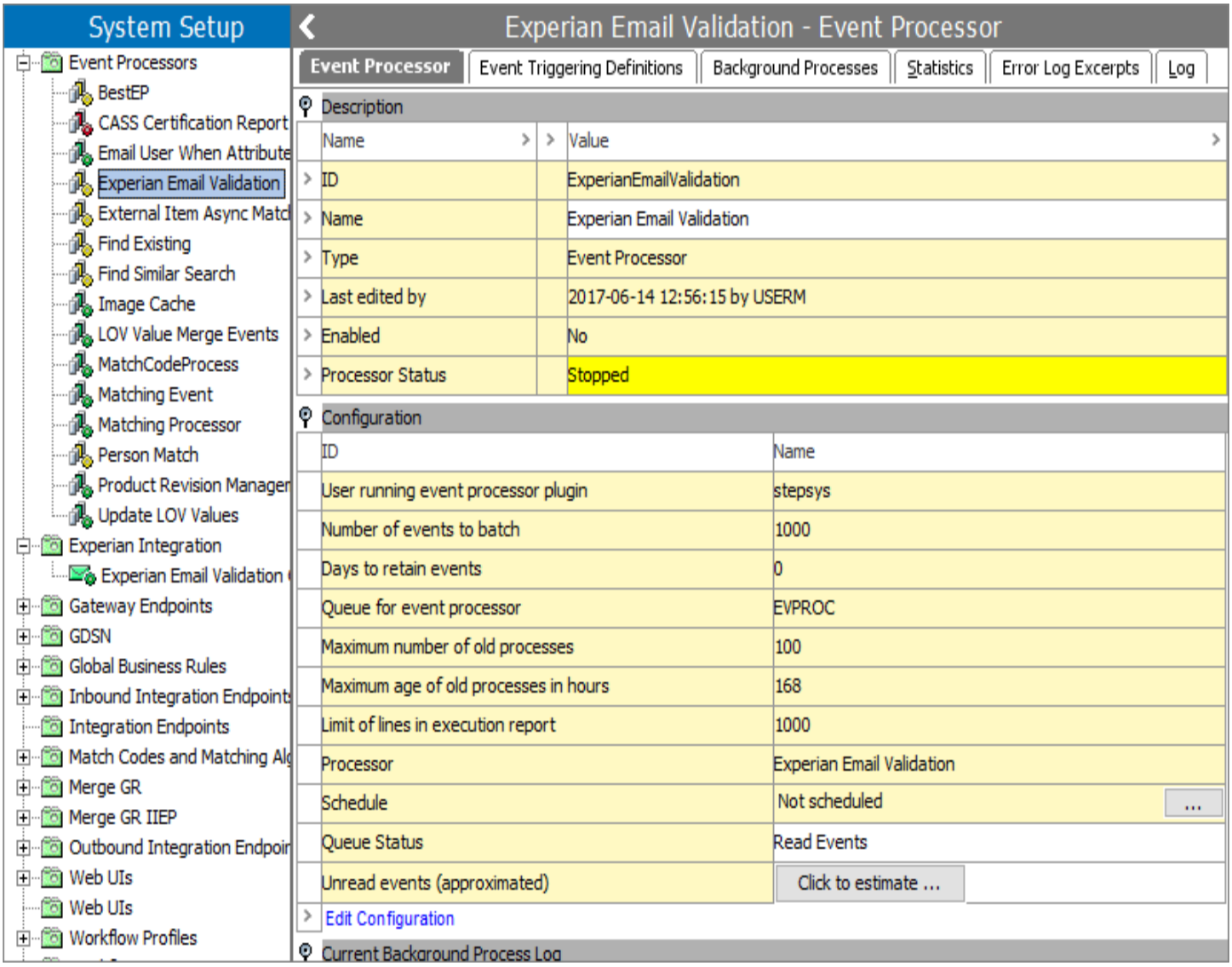
entire account into consideration. If JavaScript is used to implement the Email Revalidation condition, the bind 'Current Email' can be used to refer to the email data container that is currently being processed.

Important: All Email Revalidation Business Conditions must be valid for the object types that use the email data container. For example, if you are working with 'Customers' object types that have email data stored in a data container named 'Email,' then the Email Revalidation Business Condition must be valid for the 'Customers' object type. When the Easy Setup for Email Component Model wizard is used, this occurs automatically.

For more information on how the Email Revalidation Business Condition can be configured within the Experian Email Validation processing plugin, see **Experian Email Validation Processing Plugin Parameters and Triggers** section of the **Processing Plugins** documentation.

Experian Email Validation Processing Plugin

The Experian Email Validation processing plugin can be used to create an event processor that listens for changes to email data on account objects. This means that email updates (manual or via import) will create events for the configured event processor. The Experian Email Validation processing plugin will interface with the Experian batch API and send batches of emails for validation to the Experian service. The emails will be extracted from the accounts that originate from the events using the Experian Email Validation processing plugin. The batch being processed by the event processor will continue to poll (based upon the configurations within the Experian Configuration object), for an answer from the Experian batch API until the batch has been processed or times out. When updates are received, the email data quality fields (configured within the Email Component Model) are updated. A new batch will not be picked up until the current batch has been processed with answers received or has timed out.



The screenshot above is an example of how the Experian Email Validation processing plugin can be set up. For this example, the Easy Setup for Email Component Model wizard was used, and during the wizard step 'Create New Experian Email Validation Event Processor,' the Setup Group 'Event Processors' was selected. It is important to note, before this event processor configuration can be used, it must be enabled.

For more information, see the **Experian Email Validation Processing Plugin Parameters and Triggers** section of the **Processing Plugins** documentation.

Web UI Validate Emails Action Button

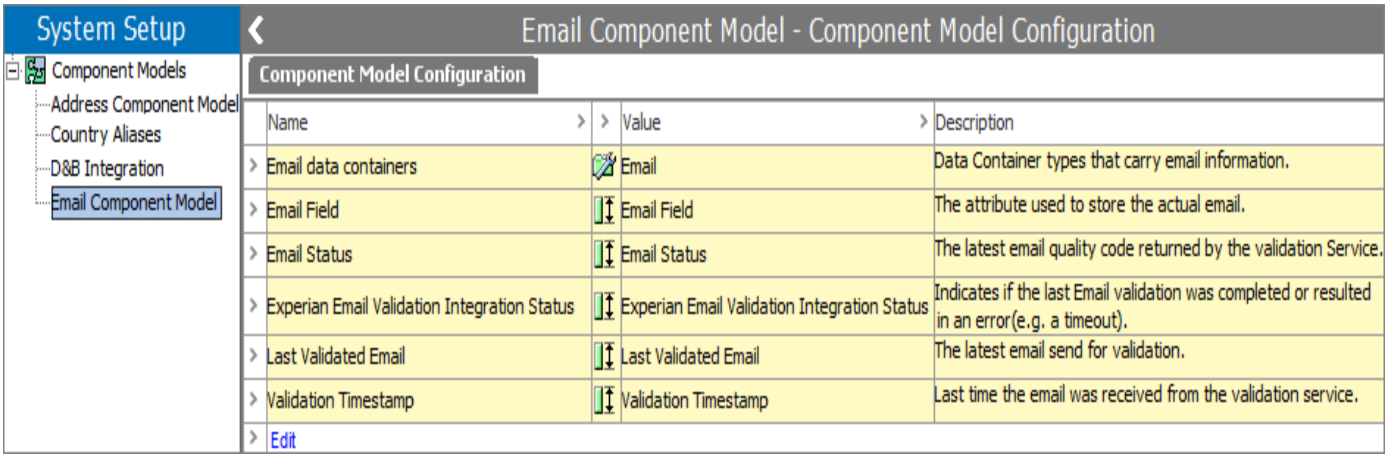
The 'Validate Emails' action button is available within Web UI, and allows users to perform email validations on a node list with one click. Users can choose one or more objects (containing email account data) that need to be validated from a list of emails, then click on the 'Validate Emails' button to run the 'Experian Email Validation Job' background process. In the background, the Experian Email Validation Job will continue to poll for an answer from

the Experian batch API and wait for a status message on all emails. Whenever an update is received, the available status information will be written into the execution report of the background process, and the corresponding email data quality fields (configured within the Email Component Model) will be updated.

For more information, see the **Experian Email Validation Integration in Web UI** section of this guide.

Email Component Model

The Email Component Model defines the structure and data quality of emails in STEP. It contains the configuration of the email data containers, and attributes that are necessary for proper functionality of the email validation and email data quality overview. After running the easy setup, (covered in the **Configuring Experian Email Validation Integration Using the Easy Setup Option** topic within this guide) the Email Component Model will map the component model names (Experian data fields) to STEP attributes. A completed component model using the Easy Setup option and automatic configuration options will appear like the following image.



If during the easy setup not all values could be mapped, then you will be able to see what requires manual mapping within the component model. If any of the object types, attributes / data containers being mapped are unclear, the Description column provides context for how these fields are to be used.

For more information, see the **Configuring Experian Email Validation Integration Using the Easy Setup Option** topic within this guide.

Configuring Experian Email Validation Integration Using the Easy Setup Option

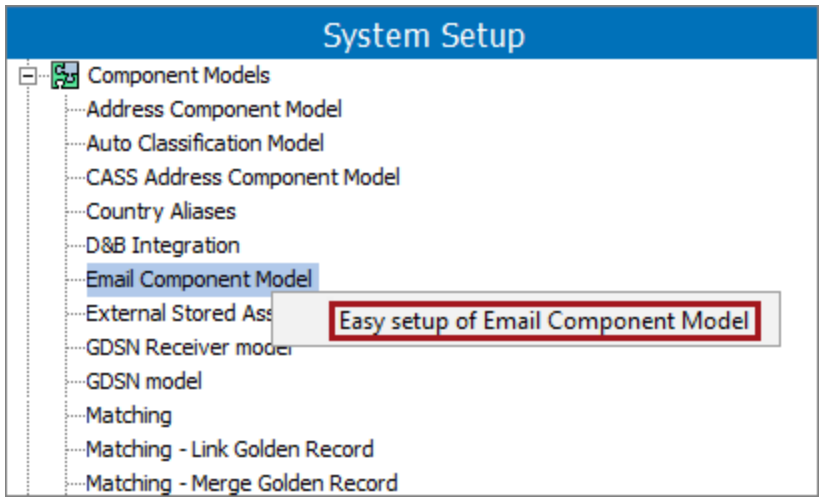
The Experian Email Validation Integration includes an Easy Setup option that will create the setup files, needed attributes, and data containers. The Easy Setup option is designed to make it so that users have very little to do configuration-wise to get up and running as soon as possible. Anyone configuring or using the Email Component Model Easy Setup option needs to have the proper privileges and understand how all the pieces work together.

Important: The Easy Setup can be finished without supplying the Experian Secure Token, however before the Experian Email Validation Integration can be used, the Token will need to be added by rerunning the Email Component Model Easy Setup wizard or editing the Experian Email Validation Configuration object.

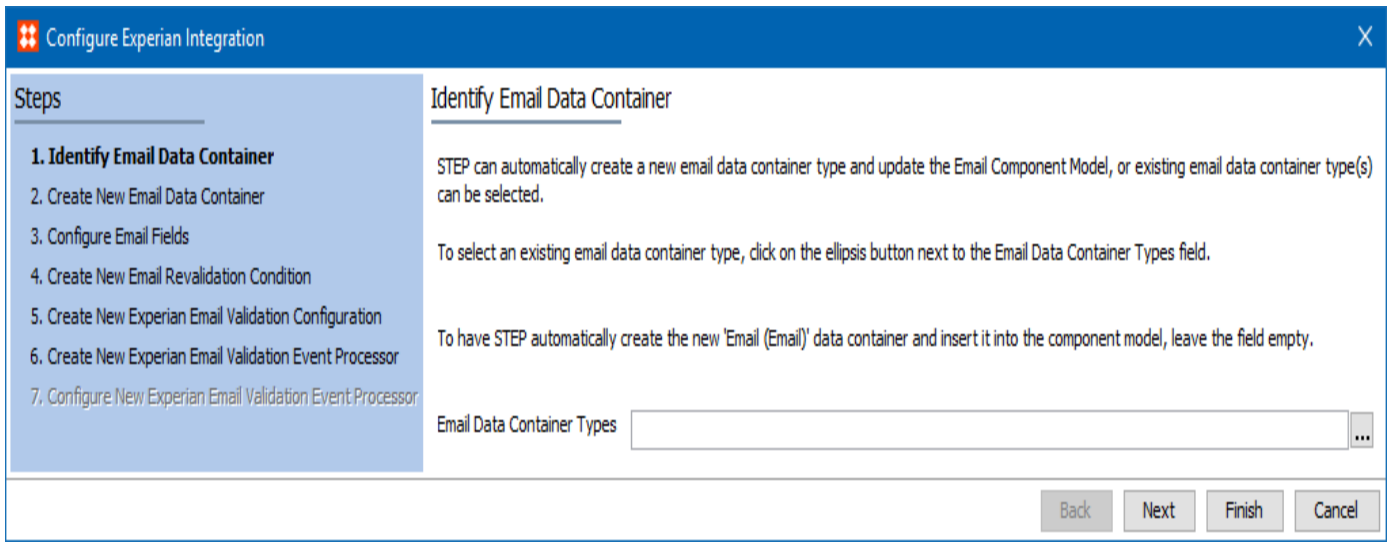
Optionally (before starting the easy setup wizard), create a setup group for the Experian Configuration to be stored in, or when prompted simply pick any one of the existing setup groups.

To start the automatic configuration:

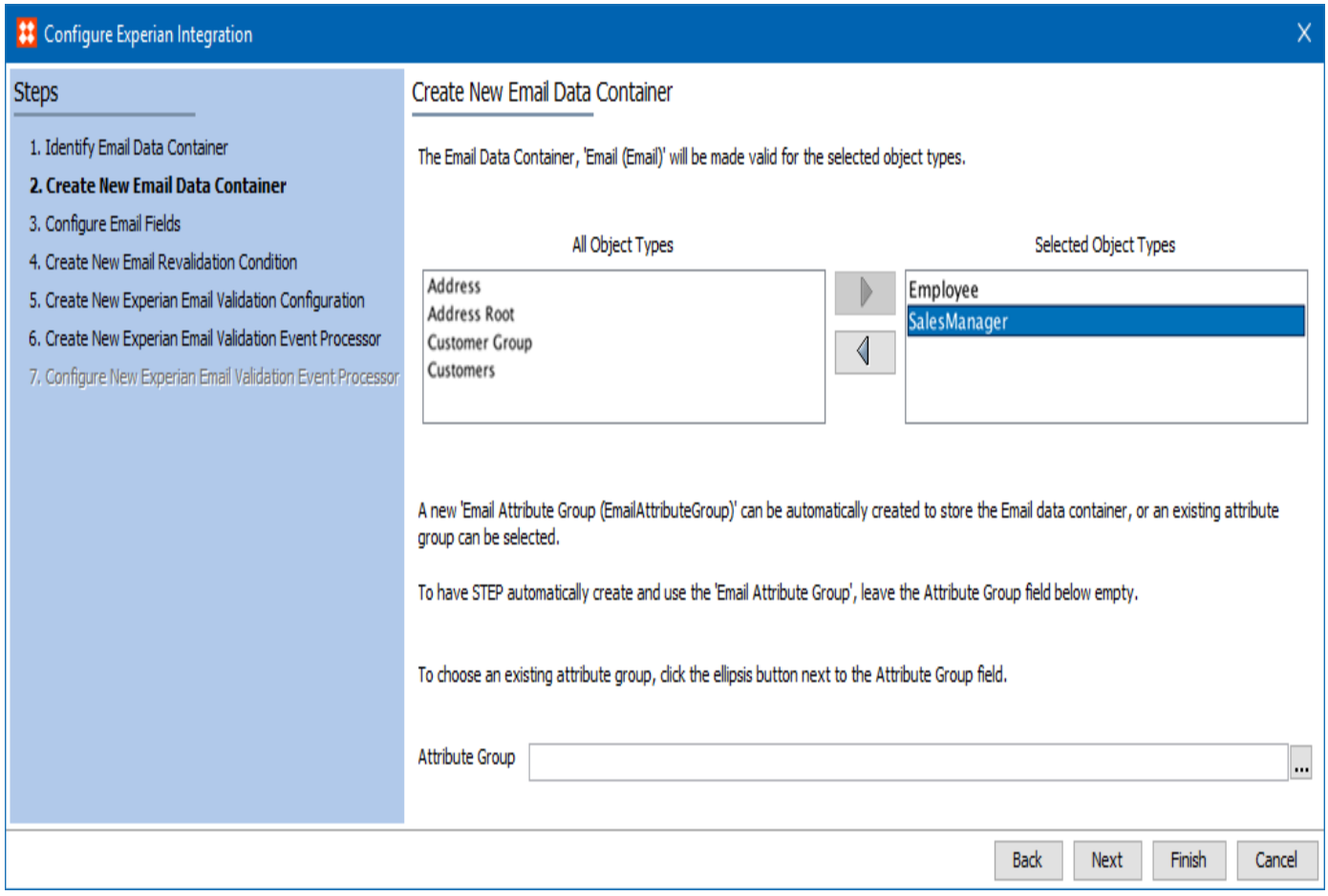
1. Go to System Setup > Component Models > Select **Email Component Model**.
2. Right-click **Email Component Model**, and select **Easy setup of Email Component Model**.



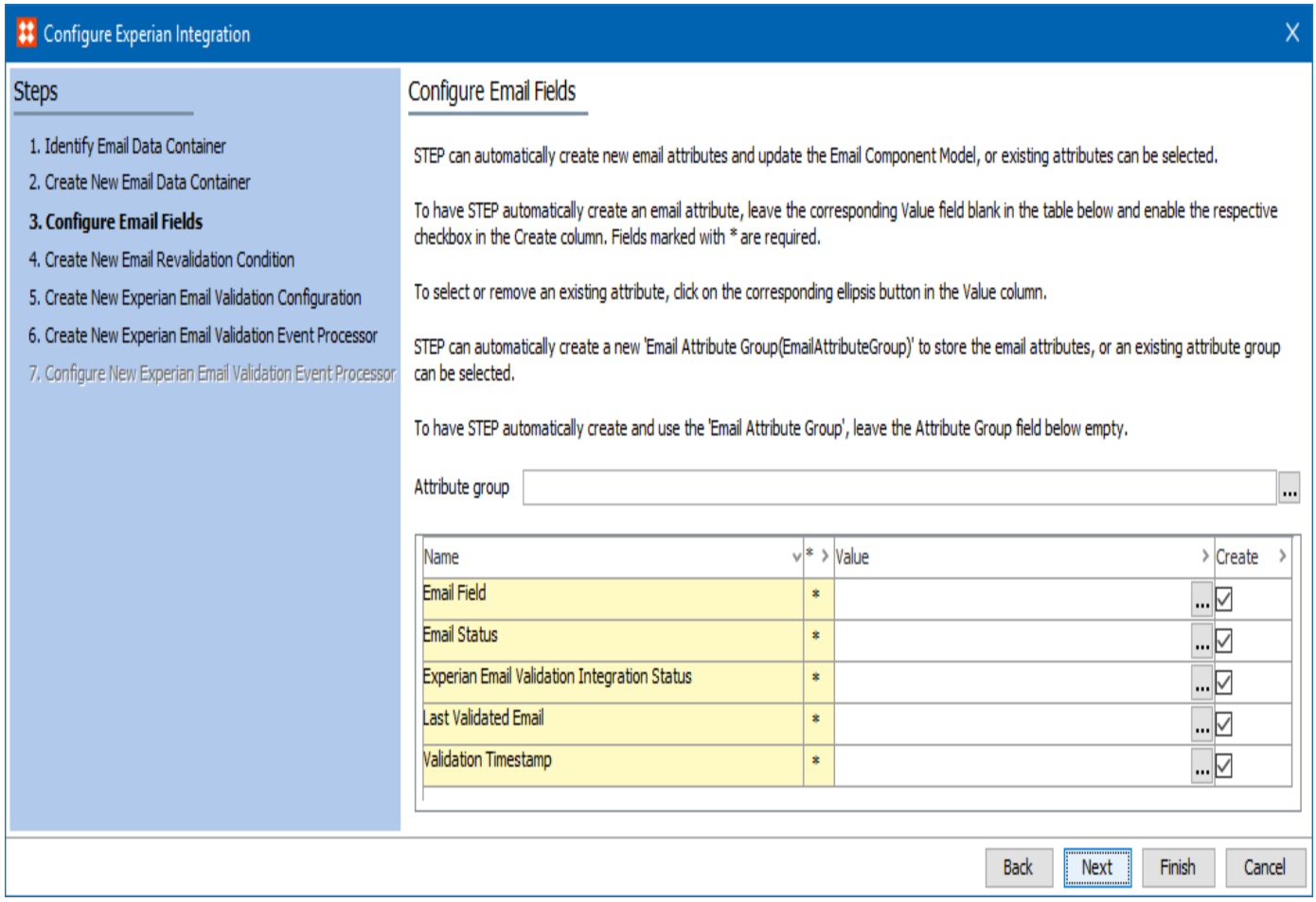
3. The Configure Experian Integration dialog will display the wizard step 'Identify Email Data Container' with detailed configuration instructions. Read the dialog text carefully to determine the necessary action.



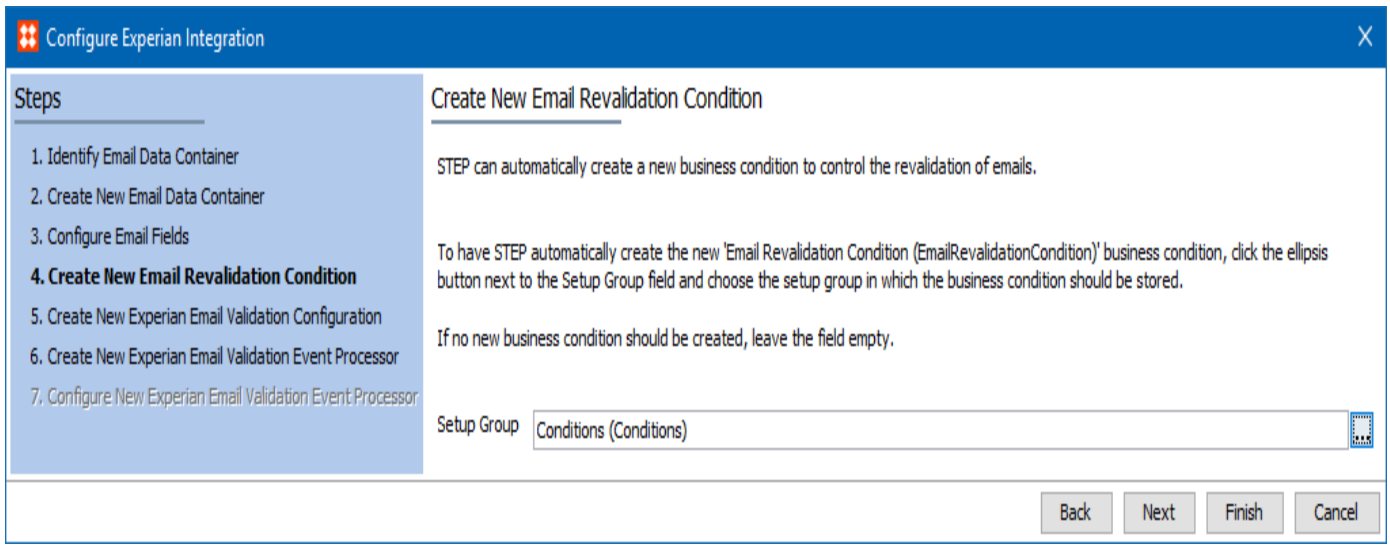
4. Click the **Next** button, and the wizard step 'Create New Email Data Container' will display with detailed configuration instructions. At a minimum, choose the object type(s) to enable the Next button.



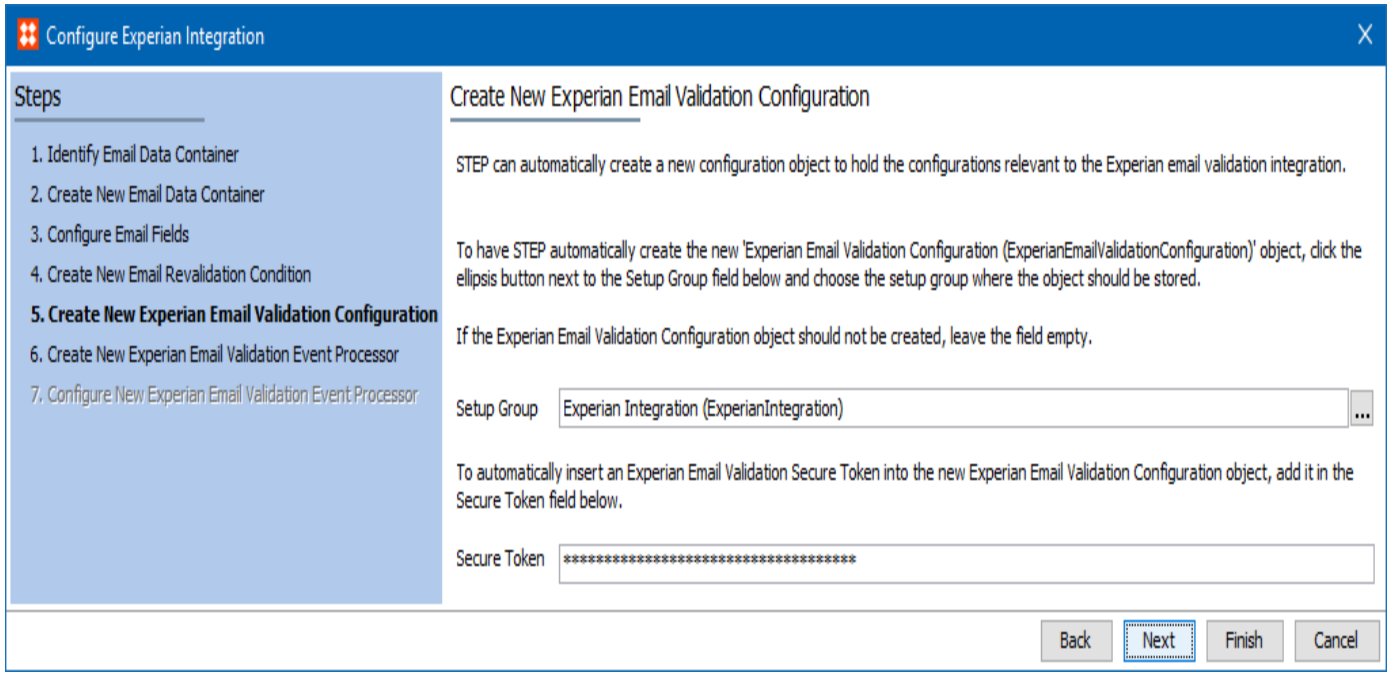
5. Click the **Next** button, and the wizard step 'Configure Email Fields' will display with detailed configuration instructions.



6. Click the **Next** button, and the wizard step 'Create New Email Revalidation Condition' will display with detailed configuration instructions.

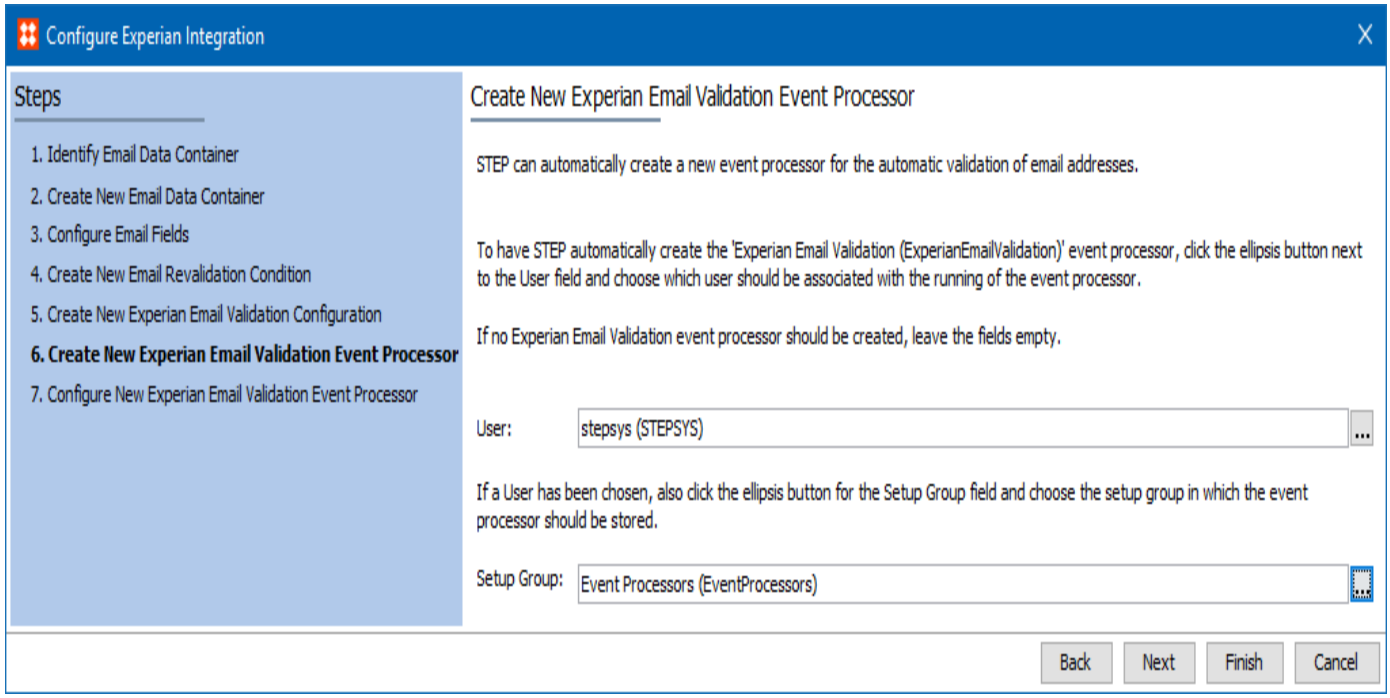


7. Click the **Next** button, and the wizard step 'Create New Experian Email Validation Configuration' will display with detailed configuration instructions.



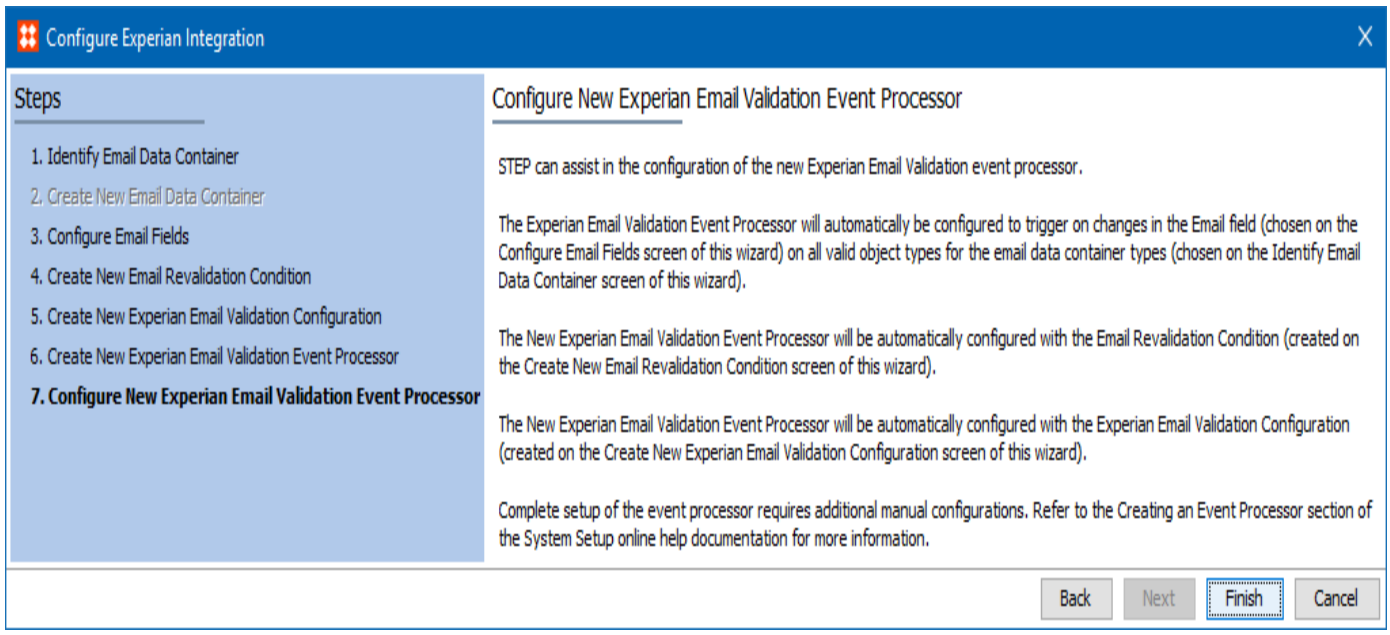
- **Setup Group:** For the example above, prior to starting the wizard a Setup Group was created (as advised in the beginning of this section). It is possible to cancel the wizard, and create your own Experian specific Setup Group, or simply click the ellipsis button (...) and pick any one of the existing setup groups.
- **Secure Token:** As characters are entered into the field, they are masked for security purposes. This field can be left blank, but you will need to return to this step again later to enter the token before the Experian email validation feature can be used.

8. Click the **Next** button, and the wizard step 'Create New Experian Email Validation Event Processor' will display with detailed configuration instructions.

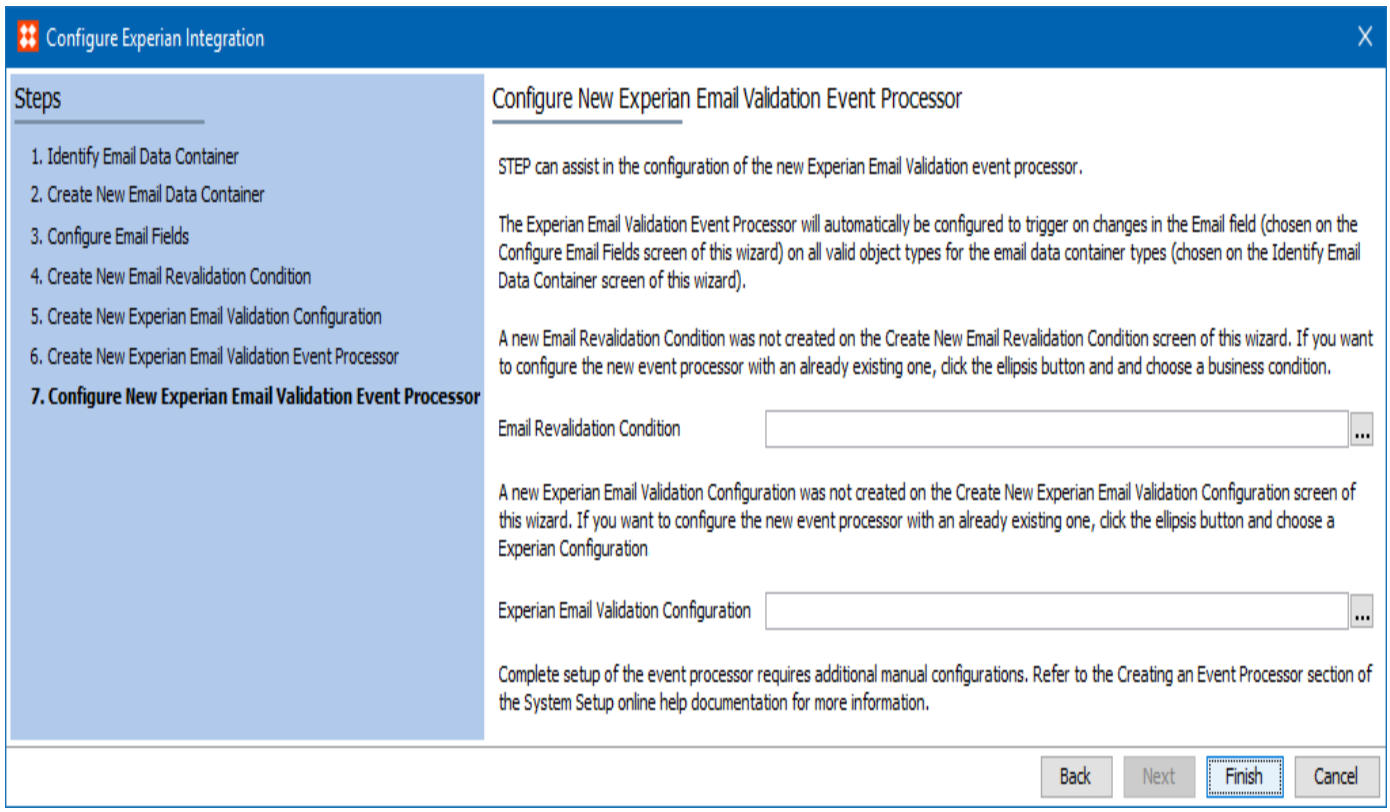


Important: The privileges of the selected user determine which actions the event processor can perform and what data can be processed. Common setup is to create a special system user for this purpose so that the effects of the event processor are easily identified. For more information, see the **Configure Action Sets and Privileges** section of the **Initial Setup for Event Processors** documentation.

9. Click the **Next** button, and the wizard step 'Configure New Experian Email Validation Event Processor' will display with detailed configuration instructions.



If a Setup Group was not selected during the wizard step 'Create New Email Revalidation Condition,' then the wizard step 'Configure New Experian Email Validation Event Processor' will display with the following.



10. Click the **Finish** button, the wizard will close, and the Email Component Model will be populated with the selections made during the wizard.

Important: If the wizard was used to create a new event processor, the additional manual steps necessary to set the Queue status and enable the event processor need to be completed. For more Information, see the **Event Processor Queue Status** documentation, and the **Enable Event Processor** section of the **Running an Event Processor** documentation.

Experian Email Validation Integration in Web UI

The Experian email validation integration provides easy maintenance of valid email contact data and provides an overview of email data quality through use of the Experian Data Quality asynchronous Clean Web Service (Experian).

Prerequisites

This section of the Experian Email Validation integration requires an understanding of the Web UI, how to create screens, and the necessary user permissions to do so. See the **Web User Interfaces** documentation for more information on these topics.

Additionally, users should be familiar with the Experian Email Validation integration setup and processes. For more information, see the **Experian Email Validation Integration** section of the **Data Integrations** documentation.

Once all setup is complete, the Experian Email Validation integration allows users to perform email validations on a node list with one click of the 'Validate Emails' button. Users can choose one or more customer objects (containing email account data) that need to be validated from a list of emails, then click on the 'Validate Emails' button to run the background process (Experian Email validation Job). In the background, the Experian Email Validation Job will continue to poll for an answer from the Experian batch API and wait for a status message on all emails. Whenever an update is received, some status information will be written into the execution report of the background process, and the corresponding email data quality fields will be updated and visible to the user in the Web UI.

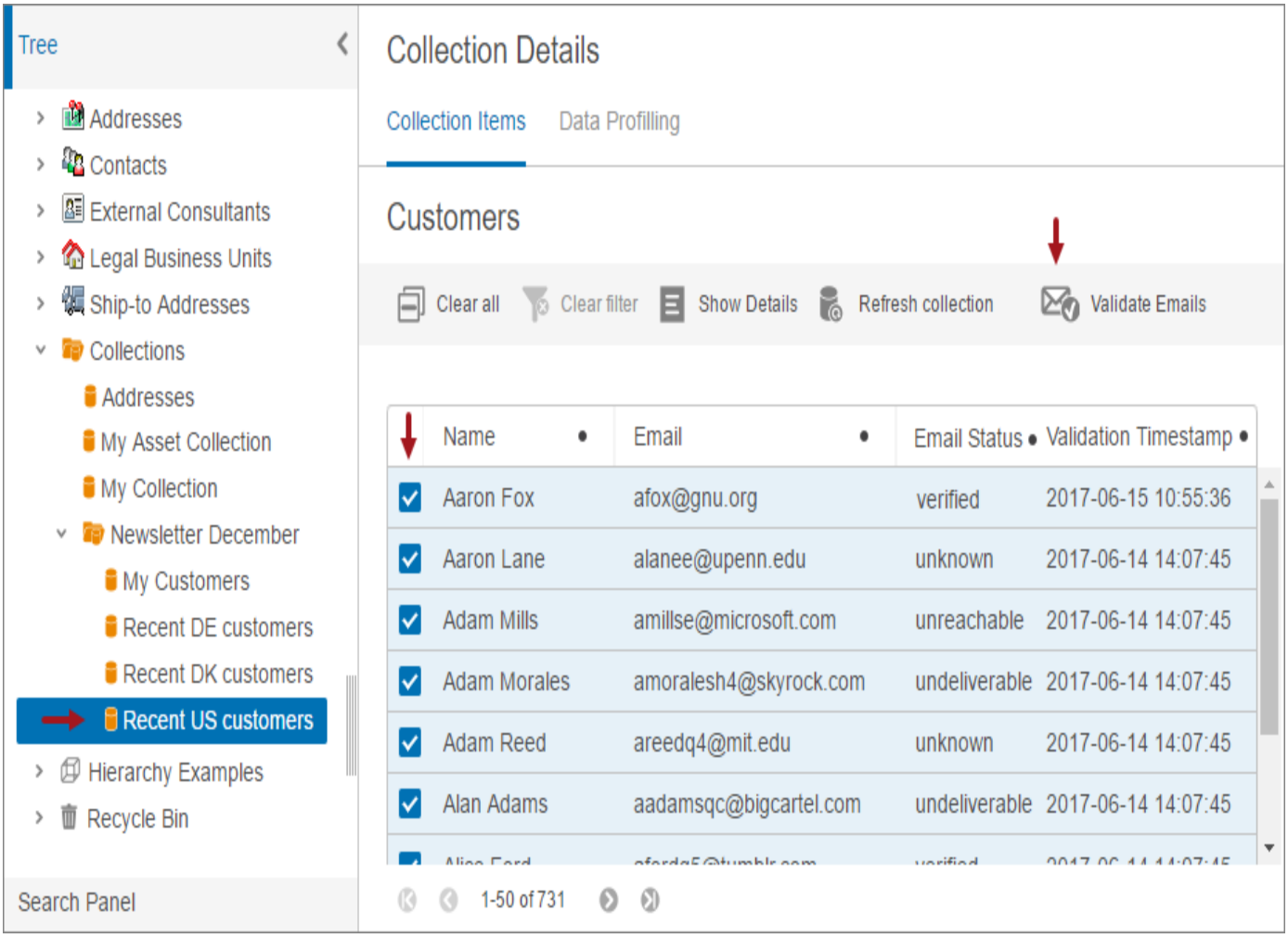
It is possible to monitor the progress of an Experian Email Validation Job using the Background Process Notification component. Also, Email data that is not validated correctly, can be easily identified.

Important: To use the Experian Email Validation Integration functionality, the applicable recipe must be applied, and the Experian License must be obtained from Stibo Systems in order to have access to the Experian API key. Contact your Stibo Systems account manager for more information and licensing terms.

Using Web UI to Validate Email Addresses

Once all setup is complete, users can navigate to a node or collection of objects with email address information stored as data containers, select all necessary objects from the displayed node list, and click the 'Validate Emails' button.

In the example below, the 'Recent US customers' collection is selected and displays the 'Collection Details' screen. On this screen the 'Collection Items' tab is selected and displays the 'Customers' list of objects with the tool bar. The 'Select all' button is used to select all 731 objects within the list which is signified by a check mark within the checkbox. Additionally, the 'Validate Emails' button displays.



When the 'Validate Emails' button is clicked, a background process notification will display (if configured). Since the Experian service does not return immediate responses, it is recommended that the corner bar background notification component be configured so that users can easily follow up with the status of the email data submitted for validation. For more information, see the **Background Process Notification Component** section of the **Corner Bar Component** documentation.

Note: The Experian service is an asynchronous service, aimed at validating large batches of email data. Therefore it will not return immediate responses. The response times depend on the number of emails sent, and email data quality. The guaranteed response times are from 2 (less than 1,000 email addresses) to 20 hours (less than 100,000 email addresses).

When a response is received, one of the following result values will be written into the 'Email Status' email data quality field:

- **(blank):** Email has never been sent for validation. Typically only seen when information is first imported into STEP.
- **Disposable:** Domain is administered by a disposable email provider (e.g. Mailinator).

- **Illegitimate:** Seed, spam trap, black hole, technical role account or inactive domain.
- **Malformed:** The email is identified by STEP as having an illegal format.
- **Undeliverable:** Mailbox or domain does not exist, or mailbox is full, suspended or disabled.
- **Unknown:** We were unable to conclusively verify or invalidate this address.
- **Unreachable:** Domain has no reachable mail exchangers.
- **Verified:** Mailbox exists, is reachable, and not known to be illegitimate or disposable.

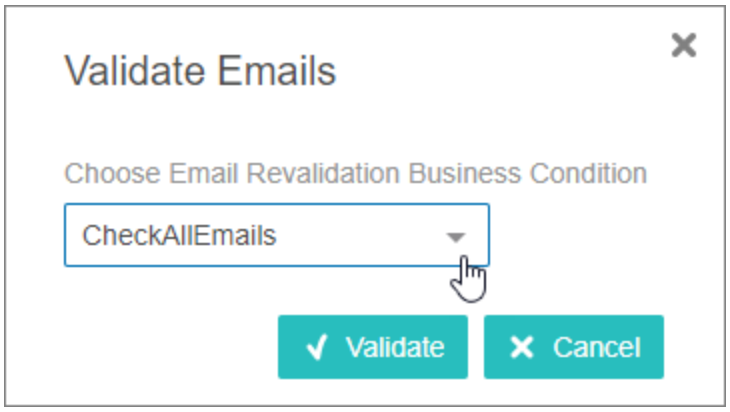
The 'Validation Timestamp' field will be updated with the date and time the email address was last received from the Experian service.

For more information, see the **Experian Email Validation Processing Plugin Parameters and Triggers** section of the **Processing Plugins** documentation.

Validate Emails by Selecting from a List of Revalidation Conditions

Optionally, more than one email revalidation condition can be configured, allowing users to quickly and easily narrow down their Experian email validation request by selecting from common business conditions (i.e., Validate new emails only, Validate new emails and emails that have not been validated in the last 30 days, Validate emails with specific domains).

When more than one email revalidation condition is configured within the designer, and a Web UI user clicks the Validate Emails action button (as described in the previous section), they will be prompted to choose from a dropdown list of available email revalidation business conditions (as shown below).



Once the desired email revalidation condition is selected from the dropdown list, and the user clicks the Validate button, then the background process notification will display (as described in the previous section).

For information on configuring multiple email revalidation business conditions, see the **Configuring a Validate Email Action Button for a Node List** topic within this guide.

Configuring a Validate Emails Action Button for a Node List

The Validate Email action button must be added to a node list and configured with a previously created Experian Email Validation Configuration. Optionally one or more email revalidation business conditions can be added, allowing users to refine the collection of emails selected to be sent for email validation.

Prerequisites

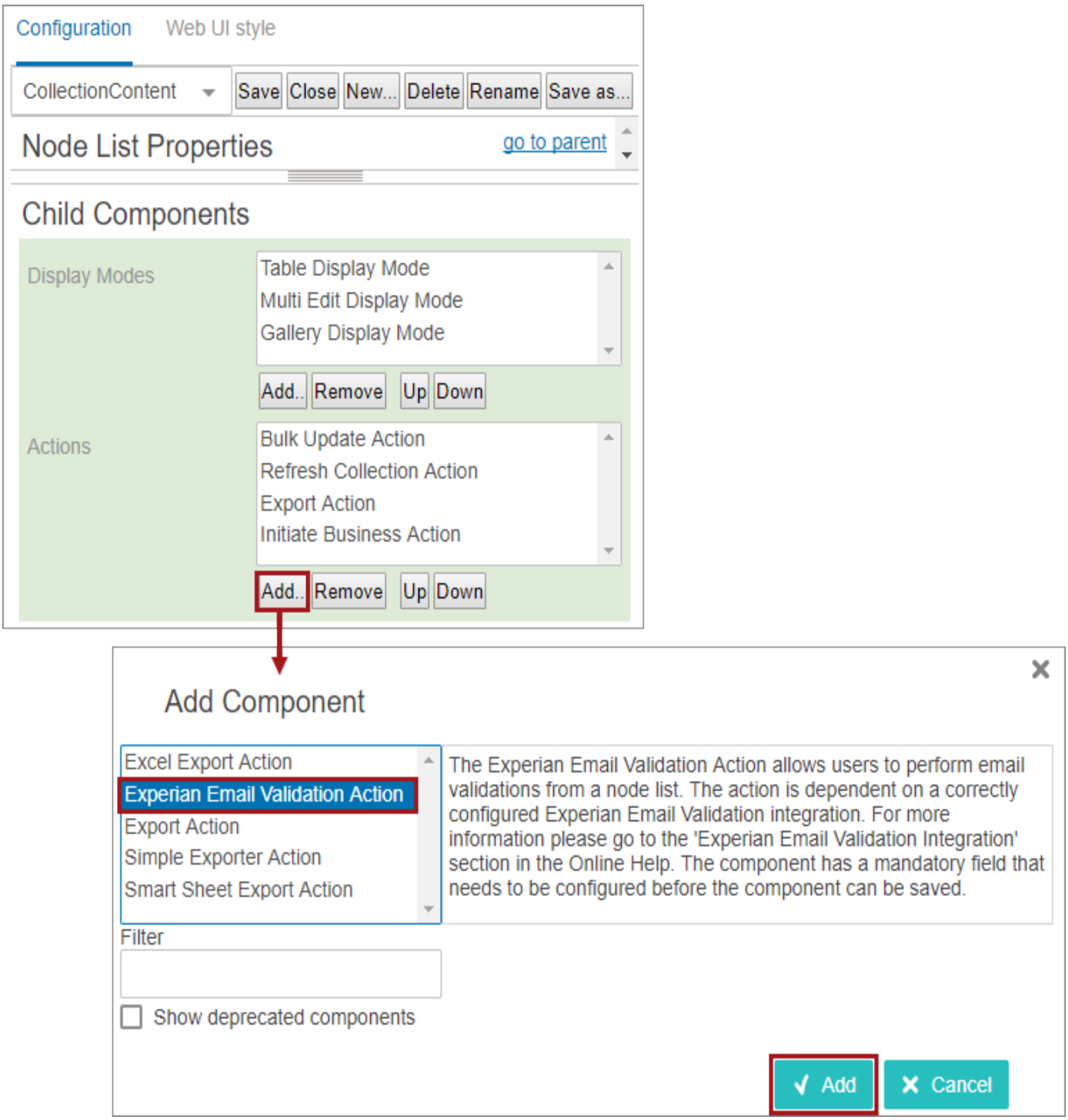
Before configuring a Validate Emails action button, it is recommended to have a firm understanding of the **Experian Email Validation Integration** section of this guide, and to have created the mandatory Experian Email Validation Configuration using the Experian Configuration object type.

For more information about action buttons on Node List, see the **Action Button Configuration on a Node List** section of the **Using a Web UI** documentation.

Add a Validate Email Action Button to a Node List

Steps for adding a Validate Email action button to a node list are below.

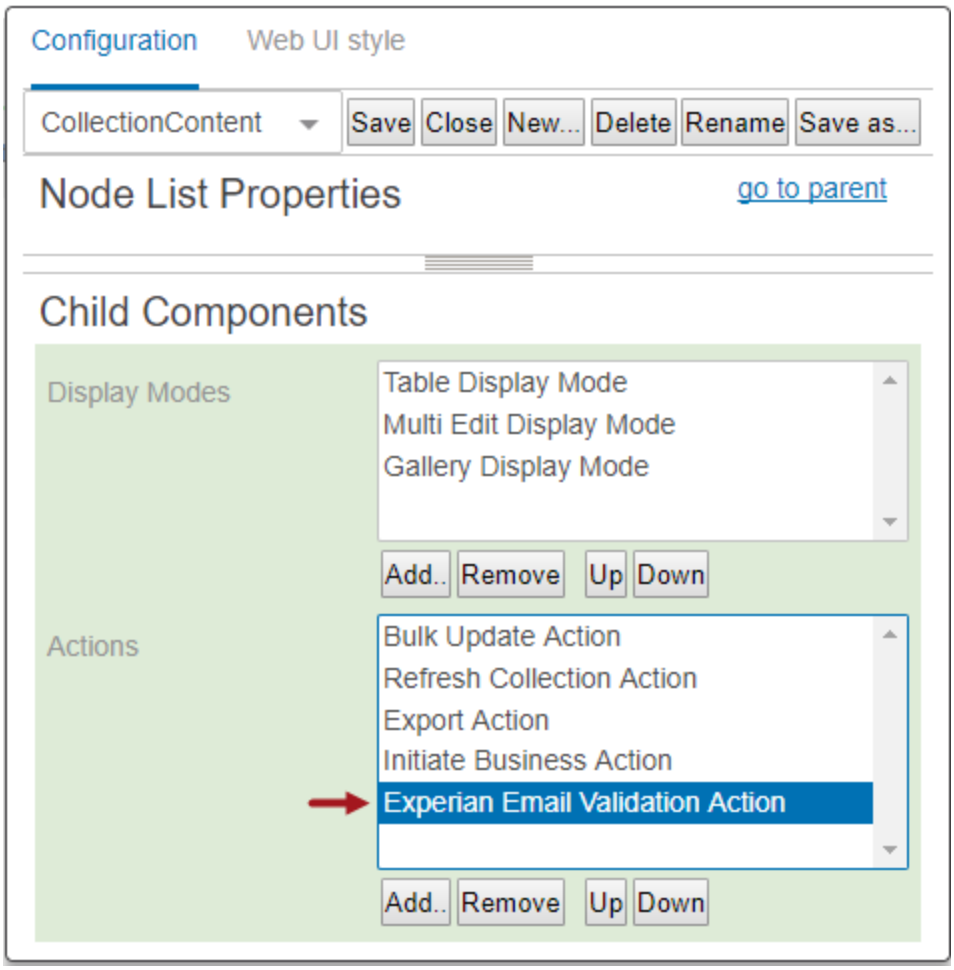
1. Go to your Node List Properties > Child Components > Actions parameter
2. Click the **Add** button, and the Add Component dialog will display.
3. Select **Experian Email Validation Action**, click the **Add** button to close the dialog, and continue to the configuration steps.



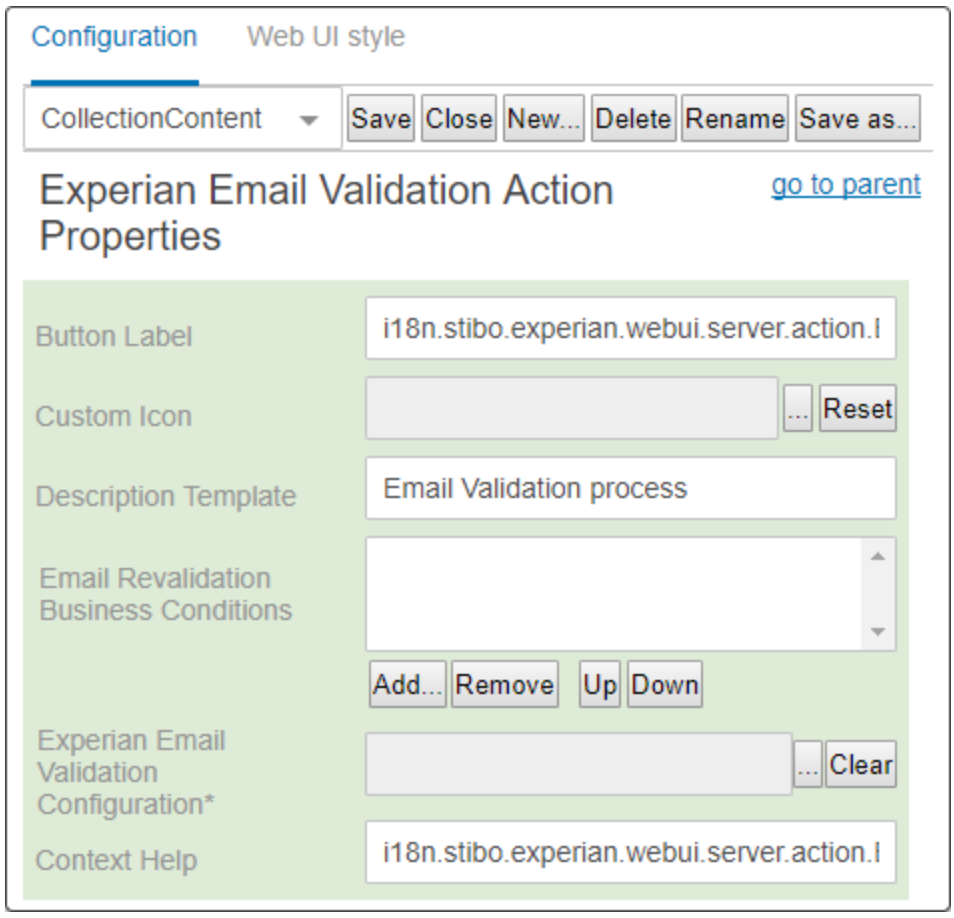
Configure a Validate Email Action Button for a Node List

Once the Experian Email Validation Action component is added to the Node List Actions parameter, follow the steps below to complete the configuration.

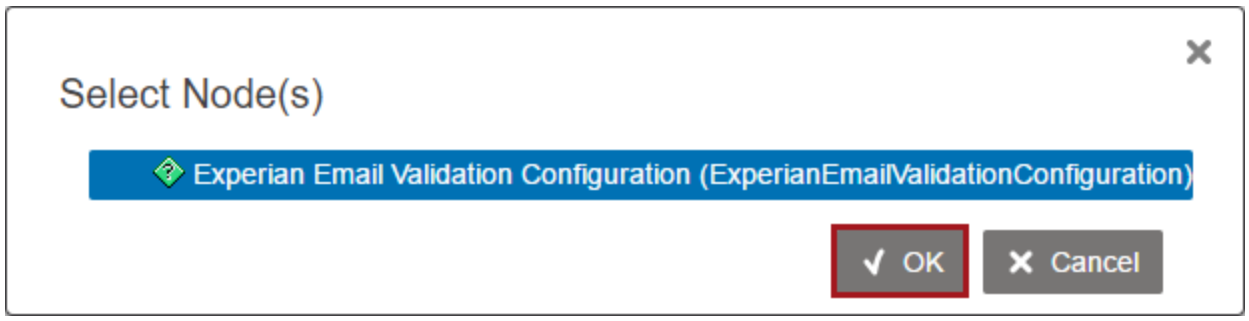
1. From the Actions parameter list, double click the newly added **Experian Email Validation Action** (as shown below).



The Experian Email Validation Action Properties dialog will display as shown below.



2. It is mandatory to populate the Experian Email Validation Configuration parameter with an Experian Configuration object. Click the ellipsis button (...) next to the Experian Email Validation Configuration parameter, and a Select Node(s) dialog will display Experian Configuration object types only.



Note: If the Email Component model easy setup wizard was used to automatically create the Experian Email Validation Configuration object, then the configuration option will appear as shown above.

3. Select **your Experian Configuration object**, and click the **OK** button. The Select Node(s) dialog will close, and the selected Experian Configuration object will display within the Experian Email Validation Configuration

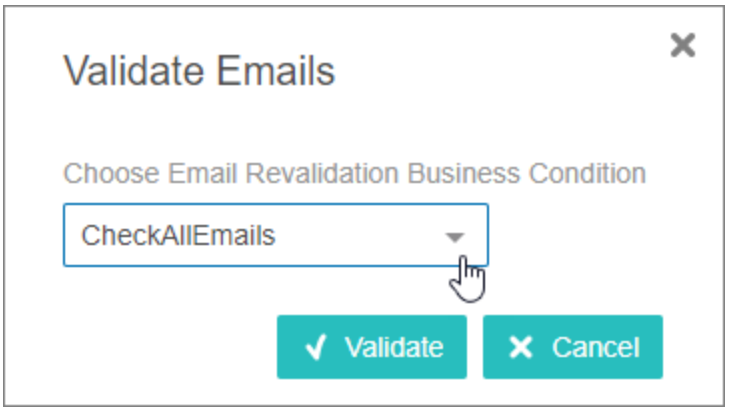
parameter.

4. Click the **Save** and **Close** buttons on the designer.

Optionally, additional parameters within the Experian Email Validation Action properties can be configured. The optional parameters are described below.

Configure Optional Parameters for the Experian Email Validation Action Properties

- **Button Label:** Enter the text to be displayed as the label for the action button icon. The label will only be displayed if the 'Include Label' parameter on the parent Node List properties is enabled.
- **Custom Icon:** Adding a custom icon will overwrite the default icon displayed in Web UI. The recommended size of the icons is 20 (height) x 35 (width) pixels. It is recommended that icons use deep jewel toned colors that fade well when disabled.
- **Description Template:** Enter the text to be used to identify the corresponding background process.
- **Context Help:** Enter text to be displayed when a user hovers over the action button in Web UI.
- **Email Revalidation Business Conditions:** Adding multiple Email Revalidation Business Conditions can help users quickly and easily narrow down their Experian email validation request by selecting from common business conditions (i.e., Validate new emails only, Validate new emails and emails that have not been validated in the last 30 days, Validate emails with specific domains).
  - When business conditions are added to this parameter, they will display for selection when a user clicks the Validate Emails action button in Web UI (as shown below).

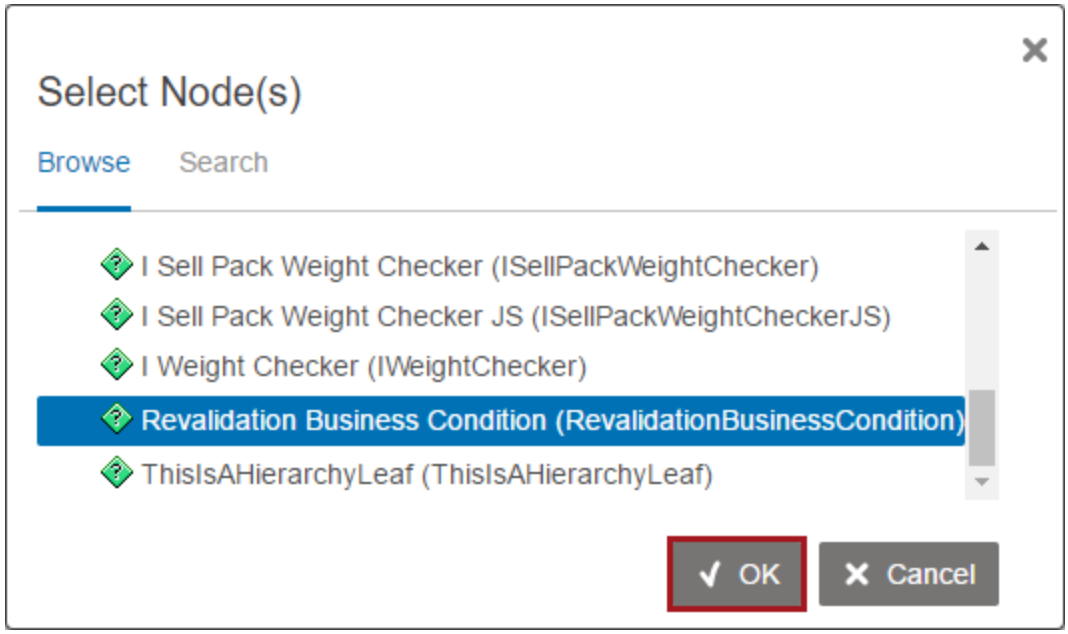


  - When the parameter is empty, and the Web UI user clicks the Validate Emails action button, the user is not prompted to select a business condition, and all selected emails will be sent for email validation.

Add Email Revalidation Business Conditions

Below are steps to add a previously configured business conditions to the Email Revalidation Business Conditions parameter.

1. Click the ellipsis button (...) next to the Email Revalidation Business Condition parameter to display a Select Node(s) dialog.

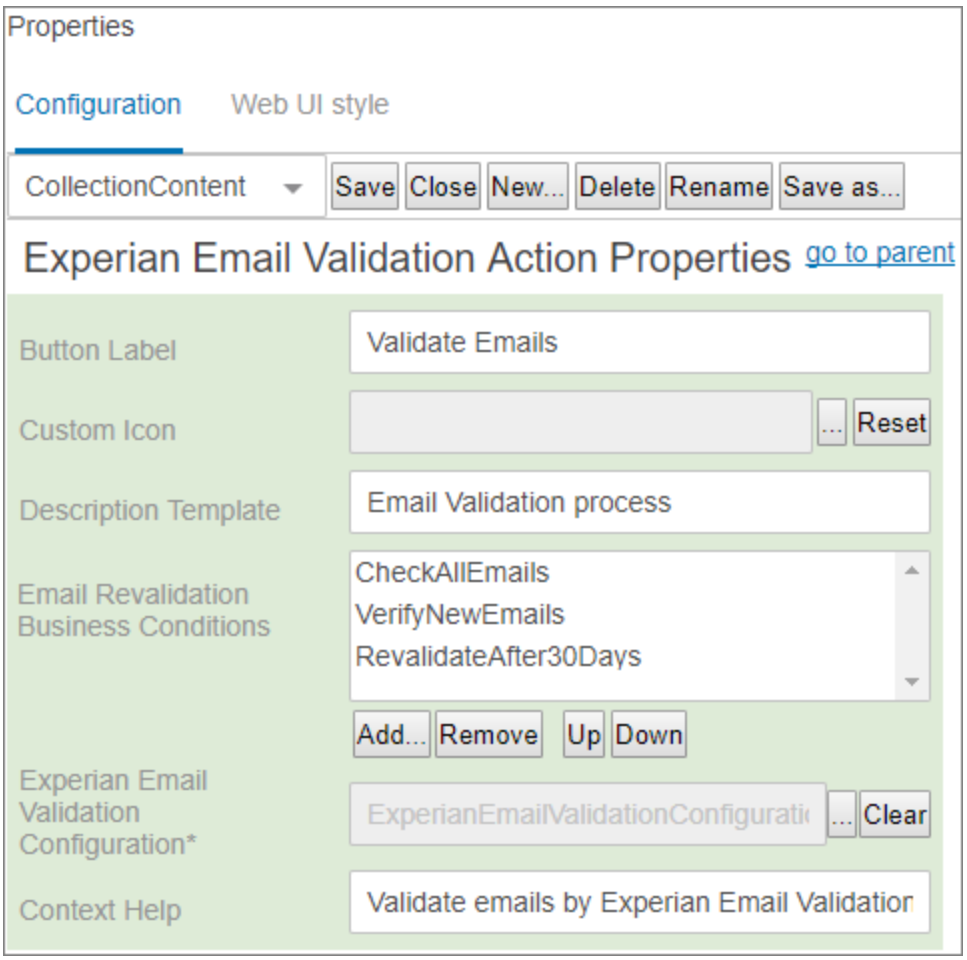


Note: If the Email Component model easy setup wizard was used to automatically create the revalidation business condition, then the condition will appear as shown above.

2. Browse or search to select **your revalidation business condition**.
3. Click the **OK** button, the Select Node(s) dialog will close, and the selected revalidation business condition will display within the Email Revalidation Condition parameter.
4. Optionally, repeat the above steps to add more than one email revalidation business condition.

Note: If one email revalidation business condition is added to the Email Revalidation Business Condition parameter, and the Web UI user clicks the Validate Emails action button, the user will not be prompted to select a business condition, and only the selected emails that comply with the configured email revalidation business condition will be sent for email validation. To allow Web UI users to choose a 'Check All Emails' option along with the added email revalidation business condition, then an additional 'Check All Emails' email revalidation business condition needs to be created and added to the Email Revalidation Business Condition parameter.

Below is an example of configuring multiple email revalidation business conditions.



For information on and images of the Email Validation business condition in the workbench, see the **Email Revalidation Business Condition** section of the **Experian Email Validation Integration** topic in this guide

Loqate Integration

Loqate is a third-party address standardization service that, when integrated with STEP, is used to return standardized addresses that adhere to the standards of local postal authorities such as the USPS. Standardized addresses are essential to securing safe postal deliveries and also help save money when doing mass mailings. A fully standardized address is also a first step in customer deduplication (finding and removing duplicate records containing these addresses) using Matching, Linking, and Merging.

The integration to Loqate services is implemented using the following STEP components:

- Business actions and bulk updates that enable address standardization and verification of addresses
- Address Component Model

The integration to Loqate Local with CASS also uses the following:

- CASS Address Component Model
- Event processor for the generation of CASS certification reports

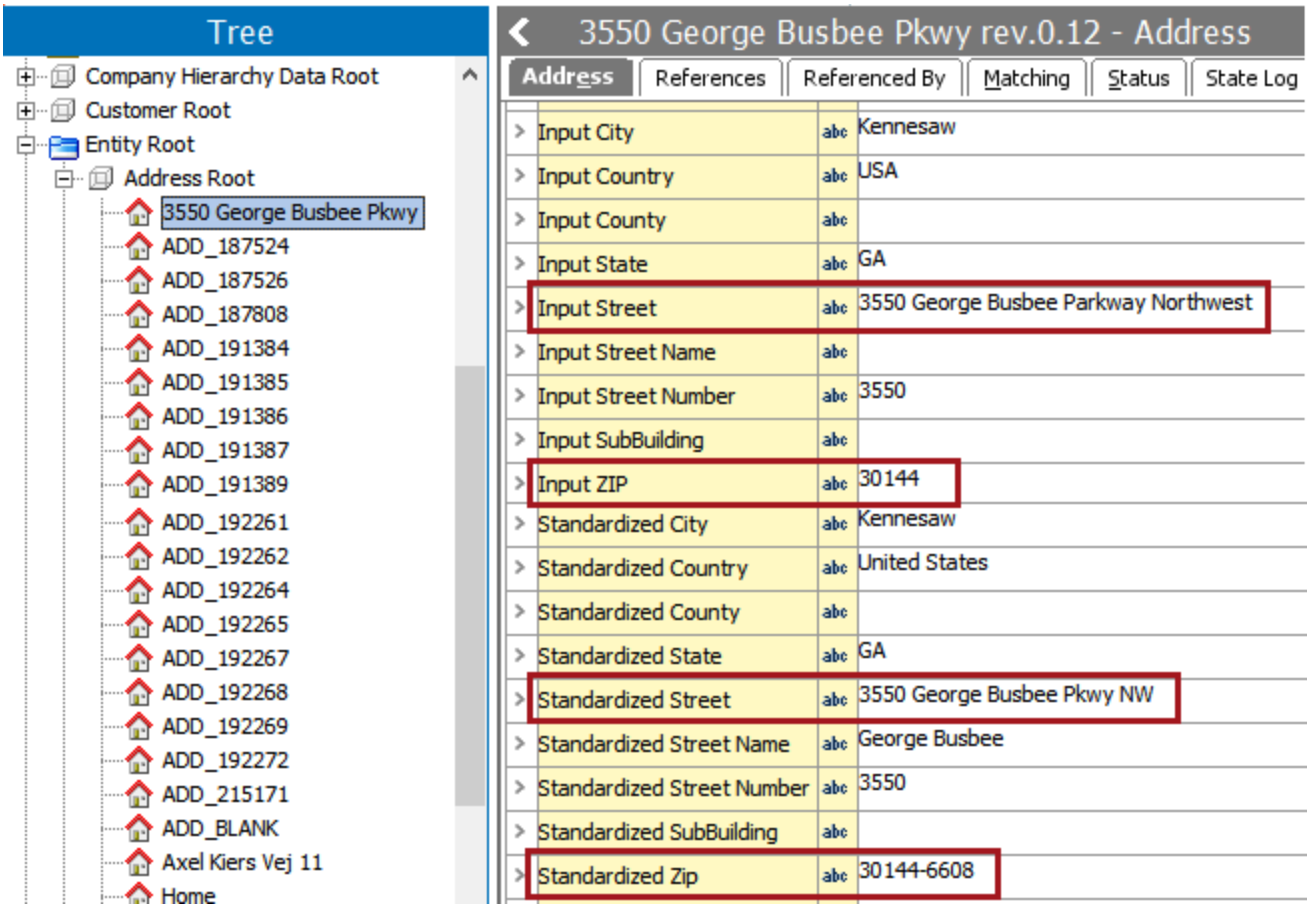
To assist with proper configuration, easy setup actions are available to assist in the Loqate address field mappings as well as the creation of associated address object types, business rules, and event processors.

Important: A Loqate integration requires access to the following domains to function properly. For the Loqate Cloud, a Secure Sockets Layer (SSL) connection must be made to http://saas.loqate.com. For the Loqate Local solution, an SSL connection must be made to https://licensing.loqate.com and https://download.loqate.com.

Loqate Overview

By using Loqate, an address is first standardized and then verified. These are technically two separate processes, but must be executed together to ensure an address is valid. To standardize an address, Loqate will update the address input information from STEP by ensuring that it uses the approved spelling, abbreviations, and formatting of the relevant postal authorities. However, a standardized address alone does not guarantee validity or deliverability. Once the address is standardized, it is matched against Loqate's reference data to be validated. If any city, state, or ZIP code information is missing from the input, Loqate may not be able to uniquely identify and add these to the standardized output. Therefore, the output from Loqate will have quality measures that indicate how valid the address is.

The following screenshot show a simple example of street address and ZIP code values as they look before being sent to Loqate (Input Street and Input ZIP) and as they look after being standardized and returned from Loqate (Standardized Street and Standardized Zip).



STEP integrates with Loqate in three different ways: **Cloud**, **Local**, and **Local with CASS**. These are similar services, but with slight variations. This introductory topic provides a brief overview of these three methods, along with the required configuration properties.

Stibo Systems is a reseller of the Loqate solution, commercially licensing the Loqate software along with its reference data. For information on obtaining and installing any of the three variations of the Loqate address standardization service, contact your Stibo Systems account manager. Additional support information and installation instructions can be found on the Loqate website. (Users must have a Loqate account already set up before they can access the website.)

Loqate Cloud

The Loqate Cloud API service is an integration that enables STEP to communicate with an off-premises Loqate cloud server, hosted by Loqate. Input (non-standardized) address information is stored in STEP in attribute values that are mapped to Loqate fields within the Address Component Model. This information is sent from STEP to the Loqate cloud where it is validated and standardized. Once Loqate parses the data, the standardized address information is returned to STEP and stored in standardized output address fields. Loqate charges users a small fee every time a call is made to the Loqate cloud.

To integrate with the Loqate Cloud solution, STEP users must have the relevant Loqate cloud licenses and API license key.

The Loqate cloud solution may be a preferred option for users who would like to save money on infrastructure cost by using an on-demand service hosted by Loqate. However, the cloud solution has more limited functionality than the local solution. For example, fewer Loqate fields are available in the cloud solution than in the local solution. Also, users must be connected to a local Loqate engine in order to use the CASS program.

Loqate Local

The Loqate Local API service is an integration that enables STEP users to standardize address information against reference data stored on a local server, typically on the STEP application server itself. Just like in the cloud service, input address information is stored in attribute values that are mapped to Loqate fields within the Address Component Model. However, instead of being sent to a Loqate-hosted cloud server, the address data is sent from STEP to the locally installed Loqate engine, where it is validated and standardized. Once the Loqate engine parses the data, the standardized address information is returned and stored in standardized output address fields.

To integrate with the Loqate Local solution, STEP users must have a Loqate Local license and API license key. Additionally, users must install Loqate software (provided by Stibo), then make an initial connection to an external Loqate server to download the Loqate reference data packs. Once the software and data packs are locally installed, address information can be sent directly to the Loqate installation on the local server, with no need to connect externally to the Loqate cloud. Users will need to occasionally download updated reference data packs from Loqate, but, on a day-to-day basis, address standardization will be handled by internal communications between STEP and the locally installed Loqate engine.

The Loqate Local solution may be a preferred option for users who prefer a much tighter integration with the local API. The Loqate Local server also boasts improved performance over the cloud solution, with faster response times when bulk handling large amounts of data. The local server can also be used with CASS address standardization functionality, which adds an even stricter layer of address validation.

Important: A considerable amount of server space is needed for Loqate reference data. Approximately 13 GB alone is needed for the US data packs, which include verification datasets and geocode datasets, and approximately 35 GB is needed for the full worldwide reference data set. Loqate reference data must be accessible from each STEP application server. It can be installed on a shared drive, but for best performance, it should be maintained on a hard drive local to each server. If CASS is also activated, then performance may be impacted.

Loqate Local with CASS

The Loqate Local with CASS service is the same installation as the standard Loqate Local API solution but includes additional data packs of CASS reference data and some CASS-specific library files. An additional license is needed for CASS. For more information on CASS, see the **CASS Address Component Model** topic.

Note: The CASS solution will not work with the Loqate Cloud API.

Address Validation Web Service

If STEP is deployed with Loqate Local, STEP also offers an Address Validation web service. This web service can be used by third-party systems to perform the same address validation and standardization that is done in STEP. This allows consistent address validation across the enterprise.

The Address Validation web service comes in REST and SOAP variants and supports CASS address certification, as applicable, and geocoding. For complete documentation for Web Services functionality related to Address Validation, click the **STEP API Documentation** button on the STEP Start Page and see the SOAP and REST API sections.

Configuration Properties Requirements

The following case-sensitive properties must be added to the sharedconfig.properties file to enable Loqate functionality:

Both Local and Cloud

- Address.AddressQualityPlugin=LoqateAddressQuality
- Address.Service.Loqate.GeocodeAll=[true or false]

  Default value is true. Specifies if all addresses should be geocoded. A geocode is a pair of coordinates for the latitude and longitude of a location.

Cloud Only

- Address.Service.Loqate.License=[License Key required for Production]

  Specifies the license key of the Loqate Cloud solution.

Local Only

- Loqate.Server.Data=[direct or relative path]

  The directory where data for the Loqate Local API has been installed.

  Examples:

  - Linux: Loqate.Server.Data=/opt/stibo/step/resources/loqate/2.23.0.9136/LoqateData
  - Windows: Loqate.Server.Data=C:/LoqateData

Considerations and Limitations

- Customers are responsible for keeping all Loqate Local reference data updated on their servers.

Address Component Model

To use the Loqate and CASS integrations, the Address Component Model must first be configured in STEP Workbench.

This topic provides an overview of the Address Component Model, including full descriptions of all of the Loqate address attribute fields it contains. For instructions on how to configure the component model, see the following topics in this documentation section:

- **Easy Setup of Address Component Model**
- **Manual Setup of Address Component Model** (recommended for modifications after initial setup)

Once the component model has been configured, the system will be ready to standardize addresses using the Loqate solution.

Prerequisites

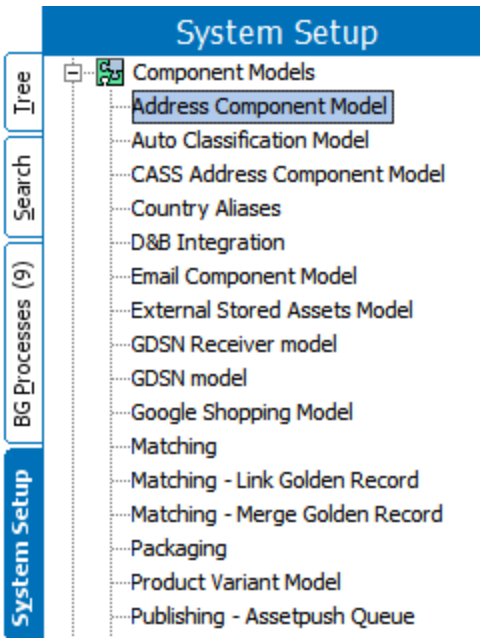
Configuring the Address Component Model requires users to be familiar with the System Setup tab in STEP Workbench and how to configure within this area (e.g., creation and maintenance of object types, attributes, and references). Users must also have the privileges required to carry out these tasks. Additionally, the following condition must be met.:

- Users must be connected to a Loqate installation, either through the Loqate Cloud API or the Loqate Local API. For more information, see the **Loqate Integration** topic in the **Data Integration** documentation.

Address Component Model Overview

The Address Component Model determines the input and output fields for the information that is sent to Loqate from STEP and returned from Loqate to STEP.

The Address Component Model is found under Component Models on the System Setup tab. If the Address Component Model is not present, contact your Stibo Systems account manager.



Loqate Address Fields

The following table lists the fields contained in the Address Component Model, along with a description of each field, the corresponding Loqate field, whether the field is available for both the Loqate Cloud service and the Loqate Local installation. Users will typically not use all address fields.

Loqate fields are mapped to STEP attributes, either manually or though easy setup of the component model. The component model contains four types of fields and are identified in the table below:

- **Object types** – The address object types used to represent addresses
- **Regular** address attributes – The **input** fields that are used as input when making a request to Loqate. These are the non-standardized, original address attributes.
- **Standardized** address attributes – The **output** fields that store the data returned from Loqate. These are the standardized and validated versions of the address fields from Loqate.
- **Data quality** attributes – The fields that store information about the validity and precision of the standardized address attributes.

Loqate responses do not overwrite the input fields, which remain as-is after standardized address data is returned. Loqate responses are kept separately in the standardized fields. For more thorough descriptions of these fields, refer to the Loqate website.

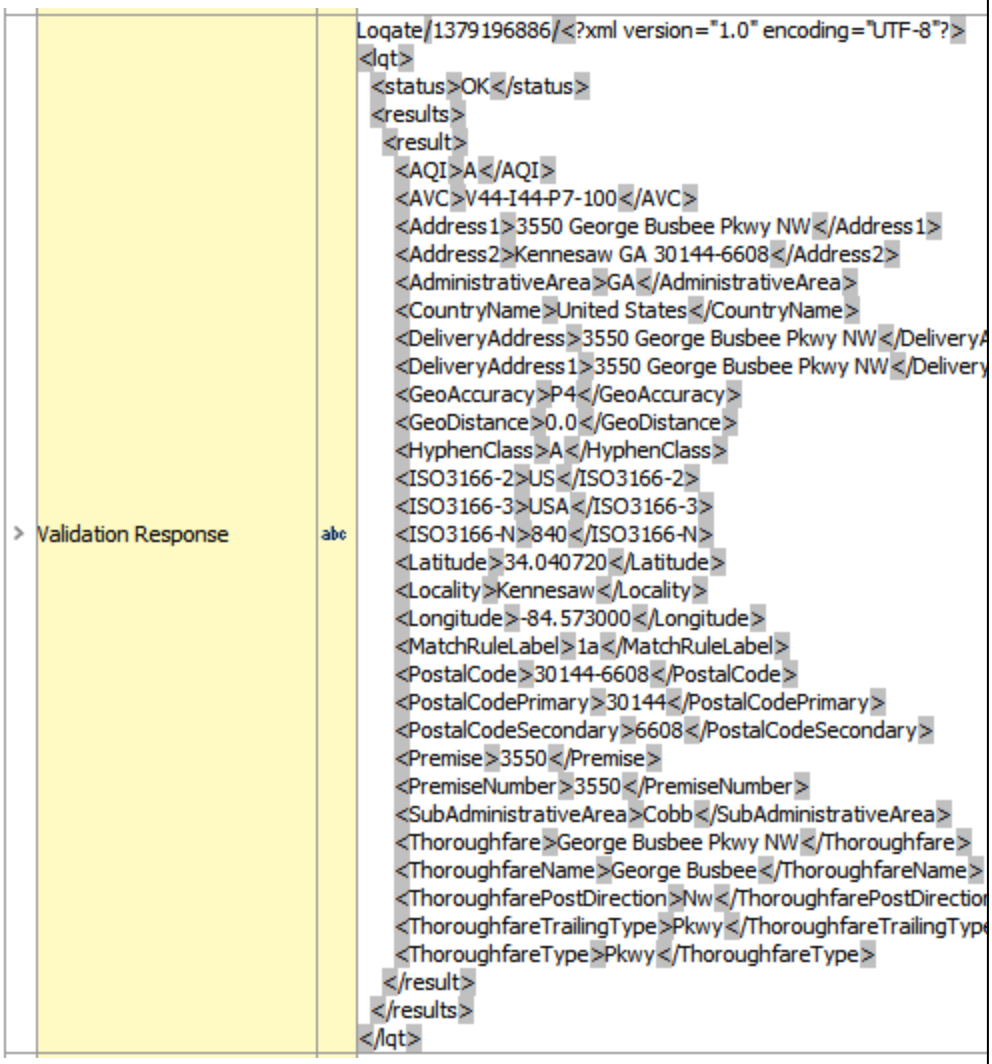
Address Component Model Field	Description	Local Loqate Field Mapping
Address Object Types and/or Address Data Container Types		
Address	The address object types used to represent addresses; can be either entities or data containers	N/A
Regular Address Attributes (INPUT fields)		
Country ISO Code	The ISO 3166 2-character country code	*Not mapped to* Loqate
Input Address 1	Input address line field, for one part of an address, e.g. street number and name	Address1 [in]
Input Address 2	Input address line field, for one part of an address, e.g. city, state abbreviation, postcode	Address2 [in]
Input Address 3	Input address line field, for one part of an address, e.g. country	Address3 [in]
Input Address 4	Input address line field, for one part of the full address Typically used if optional information is put into one of the other input Address1 - 3 fields	Address4 [in]
Input Address Line	Single line input field for an entire address	Address [in]
Input Building	Input field for name identifying an individual location, e.g. a building	Building [in]
Input City	Input field for name of a large population center, e.g. city or municipality	Locality [in]
Input Country	Input field for country name or code	Country [in]
Input County	Input field for small geographic unit within a country, e.g. county.	SubAdministrativeArea [in]
Input Dependent Locality	Input field for a small geographic unit within a city, e.g. neighborhood	DependentLocality [in]
Input Dependent Street	Input field for street information that depends on an adjoining road	DependentThoroughfare [in]

Address Component Model Field	Description	Local Loqate Field Mapping
Input Organization	Input field for business name associated with location	Organization [in]
Input PostBox	Input field for post box for a location	PostBox [in]
Input State	Input field for name of a geographic unit within a country, e.g. state or province	AdministrativeArea [in]
Input Street	Input field for street information, e.g. street name and number	Thoroughfare [in]
Input Street Name	Input field for street name	ThoroughfareName [in]
Input Street Number	Input field for street number identifying an individual location	Premise [in]
Input Subbuilding	Input field for secondary identifier of an individual location, e.g. flat or suite	SubBuilding [in]
Input Zip	Input field for complete postal code	PostalCode [in]
Latitude	The address latitude	*Not mapped to* Loqate
Longitude	The address longitude	*Not mapped to* Loqate
Standardized Address Attributes (OUTPUT Fields)		
Geocode Latitude	Output field containing the address latitude	Latitude [out]
Geocode Longitude	Output field containing the address longitude	Longitude [out]
Standardized Building	Output field for name identifying an individual location, e.g. a building	Building [out]
Standardized City	Output field for a large population center name, e.g. city or municipality	Locality [out]
Standardized City Extra	Output field for supplemental information related to city	LocalityExtra [out]

Address Component Model Field	Description	Local Loqate Field Mapping
Standardized Country	Output field containing country name or code	CountryName [out]
Standardized Country ISO Code	Output field containing the ISO 3166 2-character country code	ISO3166-2 [out]
Standardized Country ISO 3 Character Code	Output field containing the ISO 3166 3-character country code	ISO3166-3 [out]
Standardized County	Output field for small geographic unit within a country, e.g. county	SubAdministrativeArea [out]
Standardized Department	Output field for department name associated with an organization	Department [out]
Standardized Dependent Street	Output field for street information that depends on adjoining road	DependentThoroughfare [out]
Standardized Double Dependent Locality	Output field for small population center within a city, e.g. village.	DoubleDependentLocality [out]
Standardized Formatted Address	Output field for the address formatted for mailing usage, formatted using CRLF (“\n”) as the line break	Address [out]
Standardized Neighbourhood	Output field for population center within a city, e.g. neighborhood	DependentLocality [out]
Standardized Organization	Output field for business name associated with location	Organization [out]
Standardized PostBox	Output field for post box for a location	PostBox [out]
Standardized Region	Output field for the largest geographic unit within a country	SuperAdministrativeArea [out]

Address Component Model Field	Description	Local Loqate Field Mapping
Standardized State	Output field for a geographic unit within a country, e.g. state or province	AdministrativeArea [out]
Standardized Street	Output field for street name	DeliveryAddress [out]
Standardized Street Name	Output field for street name	ThoroughfareName [out]
Standardized Street Number	Output field for street number	PremiseNumber [out]
Standardized Street Type	Output field for street type, e.g. Rd for road and St for street	ThoroughfareType [out]
Standardized SubBuilding	Output field for secondary identifier for an individual location, e.g. flat or suite	SubBuilding [out]
Standardized Zip	Output field for complete postal code	PostalCode [out]
Quality Measures		
Geocode Accuracy	Output field for Geocode Accuracy. This field indicates the precision level of the geocode that has been assigned to an address by Loqate.	GeoAccuracy [out]
Geocode Distance	Output field for the Geocode Distance. This field indicates the uncertainty in the physical location of the address.	GeoDistance [out]
Quality	Quality attribute for address. Validation base type is text; attribute is a calculated attribute based on other quality fields. For example, the calculation could be a combination of the values of Quality Index and Quality Verification Code. Users are responsible for writing this formula.	*Not mapped from Loqate*
Quality Index	Output field for the address quality index, which is used to indicate the quality of an address.	*Address Quality Index (AQI) response from Loqate*
Quality Verification Code	Output field for the Address Verification Code. This is used to indicate the level of verification of an address.	*Address Verification Code (AVC) response from Loqate*
Validation	Hash value for the address validation integration.	*Not mapped from*

Address Component Model Field	Description	Local Loqate Field Mapping
Hash	Contains a hash value of all input fields. This makes it possible to determine if the address has changed since the last validation Field is updated whenever the standardized address attributes are updated by the Loqate integration. Field is calculated by STEP and is not mapped to Loqate.	*Loqate*
Validation Integration Status	Contains the latest status of the address validation integration. Field is updated whenever the standardized address attributes are updated by the Loqate integration. Indicates if the last address validation was completed or resulted in an error. Valid values are: <empty> and Failed. This field makes it possible to search for accounts and addresses where an error has occurred during the address validation.	*Not mapped from Loqate*
Validation Response	Output field for the cached validation response. This field contains the full response from Loqate. Validation base type is text; maximum length must be at least 1000.	*Contains the full response from Loqate*

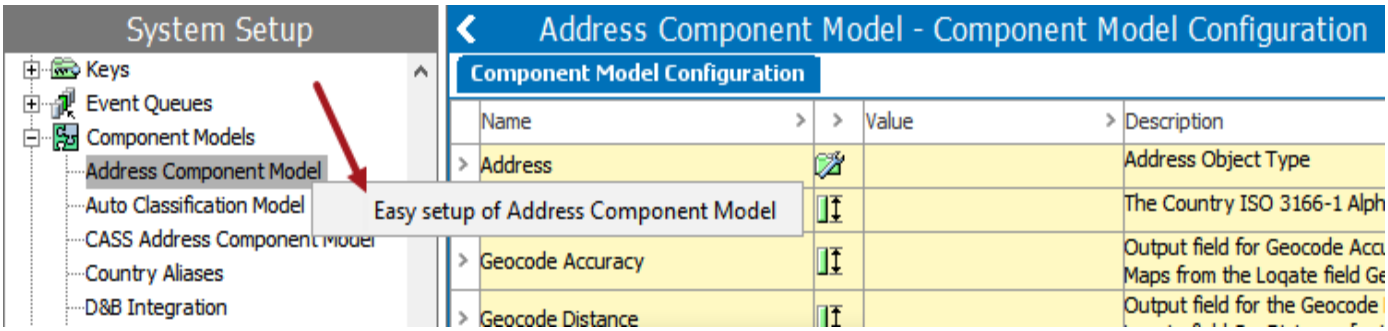
Address Component Model Field	Description	Local Loqate Field Mapping
		
Validation Time	Date and time stamp of the most recent successful address validation. Validation base type is 'ISO Date and Time.' Field is updated whenever the standardized address attributes are updated by the Loqate integration.	*Not mapped from Loqate*

Easy Setup of Address Component Model

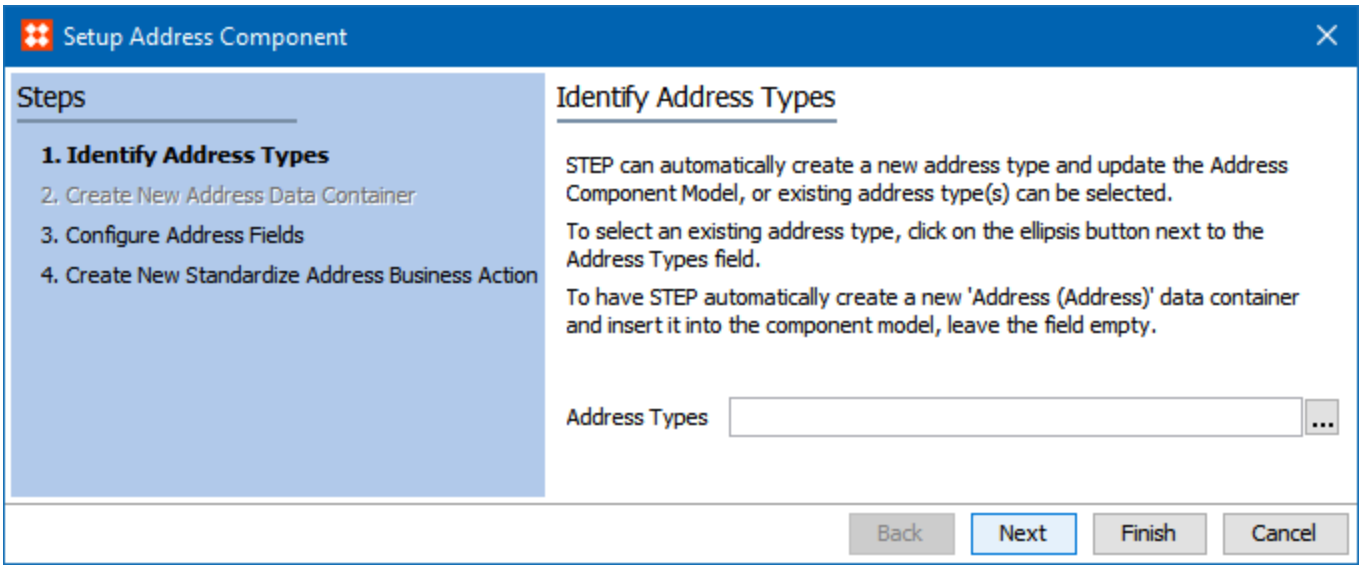
The recommended method for initially configuring the Address Component Model is to use the 'Easy setup of Address Component Model' wizard. By using this wizard, STEP can automatically create all of the address attributes required for the solution while simultaneously mapping them to the corresponding Loqate fields. Additionally, the wizard can create an address data container to house the attributes and a 'standardize address' business action. By using this wizard, little manual action needs to be taken to complete the configuration, making it a simple and straightforward way to get the solution up and running quickly.

The following steps describe how to configure the Address Component Model using the easy setup method. Also note that detailed help text is present on each step of the wizard.

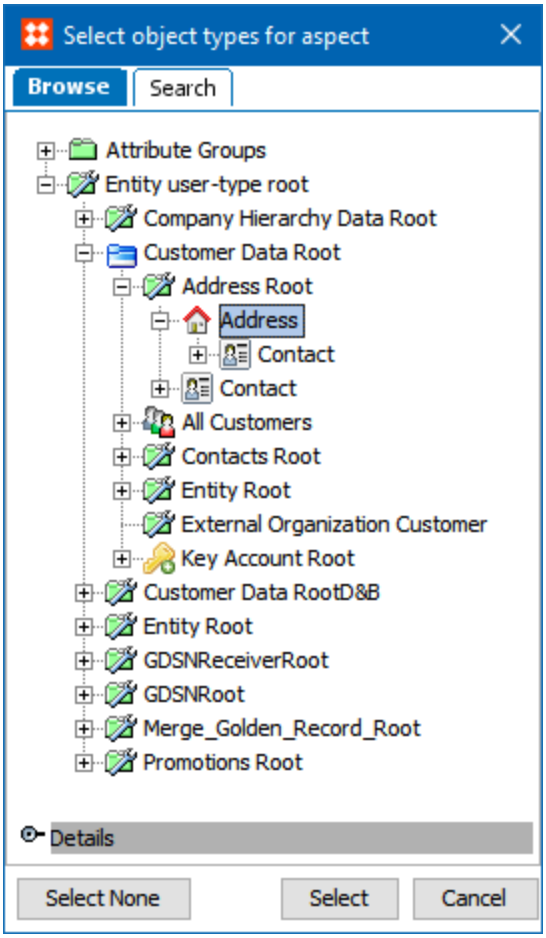
1. Locate the Address Component Model under System Setup > Component Models.
2. Right-click on the Address Component Model and click 'Easy setup of Address Component Model.'



3. On the **Identify Address Types** screen, the system provides the opportunity to automatically create a new address data container object type if one does not already exist.



If you already have an object type (or types) that you would like to use, click the ellipsis button (...) next to the Address Types field and select the relevant object type(s) from the 'Select object types for aspect' dialog. Note that only entities and or data containers can be selected. The below screenshot shows the dialog with a preexisting 'Address' entity object type selected. To multi-select objects, click and hold the Ctrl or Shift key. Click **Select** to choose the object(s) and close the dialog.



If you prefer to have STEP create the new object type, which will be named Address (ID = Address), leave the 'Address Types' field blank.

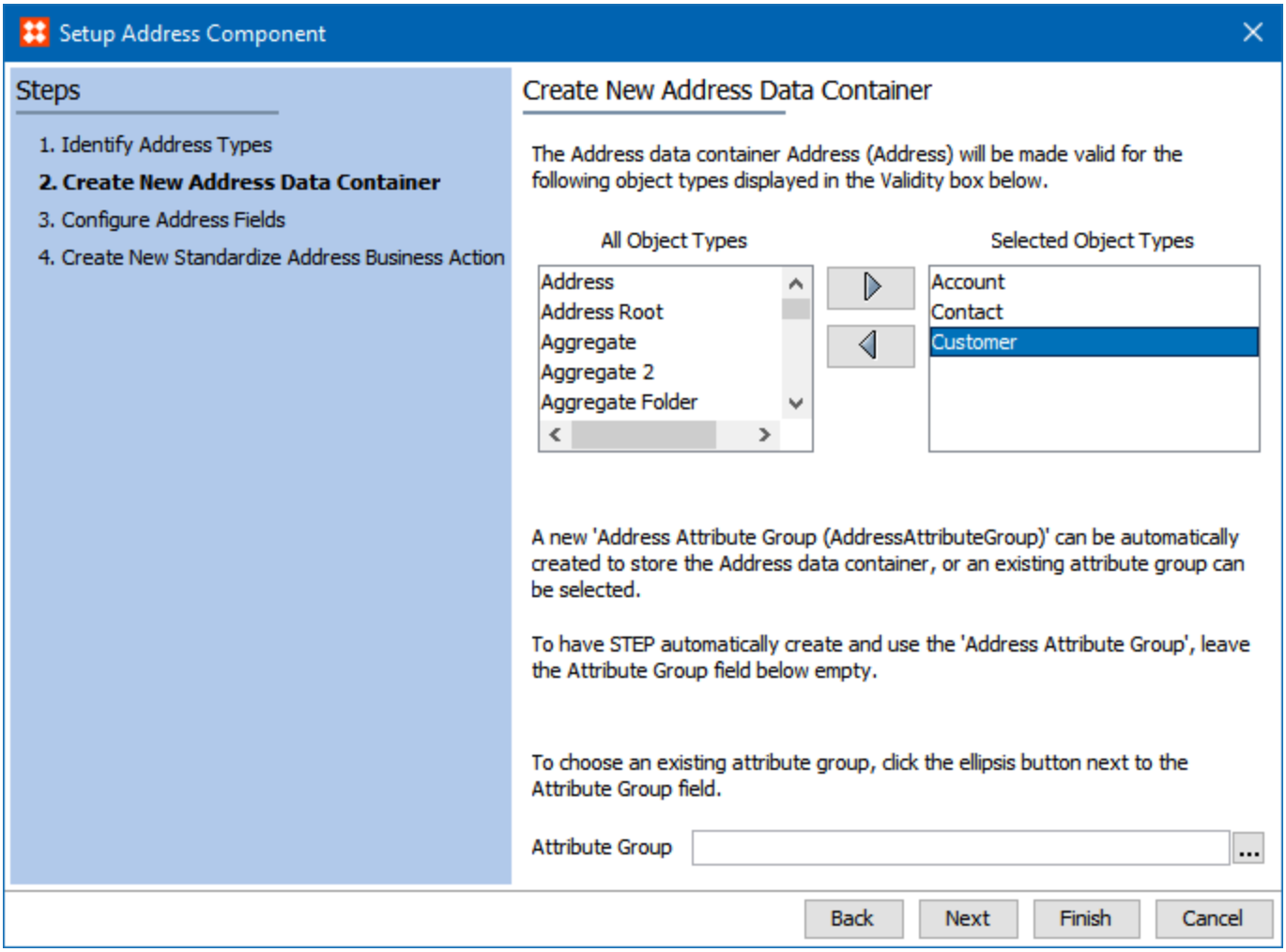
Click **Next**.

Note: If 'Address Types' is left blank in this step, the **Create New Address Data Container** screen will display after clicking Next (see step 4 below). If a previously existing address object type is selected, the **Configure Address Fields** screen will display (see step 5 below).

---

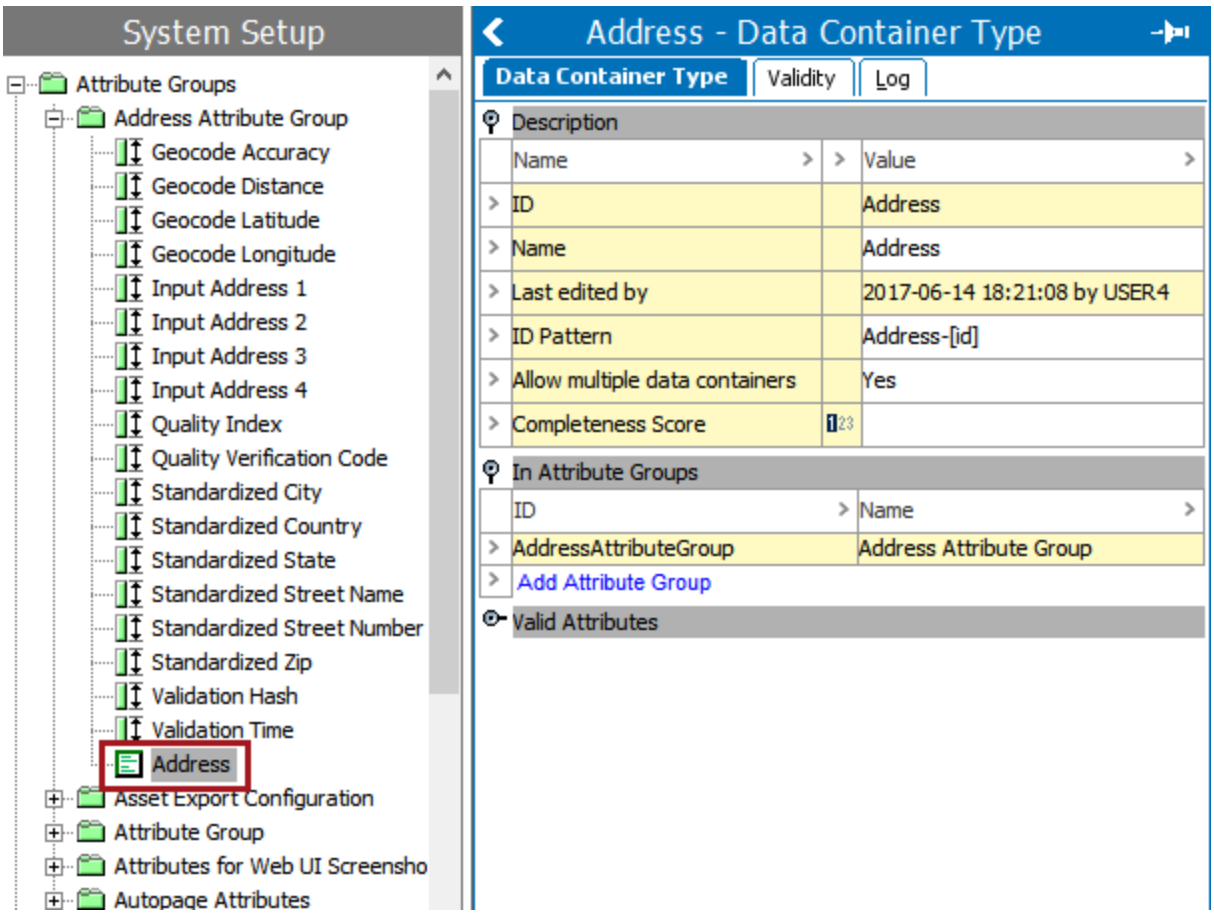
4. If the **Create New Address Data Container** screen is displayed, in the 'All Object Types' window, select the entity object types that should be valid for the data container that is created in this step. Click the top arrow to move the selections into the 'Selected Object Types' window. To remove an object from the 'Selected Object Types' window, click the bottom arrow to move the selection back to the 'All Object Types' window.

At the bottom of the screen, click the ellipsis button (...) to select the attribute group where you would like to store the data container. Leave the field blank to have STEP automatically create an attribute group, which will be named 'Address Attribute Group' (ID = AddressAttributeGroup).



After completing this step, the Address data container will be created and placed into the designated attribute group. The ID pattern will be Address-[id], and 'Yes' will be selected by default for 'Allow multiple data containers.' Any attributes chosen for auto-creation in the next step of the easy setup wizard (Configure Address Fields) will be made valid for this data container.

Note: Any address attributes that exist prior to the easy setup of the Address Component Model will not be modified by the easy setup action. I.e., they will not automatically become valid for the data container created in this step and must be manually linked to it later. For more information, see the **Setting Up Data Container Types in Workbench** topic in the **Data Containers** documentation.



5. On the **Configure Address Fields** screen, attributes are mapped to corresponding Loqate input and output fields. Mandatory attributes are indicated by an asterisk (*) in the second column. (Some fields are not mapped to Loqate, such as 'Country ISO Code', but these fields are optional.) To select or remove the displayed mapping to a STEP attribute, click on the corresponding ellipsis button (...) in the Value column. For full information on the range of fields available in the component model, see the **Address Component Model** topic.

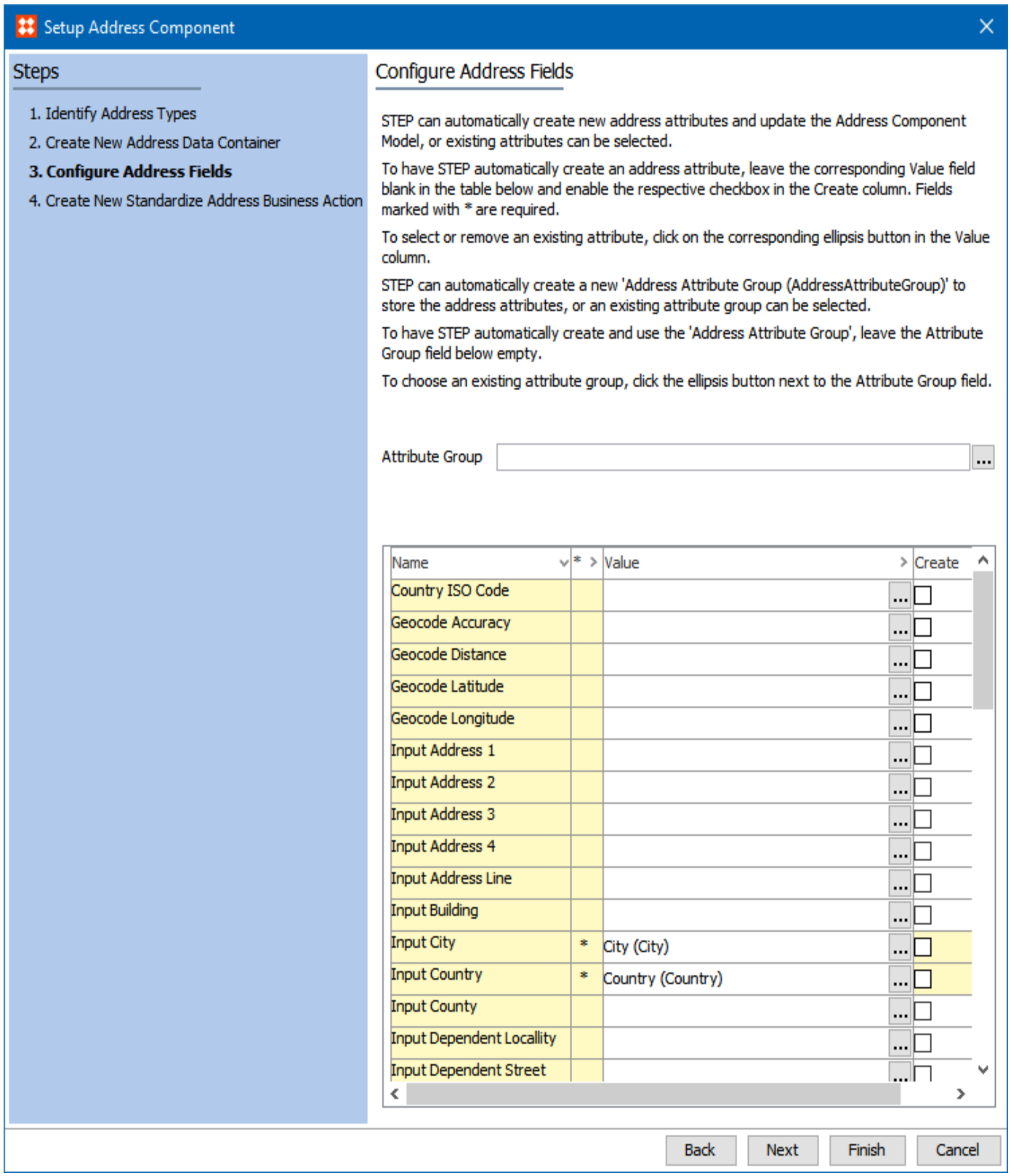
   To have STEP automatically create an address attribute, leave the corresponding Value field blank and enable the respective checkbox in the Create column. All automatically created attributes will be description attributes and be made valid for the configured address types. They will have a name equal to the field name and an ID equal to the field name with spaces removed. For example, for the 'Standardized Double Dependent Locality' field, the automatically created attribute will be named 'Standardized Double Dependent Locality' and have the ID of 'StandardizedDoubleDependentLocality.'

   It is not required to have STEP create the attributes, but is recommended. If any of the attributes already exist (based on ID) and the Create box is checked, a message will display to inform the user that the attribute already exists.

Note: No 'select all' option is available for the Create column; this omission is intentional, as it forces users to give more thought as to which attributes they actually need instead of creating all attributes at once and having

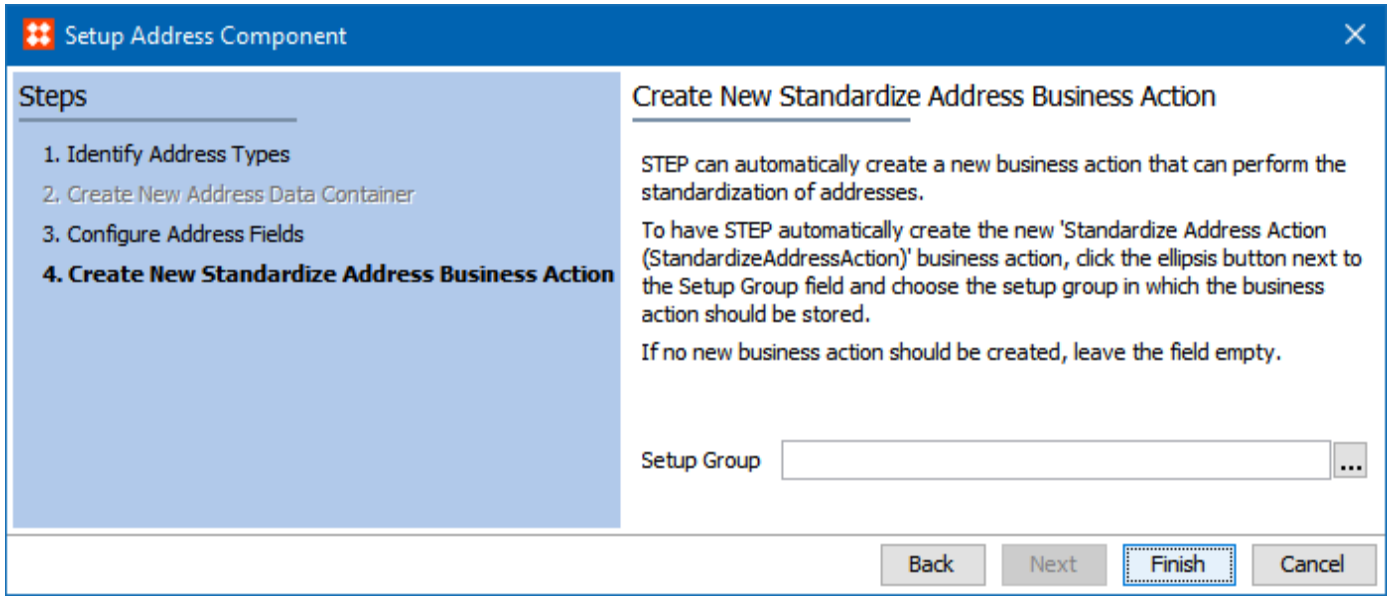
too many. The complete set of input and output fields cover several address formats, so it is important that users consider select and/or create the attributes that match their business needs. For example, if there is a need for importing single-line addresses, then the 'Input Address Line' field should be activated.

To select an attribute group where you would like to store the newly created attributes, click the ellipsis button (...) next to the Attribute Group field to launch the 'Select Attribute Group' dialog. Leave the field blank to have STEP automatically create the attribute group, which will be named 'Address Attribute Group' (ID = AddressAttributeGroup).

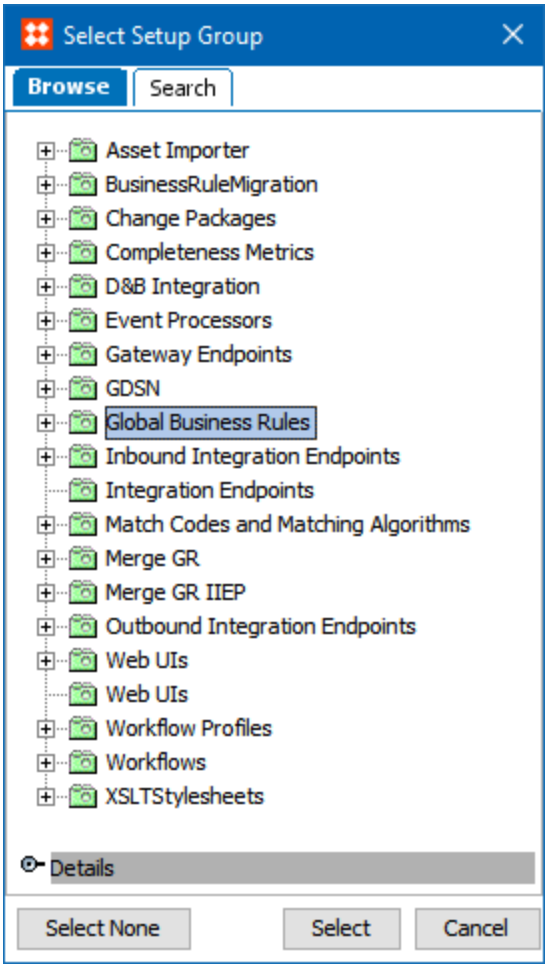


Click **Next** when you have finished mapping your attributes.

6. On the **Create New Standardize Address Business Action** screen, if you would like to have STEP automatically create a 'Standardize Address' business rule, click the ellipsis button (...) next to the Setup Group field and select the setup group to house the action. Leave the field blank and click **Finish** if you do not want to create the business rule or would like to create it at a later time.



Click the ellipsis button (...) to open the 'Select Setup Group' dialog. Choose the setup group in which you would like to store the newly created business rule, then click **Select** to close the dialog.



For more information on how to complete the configuration of this business action after it is created during the easy setup process, see the **Business Action: Standardize Address** topic in the **Business Rules** documentation.

7. Click **Finish** to complete the wizard and create the business action.

Manual Setup of Address Component Model

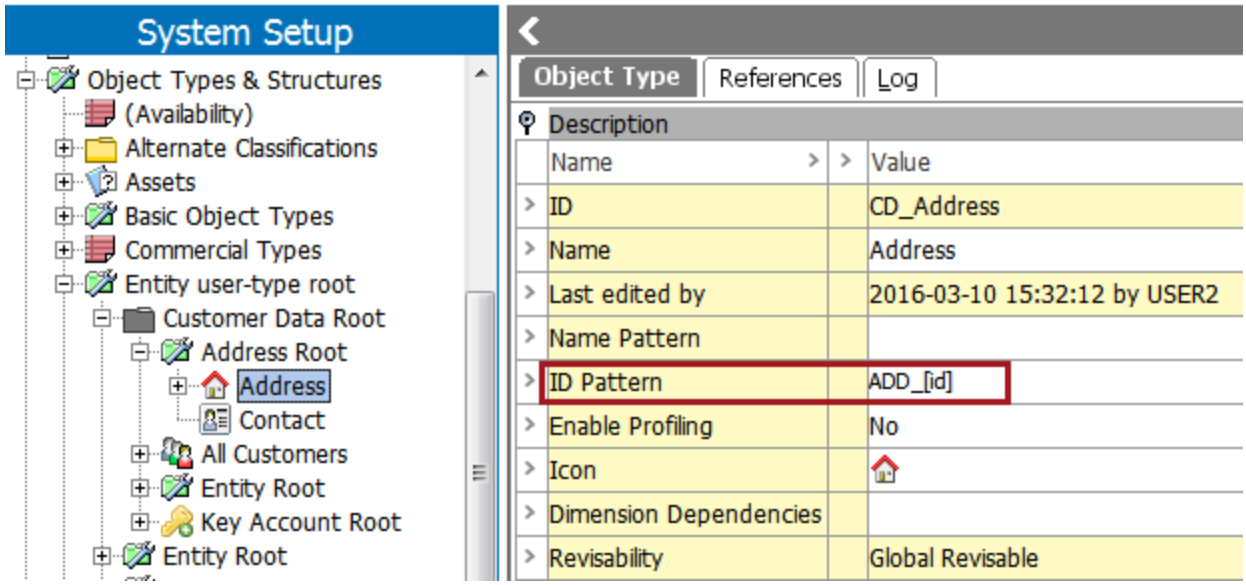
To manually set up the Address Component Model, all required object types and attributes must first be created in the workbench. Then, these attributes must be manually mapped to the corresponding Loqate fields in the component model.

Since every screen in the 'Easy setup of Address Component Model' wizard has an option where users can select preexisting object types, attributes, attribute groups, and setup groups, it can be expected that the full configuration of the Address Component Model may be a combination of both easy setup and manual setup. It is also useful to understand how to manually work with the component model since certain one-off operations, like changing an attribute mapping, may need to be performed after the easy setup is complete.

Data Model Considerations and Requirements

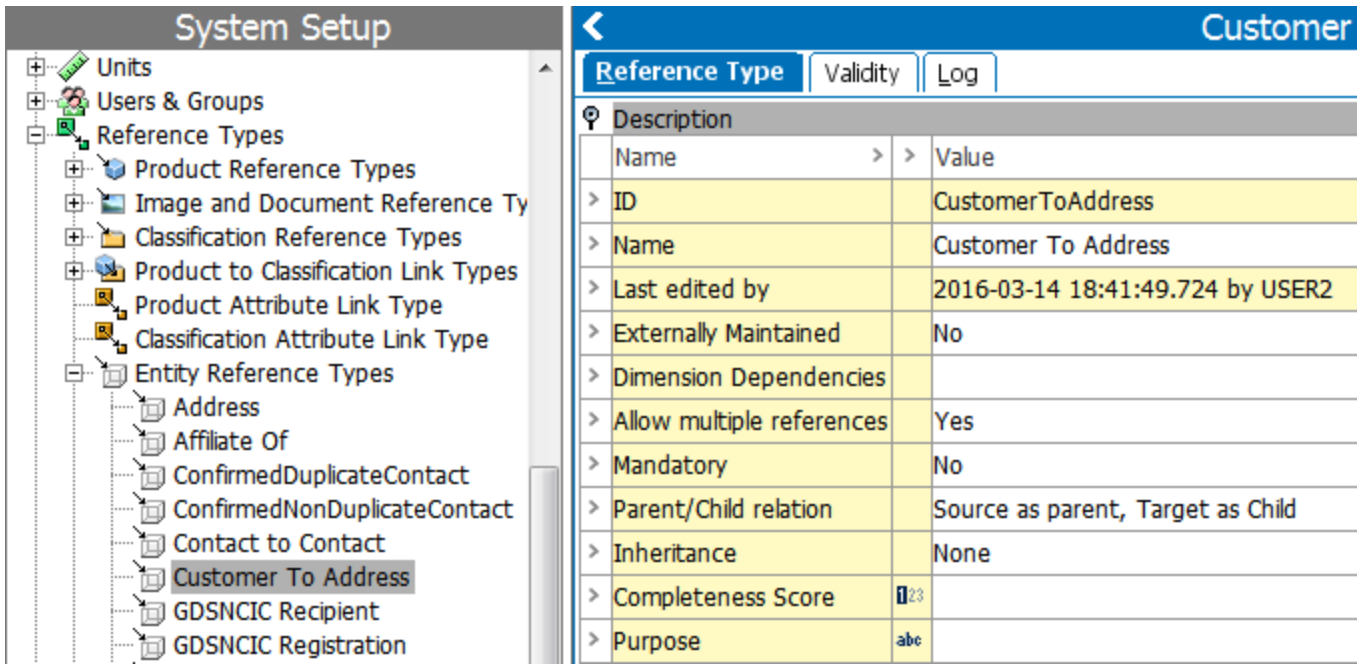
To manually set up the Address Component Model in the workbench, some basic data must be in place. Each element that is required to complete the setup is listed below.

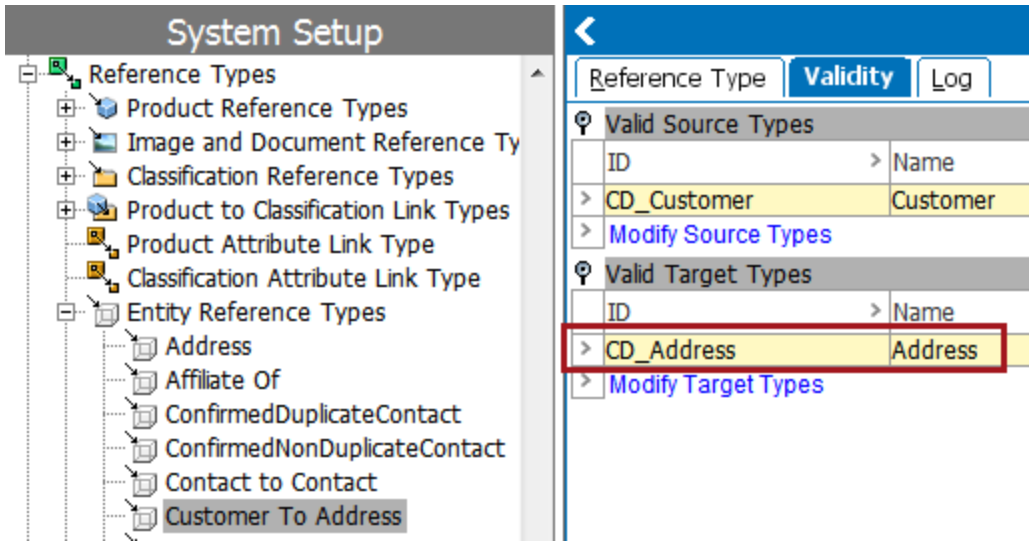
1. If you plan to use an Address object type (instead of an address data container), it must use an auto-generated ID format (e.g., [id]). An example is shown below.



Important: Data container types can also be used and mapped as an Address object type. The attributes mapped to the component model fields must be valid for the specified data container type or types.

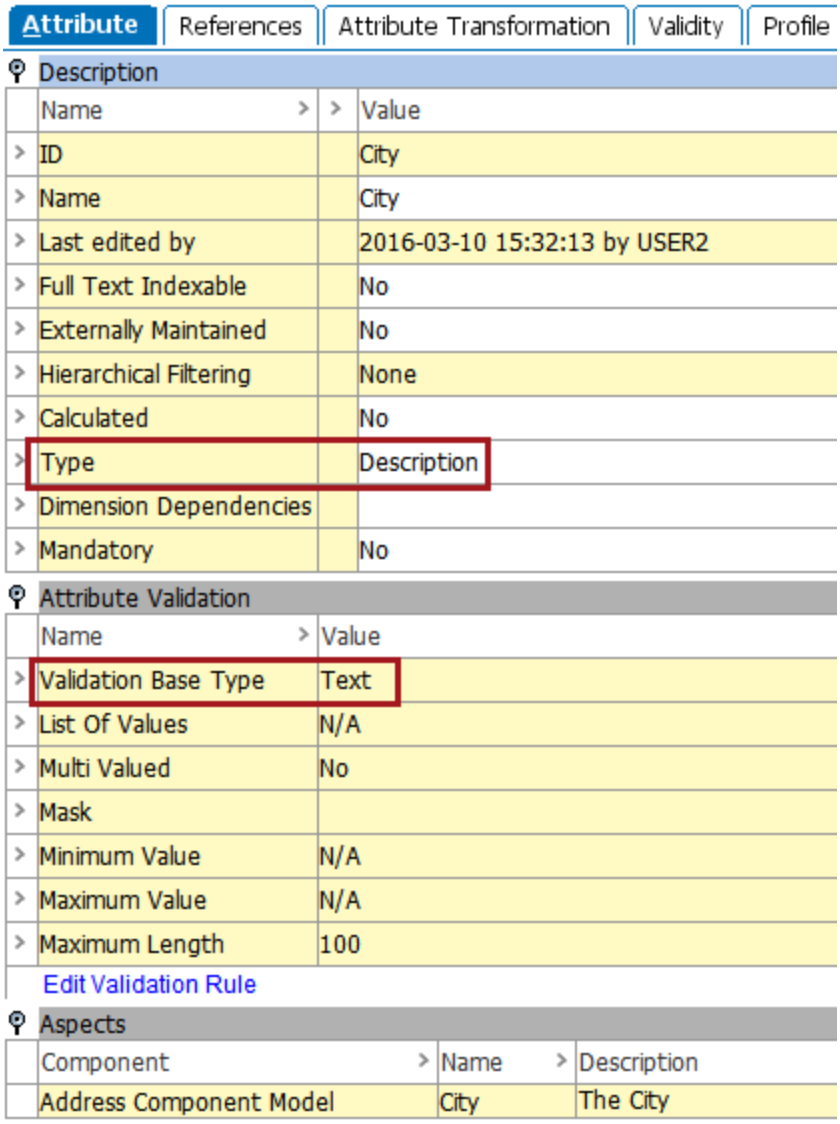
2. A reference must exist between the address object type and an associated object type (e.g., supplier, customer, location). The address object must be the *target* of the reference. An example is shown below.





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. The attributes must also be standard text attributes, with the exception of the attribute that will be used for the 'Validation Time' field, which must have a validation base type of 'ISO Date and Time.'

   An example of a text-based Description attribute 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

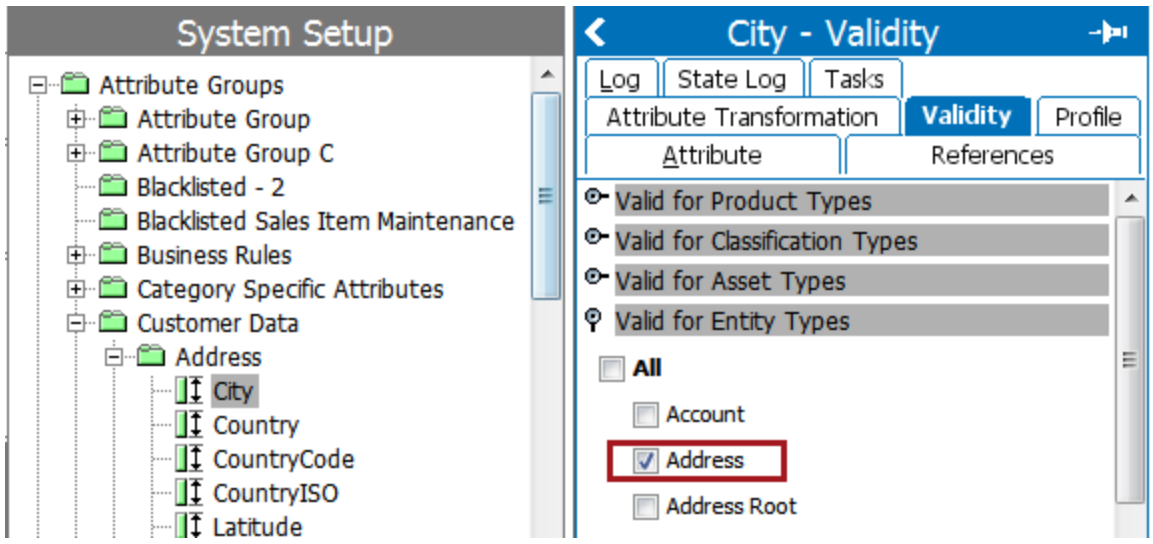
Attribute Validation

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
Address Component Model	City	The City



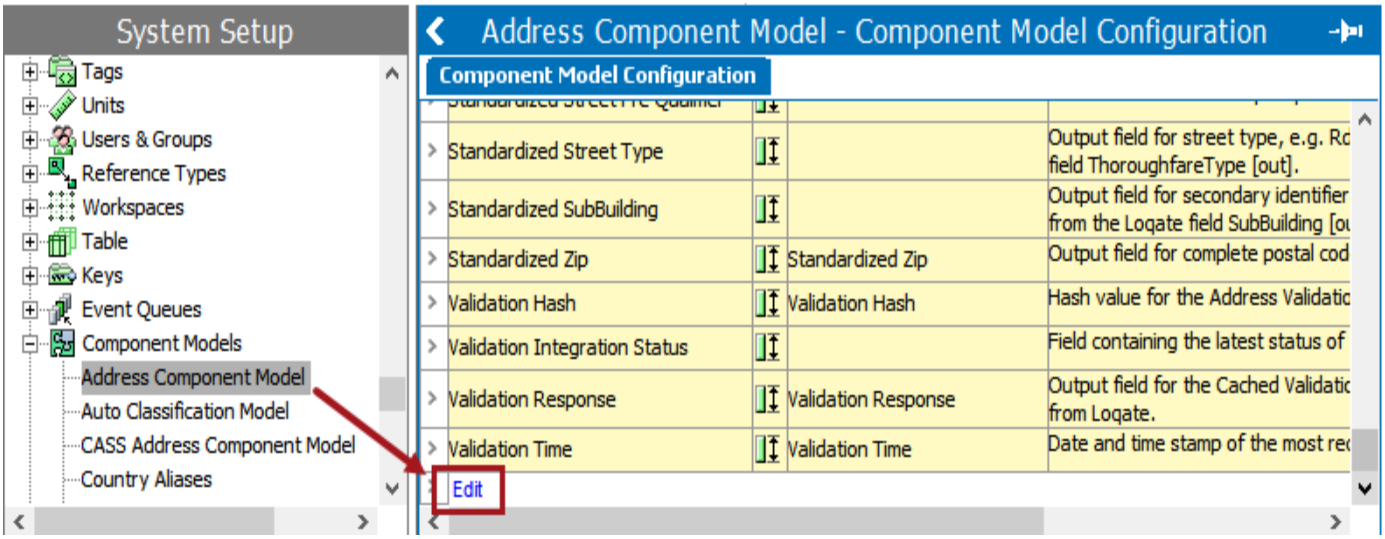
Once the required data model configuration is in place, the component model can be set up.

Manual Attribute Mapping

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 **Address** mapping must be configured. The selection can be the address object type referred to in step 1 of the data model considerations and requirements, above, or can be any entity or address data container on which the attributes selected in the component model are valid.
- The **Input Street**, **Input Street Name**, and **Input Street Number** parameters are closely related. Input Street is used to hold a complete street address, including a house or building number, as well as a street name. Input Street Name holds the street name only, while Input 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 Input Street is required, while Input Street Name and Input Street Number are optional.
- Any attributes for which address data should be stored must be populated. Some mappings are required, while others are optional. For full information on which fields are required and which fields are optional, see the attribute table in the **Address Component Model** topic.

To start the mapping process, 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.

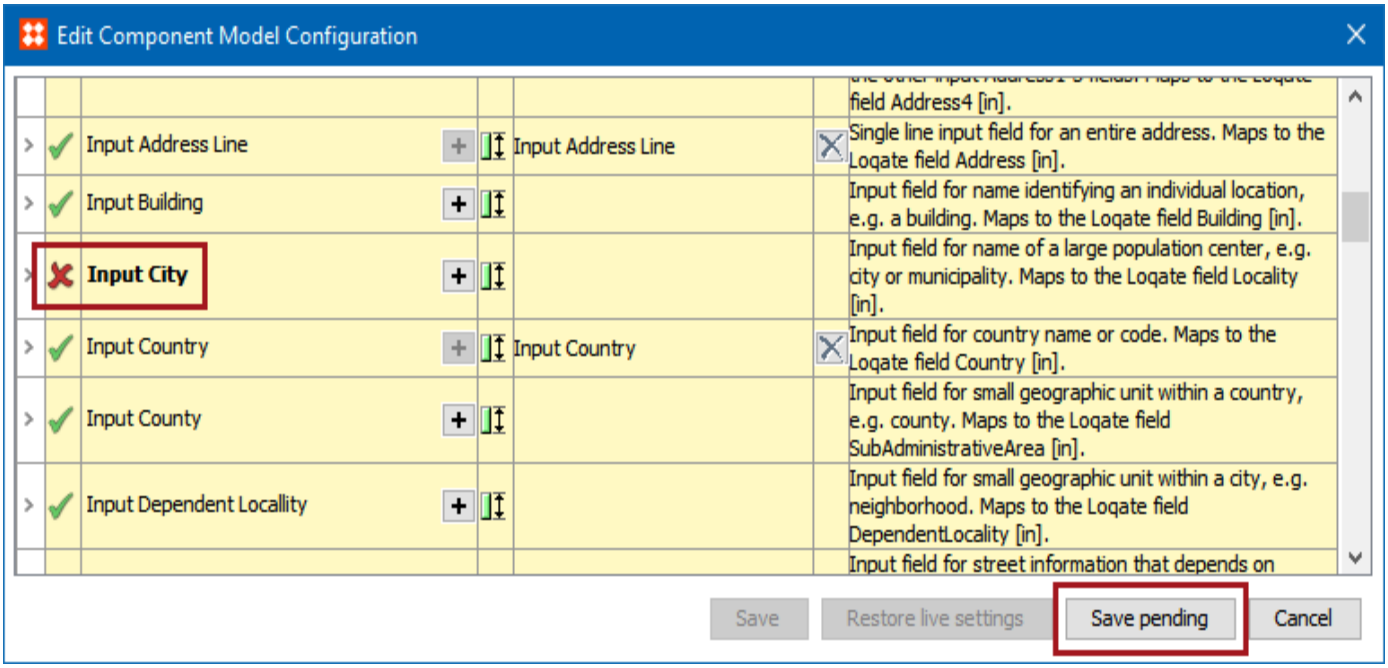
Edit Component Model Configuration

Name	Value	Description
Address	Address	Address Object Type
Country ISO Code	Country ISO Code	The Country ISO 3166-1 Alpha-2 code. Optional field not mapped to Loqate.
Geocode Accuracy	Geocode Accuracy	Output field for Geocode Accuracy. This field indicates the precision level of the geocode that has been assigned to an address. Maps from the Loqate field GeoAccuracy [out].
Geocode Distance	Geocode Distance	Output field for the Geocode Distance. This field indicates the uncertainty in the physical location of the address. Maps from the Loqate field GeoDistance [out].
Geocode Latitude	Geocode Latitude	Output field containing the Latitude. Maps from the Loqate field Latitude [out].
Geocode Longitude	Geocode Longitude	Output field containing the Longitude. Maps from the Loqate field Longitude [out].
Input Address 1		Input address line field, for one part of an address, e.g. street number and name. Maps to the Loqate field Address1 [in].
Input Address 2		Input address line field, for one part of an address, e.g. city state abbreviation postcode. Maps to the Loqate field Address2 [in].
Input Address 3		Input address line field, for one part of an address, e.g. country. Maps to the Loqate field Address3 [in].
Input Address 4		Input address line field, for one part of the full address. Typically used if optional information is put into one of the other input Address1-3 fields. Maps to the Loqate field Address4 [in].
Input Address Line		Single line input field for an entire address. Maps to the Loqate field Address [in].
Input Building		Input field for name identifying an individual location, e.g. a building. Maps to the Loqate field Building [in].
Input City	City	Input field for name of a large population center, e.g. city or municipality. Maps to the Loqate field Locality [in].
Input Country	Country	Input field for country name or code. Maps to the Loqate field Country [in].
Input County		Input field for small geographic unit within a country, e.g. county. Maps to the Loqate field SubAdministrativeArea [in].
Input Dependent Locallity		Input field for small geographic unit within a city, e.g. neighborhood. Maps to the Loqate field DependentLocality [in].
Input Dependent Street		Input field for street information that depends on adjoining road. Maps to the Loqate field DependentThoroughfare [in].
Input Organization		Input field for business name associated with location. Maps to the Loqate field Organization [in].
Input PostBox		Input field for post box for a location. Maps to the Loqate field PostBox [in].
Input State	State	Input field for name of geographic unit within a country, e.g. state or province. Maps to the Loqate field AdministrativeArea [in].
Input Street	Street	Input field for street information, e.g. street name and number. Maps to the Loqate field Thoroughfare [in].
Input Street Name		Input field for street name. Maps to the Loqate field ThoroughfareName [in].
Input Street Number		Input field for street number identifying an individual location. Maps to the Loqate field Premise [in].
Input SubBuilding		Input field for secondary identifier of an individual location, e.g. flat or suite. Maps to the Loqate field SubBuilding [in].
Input Zip	Zip	Input field for complete postal code. Maps to the Loqate field PostalCode [in].
Latitude	Latitude	The Latitude. Optional field not mapped to Loqate.
Longitude	Longitude	The Longitude. Optional field not mapped to Loqate.
Quality	Quality	Quality attribute for simple address. Not mapped from Loqate.
Quality Index	Quality Index	Output field for the Address Quality Index is used to indicate the quality of an address. Maps from the Loqate field Address Quality Index.
Quality Verification Code	Quality Verification Coc	Output field for the Address Verification Code. This is used to indicate the level of verification of an address. Maps from the Loqate field Address Verification Code.
Standardized Building		Output field for name identifying an individual location, e.g. a building. Maps from the Loqate field Building [out].
Standardized City	Standardized City	Output field for large population center name, e.g. city or municipality. Maps from the Loqate field Locality [out].
Standardized City Extra		Output field for supplemental information related to city. Maps from the Loqate field LocalityExtra [out].

Save | Restore live settings | Save pending | Cancel

When editing the mappings, double-click the + button to make value additions and the X button to remove any existing values. If the + button 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. Save pending allows you to save the current mappings until all required values can be supplied. The required values must be populated before a true save can be completed and the component model is functional.



CASS Address Component Model

Users of the Loqate Local solution who are located in the United States can obtain an additional license from Stibo Systems to take advantage of the CASS program, which provides an even stricter level of address standardization. CASS (Coding Accuracy Support System) is a certification program run by the United States Postal Service (USPS) that is offered to all mailers, service bureaus, and software vendors that would like the USPS to evaluate the quality and accuracy of their address-matching software. Mailers who use CASS-certified software to check their mailing addresses are able to qualify for discounted postage rates from the USPS. STEP makes it possible to standardize and validate address using the CASS process and to generate and extract CASS reports that can be used to certify that addresses have been CASS validated.

The CASS Address Component Model determines the output fields for the information that is returned from Loqate to STEP after addresses have been validated against CASS data on the Loqate Local server. Loqate is CASS certified and offers CASS verification of address data.

Once the CASS component model has been configured, the system will be ready to standardize addresses against CASS data using the Loqate Local solution.

For additional information on CASS input fields, see the Loqate 'CASS Overview' support website: https://support.loqate.com/support/local-apis/cass-overview-2/

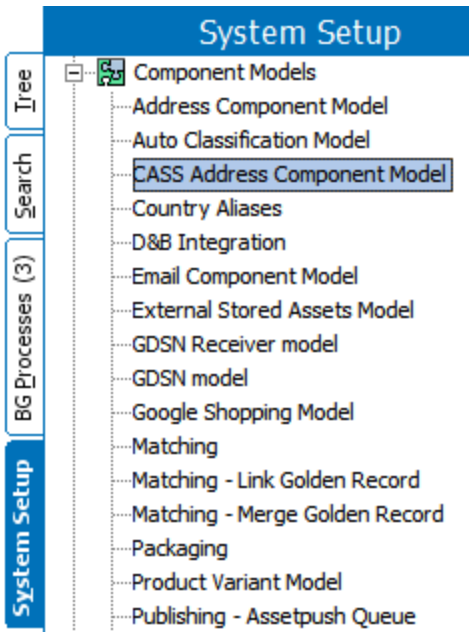
Prerequisites

Before configuring the CASS Address Component Model, the following conditions must be met:

- Users must be based in the United States, as CASS is not valid outside of the US.
- Users must be connected to a Loqate **Local** API server installation and have a CASS license. The CASS solution will not work with a Loqate Cloud API installation.
- Users must have updated the Loqate reference data with the CASS reference data and libraries
- The Address Component Model must already be configured. For more information, see the **Address Component Model** topic.

CASS Address Component Model Overview

The CASS Address Component Model is found under Component Models on the System Setup tab. If the CASS Address Component Model is not present, contact your Stibo Systems account manager.



CASS Address Fields - Input From Address Component Model

The CASS integration requires that users first complete the **Address Component Model**, which contains the basic address attributes such as city and state. The following fields within the Address Component Model are required for CASS address validation. All are mandatory in the Address Component Model except for 'Input Address 1.'

- Input Address 1 – may contain the street number and name, but not the entire address. This is not a mandatory field in the Address Component Model but is required to use CASS.
- Input City – may contain the city only, but can also contain the city, state, and ZIP combined
- Input State
- Input Zip

The following fields can also be used with CASS but are optional:

- Input Dependent Locality – input field for a small geographic unit within a city, e.g. neighborhood
- Input Organization – input field for a business name associated with location

CASS Address Fields - Output In CASS Address Component Model

The following table lists the fields contained in the CASS Address Component Model, along with a description of each field and the corresponding Loqate field. The fields are all output attributes, meaning that they are not populated by users. They are populated with the values returned from Loqate after an address has been validated against the CASS address standardization data files on the Loqate Local server.

CASS Address Component Model Field	Description	Local Loqate Field Mapping
Address Object Types and/or Address Data Container Types		
Standardized CASS Address	The address types used to represent addresses, can be either entities or data containers	N/A
Standardized Address Attributes (OUTPUT Fields)		
CASS Congressional District	The congressional district to which the address belongs	CongressionalDistrict
CASS DPV Confirmed Indicator	Indicates the deliverability of the address	DPVConfirmedIndicator
CASS Delivery Point BarCode	2-digit delivery point code and 1-digit check digit	DeliveryPointBarCode
CASS FIPS County Code	5-digit FIPS (Federal Information Processing Standard) code	FIPSCountyCode
CASS No Stat Indicator	Indicates the address is not receiving delivery, and the address is not counted as a possible delivery	NoStatIndicator
CASS Residential Delivery	Indicates whether the input address is a residential address or a business address	ResidentialDelivery
CASS Vacant Indicator	Indicates that the delivery point was active in the past, but is currently vacant and is not receiving deliveries.	VacantIndicator
Remaining CASS fields		
CASS Validation Response	Collects remaining CASS output field values. Validation base type is text; maximum length must be at least 1000. CASS Validation Response abc AutoZoneIndicator: D, CarrierRoute: C014, CMRAIndicator: N, DefaultFlag: , DPVFootnotes: AABB, eLOTCode: A, eLOTNumber: 0202, EWSFlag: , FalsePositiveIndicator: , Footnotes: , LACSLinkCode: , LACSLinkIndicator: , LACSStatus: , PMBNumber: , PMBType: , PrimaryAddressLine: 3550 BUSBEE PKWY NW STE 350, RecordType: H, ReturnCode: 31, SecondaryAddressLine: KENNESAW GA 30144-2122, SUITELinkFootnote:	AutoZoneIndicator CarrierRoute CMRAIndicator DefaultFlag DPVFootnotes eLOTCode eLOTNumber EWSFlag FalsePositiveIndicator Footnotes LACSLinkCode LACSLinkIndicator

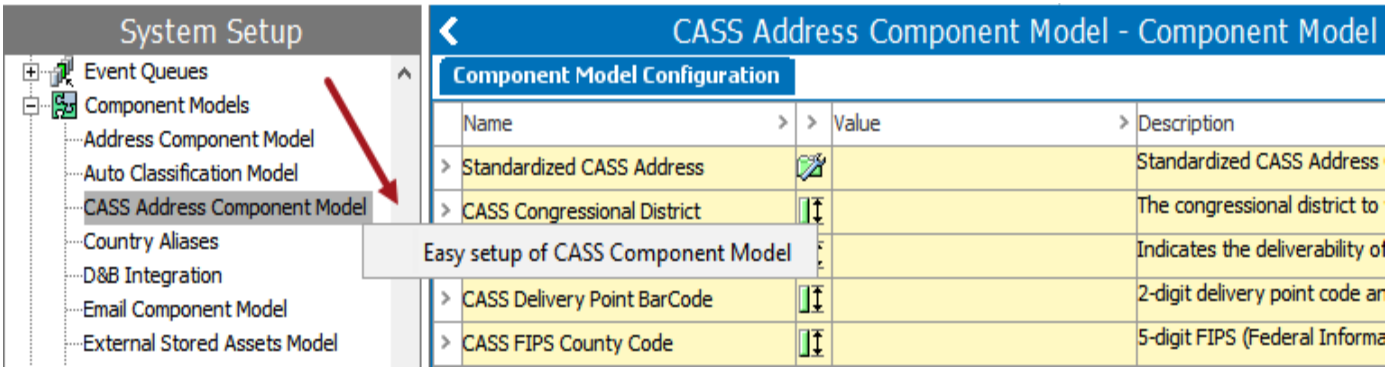
CASS Address Component Model Field	Description	Local Loqate Field Mapping
		LACSStatus PMBNumber PMBType PrimaryAddressLine RecordType ReturnCode SecondaryAddressLine SUITELinkFootnote

Easy Setup of CASS Address Component Model

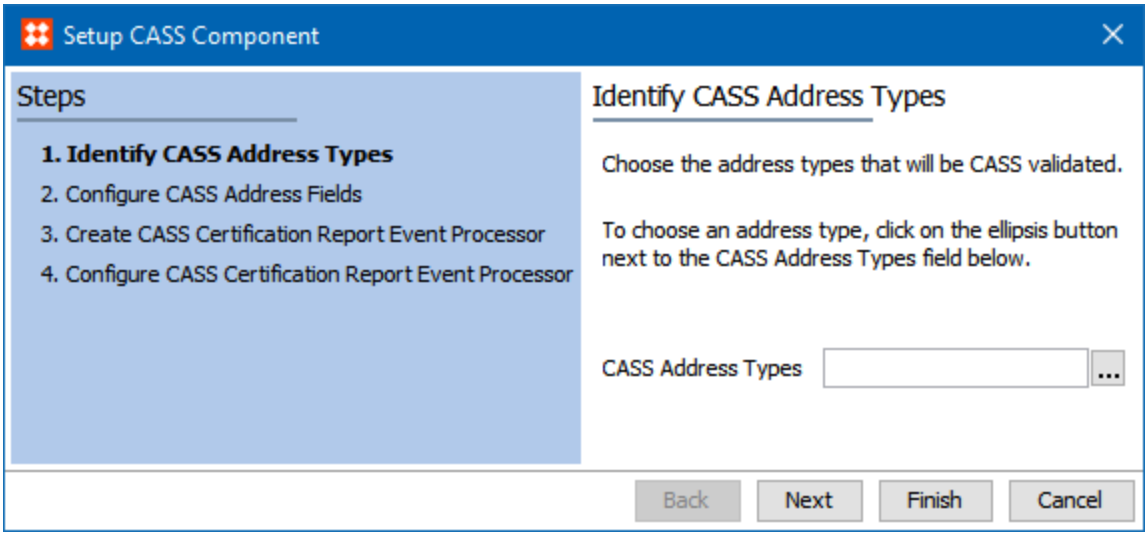
The recommended method for configuring the CASS Address Component Model is to use the 'Easy setup of CASS Component Model' wizard. By using this wizard, STEP can automatically create all of the address attributes required for the CASS solution, as well as a CASS Certification Report event processor used to generate CASS certification reports. By using this wizard, little manual action needs to be taken to complete the configuration, making it a simple and straightforward way to get the solution up and running.

The following steps describe how to configure the CASS Address Component Model using the easy setup method. Also note that detailed help text is present on each step of the wizard.

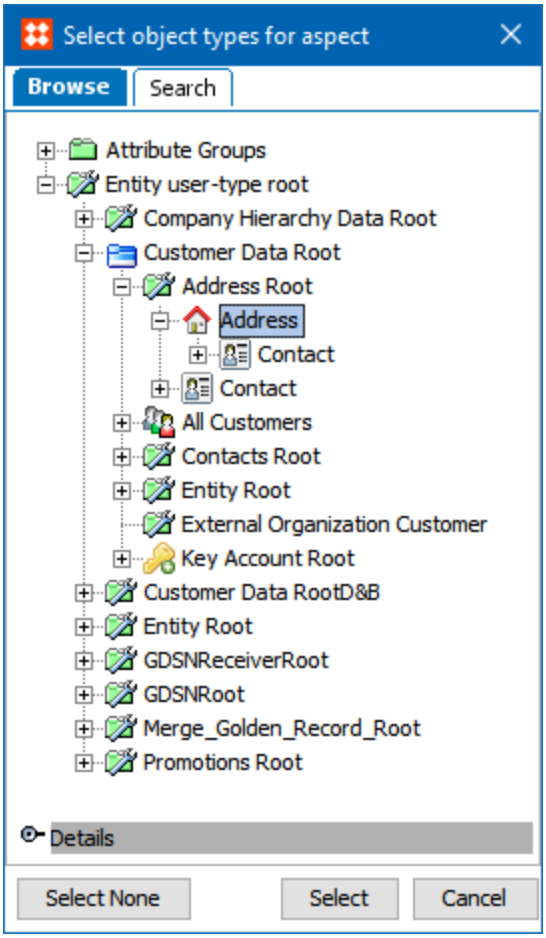
1. Locate the CASS Address Component Model under System Setup > Component Models.
2. Right-click on the CASS Address Component Model and click 'Easy setup of CASS Component Model.'



3. On the **Identify CASS Address Types** screen, click the ellipsis button (...) next to the CASS Address Types field and select the relevant object type(s) from the 'Select object types for aspect' dialog that displays. This should be one or more of the address types used in the Address Component Model.



The below screenshot shows the dialog with an 'Address' entity object type selected. Note that only entities and or data containers can be selected. To multi-select objects, click and hold the Ctrl or Shift key. Click **Select** to choose the object(s) and close the dialog.



Click **Next**.

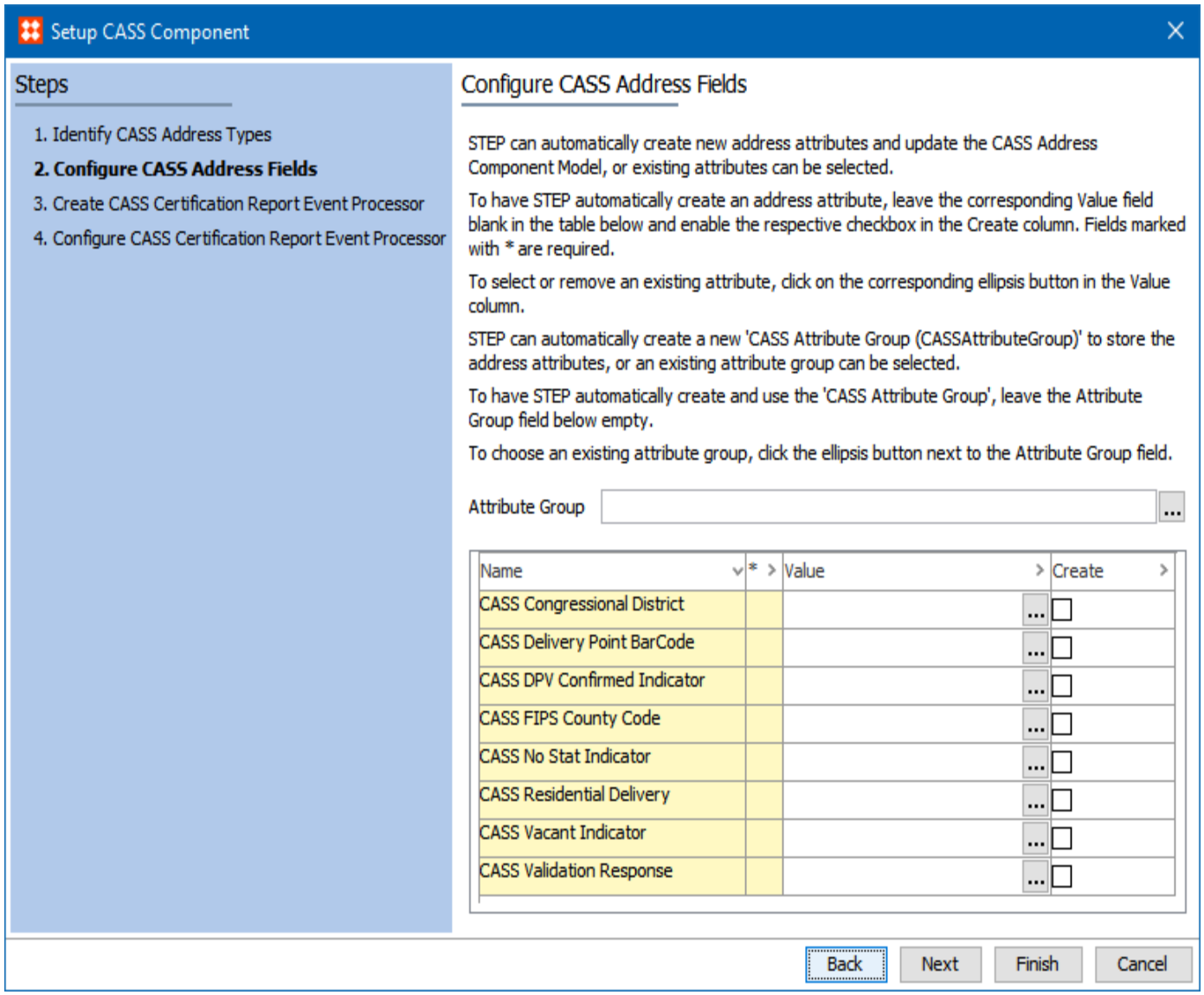
4. On the **Configure Address Fields** screen, attributes are mapped to corresponding CASS output fields. To select or remove an existing attribute, click on the corresponding ellipsis button (...) in the Value column.

   To have STEP automatically create an address attribute, leave the corresponding Value field blank and enable the respective checkbox in the Create column. All automatically created attributes will be Description attributes and be made valid for the configured address types. They will have a name equal to the field name and an ID equal to the field name with spaces removed. For example, for the 'CASS Congressional District' field, the automatically created attribute will be named 'CASS Congressional District' and have the ID of 'CASSCongressionalDistrict.'

   It is not required to have STEP create the attributes, but is recommended. If any of the attributes already exist (based on ID), a message will display to inform the user that the attribute already exists.

Note: No 'select all' option is available for the Create column; this omission is intentional, as it forces users to give more thought as to which attributes they actually need instead of creating all attributes at once and having too many.

To select an attribute group where you would like to store the newly created attributes, click the ellipsis button (...) next to the Attribute Group field to launch the 'Select Attribute Group' dialog. Leave the field blank to have STEP automatically create the attribute group, which will be named 'CASS Attribute Group' (ID = CASSAttributeGroup).

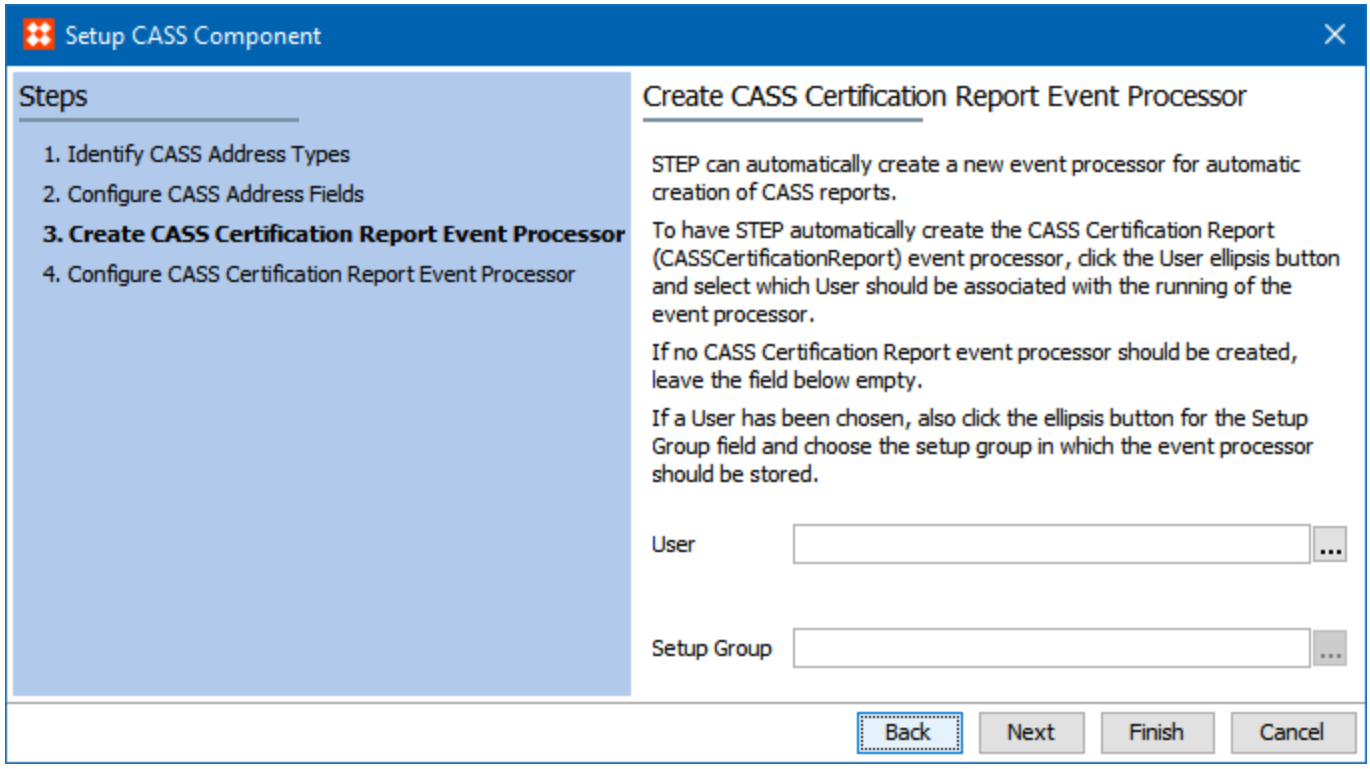


Click **Next** when you have finished mapping and/or creating your attributes.

5. On the **Create CASS Certification Report Event Processor** screen, the system prompts you to choose a User and a Setup Group to have STEP automatically create a 'CASS Certification Report' event processor.

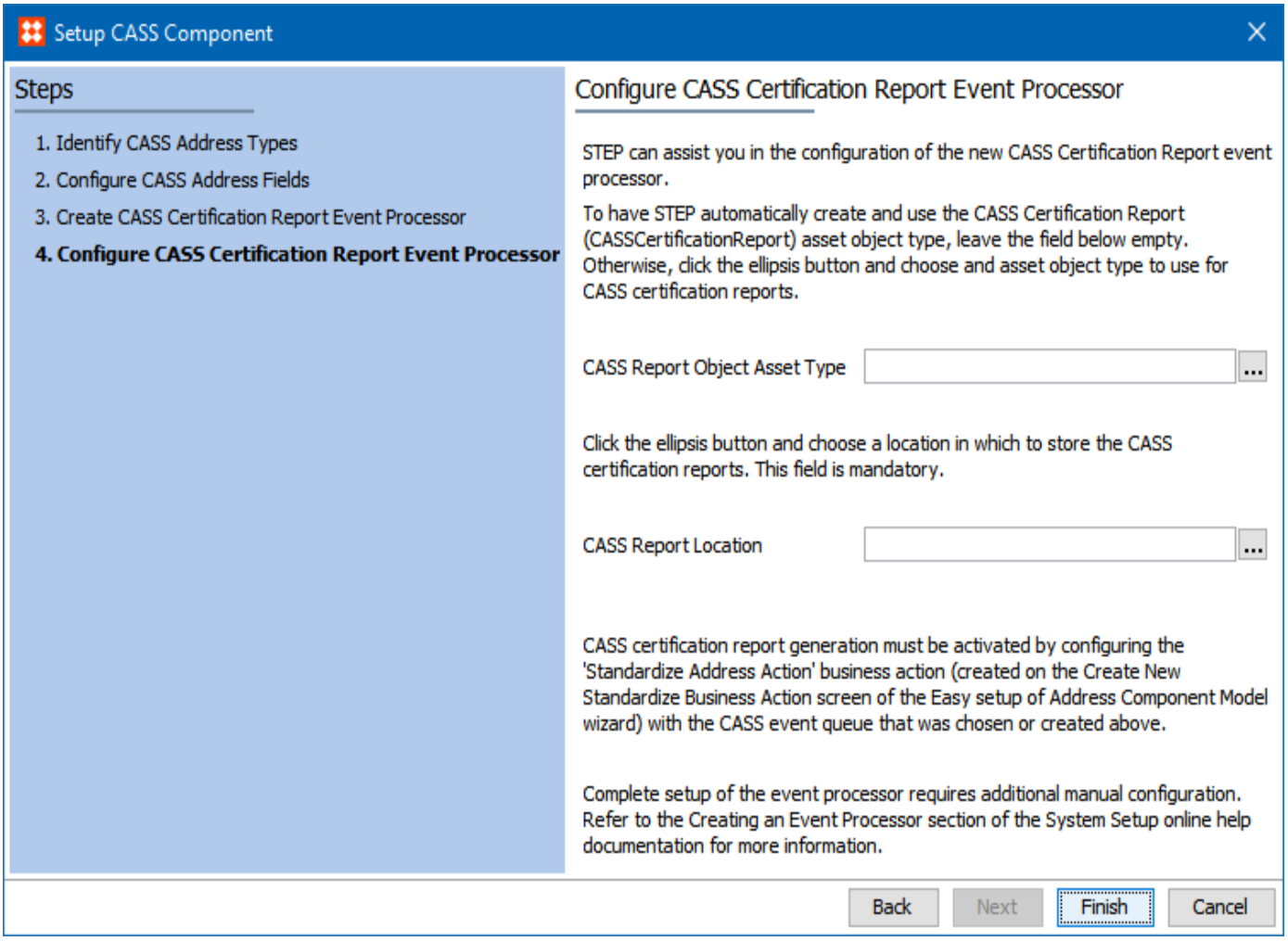
This processor will be used to generate CASS certification reports. For more information on the default configuration of this event processor, see the 'Default Configuration - CASS Certification Report Event Processor' section of this topic (below). For more information on CASS certification reports, see the CASS Certification Report Generation section of this topic (below).

Click **Finish** if you do not want to create the event processor or would like to create it at a later time. Otherwise, click the ellipsis button (...) next to the User field to select the dedicated system user for the event processor. Then, click the ellipsis button (...) next to the Setup Group field to select the setup group where the event processor should be stored.



6. On the **Configure CASS Certification Report Event Processor** screen, click the ellipsis button (...) next to the 'CASS Report Object Asset Type' field to select the asset object type that will be used for the CASS certification reports. These assets will be stored in STEP as normal .TXT files. If you do not already have an asset object type that you would like to use, leave the field blank to have STEP automatically create it.

   Click the ellipsis button (...) next to the 'CASS Report Location' field to choose the classification hierarchy folder where the CASS certification reports should be stored.



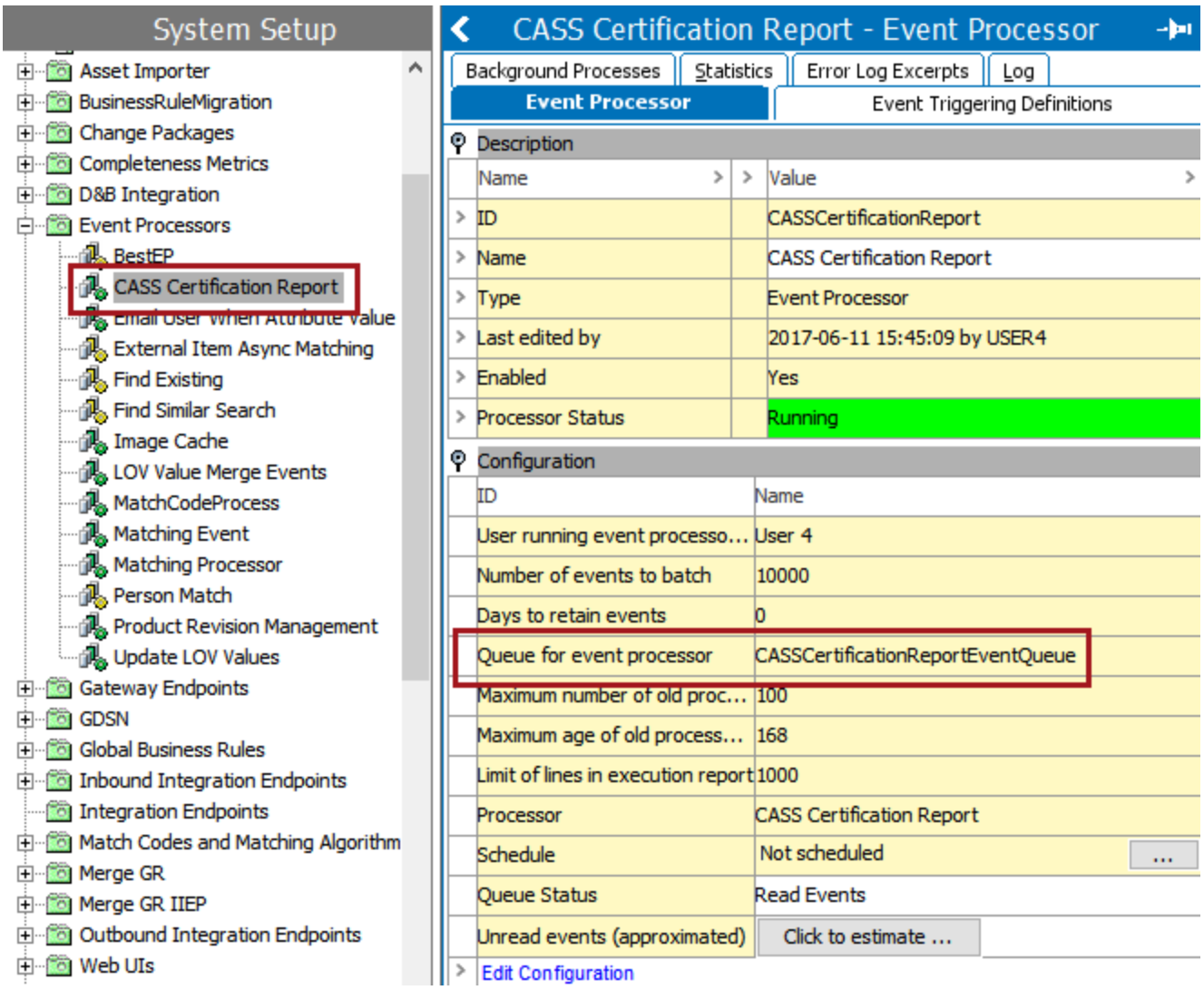
Click **Finish** to complete the easy setup of the component model.

For more information on how to complete the configuration of the event processor after you have completed the easy setup wizard, see the **CASS Certification Report Processing Plugin Parameters and Triggers** topic in the **Event Processors** documentation.

Default Configuration - CASS Certification Report Event Processor

The default configuration of a CASS certification report event processor, as created through the easy setup of the CASS Address Component Model, is pictured below. All default options can be left as-is, or users can adjust specific settings to meet their business needs. The event processor is configured, by default, with a large batch size and a low frequency.

The default queue for the event processor is called CASSCertificationReportEventQueue. If not created through the easy setup of the component model, this queue must first be created, then the name must be manually entered on the 'Configure Event Processor' screen of the Event Processor Wizard.



Important: By default, CASS certification event processors are not scheduled. When address standardization operations are initiated by a manual 'Standardize Address' bulk update on address / data container objects or by a 'Standardize Address' business action, these events will sit in the event processor unless the event processor is manually invoked or the processor is scheduled to pick up events at certain intervals. For more information, see the **EPW - Schedule Event Processor** topic within the **Creating an Event Processor** section of the **Event Processors** documentation.

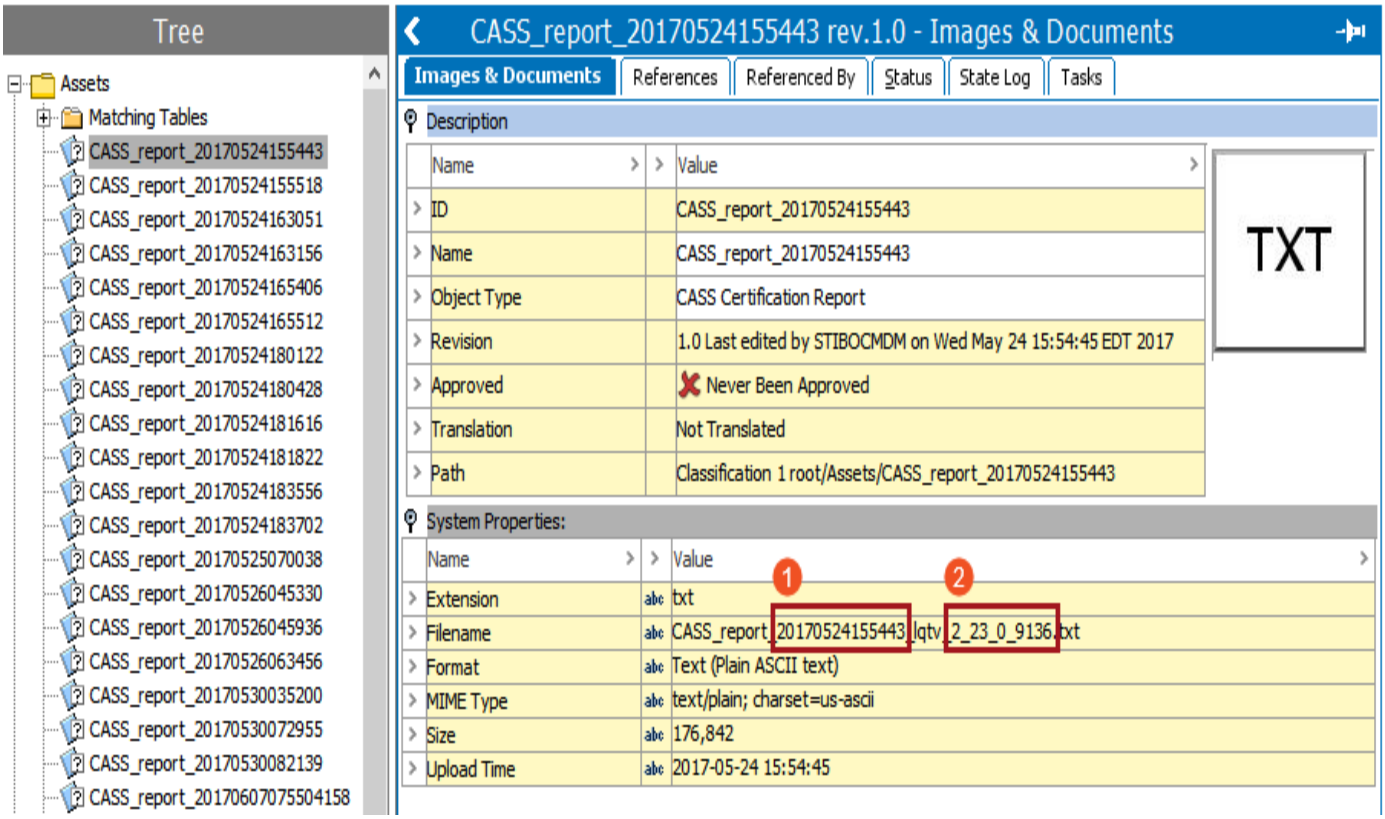
CASS Certification Report Generation

When objects are sent to the CASS certification report event processor, the Loqate Local API uses a Loqate program, lqtBatch, to generate the CASS reports. This program is delivered with the Loqate Local API. When the event processor is invoked, the CASS Certification Event processor plugin:

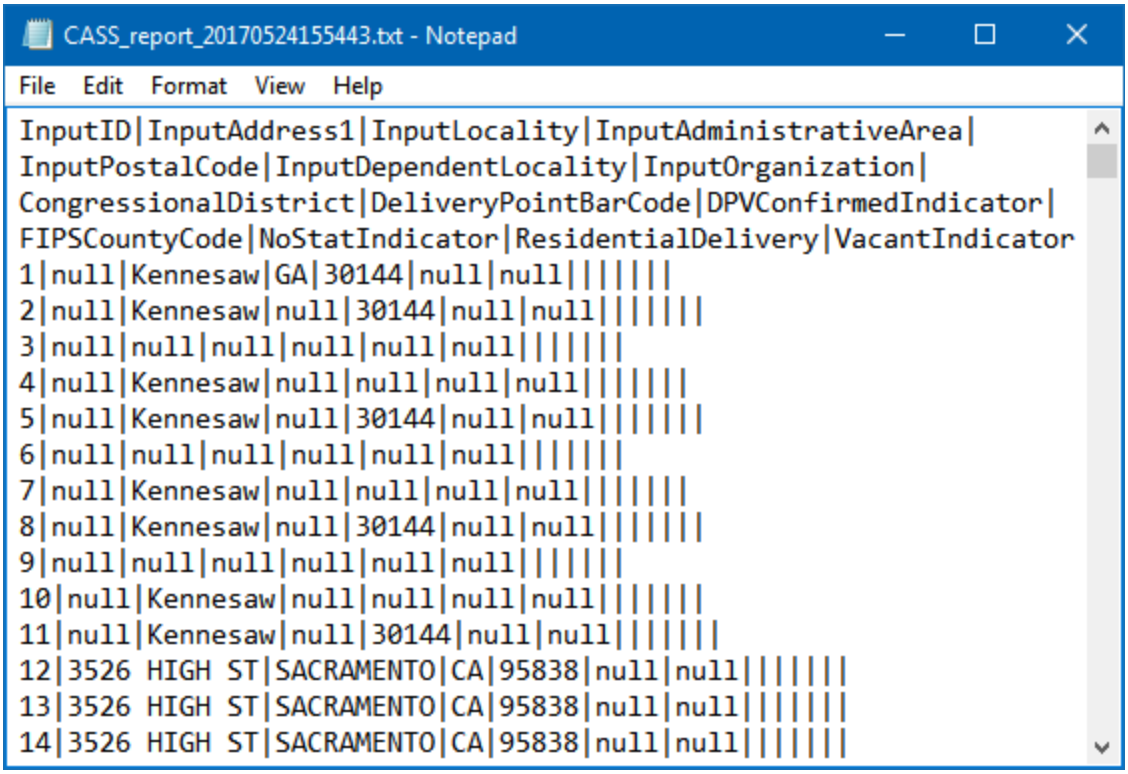
1. Extracts all US addresses from all originating objects of all the events in the batch
2. Generates an input text file with all these addresses

3. Sends a command to lqtBatch, using this text file as the input
4. Places the output file 'CASS_report_[time stamp]_lqtv_[loqate version].txt' in the specified CASS report location in the classification hierarchy using the specified CASS report asset object type.

The below screenshot shows an example of CASS reports stored within the Assets folder in the STEP classification hierarchy. In the below pictured Filename, the first number string (1) is a report generation time stamp the second number string (2) is the Loqate version number.

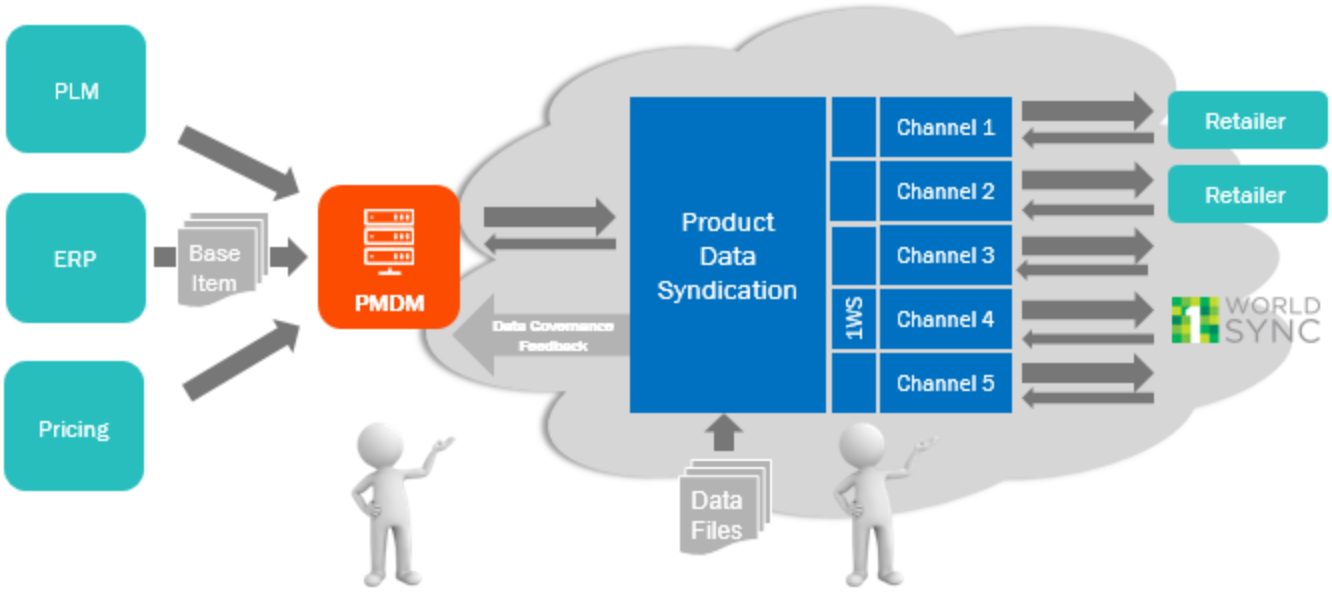


The below is a sample CASS certification report.


CASS_report_20170524155443.txt - Notepad
File Edit Format View Help
InputID|InputAddress1|InputLocality|InputAdministrativeArea|
InputPostalCode|InputDependentLocality|InputOrganization|
CongressionalDistrict|DeliveryPointBarCode|DPVConfirmedIndicator|
FIPSCountyCode|NoStatIndicator|ResidentialDelivery|VacantIndicator
1|null|Kennesaw|GA|30144|null|null|||||||
2|null|Kennesaw|null|30144|null|null|||||||
3|null|null|null|null|null|null|||||||
4|null|Kennesaw|null|null|null|null|||||||
5|null|Kennesaw|null|30144|null|null|||||||
6|null|null|null|null|null|null|||||||
7|null|Kennesaw|null|null|null|null|||||||
8|null|Kennesaw|null|30144|null|null|||||||
9|null|null|null|null|null|null|||||||
10|null|Kennesaw|null|null|null|null|||||||
11|null|Kennesaw|null|30144|null|null|||||||
12|3526 HIGH ST|SACRAMENTO|CA|95838|null|null|||||||
13|3526 HIGH ST|SACRAMENTO|CA|95838|null|null|||||||
14|3526 HIGH ST|SACRAMENTO|CA|95838|null|null|||||||

Product Data Syndication

One element of product master data management is product data syndication—delivering your onboarded, cleansed, and enhanced STEP data as a single view to multiple external systems, called channels. Stibo Systems' **Product Data Syndication** (PDS) platform allows your single-view master data to be mapped, based on the established data standards for the channels you require. Channels (depending on availability) allow syndication to product retailers, GDSN, and/or Sales / Distribution sites.



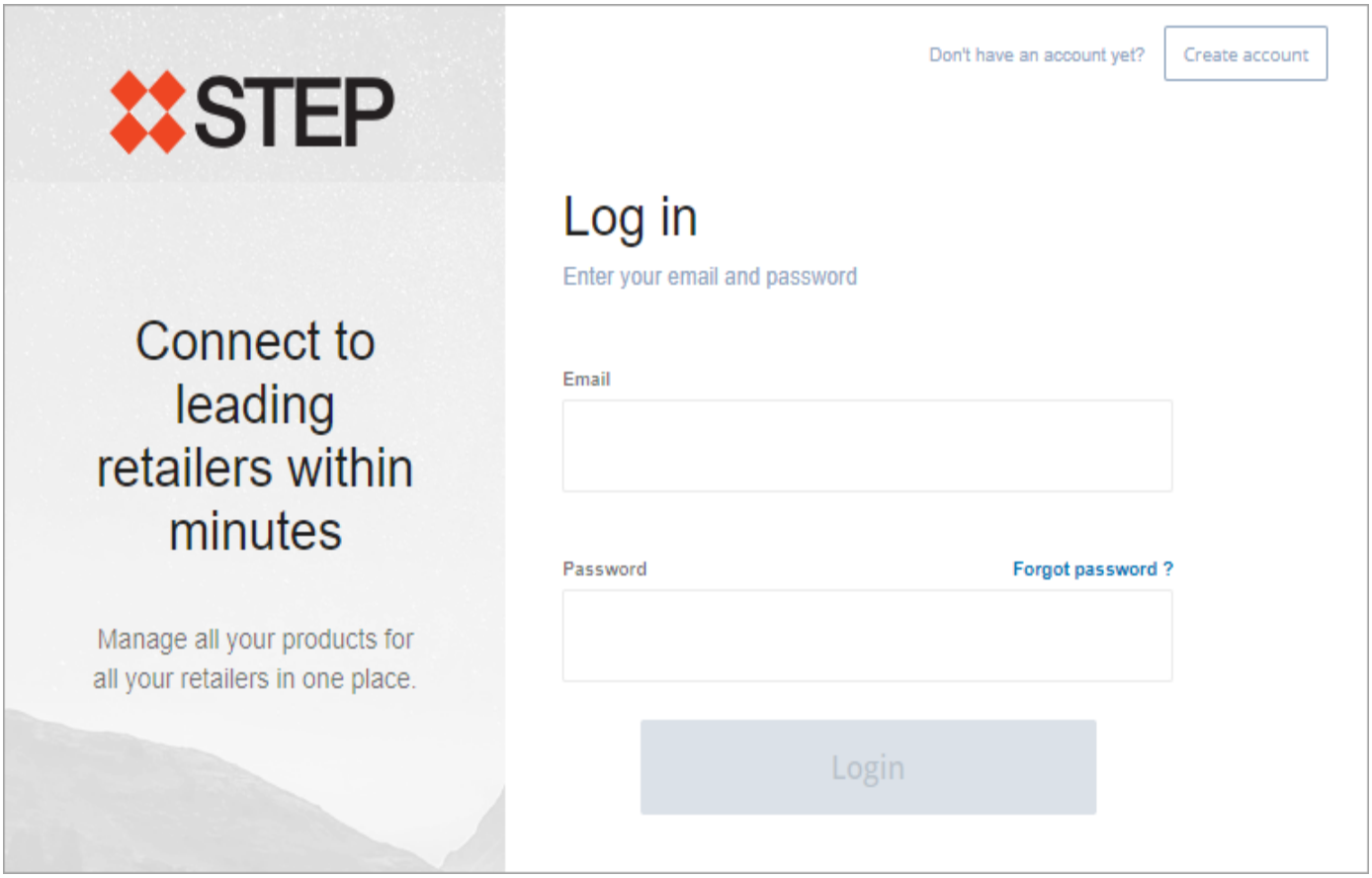
On-the-fly error checking in PDS is performed against channel data standards to prevent you from publishing non-standard data. Corrections for errors can be saved as rules for future use, reducing the overall time spent generating quality data.

Integration between STEP and PDS involves:

- Master data sent from STEP to PDS via an outbound integration endpoint. This can include a product's primary image, product references as well as metadata on those references, and packaging hierarchy information.
- PDS channel status information is received by STEP via an inbound integration endpoint. This allows STEP users to monitor the status of products being syndicated by PDS.

Prerequisites

To get an administrative account for PDS, talk to your Stibo Systems account manager. Your account administrator has the ability to invite you to the PDS account from the PDS UI. In doing so, you will receive a sign-up email where you define the password. You will use these credentials to log into the PDS system at https://pds.stibosystems.com.

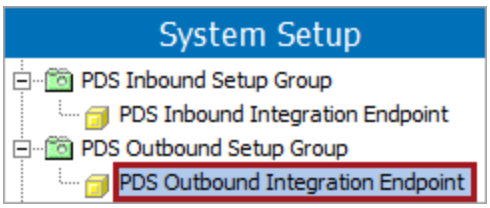


If you encounter any issues within the PDS site, use the live chat help in PDS – available on the question mark icon in the top right-hand corner of the application. Issues while in the STEP Web UI or STEP Workbench should be reported using your standard reporting methods.

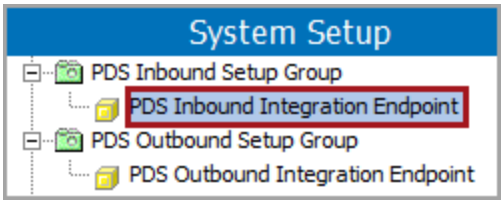
Configuration

To access the PDS platform and functionality, the 'productdatasyndication-integration' add-on component must be activated on your system. This add-on component will create an Outbound and Inbound Integration Endpoint, both pre-configured to the greatest extent possible. Once activated, STEP communication with PDS is handled via the API using auto-generated integration endpoint objects. Some manual configuration setup is required for the following objects:

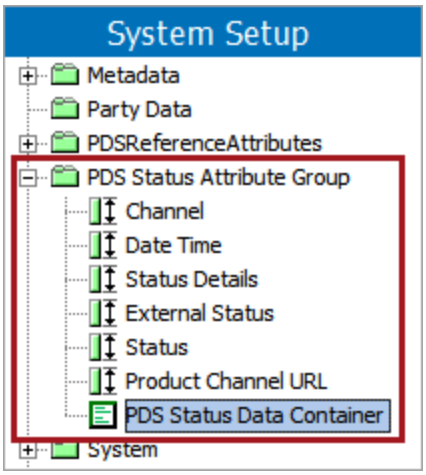
1. **PDS Outbound Integration Endpoint** - the OIEP sends master data to PDS and must be modified to work with your data. The **PDS Outbound Integration Endpoint Configuration** topic includes details for:
   - Manual required setup
   - Packaging hierarchy export setup
   - Optional product references metadata export setup



2. **PDS Inbound Integration Endpoint** - the IIEP receives the PDS channel status information. For details, see the **PDS Inbound Integration Endpoint Configuration** topic.



3. **PDS Status Data Container** - the data container used to display and monitor the PDS product status in the Web UI and the workbench, using the attributes contained within the PDS Status Attribute Group. For details, see the **PDS Channel Status Monitoring** section of this documentation.



PDS Outbound Integration Endpoint Configuration

The PDS Outbound Integration Endpoint (OIEP) is used to send STEP master data (for example, a product's primary image, product references as well as metadata on those references, and packaging hierarchy information) to PDS.

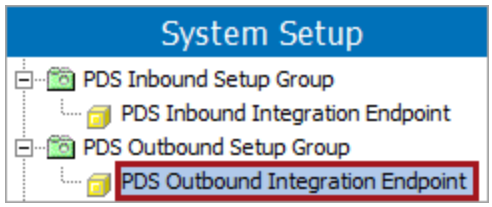
The PDS OIEP includes a predefined template and a number of other settings to reduce the setup required. However, the following updates are necessary for it to work with your data model.

This topic includes information and/or links to more information for the following configurations:

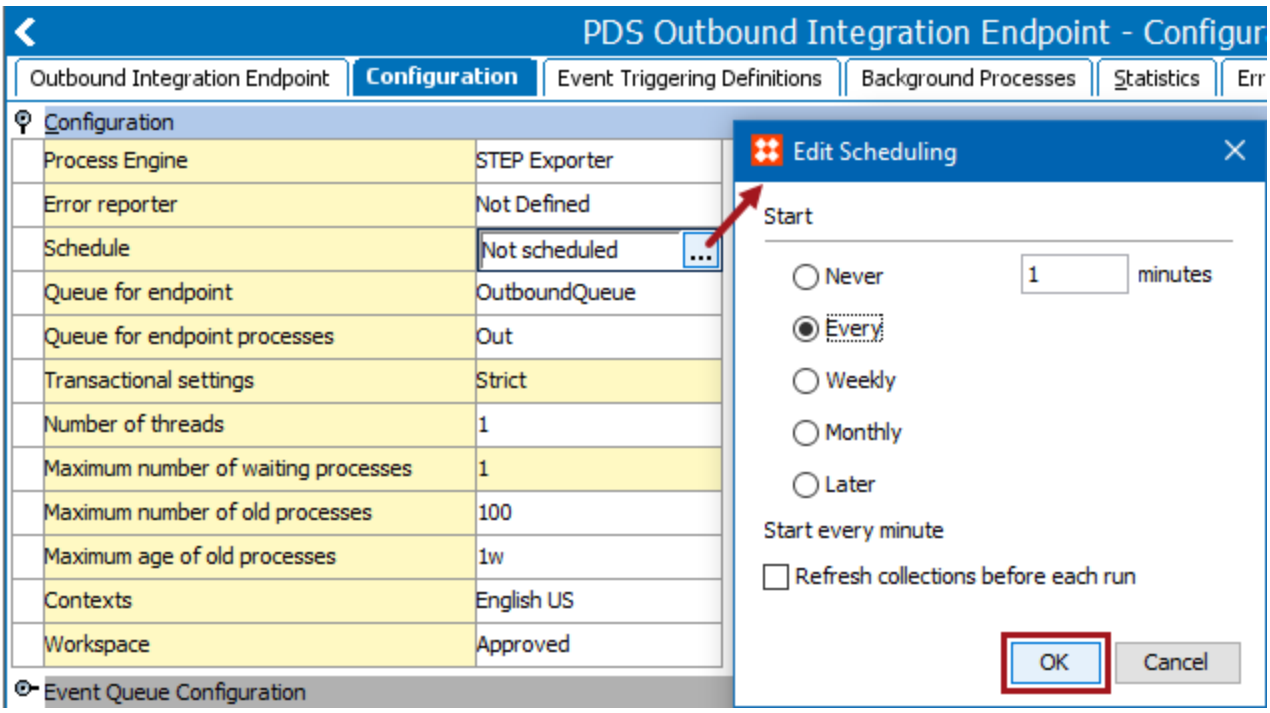
- Required manual setup
- Packaging hierarchy information export setup
- 1WorldSync composite attribute values export setup

Required Manual Setup

1. In the System Setup > PDS Outbound Setup Group node, open the PDS Outbound Integration Endpoint.



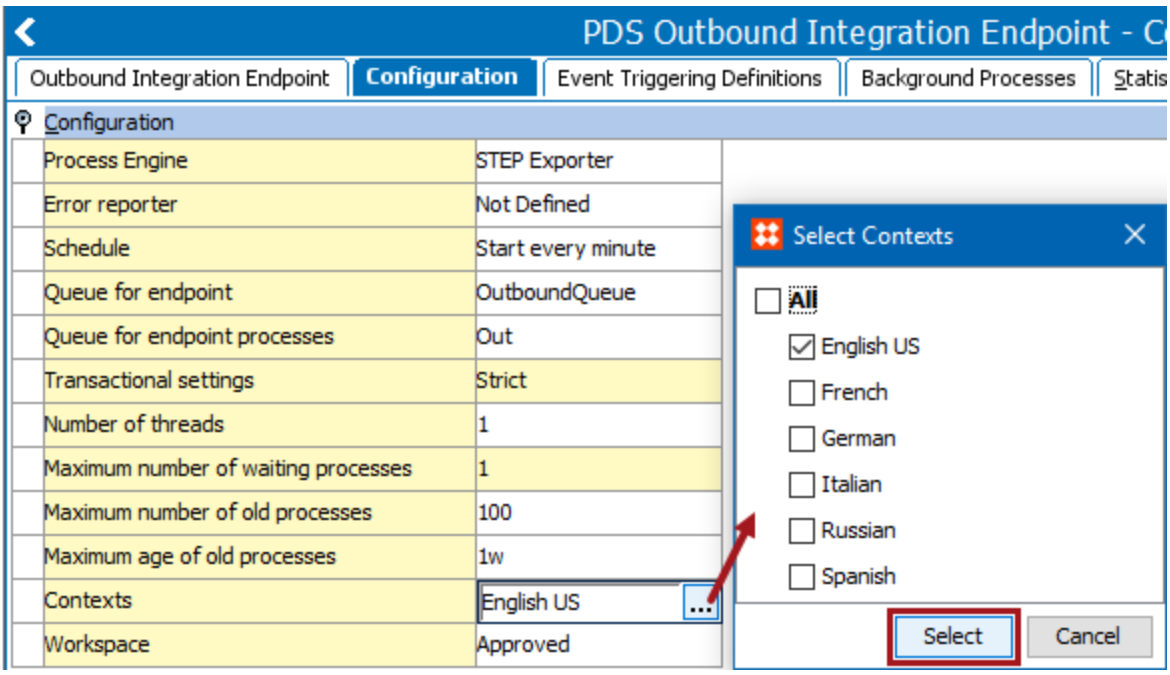
2. On the OIEP Configuration tab, open the Configuration flipper, and click into the **Schedule** parameter value to display an ellipsis button (...).
3. Click the ellipsis button (...) to display the Edit Scheduling dialog and set the required Start interval. Click the **OK** button to update the Schedule parameter.



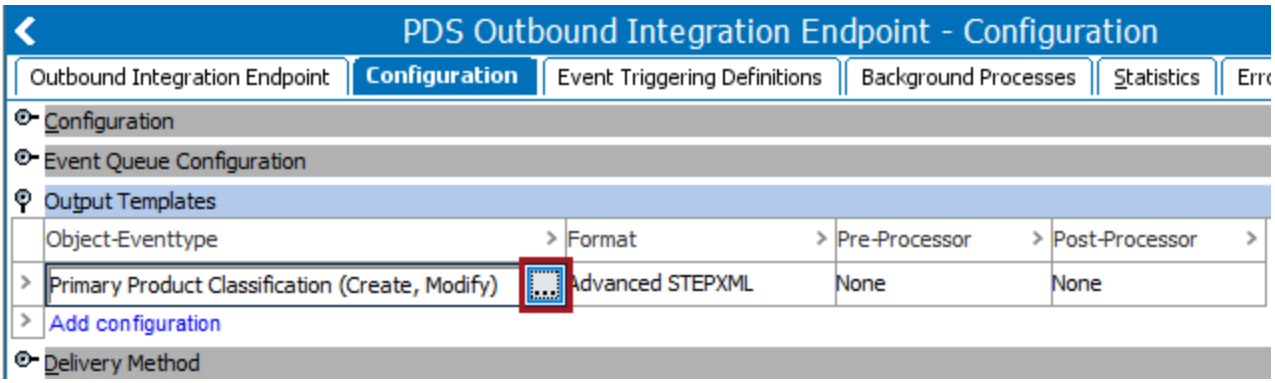
Important: Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instruction to the server to run the job. This can cause confusion about when the job will run since the scheduled time is not automatically converted to accommodate potential differences in time zones.

4. Click into the **Contexts** parameter value to display an ellipsis button (...).
5. Click the ellipsis button (...) to display the Select Contexts dialog and set the required single context to export.

   Click the **Select** button to update the Contexts parameter.

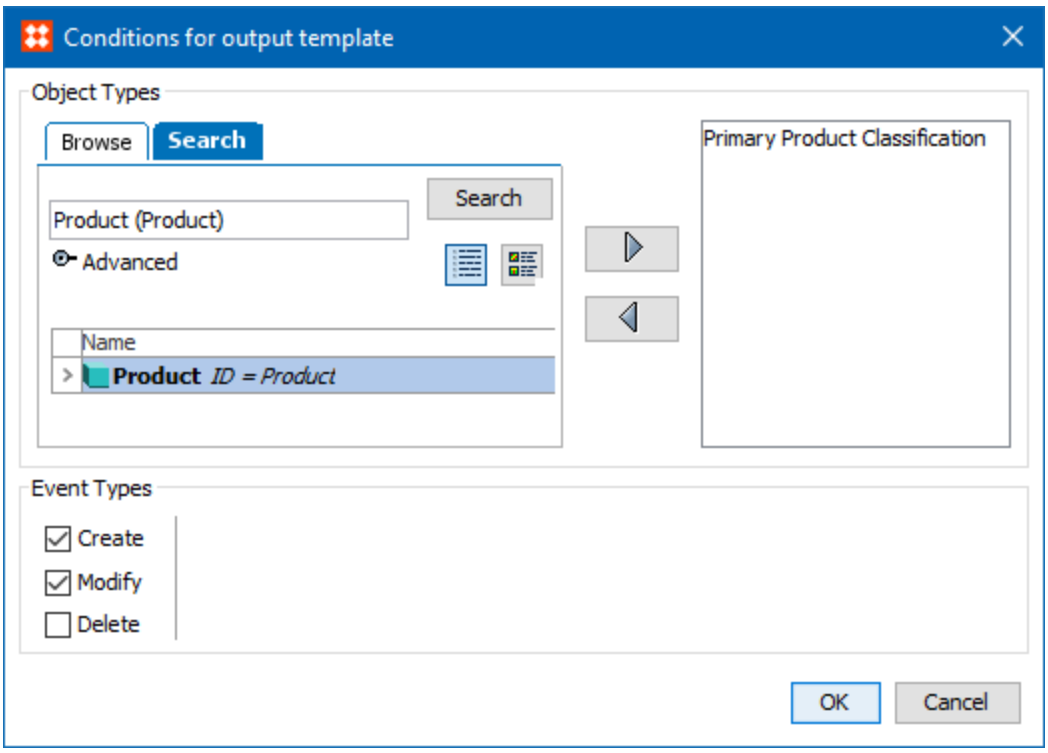


6. Open the Output Templates flipper and click into the **Object-Eventtype** parameter value to display an ellipsis button (...).



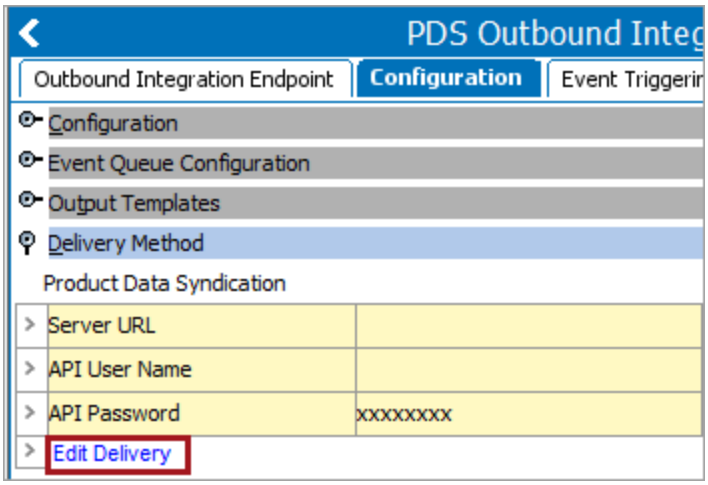
7. Click the ellipsis button (...) to display the 'Conditions for output template' dialog and modify the object types and event types to export to PDS. Click the **OK** button to update the output template.

   For more information, see the **Configure the Object Types and Event Types** section of the **OIEP - Event-Based - Output Templates Flipper** topic in the **Data Exchange** documentation.

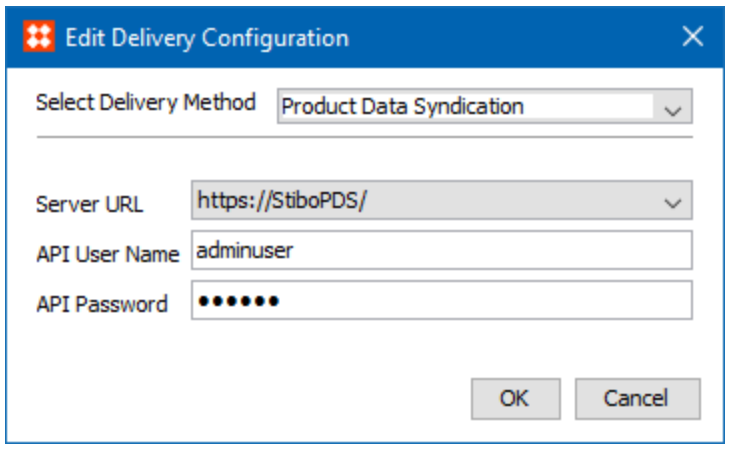


Note: The default Advanced STEPXML format template can be modified if necessary, as required to include product reference metadata, defined in the **Optional Product References Metadata Export Setup** section below.

8. Open the Delivery Method flipper and click the **Edit Delivery** link.

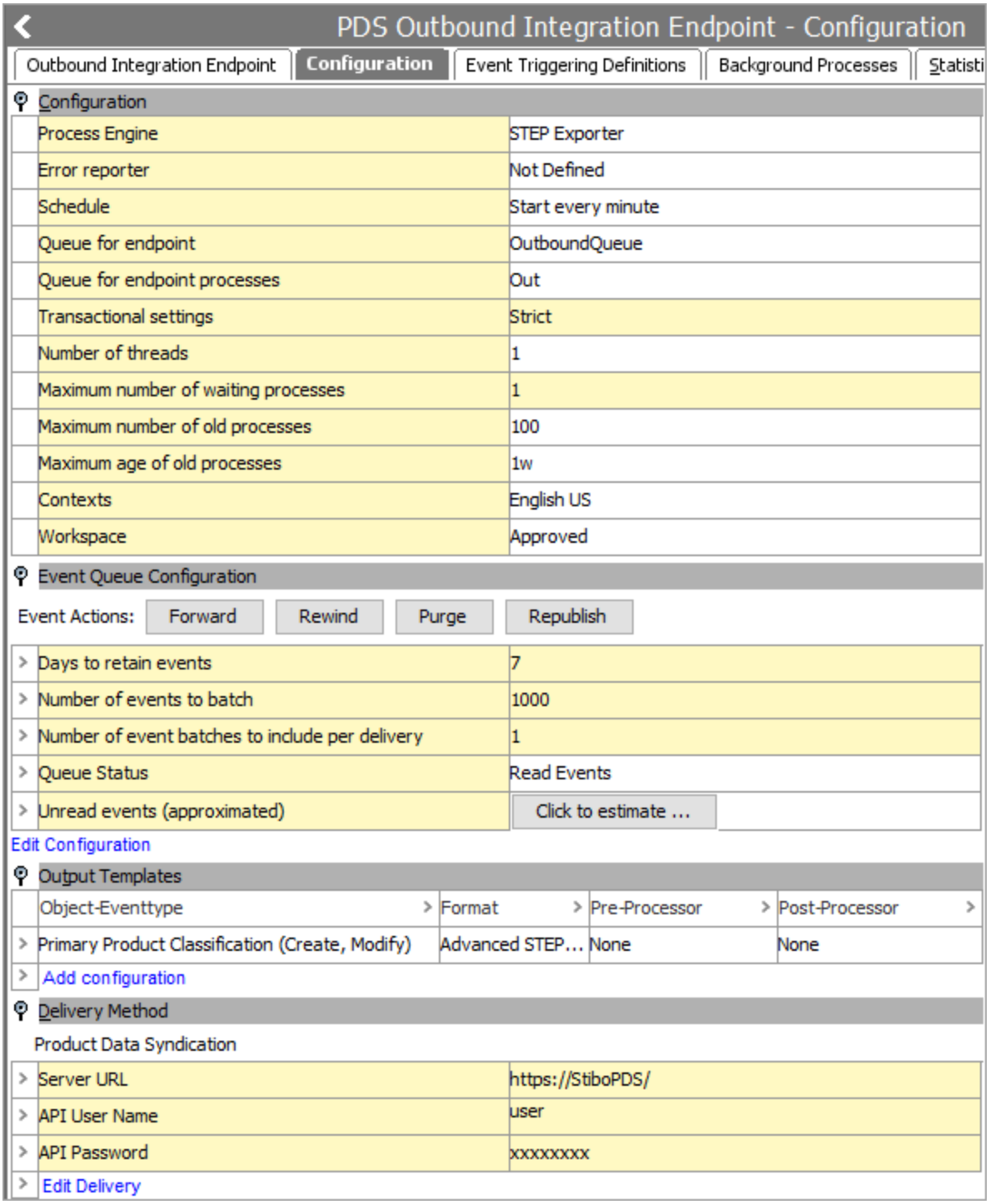


9. On the Edit Delivery Configuration dialog, configure the 'Product Data Syndication' delivery method to establish the connection from STEP to PDS. For details, see the **Product Data Syndication Delivery Method** topic in the **Data Exchange** documentation.

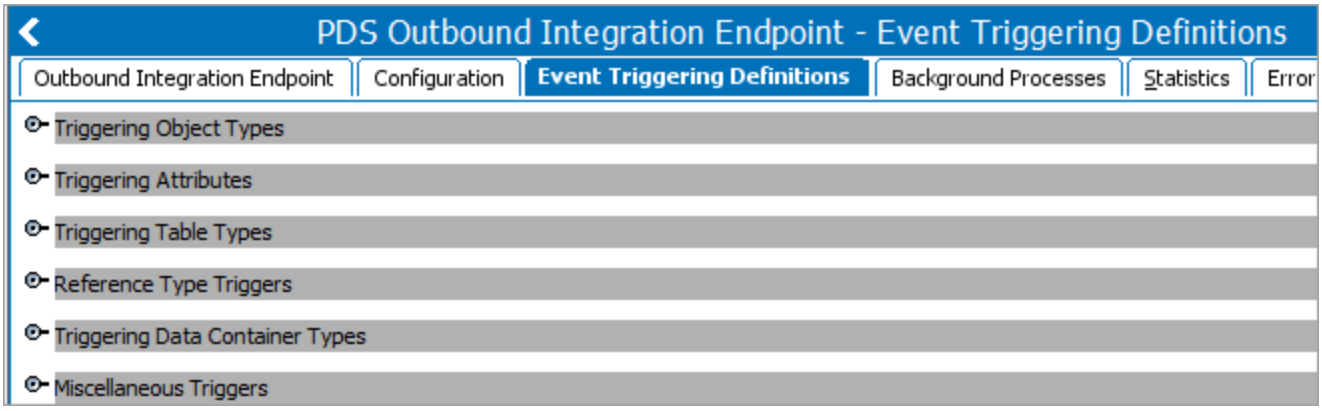


Updates made in the previous steps are displayed on the 'Configuration' tab, under the 'Configuration' flipper, 'Output Templates' flipper, and 'Delivery Method' flipper.

Note: The API User Name / API Password credentials for the PDS OIEP and PDS IIEP are not necessarily the same credentials that are needed to log into the PDS system



10. On the 'Event Triggering Definitions' tab, select the necessary actions that should trigger events for this OIEP. For more information, see the **OIEP - Event-Based - Event Triggering Definitions Tab** topic in the **Data Exchange** documentation.



Note: When using either of the setups defined in the following sections, reference types must be set as triggers. For more information, see the **Packaging Hierarchy Information Export Setup** section or the **1WorldSync Composite Attribute Values Export Setup** section below.

11. Enable the endpoint as described in the **Running an Outbound Integration Endpoint** topic of the **Data Exchange** documentation.

Packaging Hierarchy Information Export Setup

The Packaging component model allows you to send products in a packaging hierarchy (e.g., pallet-to-case-to-pack) to PDS and also include this hierarchy in PDS. The activated and configured packaging reference types determine the packaging data exported to PDS. To access the Packaging component model, the 'packaging' component must be activated on your system in addition to the normal update procedures. Contact your Stibo Systems representative for details.

If your products do not need the packaging hierarchy in PDS, this setup is not necessary.

Configuration

1. If necessary, complete the Packaging component setup as defined in **Configuring the Packaging Component in STEP Workbench** under the **Web User Interfaces** documentation.
2. Edit the PDS OIEP triggering definitions as follows to determine the STEP data activity that causes events to be sent to PDS. At a minimum, one Object Type trigger must be set before the OIEP can be enabled.

   On the Event Triggering Definitions tab, set triggers for the identified packaging reference types. For more information, see the **OIEP - Event-Based - Event Triggering Definitions Tab** topic in the **Data Exchange** documentation.

3. Enable and invoke the PDS OIEP (manually or on schedule) as described in the **Running an Outbound Integration Endpoint** topic of the **Data Exchange** documentation.

1WorldSync Composite Attribute Values Export Setup

If you do not submit products to the 1WorldSync channel in PDS, this setup is not necessary.

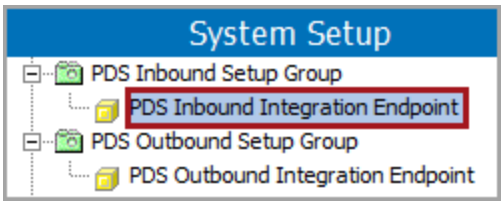
Within the 1WorldSync (1WS) channel in PDS, some attributes require composite values, meaning that a single attribute value within 1WS is composed of multiple values sent from STEP within a nested data structure. To export values in the format required by 1WS, the default Advanced STEPXML template in the OIEP must be modified to include the IDs of the **reference types** that are used to link products together within this data structure. For details, see the **Configuration of PDS Composite Metadata Attribute and OIEP for 1WS** topic.

PDS Inbound Integration Endpoint Configuration

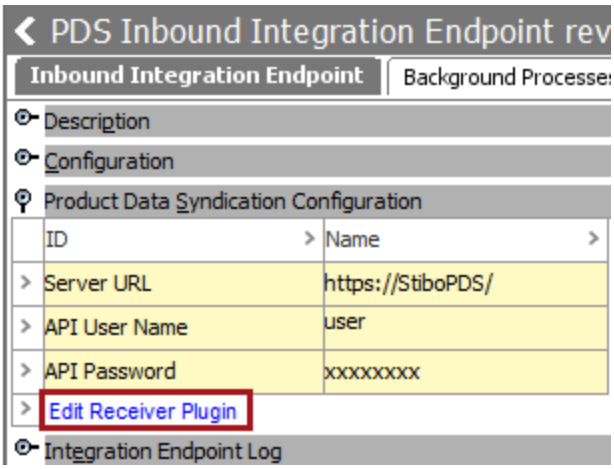
The PDS Inbound Integration Endpoint (IIEP) is used to receive the PDS status information for integrated products.

The PDS IIEP includes a number of preset parameters to reduce the setup required. However, the following updates are necessary for the IIEP to work with your data model.

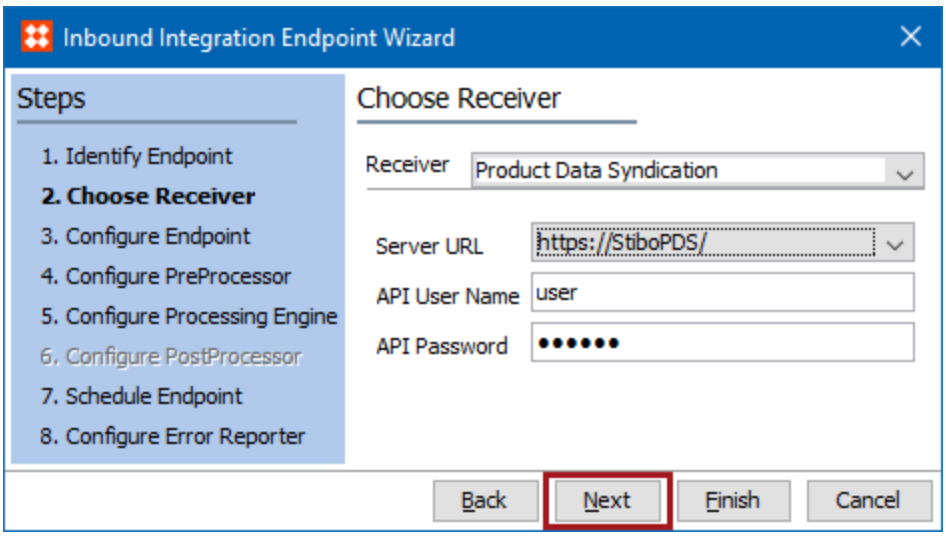
1. In the System Setup > PDS Inbound Setup Group node, open the **PDS Inbound Integration Endpoint**.



2. Display the 'Inbound Integration Endpoint' tab.
3. Open the 'Product Data Syndication Configuration' flipper and click the **Edit Receiver Plugin** link.



4. On the Inbound Integration Endpoint Wizard dialog, configure the 'Product Data Syndication' receiver option and click the **Next** button.

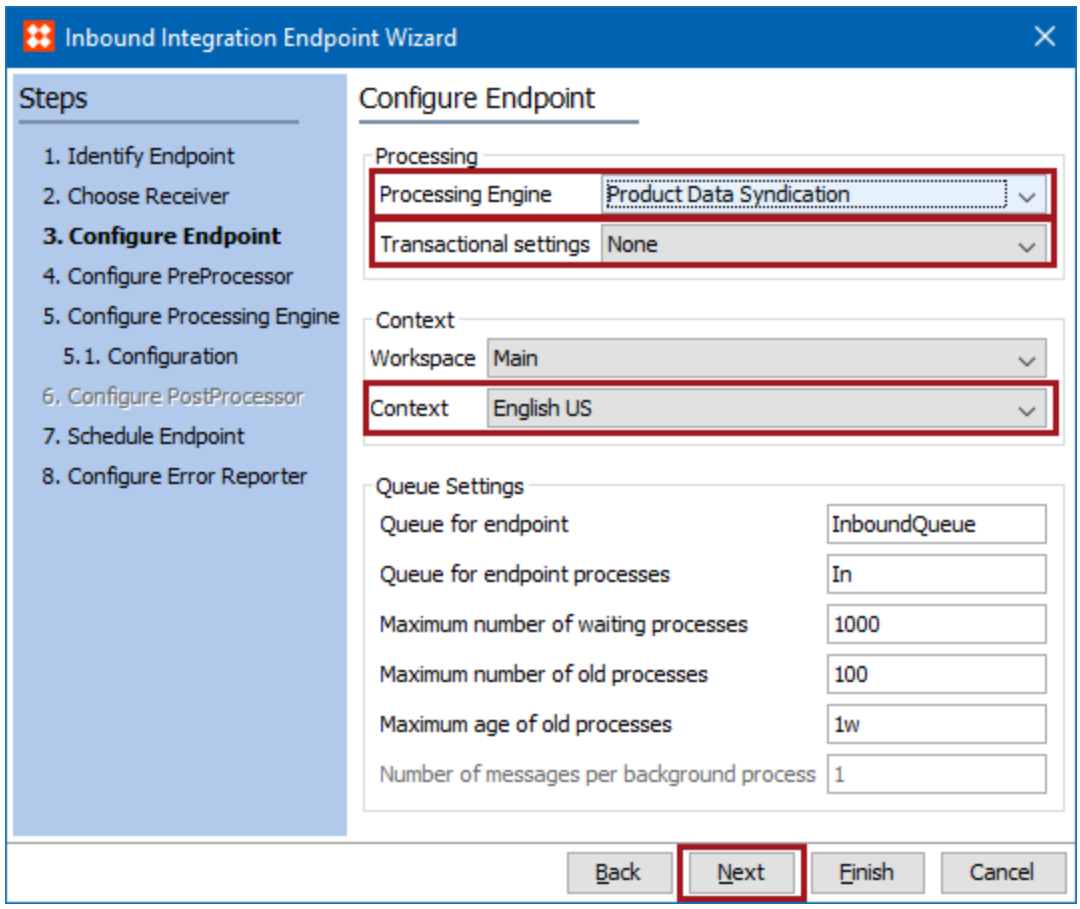


For details, see the **Product Data Syndication Receiver** topic in the **Data Exchange** documentation.

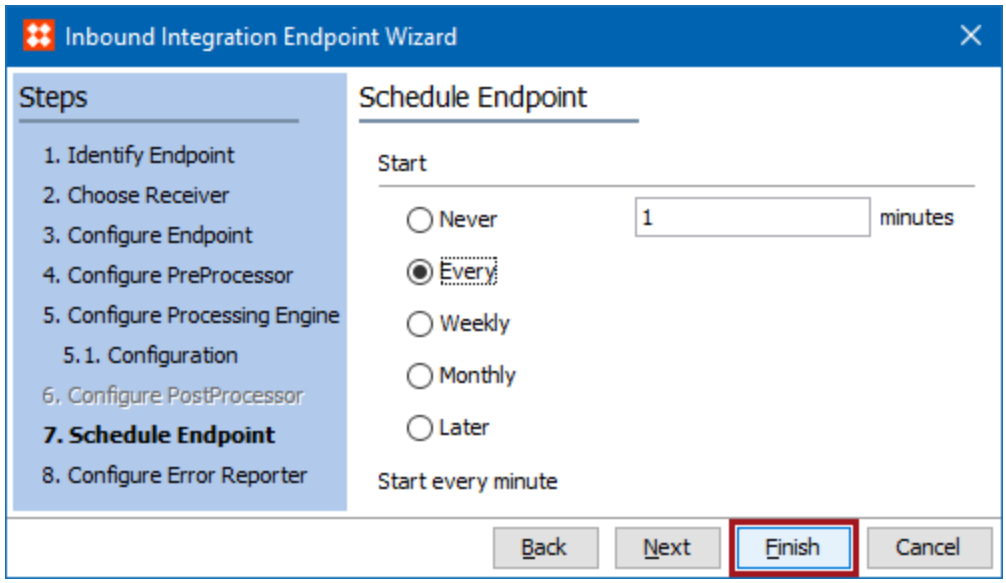
5. On the Inbound Integration Endpoint Wizard, update the following parameters:

- Ensure the 'Processing Engine' parameter is set to **Product Data Syndication** and 'Transactional settings' is set to **None**.
- Set 'Context' parameter as required for your inbound data. The Workspace must remain set to 'Main' since new data can only be added to this workspace. For more information, see the **IIEP - Configure Endpoint** topic in the **Data Exchange** documentation.
- Click the **Next** button repeatedly until the Schedule Endpoint step displays.

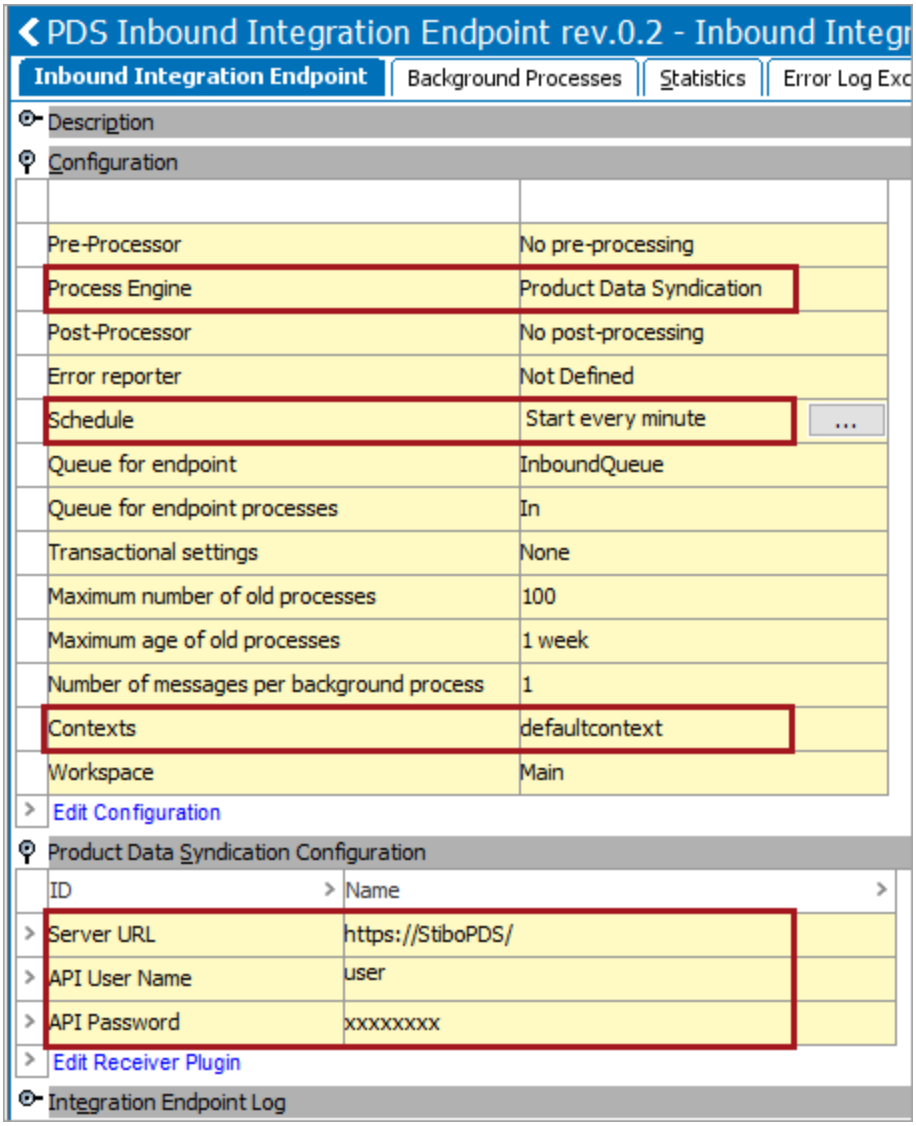
Important: Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instruction to the server to run the job. This can cause confusion about when the job will run since the scheduled time is not automatically converted to accommodate potential differences in time zones.



6. On the Schedule Endpoint step, set the desired schedule and click the **Finish** button.



Updates made in the previous steps are displayed in the 'Configuration' and 'Product Data Syndication Configuration' flippers.



7. Enable the endpoint as described in the **Running an Inbound Integration Endpoint** topic of the **Data Exchange** documentation.

After successful setup, and invocation, PDS product status information can be seen on the Data Containers tab of the product editor.

PDS Channel Status Monitoring

Status information related to products sent to PDS via STEP, as well as products added / submitted to channels in PDS, can be viewed and monitored in the **PDS Status Data Container** in the workbench and within the **PDS Channel Status** component in the Web UI.

The PDS Status Data Container is located within the **PDS Status Attribute Group**, which also contains the PDS status attributes that are valid for the PDS Status Data Container. These attributes are used to monitor the send and receive status of products between STEP and PDS, including the relevant PDS channel statuses. The data container and attributes are created automatically when the PDS integration is activated, and rows within the data container are added as products are submitted to PDS from STEP and from PDS to channels.

Note: While the PDS Data Container within the workbench and the PDS Channel Status component in the Web UI may be referred to separately in this documentation section, details will be relevant for both unless otherwise noted, as function and output are similar.

This documentation section includes the following topics related to the monitoring of PDS channel statuses:

- PDS Status Data Container Configuration
- PDS Channel Status Web UI Component
- PDS Channel Status Monitoring in Web UI

Note: This documentation section assumes that users have a basic understanding of data containers. For more information on data containers, see the **Data Containers** section of the **System Setup** / **Super User Guide** documentation.

PDS Status Data Container Configuration

The PDS Status Data Container displays information relevant to:

- Products that are submitted from STEP to the master data list in PDS
- Products that are submitted from PDS to specific channels, such as 1WorldSync, Amazon, or Walmart
- Acception / rejection statuses received back from the channels within PDS

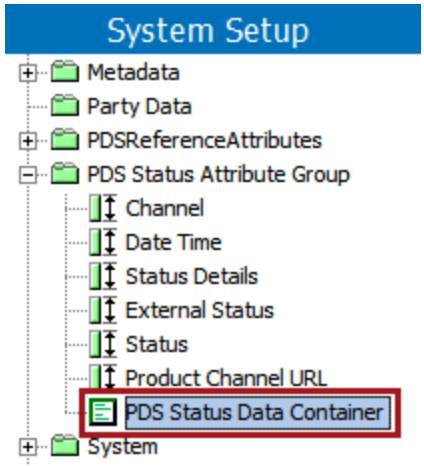
This topic provides information on:

- How to configure the PDS Status Data Container in STEP Workbench
- The attributes that make up the PDS Status Data Container
- How the data container functions when products are submitted to PDS and when status messages are returned from PDS

Configuring the PDS Status Data Container

The PDS Status Data Container is created automatically when the PDS integration is activated on your STEP system. To configure it for initial use, follow these steps:

1. In System Setup, open the 'Attribute Groups' node, select 'PDS Status Attribute Group' and click 'PDS Status Data Container.'



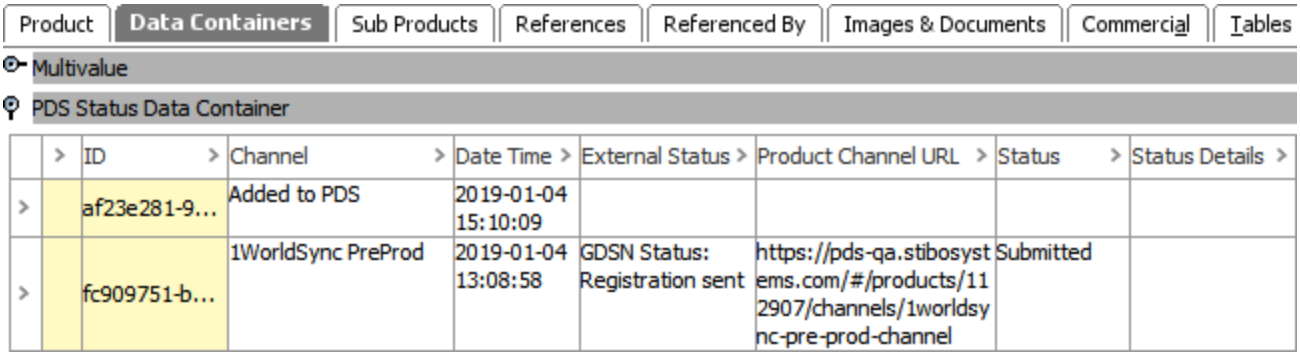
2. On the Validity tab, make the data container valid for the product object types that will be integrated with PDS.
3. Optionally, restrict the data container to specified hierarchies. Select the 'Data Container Types' tab, click the 'Restriction' parameter and set it to 'Validity restricted to hierarchies.' On the 'References' tab, select the required classification or product hierarchies.

For more information regarding configuring data containers, see the **Setting Up Data Container Types in Workbench** topic in the **Data Containers** section of the **System Setup / Super User Guide** documentation.

Viewing PDS Status Data Containers in the Workbench

In the product editor, valid object types display a 'Data Containers' tab and contain a flipper for the PDS Status Container. No data containers will display beneath the flipper until the product is initially submitted to PDS.

The example below displays a PDS Status Data Container in the workbench that includes pertinent channel names, date and times of product submission, status of products, the URL where the specific product is located, and any relevant status messages. The ID column contains the ID of the data container, which does not display in the Web UI PDS Channel Status component.



ID	Channel	Date Time	External Status	Product Channel URL	Status	Status Details
af23e281-9...	Added to PDS	2019-01-04 15:10:09				
fc909751-b...	1WorldSync PreProd	2019-01-04 13:08:58	GDSN Status: Registration sent	https://pds-qa.stibosystems.com/#/products/112907/channels/1worldsync-pre-prod-channel	Submitted	

For more information about the functionality of PDS Status Data Containers, see the 'Functionality of the PDS Data Container' subsection below.

PDS Status Data Container Attributes

The attributes found in the PDS Status Data Container are the same attributes contained within the PDS Status Attribute Group. The PDS Status Container comes pre-configured with these attributes. Their descriptions and functions are as follows:

- **Channel** (PDS Channel): Indicates the name of the channel in which an action has taken place. When a product is initially submitted to PDS, the Channel field does not display the name of a channel but instead contains the value 'Added to PDS.' In the Web UI PDS Channel Status component, the Channel attribute also contains the link to the product URL. For further information regarding the product URL link, see the **PDS Channel Status Web UI Component Configuration** topic.
- **Date Time** (PDS Date Time): Specifies when an action (such as a product submission to channel) has occurred. By default, the time and date is displayed in the ISO format.
- **External Status** (PDS External Status): Indicates status of products submitted to a channel. These messages are generally channel-specific. Depending on the channel, a higher level of detailed information may be displayed than the information presented in the Status attribute text field.
- **Product Channel URL** (PDS Product Channel URL): Displays the URL of the product in PDS. In the workbench, the URL can be copied and then pasted into a browser to access the specific product's location. In the Web UI the Product Channel URL attribute can be added to the PDS Channel Status component, but is not necessary as a link is automatically provided in the Channel attribute.
- **Status** (PDS Status): Indicates both status of a product added and submitted to a channel. This is the same channel status that can be seen within PDS.

- **Status Details** (PDS Status Details)**:** When applicable, displays pertinent and additional information related to an External Status message e.g., Catalog Item Confirmation (CIC) message details.

Functionality of the PDS Data Container

The PDS Status Data Container is empty until a product is submitted to PDS. Since the PDS Status Data Container is configured to allow multiple data containers, multiple data containers will be added as products flow back and forth between STEP and PDS and their statuses are updated.

New rows are added to the data container when:

- A product is sent from STEP Workbench to PDS via the PDS Outbound Integration Endpoint.
- A product is added to a PDS channel.

Rows are updated within the data container when a change of status is received from PDS via the PDS Inbound Integration Endpoint. Generally, these updates are due to a product being submitted to a channel within PDS or messages from channels, e.g., a submitted or rejected product message.

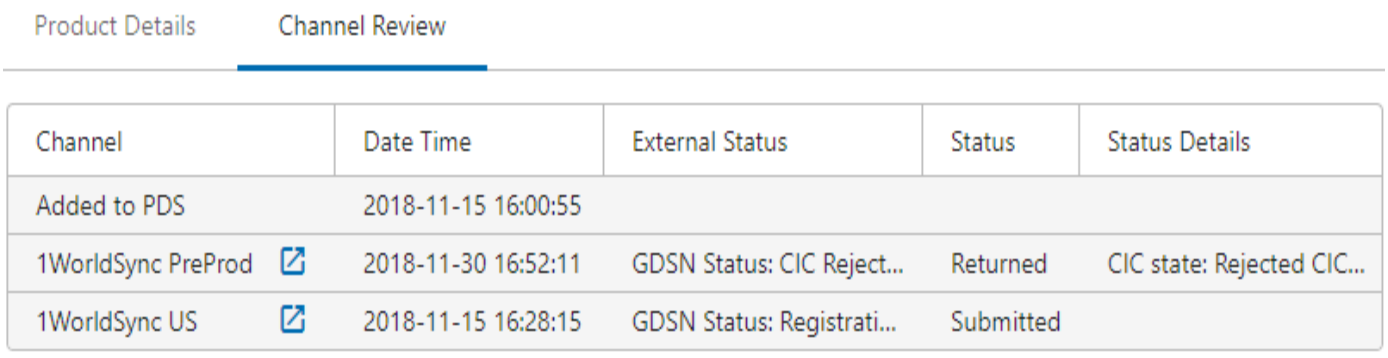
For more information on the PDS Outbound Integration Endpoint, see the **PDS Outbound Integration Endpoint Configuration** topic.

For more information on the PDS Inbound Integration Endpoint, see the **PDS Inbound Integration Endpoint Configuration** topic.

Important: Adding a product to a channel and submitting a product to a channel are two different actions. Adding a product to a channel is when the product within the master data list in PDS is added to a channel. Submitting a product to a channel is when a product that has already been added to a channel within PDS is submitted to a channel outside of PDS, meaning product data is being sent out of PDS to the receiving systems.

Viewing PDS Status Data Containers in the Web UI

Though initially configured in STEP Workbench, end users will typically view the contents of the PDS Status Data Container in the Web UI, using the 'PDS Channel Status' component. For more information on the configuration of this component and how it is used to monitor PDS channel status, see the **PDS Channel Status Web UI Component** topic.



PDS Channel Status Web UI Component

The PDS Channel Status Web UI component is used to track the status of products as they are submitted between STEP, PDS, and channels into which PDS sends data. Users that have a PDS integration in their STEP system have access to the PDS Channel Status in the Web UI. Provided users are also logged into their PDS system, users can directly access a given product via a link located in the PDS Channel Status Web UI component.

Note: This topic assumes that you are familiar with the Web UI Designer and basic Web UI component configurations. For more information, see the **Design Mode Basics** topic in the **Web UI Getting Started** documentation.

Configuring the PDS Channel Status Web UI Component

The PDS Channel Status Web UI component can be added to the Web UI as a component on a Node Details screen or a row within a Node Editor.

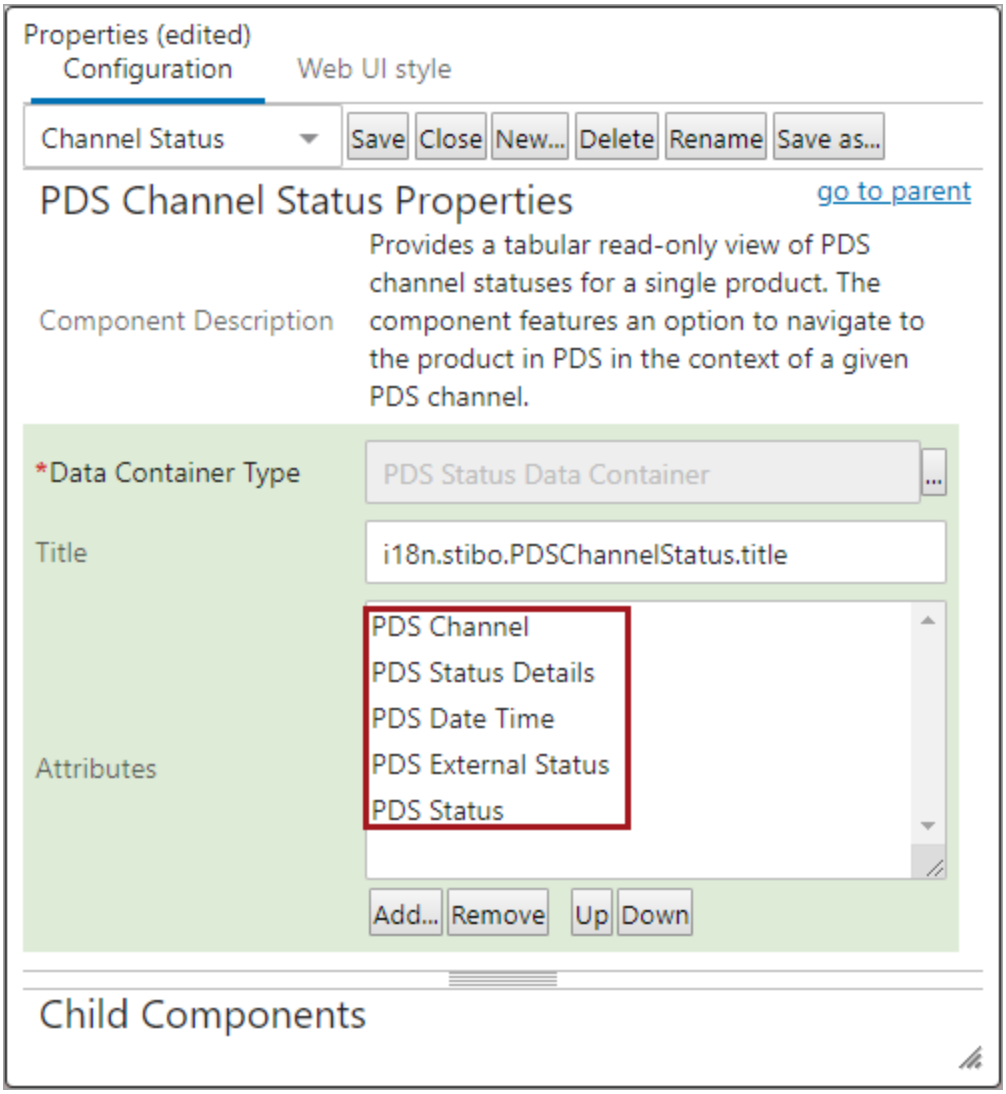
For more information on adding a row to a Node Editor, see the **Node Editor Component** topic in the **Using a Web UI** documentation.

For more information on adding a component to a Node Details screen, see the **Node Details Screen** topic in the **Using a Web UI** documentation.

The PDS Channel Status Properties window comes pre-configured with the Data Container Type, Title, and Attributes necessary to use the PDS Channel Status component. No other configuration is necessary.

It is important to note that a title value entered for the PDS Channel Status component, either default or custom, will only display when added as a row in a Node Editor.

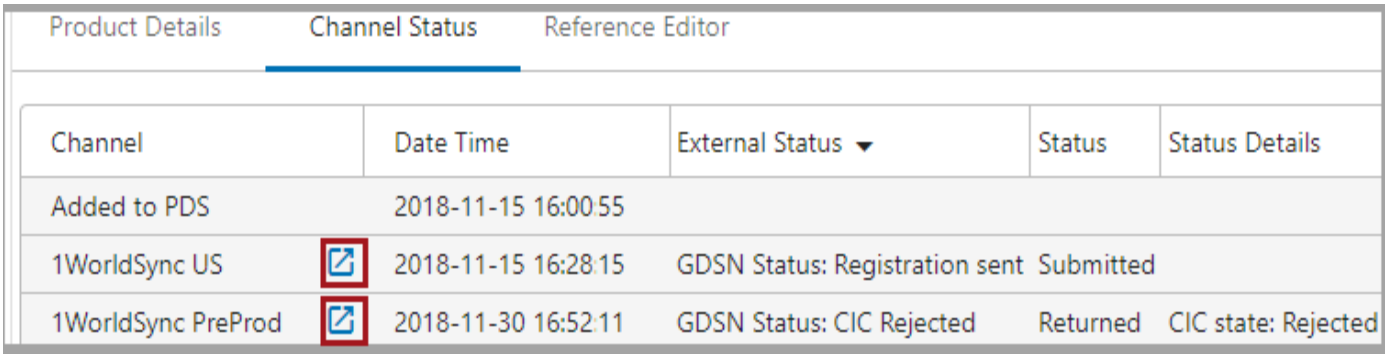
Note: Before entering a custom title, it is important to know the title parameter offers i18n key functionality. Presence of an i18n key indicates that the field can be included in extraction for external translation, and that a value has not been manually populated. Once a value has been manually populated within the designer, it is no longer available for extraction unless the manual value is removed and the configuration saved, closed, and then reopened. Customers planning to pursue or utilize Web UI translations should not overwrite i18n values manually in the designer, and should instead populate texts within the Web UI locale files on the application server. For more information, see the **Localization** topic within the **Administration Portal** documentation.



Note: Although the attribute 'Product Channel URL' can be added to the component, it is not necessary as the link for the URL is already included in the 'PDS Channel' column. It is recommended that the pre-configured attributes are left as-is for optimal performance.

PDS Channel Status Web UI Component Link

The PDS Channel Status Web UI component includes a link to products that have been submitted to a channel within the PDS system. Users that are also logged into their PDS system will be redirected to the relevant product in the context of the channel when clicking the provided link.



In the example above, the relevant product has been added to PDS, and within the PDS system, submitted to the 1WorldSync US and the 1WorldSyncPreProd channels. Clicking the URL link button located within the Channel row (the blue box with upward arrow, highlighted in the graphic) opens the product in the channel connected to that link.

For more information regarding the functionality of the PDS Channel Status Web UI component, see the next topic in this documentation section, **PDS Channel Status Monitoring in Web UI**.

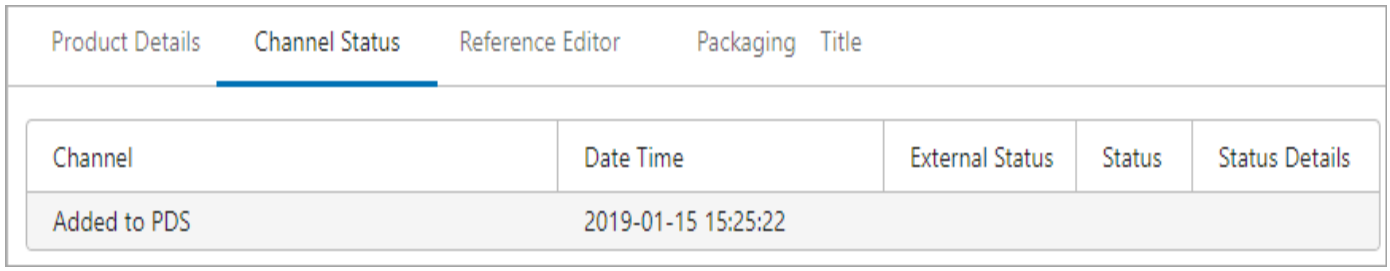
PDS Channel Status Monitoring in Web UI

As explained in the previous section of this documentation, **PDS Channel Status Web UI Component**, the PDS Channel Status Web UI component is used to track the status of products as they are submitted between STEP, PDS, and channels into which PDS sends data. The information displayed within the PDS Channel Status component is provided by the PDS Status Data Container in STEP Workbench.

The examples provided in this topic demonstrate how the PDS Channel Status component functions based on actions taken in regards to a product.

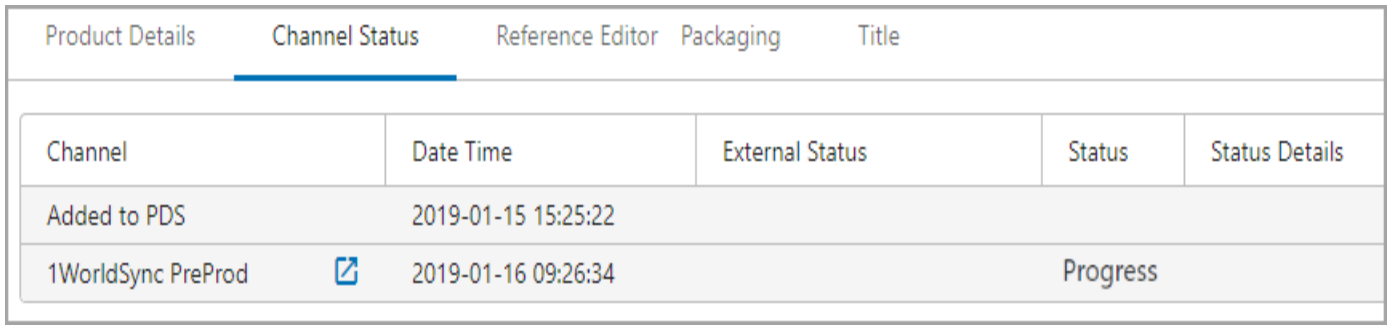
Initial Submission of a Product to PDS

In the image below, a product within STEP has been added to PDS. A new row within the PDS Channel Status component is created. This new row displays that the product has been added to PDS as well as the date and time it was added.



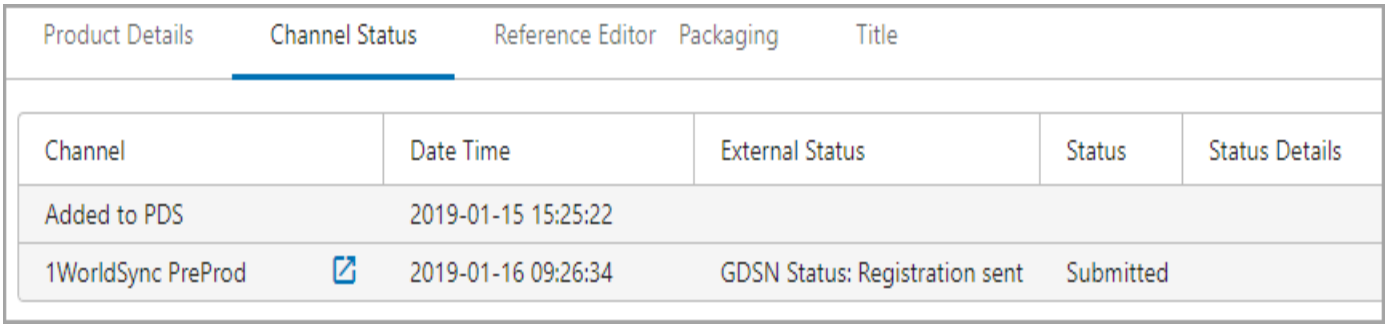
Addition of a Product to PDS Channel

This example illustrates what occurs in the PDS Channel Status component once a product is added to a channel within PDS. In this case, the channel name is 1WorldSync PreProd. A new row is added, which includes the name of the channel, a link to the product in PDS (the blue box with the upward arrow), the date and time the product was added to the channel, and a status message of 'Progress' within the Status field.

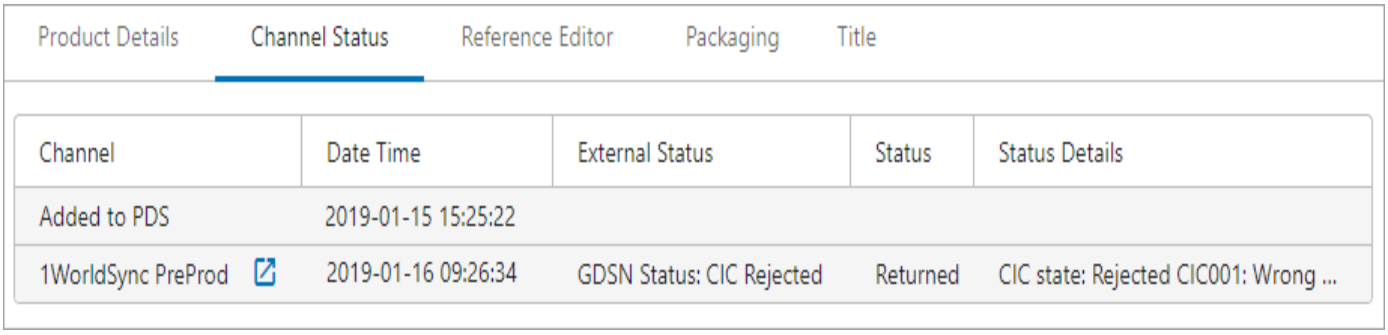


PDS Channel Status Changes

The following image shows a status change in the PDS Channel Status component. In this example, a product is submitted to a channel within PDS. No new rows are added, but the External Status text field now has additional information and the Status text field has been updated to 'Submitted' status.

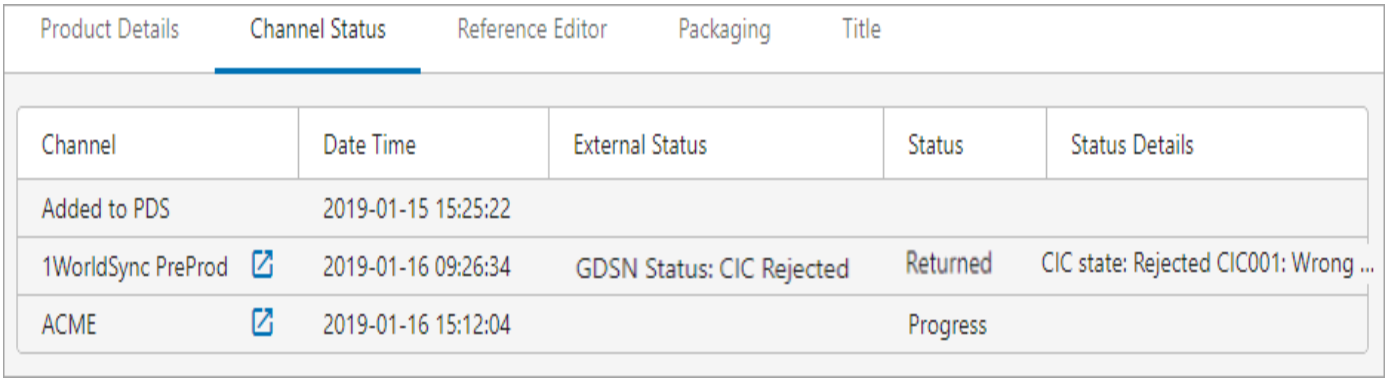


The next image shows another status change example. The product has been rejected and returned by the channel, and the Status Details text field includes pertinent information (in this case, a CIC message) explaining why the product was rejected.



Addition of a Product to an Additional PDS Channel

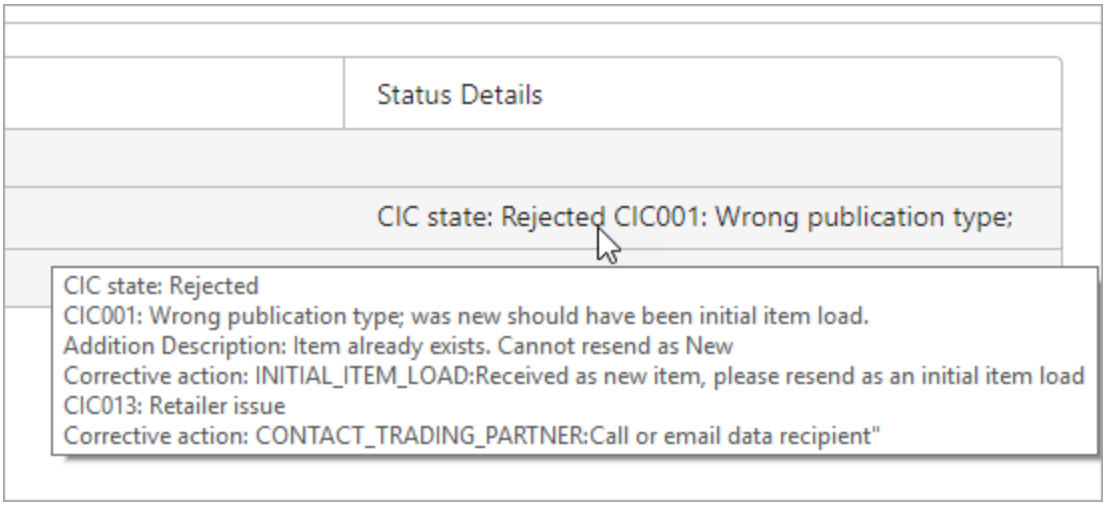
The below image shows how a new row is added to the PDS Channel Status display when a product is added to an additional PDS channel. In this example, the product was first added to the 1WorldSync PreProd channel, and a new row was created when it was added to the ACME channel.



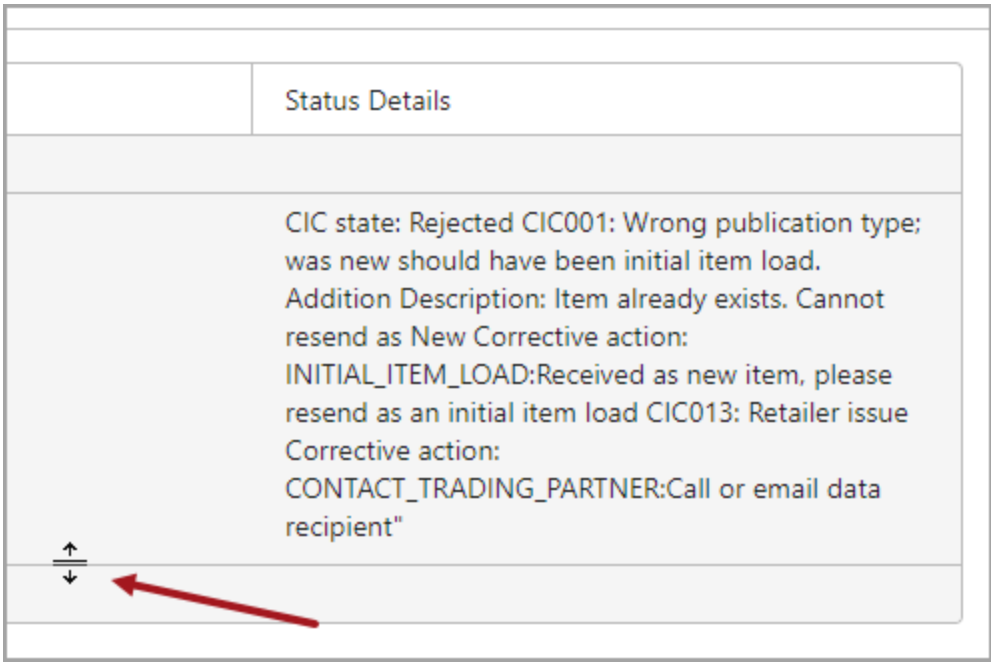
Truncated Status Messages

In the PDS Channel Status component, there will be instances (like the one shown directly above) where the full text of the message will not be displayed. To display this message in full, users can either:

- Hover over the truncated text to see the entire text in a popup:



- Drag the bottom rule line on the row until the row is large enough to view all text. Alternatively, the column can be dragged wider.



Catalog Item Confirmation (CIC) Messages

A Catalog Item Confirmation (CIC) message is a GDSN-specific message type that refers to communication between a data recipient and a data source, indicating the status of an item in regards to its standing with the recipient. CIC statuses are displayed within the External Status field and additional details are displayed within the Status Details field.

There are four possible CIC status responses:

Received: Item has been received by the recipient and has passed any GDSN validation rules.

Review: Item has not been stored in the recipient's system because of validation errors.

Rejected: Item will not be stored in the recipient's system. These items will not be sent anymore.

Synchronized: Item was successfully stored in the recipient's system.

Note: While the above information discusses CIC messages specifically, be aware that different PDS channels may have messages specific to their system and will not necessarily reflect the information within a CIC message.

1WorldSync Composite Data Configuration

Within the 1WorldSync (1WS) channel in PDS, some attributes require *composite* values. The value of a composite attribute in 1WS is composed of multiple values sent from STEP in a nested data structure.

To prepare these composite structures, data setup is required in STEP Workbench that involves configuration properties, metadata attributes, and product references.

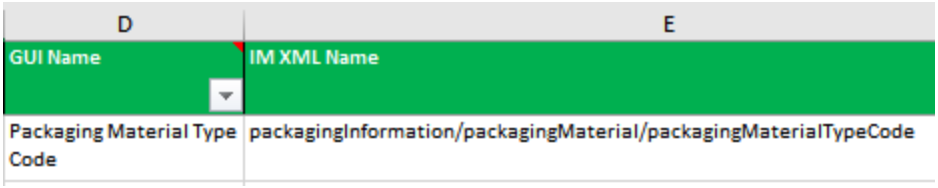
Note: In PDS terminology, a 'composite attribute' is an attribute that can only contain a 'nested' composite data structure as a value. It is not the same thing as a data container in STEP, which is also referred to as a 'composite attribute' when used on products.

Basic Overview of 1WorldSync Composite Attribute XML Attributes and File Paths

For values to be accepted by 1WS, they must conform to the XML file paths as defined by the 1WorldSync data model. 1WS XML file paths are composed of 1WS XML attribute IDs, and, as such, any composite attribute data sent from STEP to PDS for ingestion by 1WS must contain the IDs of the corresponding 1WS XML attributes.

A spreadsheet containing a full list of all 1WorldSync XML file paths and attributes, called the '1WorldSync Data Model and Code List,' is publicly available and downloadable from the 1WorldSync 'Documents & Downloads' website at http://ws.1worldsync.com/en/downloads/. Additional information about the 1WorldSync XML schema is the '1WorldSync Item Management Participant Dictionary and Valid Values' spreadsheet, which is available to 1WorldSync subscribers but not publicly available.

Screenshots from the '1WorldSync Item Management Participant Dictionary and Valid Values' spreadsheet are used throughout this documentation section to illustrate how STEP data corresponds to the 1WorldSync data structure. In the following screenshot, the 'GUI Name' column corresponds to the name of an attribute in 1WS, and the 'IM XML Name' column corresponds with the 1WS XML file path, which represents the 'nested' levels of data that must be extracted from STEP to populate the value of the 1WS attribute.



D	E
GUI Name	IM XML Name
Packaging Material Type Code	packagingInformation/packagingMaterial/packagingMaterialTypeCode

1WorldSync Composite Data Configurations in STEP Workbench

This documentation section contains the following topics, which describe the configurations required in STEP Workbench to deliver data from STEP in the XML data format required by 1WorldSync.

- **Configuration of PDS Composite Metadata Attribute and OIEP for 1WS**: Explains how to configure the 'PDS composite attribute ID' attribute and the PDS OIEP to deliver 1WS XML attribute ID information to PDS
- **Sample Data Model for PDS Composite Product Structure**: Provides an overview of a sample product structure designed to send nested product information to 1WS

- **Configuration of PDS Composite Attribute ID Values on Reference Types and Attributes**: Contains more detailed explanations of how 1WS XML attribute IDs correspond with attributes and references in STEP. This topic also includes an example of the XML format required by 1WorldSync.

Configuration of PDS Composite Metadata Attribute and OIEP for 1WS

1WS XML attribute IDs are stored in STEP as values within a 'PDS composite attribute ID' metadata attribute that is valid on the **reference types** that link products together and on the **attributes** whose values are included within the nested data structure sent to PDS.

The 1WS XML attribute IDs must be stored this way in STEP since it is not possible to map attributes within a composite structure in PDS. This is because 1WorldSync does not use the same 'references' concept that is used within STEP to tie products together. As such, 1WS XML attribute IDs are stored within this metadata attribute as a *method* of mapping STEP attributes to corresponding 1WS XML attributes.

Before a nested data structure can be sent from STEP to PDS, some initial manual configurations must be performed:

- A 'PDS composite attribute ID' attribute must be created and configured, then made valid for all reference types and attributes
- The Advanced STEPXML Template in the PDS OIEP must be modified to specify the reference types that will contain values for this attribute

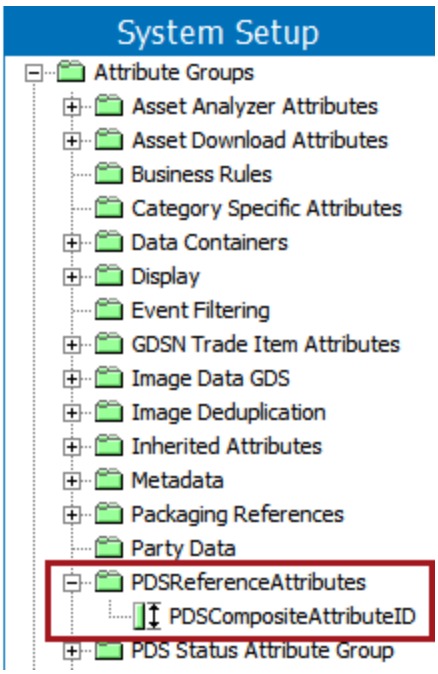
Details on each configuration are explained in the following subsections.

'PDS Composite Attribute ID' Attribute Configuration

The following configuration steps must be performed to set up the 'PDS composite attribute ID' attribute:

- First, the attribute must be created manually, since it is not included with the 'PDS Status Attribute Group' attributes that are created upon activation of the PDS component on your STEP system. For more information on the PDS Status Attribute Group attributes, see the **PDS Channel Status Monitoring** section of this documentation.

  The 'PDS composite attribute ID' attribute can be given any ID or name and can be created anywhere in your system. In this example, the name and ID of the attribute is 'PDSCompositeAttributeID' and has been created within an attribute group named 'PDSReferenceAttributes.'



- The ID of this attribute must be added to the **PDSDelivery.CompositeAttributeID=[attribute_id]** property in the sharedconfig.properties file on your STEP application server. For example:

  ```
  PDSDelivery.CompositeAttributeID=PDSCompositeAttributeID
  ```

- The attribute must be made valid on the **Attribute** (stibo.normalattribute) object type and the **Reference-Type** (Reference-Type user-type root) object type, located in System Setup under Object Types & Structures > Basic Object Types.

  Note: The 'PDS composite attribute ID' attribute is made valid on the reference type *object*, not on the reference type *link* between the source and target product.

  For information on how to make an attribute valid on the Attribute object type, see the **Attribute Metadata on Attributes** topic in the **Attributes** section of the **System Setup** / **Super User Guide** documentation. The steps for making an attribute valid on the Reference-Type object are the same as those used for the Attribute object type.

Configuration of PDS OIEP Advanced STEPXML Template

Next, the IDs of the **reference types** that will contain values for the 'PDS composite attribute ID' metadata attribute must be added to the default Advanced STEPXML template within the PDS OIEP.

1. Edit the PDS OIEP format template as follows to determine the layout of the data sent to PDS:
   - Open the Output Templates flipper and click into the Format parameter to display an ellipsis button (...).
   - Click the ellipsis button (...) to display the 'Select format' dialog.

- Follow the instructions within the commented section (indicated by !-- and -- tags) to modify the default Advanced STEPXML template. The sample 'product cross reference IDs' should be replaced with your own 'product cross reference IDs' to export your reference metadata to PDS.
- Click the **OK** button to update the output template.

For more information, see the **Configure the Format** section of the **OIEP - Event-Based - Output Templates Flipper** topic in the **Data Exchange** documentation.

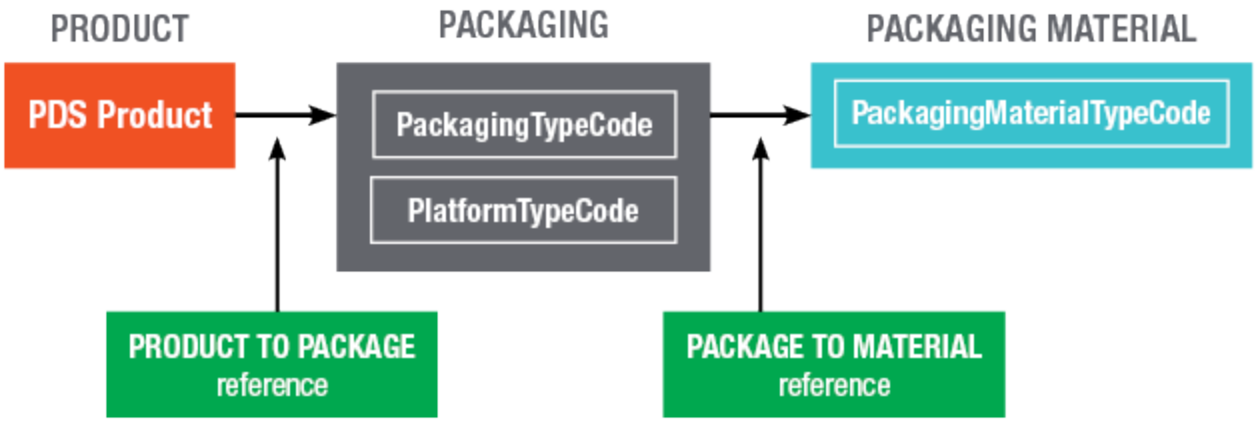
3. Edit the PDS OIEP triggering definitions as follows to determine the STEP data activity that causes events to be sent to PDS. At a minimum, one Object Type trigger must be set before the OIEP can be enabled.

   On the Event Triggering Definitions tab, set triggers for the product reference types that include the metadata attribute defined earlier. For more information, see the **OIEP - Event-Based - Event Triggering Definitions Tab** topic in the **Data Exchange** documentation.

4. Enable and invoke the endpoint (manually or on schedule) as described in the **Running an Outbound Integration Endpoint** topic of the **Data Exchange** documentation.

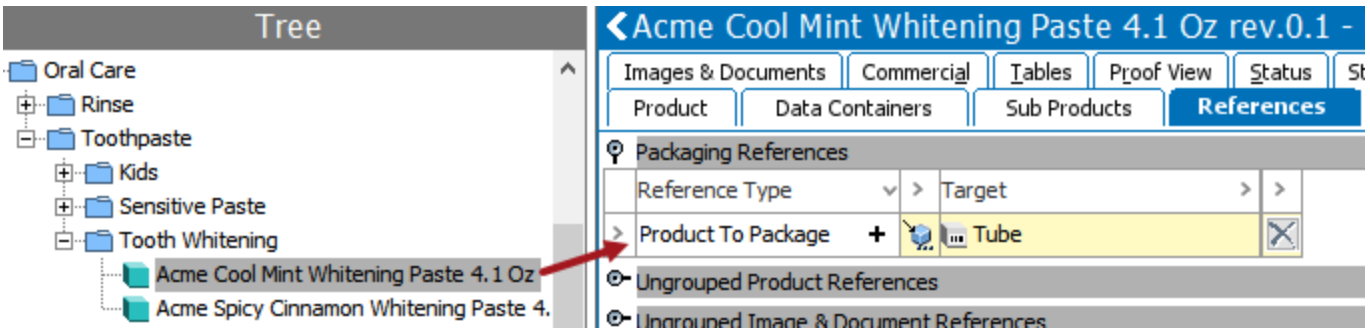
Sample Data Model for PDS Composite Product Structure

A sample three-level data model composed of three different product object types and two reference types is used in this documentation to illustrate how 'nested' information in STEP is configured for export to 1WS. An explanation of the objects, references, and attributes shown in this diagram is provided in the bullet list below the image.

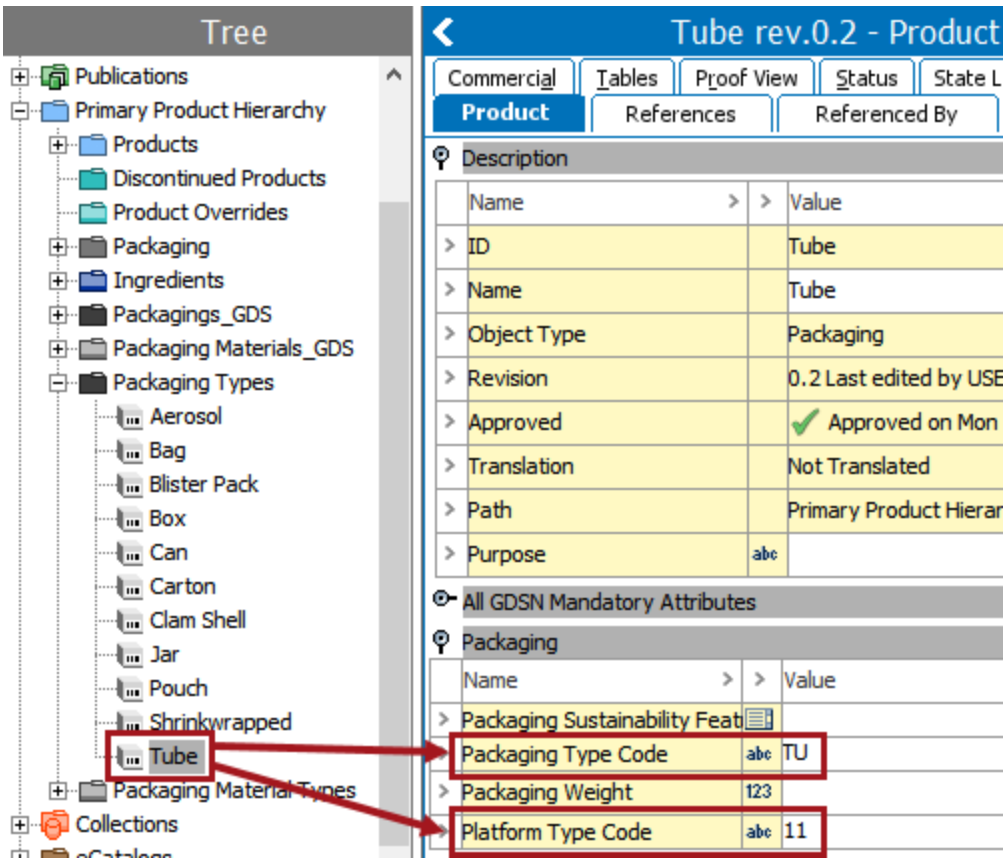


- **PDS Product:** In this example, the PDS product is named 'Acme Cool Mint Whitening Paste 4.1 Oz.' This product is considered *Level 1* in the composite data structure sent to PDS.

- **Product to Package reference:** The Acme toothpaste product references the 'Tube' packaging product object using the Product to Package (ProductToPackage) product reference type.

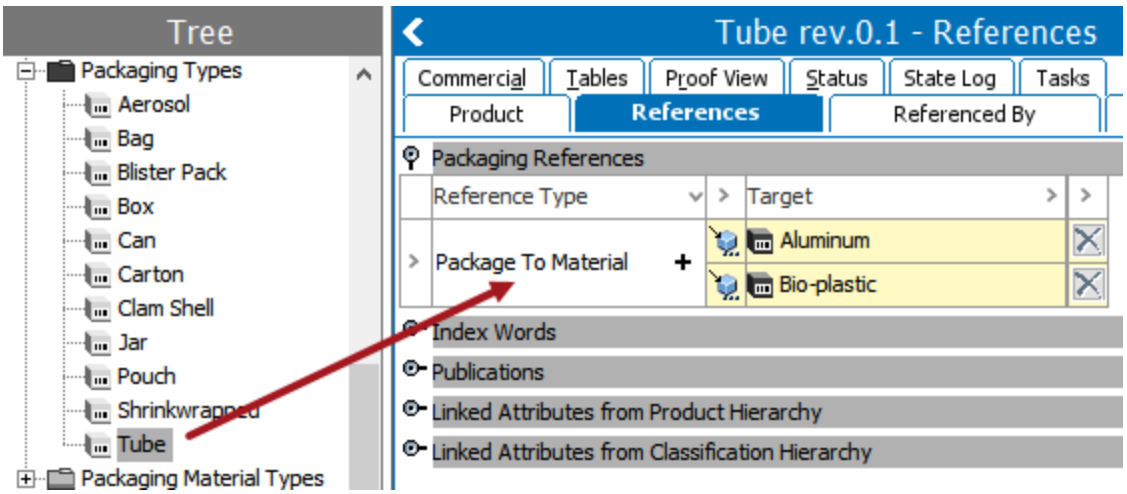


- **Packaging:** The 'Tube' product contains values for two attributes, Packaging Type Code and Platform Type Code. The packaging product is considered *Level 2* in the composite data structure, and these values will be sent to PDS within this level of the composite attribute value.

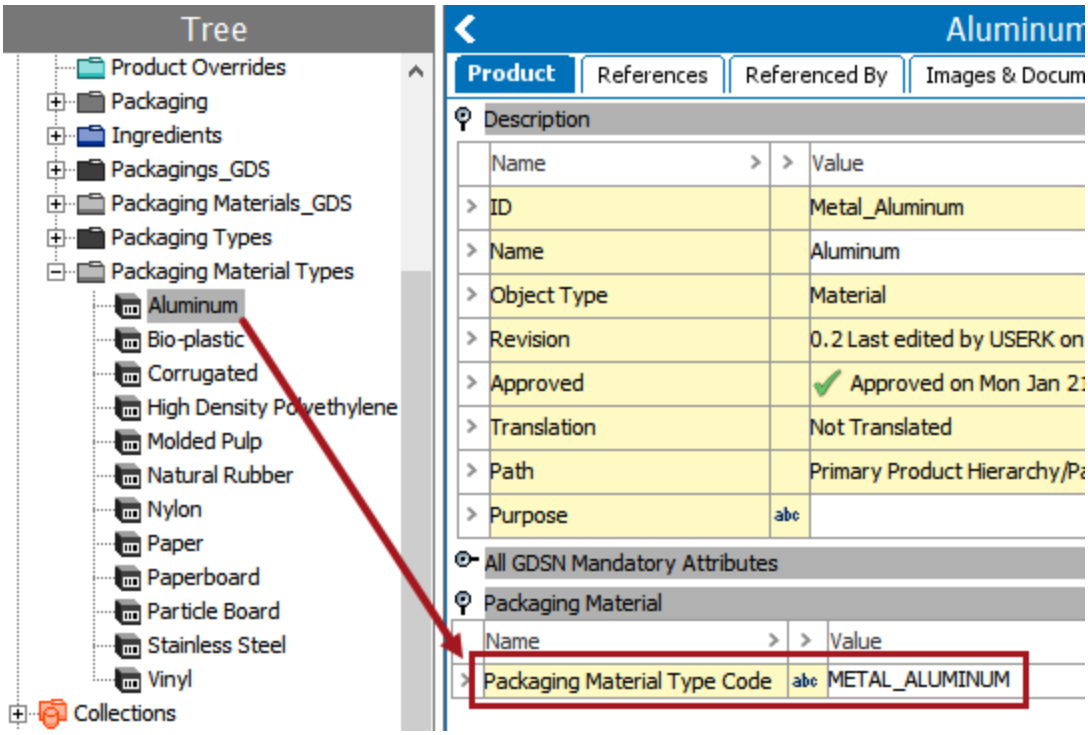


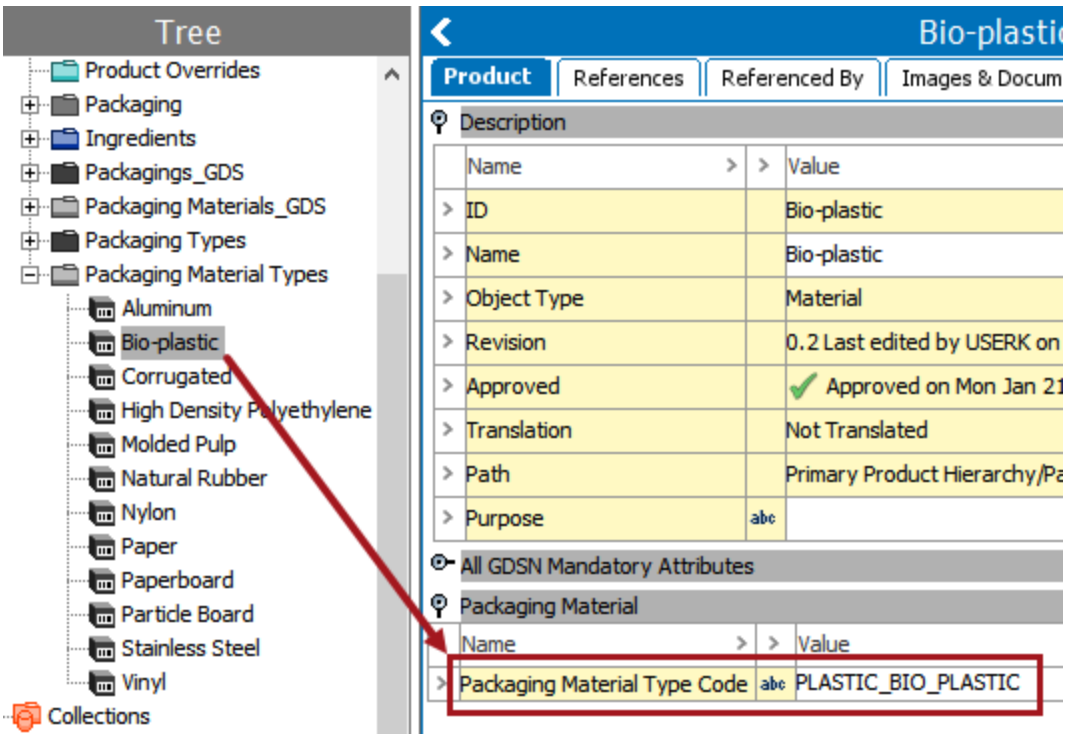
Note: In a real-world scenario, there would be numerous additional packaging attributes; however, only two are shown to illustrate the basic functionality.

- **Package to Material reference:** The 'Tube' product references two packaging materials product objects, 'Aluminum' and 'Bio-plastic,' using the Package to Material (PackageToMaterial) product reference type.



- **Packaging Material:** The 'Aluminum' and 'Bio-plastic' product objects represent the packaging materials that compose the toothpaste tube. They contain values for the Packaging Material Type Code attribute, which will be sent to PDS as part of *Level 3* of the composite data structure.





The next topic in this documentation, **Configuring PDS Composite Attribute ID Values on Reference Types and Attributes**, delves into more detail on how 1WorldSync XML attribute IDs are applied to and extracted from this sample hierarchy.

Configuration of PDS Composite Attribute ID Values on Reference Types and Attributes

This topic details an example setup of how the 'PDS composite attribute ID' metadata attribute should be populated on the reference types and attributes within a sample product structure. It continues with the same three-level product hierarchy detailed in the previous topic, **Sample Data Model for PDS Composite Product Structure**, and further explains the use of the PDS Composite Attribute ID attribute, introduced in the **Configuration of PDS Composite Metadata Attribute and OIEP for 1WS** topic.

Sample 1WS XML Snippet

The values contained within our sample product hierarchy can be ingested as a composite attribute value by 1WorldSync using an XML file with a similar structure to the sample below.

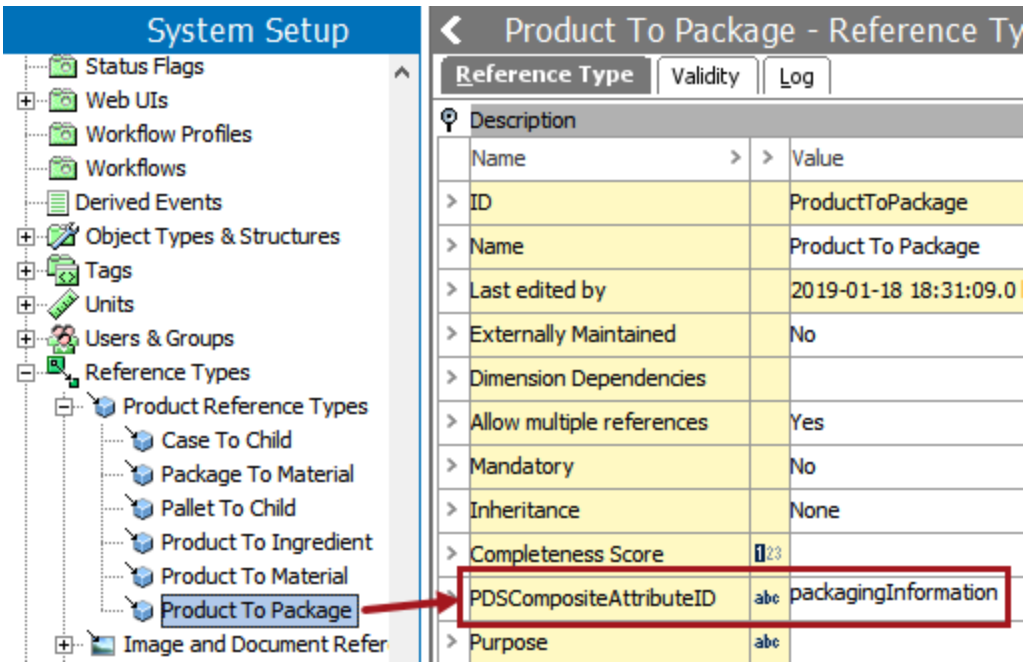
Note: This is not an entire piece of 1WS XML code, but rather a short snippet that represents the format of the composite data that would be extracted from STEP using the sample product hierarchy in this topic.

```
<attrGroupMany name="packagingInformation">
  <row>
    <attr name="packagingTypeCode">TU</attr>
    <attr name="platformTypeCode">11</attr>
    <attrGroupMany name="packagingMaterial">
      <row>
        <attr name="packagingMaterialTypeCode">METAL_ALUMINUM</attr>
      </row>
    <attrGroupMany name="packagingMaterial">
      <row>
        <attr name="packagingMaterialTypeCode">PLASTIC_BIO_PLASTIC</attr>
      </row>
    </attrGroupMany>
  </row>
</attrGroupMany>
```

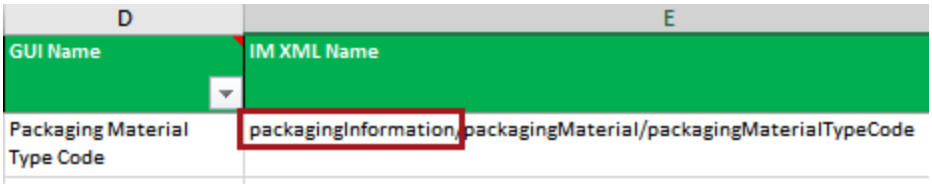
PDS Composite Attribute ID Attribute Values on References

Once the 'PDSCompositeAttributeID' attribute has been made valid for the **Reference-Type** (Reference-Type user-type root) object type in System Setup, it displays as a Description attribute on all reference types.

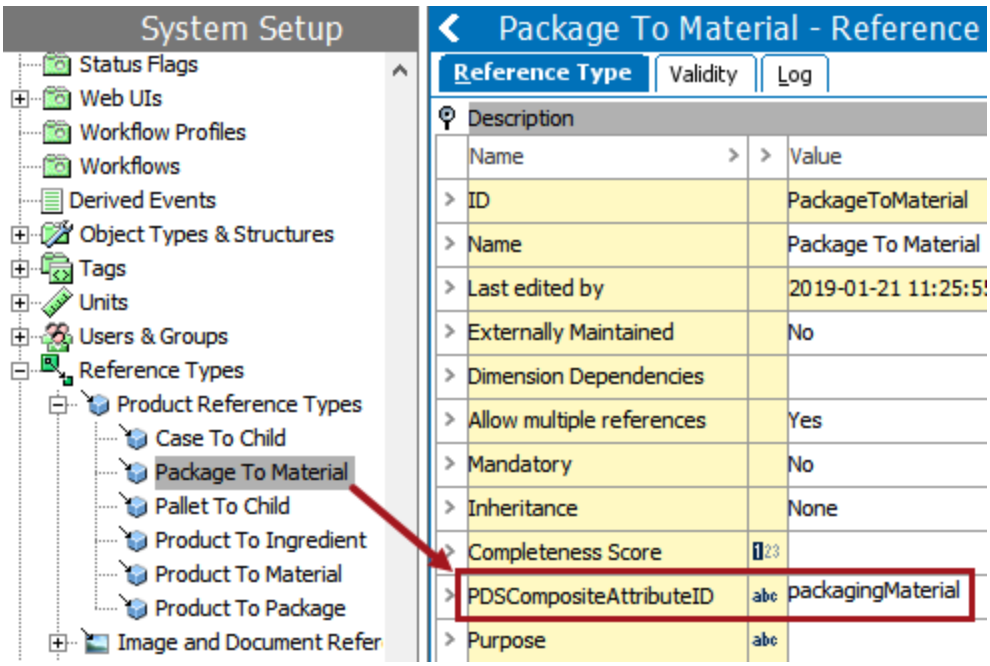
In our sample product hierarchy, the value for PDSCompositeAttributeID on the 'Product to Package' reference is 'packagingInformation,' as shown in the screenshot below.



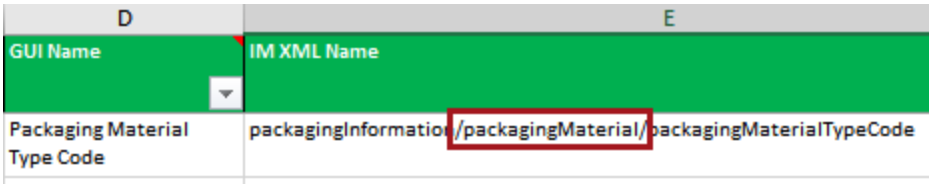
'packagingInformation' is the first XML attribute value in the above XML snippet, contained within the first 'attrGroupMany' tag. It corresponds with the first value in the 1WS XML file path shown in the below screenshot, which was taken from the '1WorldSync Item Management - Participant Dictionary and Valid Values' spreadsheet. For more information on how to obtain this spreadsheet, see the introductory topic in this documentation section, **1WorldSync Composite Data Configuration**.



The value for PDSCompositeAttributeID on the 'Package to Material' reference is 'packagingMaterial.'



packagingMaterial corresponds with the second value within the 1WS XML file path.



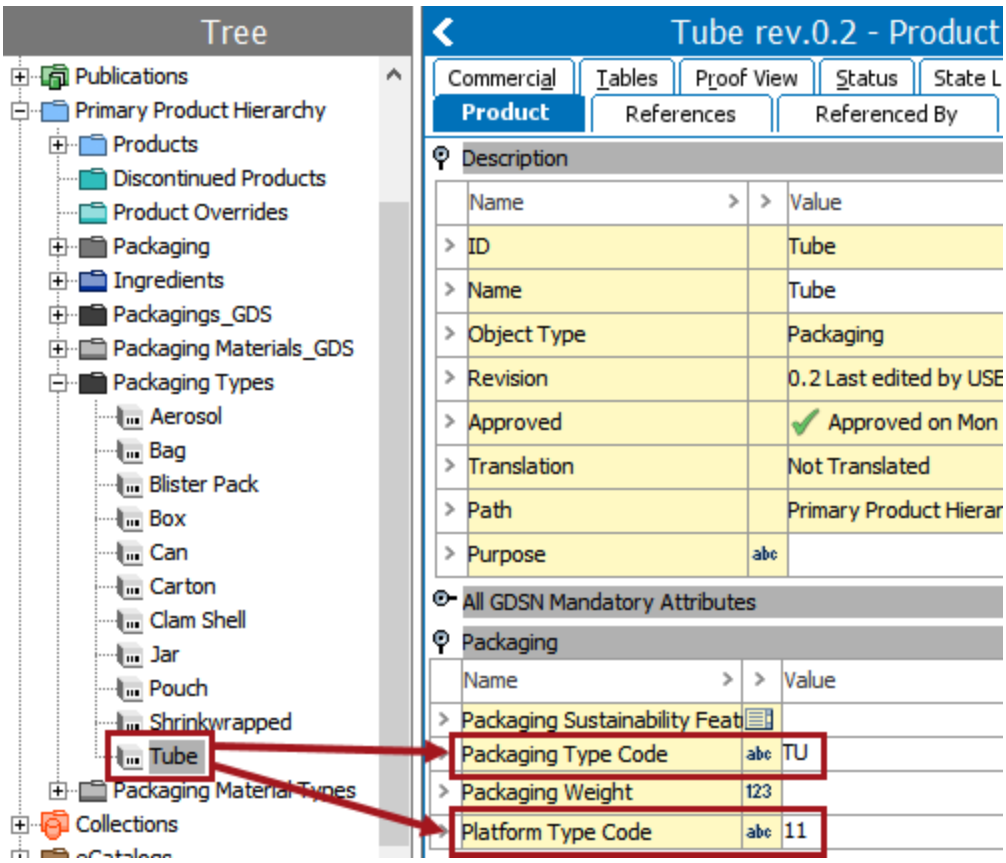
PDS Composite Attribute ID Attribute Values on Attributes

Once the 'PDSCompositeAttributeID' attribute has been made valid for the **Attribute** (stibo.normalattribute) object type in System Setup, it displays as a Description attribute on all attributes.

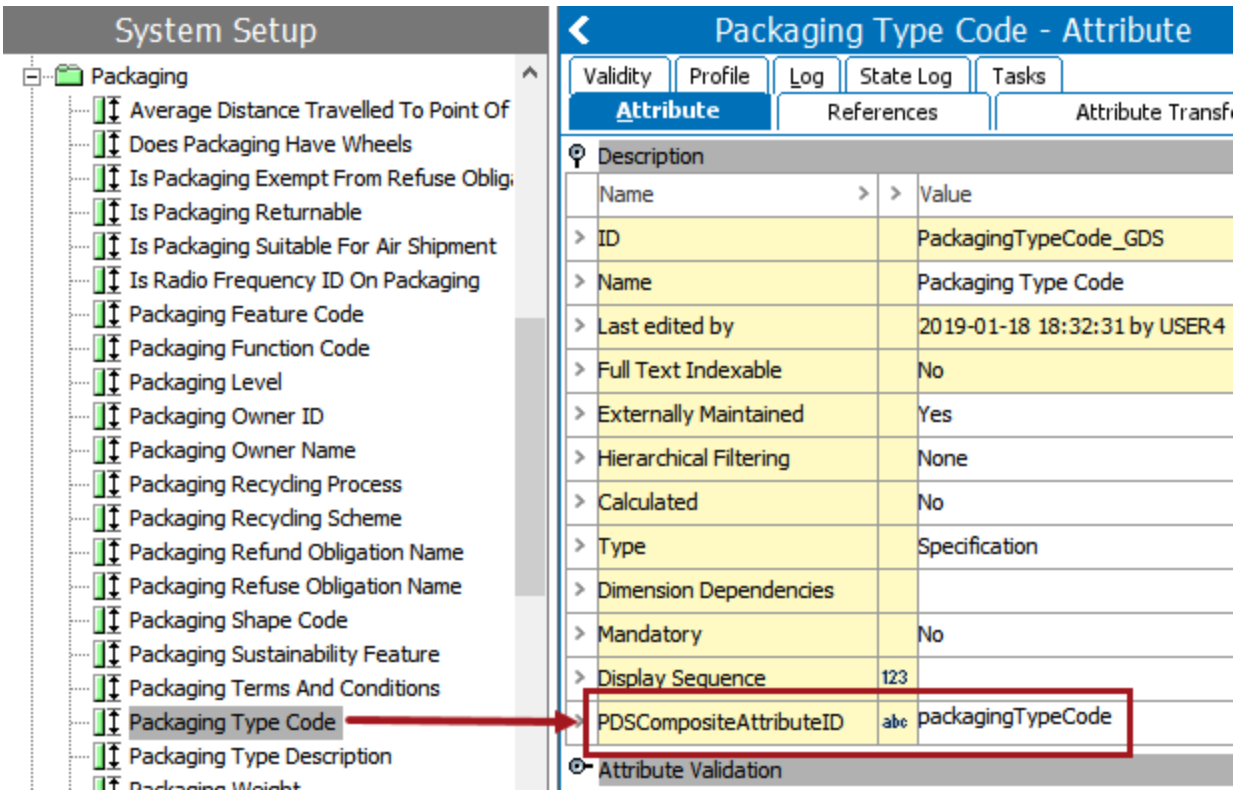
Within our sample product structure, attribute values are being sent from below the 'packagingInformation' and 'packagingMaterial' levels of the structure.

Packaging Information Attribute Values

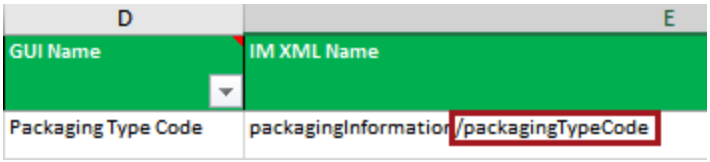
The attribute values for the two attributes on the 'Tube' product—'Packaging Type Code' and 'Platform Type Code'—are being sent to PDS as nested data inside of the 'packagingInformation' attribute.



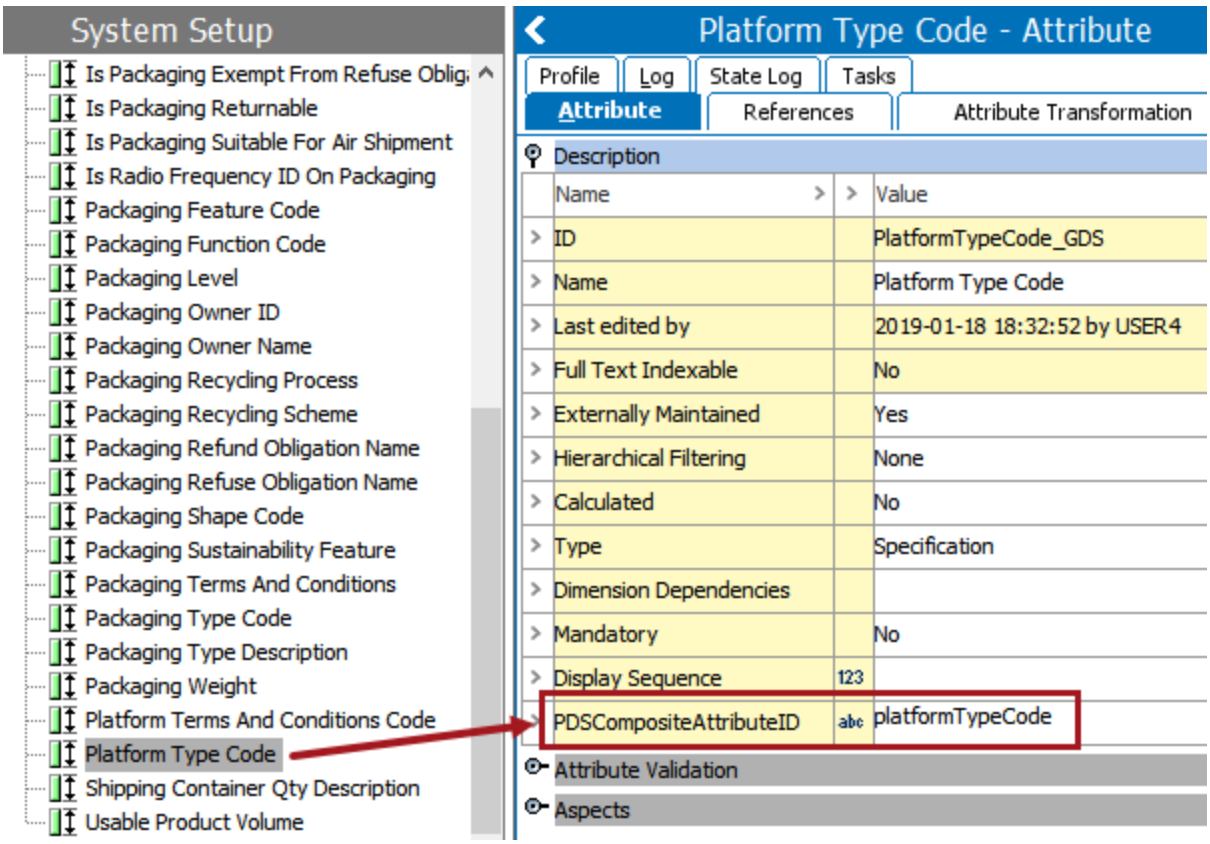
- **Packaging Type Code:** The value of PDSCompositeAttributeID on this attribute is 'packagingTypeCode.'



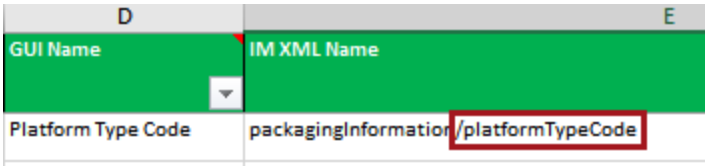
'packagingTypeCode' is included within the 1WS XML file path after 'packagingInformation,' as shown below.



- **Platform Type Code:** The value of PDSCompositeAttributeID on this attribute is 'platformTypeCode.'



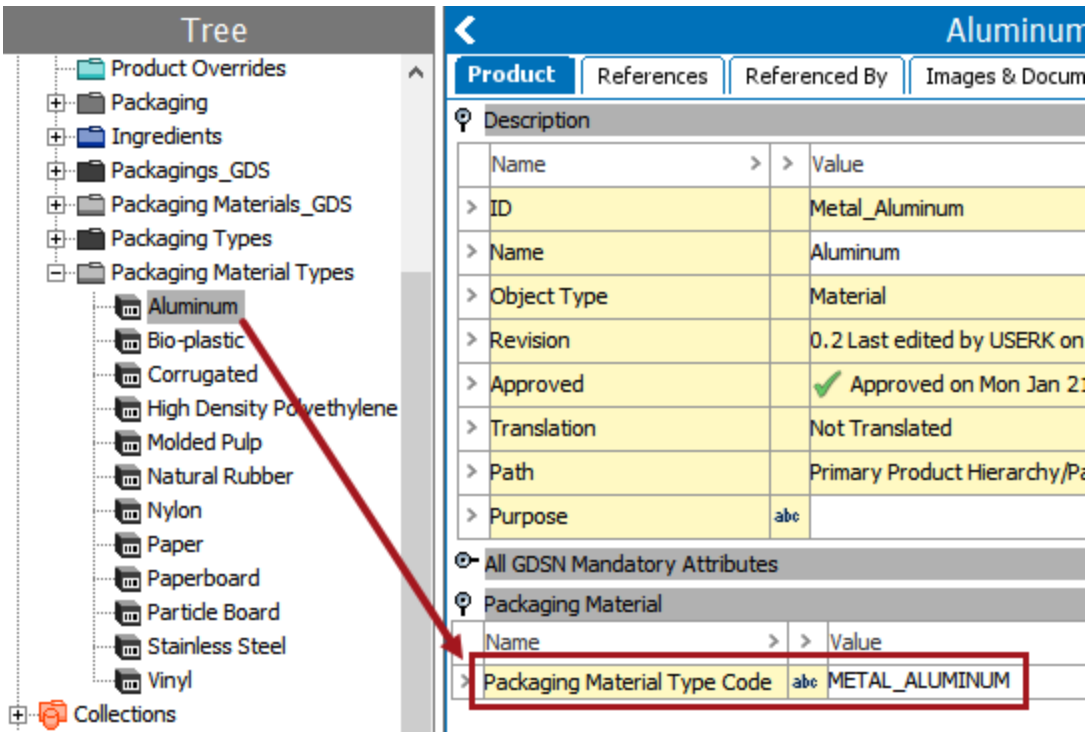
'platformTypeCode ' is included within the 1WS XML file path after 'packagingInformation,' on the same level as the aforementioned 'packagingTypeCode' attribute.



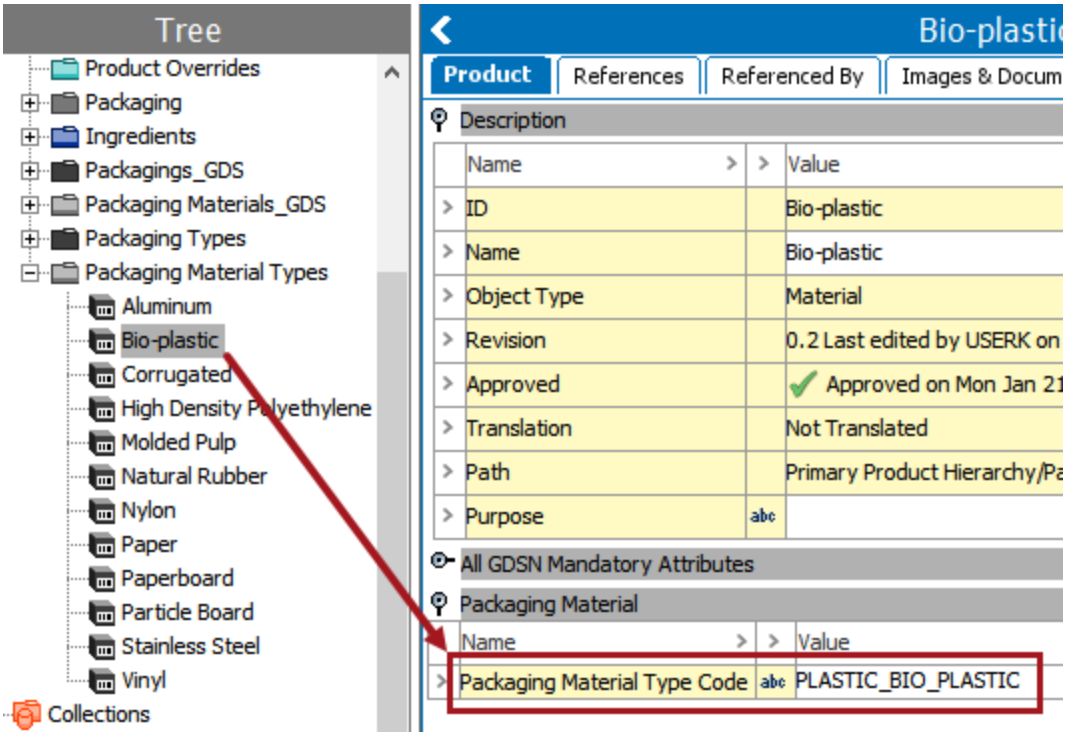
Packaging Material Attribute Values

The values from one attribute, **Packaging Material Type Code**, display within the nested 'packagingMaterial' level of the data structure. Since there are two packaging material products contained within our sample product structure, the 'packagingMaterialTypeCode' attribute appears twice in the sample XML snippet.

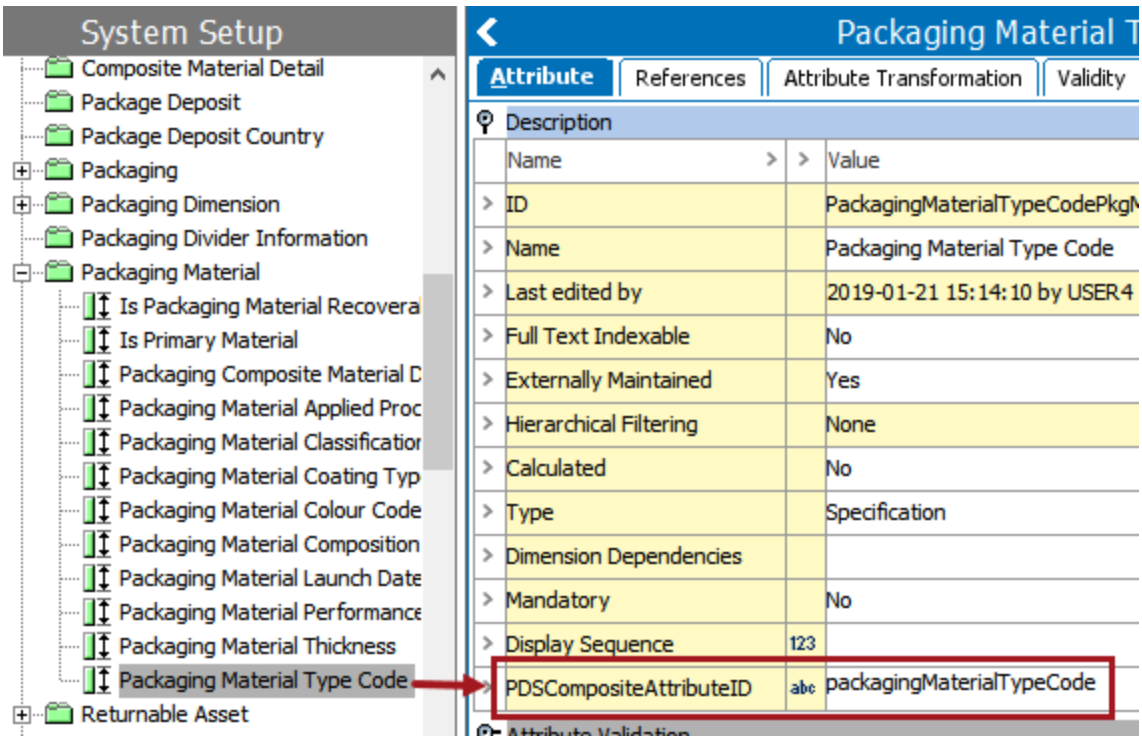
The value of 'Packaging Material Type Code' for Aluminum is METAL_ALUMINUM:



The value of 'Packaging Material Type Code' for Bio-plastic is PLASTIC_BIO_PLASTIC:



The value of PDSCompositeAttributeID On the Packaging Material Type Code attribute itself is 'packagingMaterialTypeCode':



'packagingMaterialTypeCode ' is included within the 1WS XML file path after 'packagingMaterial.'

D	E
GUI Name	IM XML Name
Packaging Material Type Code	packagingInformation/packagingMaterial.packagingMaterialTypeCode