

PRODUCT LIFECYCLE MANAGEMENT

PLM for Admins

Release 9.2-MP3 (October 25, 2019)

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PLM for Admins

Welcome to PLM where concepts can be captured, designed, created, and managed all the way to the product's retirement. PLM allows for quick adaptability to any changes that should arise during the production process, ensuring that timely responses can be made.

The following documentation describes the setup needed in workbench and Web UI. If the steps are not followed (including naming conventions, except where notated), then PLM will not function as expected.

Users of PLM will not see the workbench, and they will not see the designer in Web UI, but will only interact with PLM through the web. Proper workbench and Web UI setup is vital for the user to have a seamless experience while working.

Important: It is recommended that admin users read through the **PLM for Users** documentation before starting setup. It is important to understand how PLM works prior to beginning any configuration. Additionally, it is important to be familiar with standard STEP functionality.

Context, Action Sets, and User Groups

Setting up the proper context, action sets, and user groups are all important for helping to maintain a properly functioning system. Through context, data can be organized, and with action sets and user groups, it is possible to maintain who has access to what data. It is important that before any configuration for PLM takes place, that the following context and any needed user groups are created.

Context

A context is a specific filter placed on data in the workbench which groups a set of dimension points, allowing data to vary based on context. Each context is a combination of different dimensions, such as language and country. Only one dimension point from each dimension can be associated with a specific context. While there can be multiple contexts in workbench, PLM will only operate in the context that is specified in the uploaded configuration document.

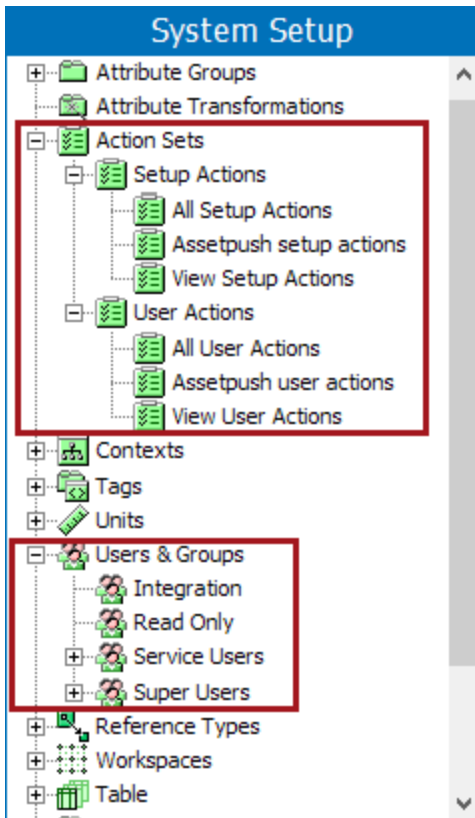
Initially, the context ID in the configuration documents is labeled 'Context1.' If this needs to be changed, notify your implementation team.

ID	Name	Purpose	Locale	Language	Country
> Context1	English US		English - en	English	USA
Add New Context					

To learn more about contexts and how to set one up, see the **Contexts** topic in the **System Setup / Super User Guide** documentation.

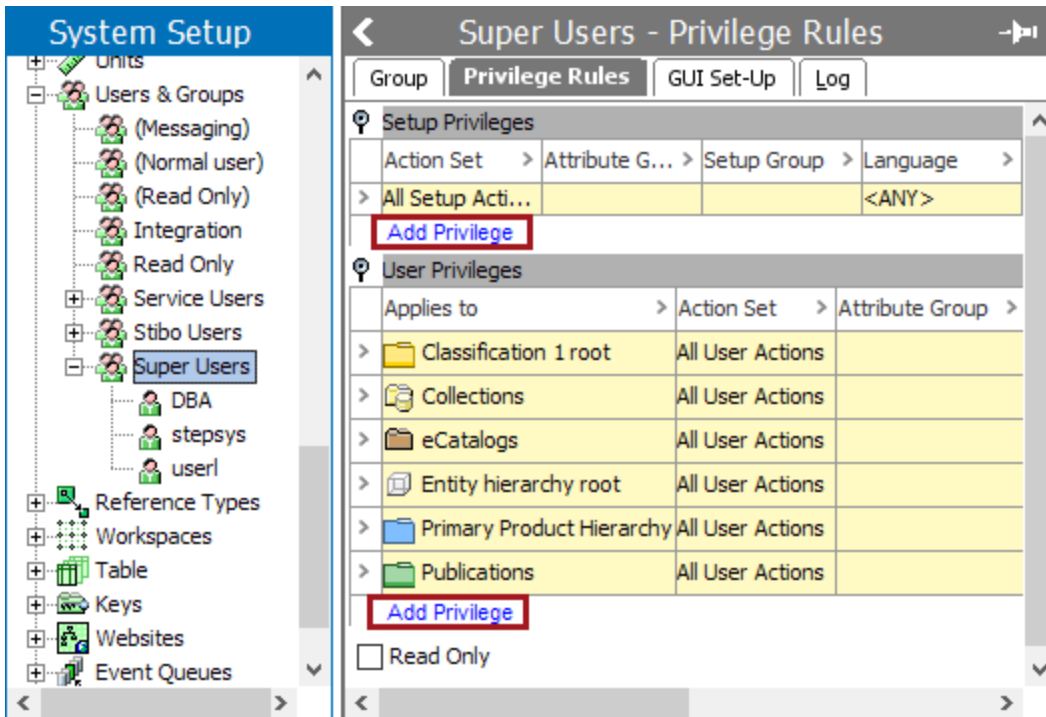
Action Sets

Action Sets are used to define the actions or privileges a user or group of users are permitted to perform in STEP and PLM. Actions are grouped into setup and user Action Sets and can be tied to user group privileges for the user groups under the Users & Groups setup area. For more on how to set up proper action sets and apply privileges, see the **Action Sets** topic in the **System Setup / Super User Guide** documentation.



User Groups

In the Users & Groups hierarchy, you can create STEP roles and authorizations to determine who can access the STEP system and what they are able to do or not do as a user in the workbench, Web UI, or in PLM. Well formed action sets allow administrators to create needed user groups with proper settings.



Make sure that each user in the user group has a valid email address. Various notifications are often sent to the user through their email address. One such notification would be that if a user is using storyboards, they will receive an email each time they are mentioned in a comment on a storyboard. The email notification to the mentioned user will include the message and the storyboard URL so that the individual can quickly navigate to that storyboard and read the comments thread.

Laura Torri - User

User | GUI Set-Up | System Settings | Log

Description

Name	Value
ID	LAURATORRI
Name	Laura Torri
E-Mail	lati@stibosystems.com
Force Authentication via S...	<input type="checkbox"/>
User Information	abc

Groups

- Stibo Users

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<http://tom.scloud.stibo.com:80/spireplm/board/board-102986/content>

If there is no email in place under the description flipper on their profile, they will not receive these notifications.

For more information on users and groups see the **Users and Groups** topic in the **System Setup / Super User Guide** documentation.

Line Plan and Schedules

Line planning is a discipline for the development of products. Line plan managers closely manage the development of line plans to ensure that they focus on the right products, meet key deadlines, and achieve goals set for cost and profit margins. Schedules are a way to manage the deadlines and goals set in the line plan.

When making a product for distribution, it is important to have a clear line plan and schedule. PLM assists managers in making decisions about whether or not a product should be produced once market analysis has been completed, and assists managers in making sure that a product goes to market on time. It also aids in identifying which tasks are taking longer than the planned duration, enabling managers to focus on process improvements.

← **Christmas 2018**

Line Plan Business Cat... Apparel

Line Plan Year: 2018

Line Plan Season: Holiday

Line Plan Start Date: 2018-03-06

Schedule Deadline: 2018-04-06

Line Plan Status: In Progress

Edit Line Plan

	707 / 240000	623 / 120			
	Item Quantity	Item Unit	-	+	Actions
<div style="display: flex; align-items: flex-start;"> ^ <div> <p>Men</p> <p style="margin-left: 20px;">Jackets (9 styles)</p> <p style="margin-left: 20px;">Pants (2 styles)</p> </div> </div>	707	623	-	+	<div style="border: 1px solid red; padding: 2px; display: inline-block;">✓</div>

Christmas 2018

- Men - Jackets →
- Men - Pants →

	2018				
		JAN	FEB	MAR	APR
<div style="display: flex; align-items: center;"> ^ <div> <p>Men - Jackets</p> </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Design 0/9</div> <div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Samples 0/9</div> <div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Delivery 0/9</div> </div>	<div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Design 3/9</div>	<div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Design 0/9</div>	<div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Design 0/9</div>	<div style="background-color: #8e44ad; color: white; padding: 5px; border-radius: 3px;">Design 0/9</div>
<div style="display: flex; align-items: center;"> v <div> <p>Men - Pants</p> </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Design Brief 0/1</div> <div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Design 0/1</div> <div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Samples 0/1</div> <div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Delivery 0/1</div> </div>	<div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Design Brief 0/1</div>	<div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Design 0/1</div>	<div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Samples 0/1</div>	<div style="background-color: #e74c3c; color: white; padding: 5px; border-radius: 3px;">Delivery 0/1</div>

For more information on how to setup line plans and schedules, see the following documentation.

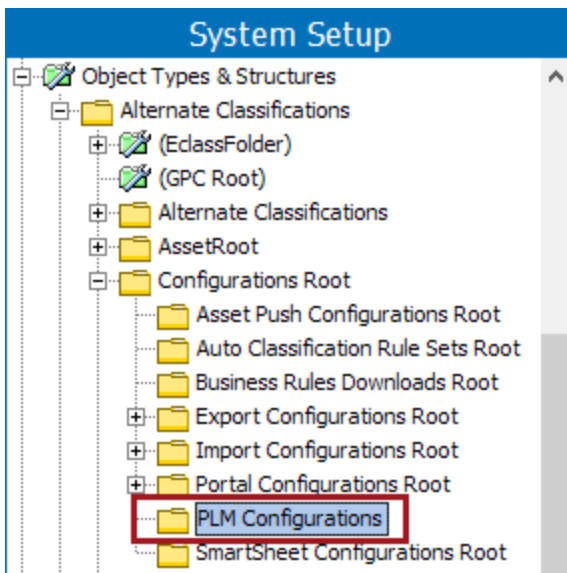
- [Setting Up Line Plans in Workbench](#)
- [Setting Up Schedules in Workbench](#)

Configuration Setup for Line Plans and Schedules

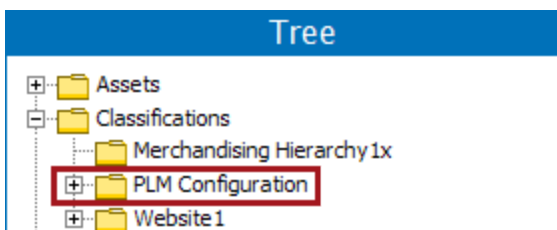
The following steps will upload the configuration file that the line plans and schedules need to function properly, if it has not already been uploaded to your system.

Important: Talk to your implementation team to discuss a configuration strategy before uploading the provided configuration files and configuring anything else for PLM line plans or PLM schedules. Proper ID alignment needs to be established when uploading this configuration file and when configuring any other line plan or schedule objects in workbench. If there is improper alignment with IDs, then the line plan or schedule will fail.

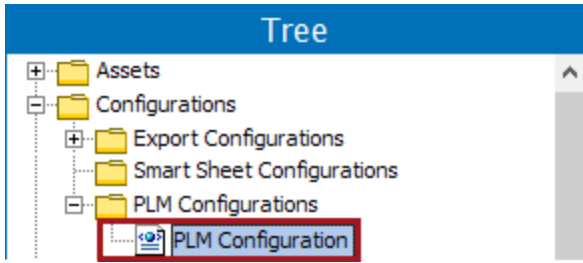
1. In **System Setup** > Object Types & Structures > Alternate Classifications > Configurations Root, create a folder to contain all PLM configurations.



2. Next, in **Tree**, below the classifications node, create a new classification folder to contain the PLM Configuration.



3. In this folder, import the PLM configuration file using the file name as the STEP ID. Make sure that all changes that are needed to be made to the PLM configuration file are made before the file is uploaded. This includes changing any IDs necessary; otherwise, the line plan or schedule will not work properly.



Note: Depending on your implementation team, these steps may or may not be handled by them. If the implementation team does not handle the steps above, they will be the ones to provide the configuration files.

Setting Up Line Plans in Workbench

For line plans to work correctly in the Web UI, proper setup needs to happen in the workbench, and the PLM configuration file needs to be uploaded. If the PLM configuration file has not already been uploaded to your system, see the **Configuration Setup for Line Plans and Schedules** topic in this documentation.

Read the following topics on how to set up line plans properly in the workbench:

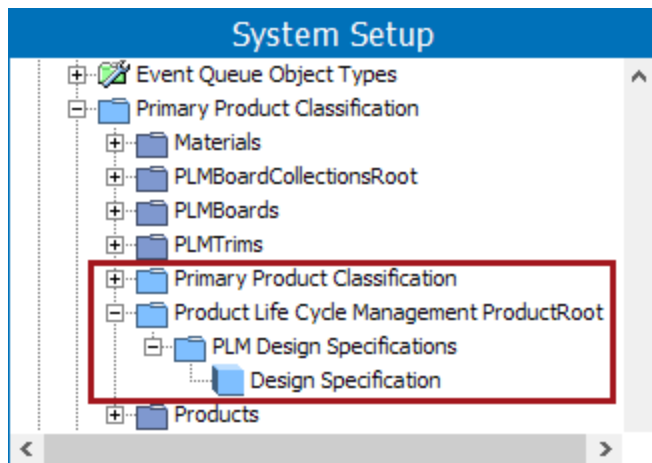
- [Creating Line Plan Object Types](#)
- [References Needed for Line Plans](#)
- [Setting Up Attributes for Line Plans](#)

Creating Line Plan Object Types

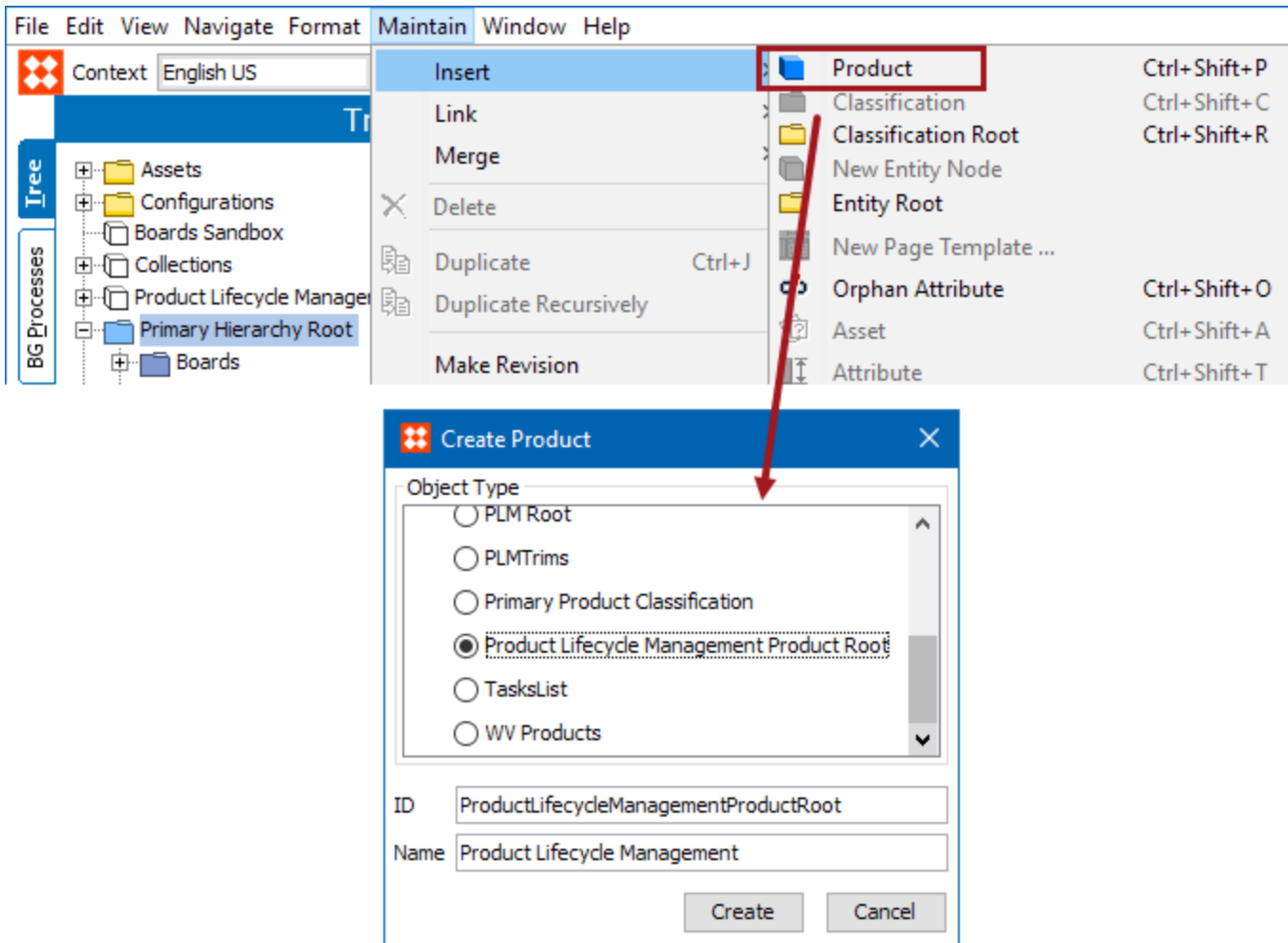
There are a number of object types necessary for line plans to function properly in Web UI. The following sections describe what Primary Product and Alternative Classifications object types are needed.

Creating Primary Product Classification Object Types

Design specifications live in the Primary Product Classification object type structures. A simple hierarchy structure with one parent needs to be created to house the design specifications uploaded from the Web UI. For more on how to create design specifications in Web UI, see the **Creating Line Plans** topic.



After the structure had been created in System Setup, it needs to be added to Tree. In Tree, click on a Primary Product Classification folder and, go to Maintain > Insert > Product > select the object type to hold the design specifications.

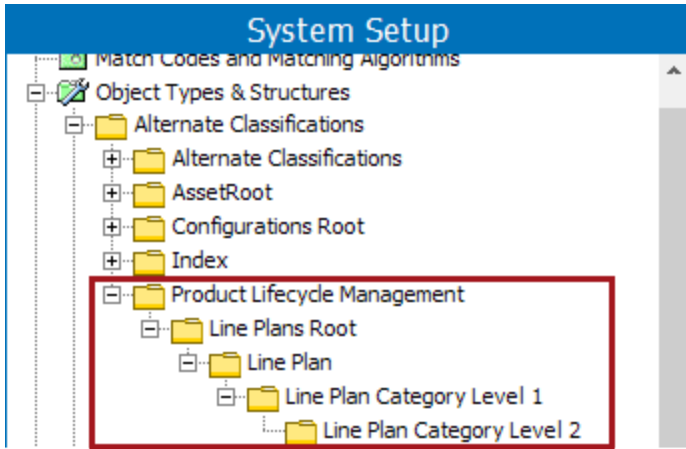


Once the hierarchy structure for design specifications has been created and added to Tree, a reference needs to be created between the line plan and design specifications. See the **References Needed for Line Plans** topic in this documentation.

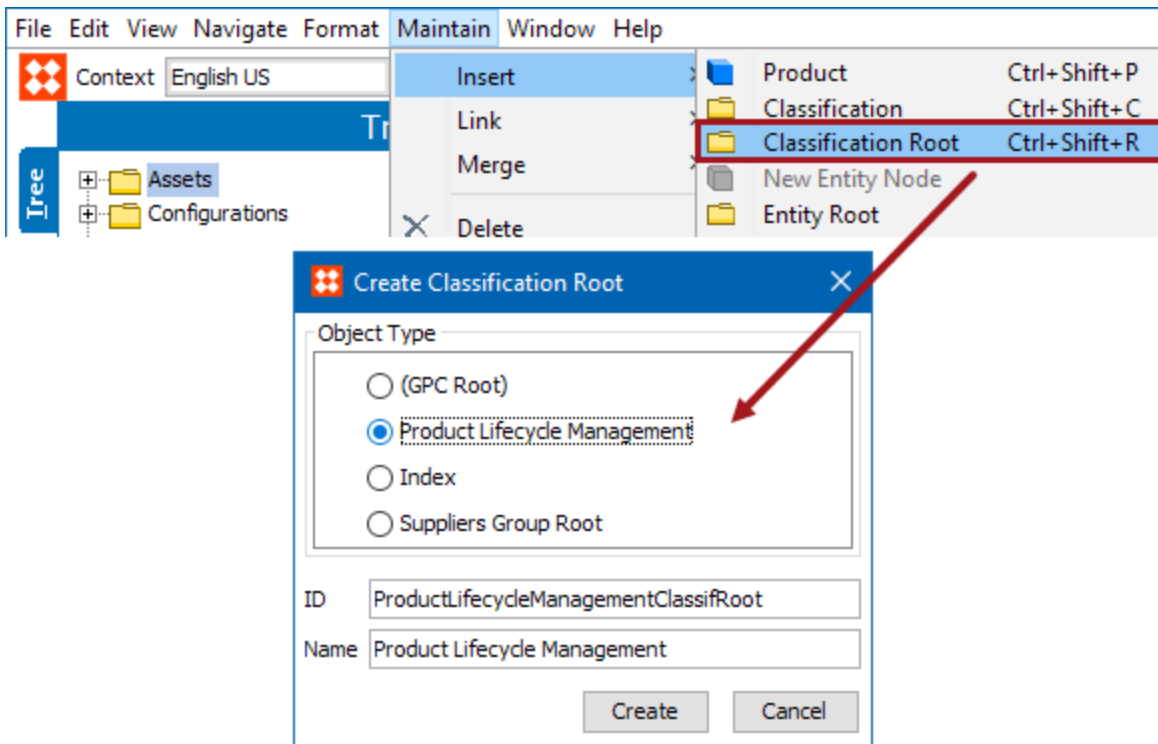
Creating Alternative Classification Object Types

Alternative Classifications are where design specifications are referenced and grouped into a folder for easy line plan use. The Product Lifecycle Management Classification root folder will need to be created for all other line plan roots to live under. Each line plan root can have up to three levels.

When finished, the line plan structure will look similar to the one below.



After the structure had been created in System Setup, it needs to be added to Tree. In Tree, click on a Classification folder and, go to Maintain > Insert > Classification Root > select the object type to hold line plans.



Each line plan will need to have attributes according to business needs. To set up needed attributes for line plans, see the **Setting Up Attributes for Line Plans** topic in this documentation.

References Needed for Line Plans

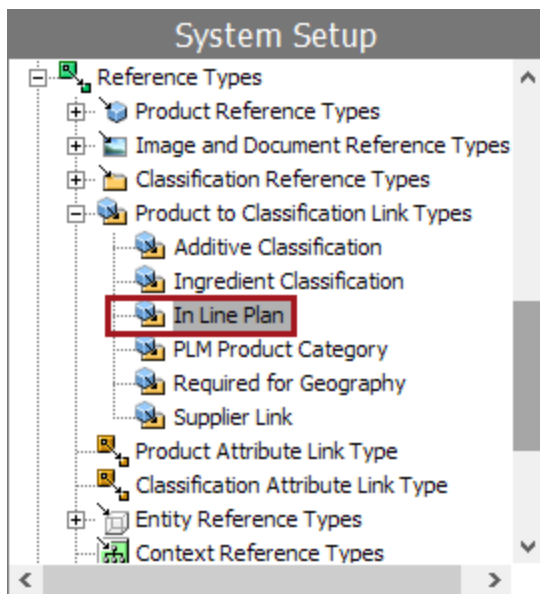
There are two different reference types required for line plans to work properly:

- Product to Classification Link Type
- Entity Reference Type

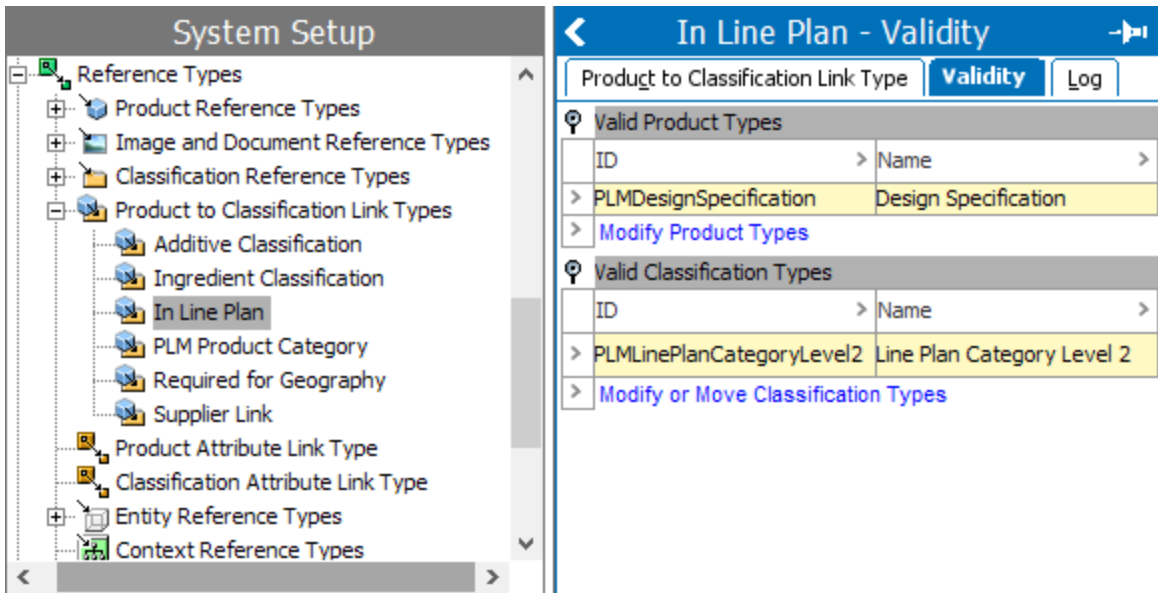
They are needed to link line plans to design specifications and line plans to schedules. This topic describes how to create the necessary reference types.

Product To Classification Link Type

The Product to Classification Link Type is needed as a reference between the line plan category level two and the design specification document. For this Product to Classification Link Type, an 'In Line Plan' reference was created.



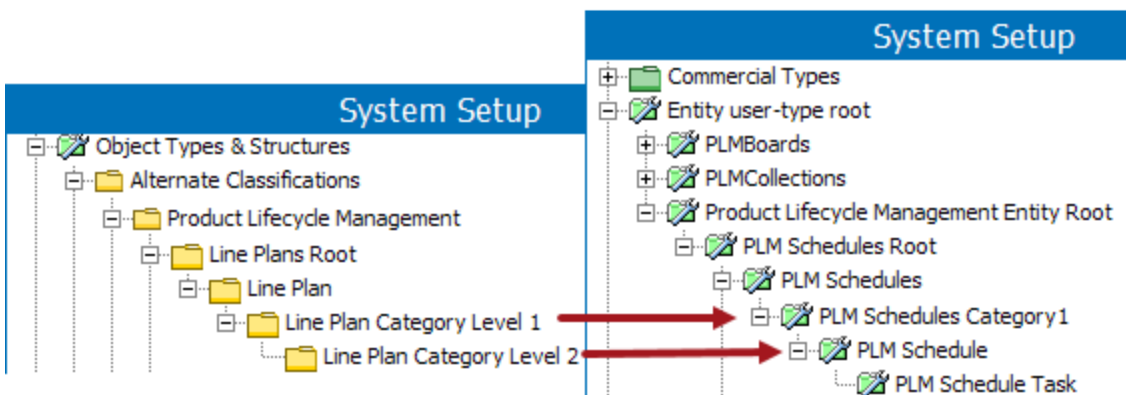
On the Validity tab for this new reference, select the design specification object type for the Valid Product Type and select the Line Plan Category Level 2 object type as the Valid Classification Type.



Entity Reference Type

There are two entity reference types needed to connect the line plan to the schedules:

- A reference to connect the classification object type for Line plan Category Level 1 to entity type PLM Schedules Category 1
- A reference to connect the classification object type for Line Plan Category Level 2 to entity type PLM Schedule



PLM Line Plan Category 1 to Schedule Category 1

A reference to connect the classification object type for Line plan Category Level 1 to entity type PLM Schedules Category 1 is needed when transitioning from line plans to schedules. When an approved line plan displays the 'Schedule' hyperlink, the reference enables the user to navigate to the appropriate schedule.

← **Christmas 2018** Business Category: Apparel
 Line Plan Start Date: 2018-03-06
 Schedule Deadline: 2018-04-06
 Line Plan Status: In Progress

[Edit Line Plan](#) **1901 / 120** **6586** **8884 / 2000000 0 (Inc**

	Item Unit	Cost	Revenue	Actions
^ Children	24	22	14	Schedule
T-shirts (1 styles)	24	22	14	

← **T-shirts** 2018

Start from date ▼ 19. April, 2038

Apparel Template (Make) ▼

Design Brief
19/04/2018 - 02/05/2018

Design
03/05/2018 - 30/05/2018

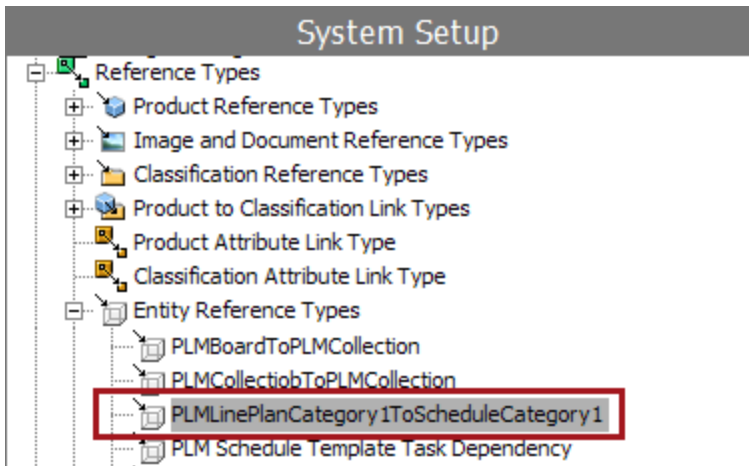
Samples
31/05/2018 - 11/07/2018

Submit

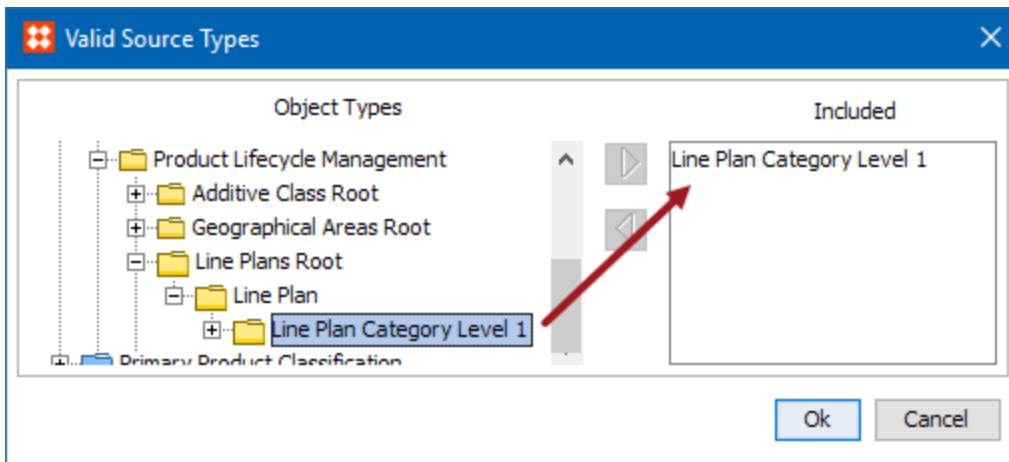
MAY JUN

Design	Design	0/0	Samples

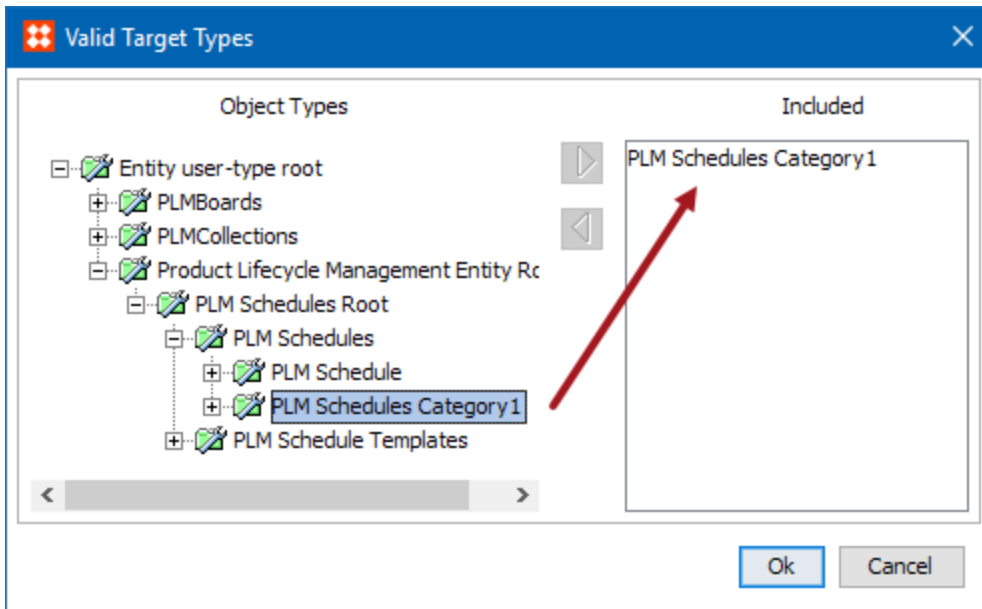
For this example it is 'PLMLinePlanCategory1ToScheduleCategory1.'



This new reference should have the first level of all line plans as a valid source type. In this example it is 'Line Plan Category Level 1.'



For the target type, make sure that it is valid for the first level of schedules. In this example it is 'PLM Schedule Category1.'



It is important that the ID of this Entity Reference is correctly put into the uploaded PLM configuration file. If the uploaded information is incorrect, then PLM may not work properly.

PLMLinePlanCategory1ToScheduleCategory1 - Reference Type

Reference Type	Validity	Log
Description		
Name	>	> Value
ID		PLMLinePlanCategory1ToScheduleCategory1
Name		PLMLinePlanCategory1ToScheduleCategory1
Last edited by		2018-04-10 13:12:13.0 by STEPSYS

```

"category": {
  "approvedAttributeId": "PLMLinePlanCategoryApproved",
  "scheduleCategoryReferenceId": "PLMLinePlanCategory1ToScheduleCategory1"
},

```

Note: You may need to talk to you implementation team to set the proper ID in the configuration file.

Line Plan Category Level 2 to Schedule level 2

This reference connects the classification object type for line plan category level 2 to entity type schedule level 2. It is needed to correctly create the subcategory from the approved line plan to the schedule subcategory.

← **2019 Summer Mens** Business Category: Apparel
 Line Plan Year: 2019
 Line Plan Season: Summer
 Line Plan Start Date: 2018-02-05
 Schedule Deadline: 2018-11-15
 Line Plan Status: In Progress

[Edit Line Plan](#) **926037200** **3222982000 / 150000000** **65.29 / 46**

	Cost	Revenue	Gross Margin %	Actions
^ Work From Home Collection	11384000	937278000	51.15	Schedule
Bottoms (72 styles)	58409000	349758000	47.01	
Shirts (32 styles)				

← **Work From Home Colle...** 2018

	JAN	FEB	MAR
● Bottoms →	[Samples 0	
● Shirts →			

To create this entity reference type, make it have the second level of line plans as a Valid Source Type, and the second level of schedules as the Valid Target Type. In the example below, the reference created is called 'Line Plan Schedule.' The second level for line plans was alternate classification Line Plan Category Level 2, and the second level for the schedule entity type was PLM Schedule.

System Setup

- Entity Reference Types
 - Line Plan Schedule
 - PLMBoardToPLMBoard
 - PLMBoardToPLMCollection
 - PLMCollectiobToPLMCollection
 - PLMLinePlanCategory1ToScheduleCategor
 - PLM Schedule Template Task Dependency
 - Schedule Task Dependency
 - Schedule Template
 - Context Reference Types
 - Workspace Reference Types

← **Line Plan Schedule - Validity**

Reference Type	Validity	Log
Valid Source Types		
ID	Name	
> PLMLinePlanCategoryLevel2	Line Plan Category Level 2	
> Modify Source Types		
Valid Target Types		
ID	Name	
> PLMSchedule	PLM Schedule	
> Modify Target Types		

Setting Up Attributes for Line Plans

When creating line plans, there are a number of attributes that need to be set up properly both in workbench and in the uploaded configuration file, in order for line plans to work in Web UI. The sections below detail what attribute setups are need.

Note: Attributes created for line plans can be calculated attributes, regular attributes, or updated through business rules based on your business needs. For the examples that follow, calculated attributes and regular attributes are used.

Line Plan Approval

When viewed in the Web UI, the line plan approval attribute is an attribute that confirms if a line plan is considered complete by clicking the checkmark under the Actions column in the line plan itself.

The screenshot shows the 'Christmas 2018' line plan details. It includes fields for Line Plan Year (2018), Business Category (Apparel), Line Plan Start Date (2018-03-06), Line Plan Season (Holiday), Line Plan Status (In Progress), and Schedule Deadline (2018-04-06). Below the details is an 'Edit Line Plan' button and a summary row with values: 1439 / 240000, 2861 / 120, 39226, and 56884 / 2000000. The main table has columns for Item Quantity, Item Unit, Cost, Revenue, and Actions. The 'Men' category is expanded to show 'Jackets (9 styles)'. A red box highlights a checkmark in the Actions column for the 'Men' category.

	Item Quantity	Item Unit	Cost	Revenue	Actions
Men	1107	1827	6562	8866	- + <input checked="" type="checkbox"/>
Jackets (9 styles)	602	1226	6562	8866	-

This designated attribute for line plan approvals needs to be a description attribute and have an 'List Of Values' as the validation base type. The LOV used for the line plan approval attribute needs to have 'text' as the validation base type and a value of 'Y' in its Values field. In the example below, the 'PLMLinePlanCategoryApproval' attribute is used.

Attribute		References	Attribute Transformation
Description			
Name	>	>	Value >
ID			PLMLinePlanCategoryApproved
Name			Category Is Approved
Last edited by			2018-03-08 13:36:18 CHI
Full Text Indexable			No
Externally Maintained			No
Hierarchical Filtering			None
Calculated			No
Type			Description
Mandatory			No
Attribute Validation			
Name	>		Value
Validation Base Type			List Of Values
List Of Values			Line Plan Approved
Multi Valued			No
Mask			
Minimum Value			N/A
Maximum Value			N/A
Maximum Length			N/A
Edit Validation Rule			

List of Values		References	Log	State Log	Tasks
Description					
Name	>	>			Value >
ID					PLMLinePlanApprovedLOV
Name					Line Plan Approved
Edited by					2018-03-08 13:28:37 by CHI
Path					Lists of Values / LOVs / !Produ...
Dimension Dependencies					Language;
Use Ids on values					Yes
Use Ids for sorting					No
In Attribute Groups					
List of Values Validation					
Name	>				Value >
Validation Base Type					Text
Allow Users to Add Values					No
Mask					
Minimum Value					N/A
Maximum Value					N/A
Maximum Length					5
Values					
Values					Value ID >
> Yes					Y
Add Value					

It is imperative that the ID for the line plan approval attribute is entered in correctly to the uploaded PLM configuration file. If it does not match, line plan approvals will not work properly in Web UI.

```
"category": {
  "approvedAttributeId": "PLMLinePlanCategoryApproved",
  "scheduleCategoryReferenceId": "PLMLinePlanCategory1ToScheduleCategory1"
},
```

Note: Talk to your implementation team to make sure that the correct attribute ID is used in the uploaded PLM configuration file.

Line Plan Page Headers

In Web UI, the line plan page headers are attributes that provide extra information about the currently viewed line plan. These attribute values are typically filled out when the line plan is being created, and can be tweaked and edited until the line plan is approved.

Edit Line Plan

Line Plan Year: 2019

Line Plan Season: Holiday

Line Plan Start Date: 05/01/2018

Schedule Deadline: 11/30/2018

Line Plan Status: In Progress

Target Item Quantity: 250

Target Unit Quantity: 150

Target Revenue: 300

Target Gross Margin %: 90

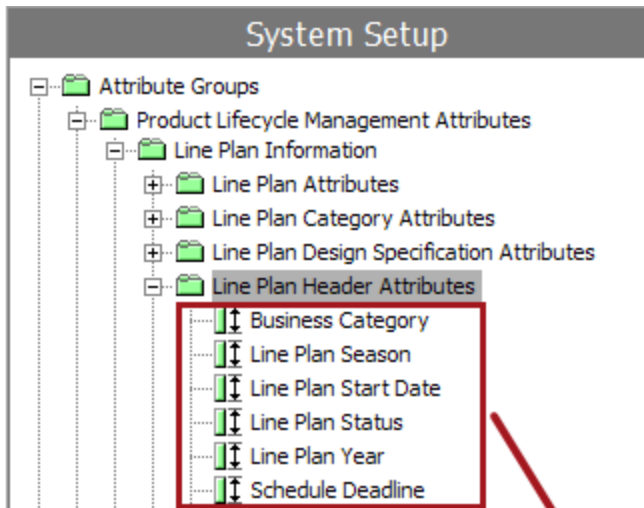
Formal Mens

Line Plan Year:	2019
Line Plan Season:	Holiday
Line Plan Start Date:	2018-05-01
Schedule Deadline:	2018-11-30
Line Plan Status:	In Progress

0 / 250 Item Quantity 0 / 150 Item Unit Actions

Create

Proper validity setup in the workbench needs to take place in order for the correct attributes to appear on the line plan page header in Web UI.



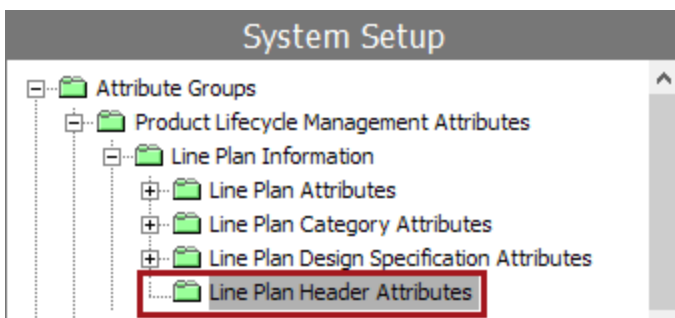
← Christmas 2018

Line Plan Year:	2018	Business Category:	Apparel
Line Plan Start Date:	2018-03-06	Line Plan Season:	Holiday
Line Plan Status:	In Progress	Schedule Deadline:	2018-04-06

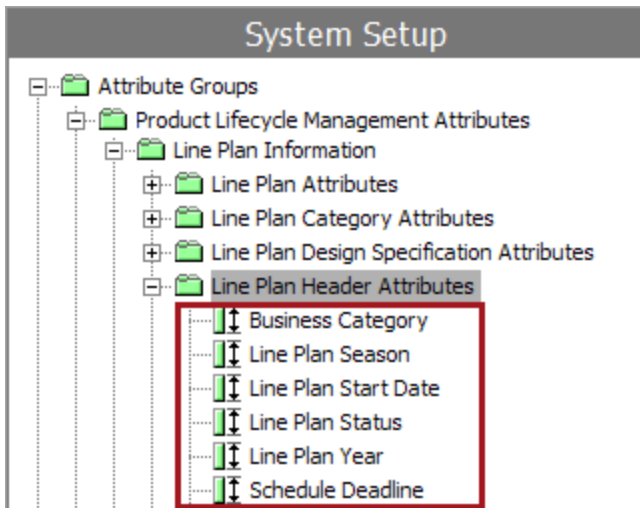
Edit Line Plan

Item Quantity	Item Unit	Cost	Actions
799 / 240000	701 / 120	586	
Men	707	627	562 - + ✓

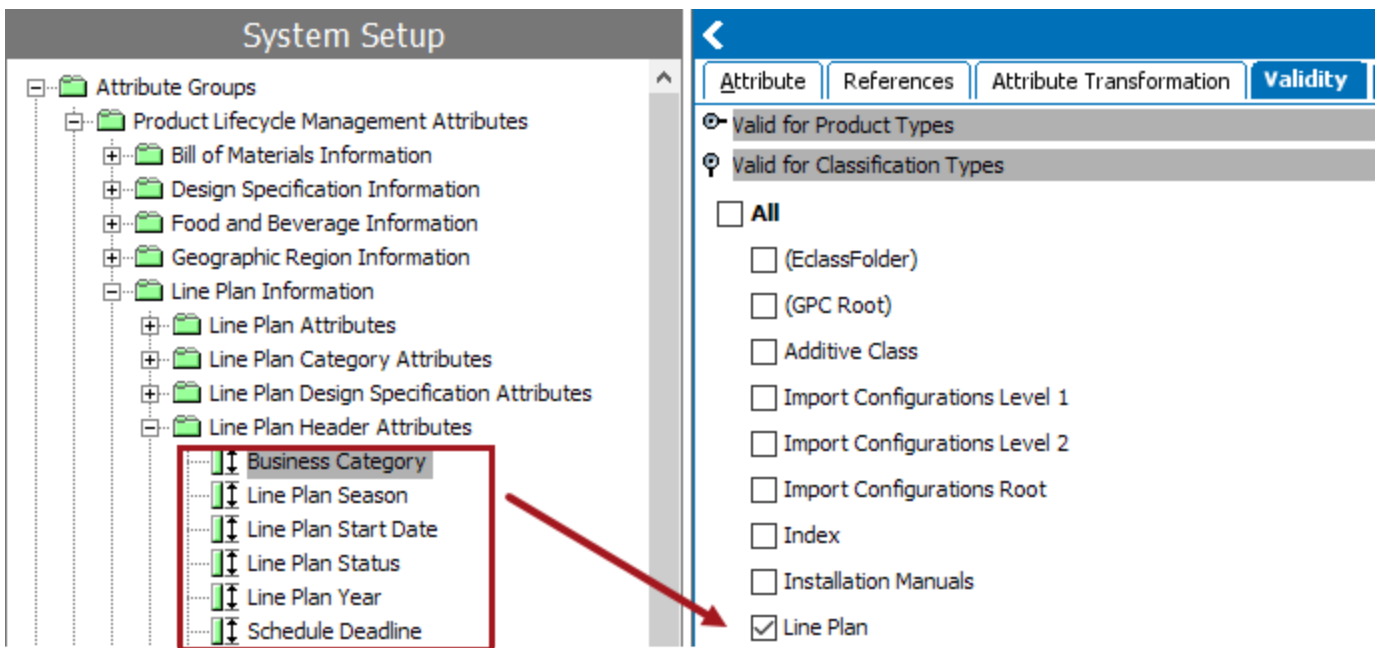
1. In System Setup, create a **PLMLinePlanHeaderAttributes** group to hold all line plan header attributes.



2. Create any children attributes needed for the line plan header in this group. For more on how to create attributes, see the section on **Attributes** in the **System Setup / Super User Guide** documentation.



3. Make the validity for these attributes valid for the object type that represents line plans. In this example, Line Plan is the needed validity to ensure that these attributes display correctly in Web UI.



4. Make sure that the proper attribute group ID is used in the uploaded PLM configuration file. If the IDs do not match, then the attribute group headers will not appear in Web UI correctly.

```

"lineplans": {
  "lineplan": {
    "headerAttributesGroupId": "PLMLinePlanHeaderAttributes"
  },
  "category": {
    "approvedAttributeId": "PLMLinePlanCategoryApproved",
    "scheduleCategoryReferenceId": "PLMLinePlanCategory1ToScheduleCategory1"
  }
}

```

Note: You may need to talk to your implementation team to ensure that the correct attribute group ID is used in the configuration file. Additionally, should any line plan page headers need to be changed, talk to your implementation team.

Line Plan Column Headers

Note: Attributes created for line plan column headers can be calculated attributes, regular attributes, or updated through business rules based on your business needs. For the examples that follow, calculated attributes and regular attributes are used.

Column headers for line plans are a group of calculated attributes that aid line plan managers in deciding if a particular line plan should be approved and brought to market based on the values in these fields.

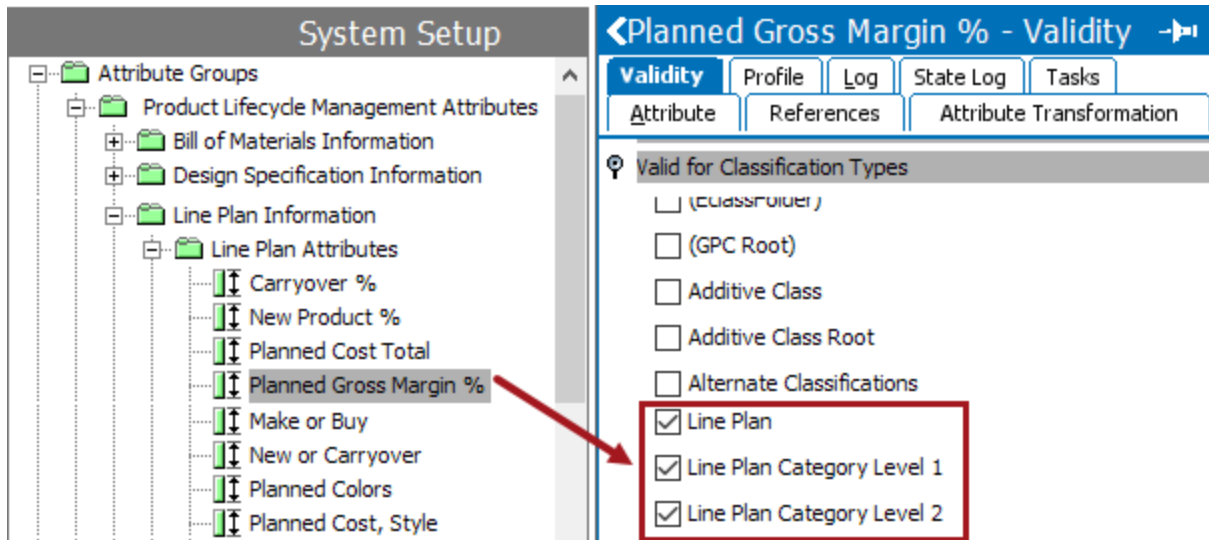
Item	Item Quantity	Item Unit	Cost	Revenue	Actions
Shirts (1 styles)	56	23	0	0	—
T-Shirts (7 styles)	327	285	0	0	—

To create column header calculated attributes:

1. Go to System Setup > Attribute Groups > create an attribute group to hold line plan column header attributes.
2. In this folder, create the necessary line plan column header calculated attributes.

Note: Some calculated attributes may be uploaded via a PLM data package, and may need to be tweaked for your business needs. If calculated attributes need to be created, talk to your implementation team.

3. Make each calculated attribute valid for all levels of the line plan.



When all needed calculated attributes are added, check that the IDs used for the calculated attributes match those in the uploaded PLM configuration file. Each calculated attribute is grouped in the PLM configuration file to make a complete line plan column header. If the IDs are not entered correctly in the PLM configuration file, the line plan column header(s) will not display or work properly.

Note: Some calculated attributes may be uploaded via a PLM data package, and may need to be tweaked for your business needs. Talk to your implementation team should you need different calculated attributes for the line plan column headers, or if the line plan column headers are not working properly. For more on how to create calculated attributes see the **Calculated Attributes** topic in the **Attributes** section of the **System Setup / Super User Guide** documentation.

Titles for line plan column headers are only able to be set in the uploaded PLM configuration file. In the example below, the Item Quantity line plan column header is represented by the following calculated attributes:

- PLMPlannedItemQuantityTotal - a value of 4079000
- PLMTargetItemQuantity- a value of 100000

```

"lineplans": {
  "lineplan": {
    "headerAttributesGrp": {
      "title": "Item Quantity",
      "targetAttributeId": "PLMTargetItemQuantity",
      "plannedTotalAttributeId": "PLMPlannedItemQuantityTotal",
      "differenceAttributeId": "PLMTargetVersusPlannedItemQuantity"
    }
  },
  "category": {
    "approvedAttributeId": "PLMApprovedItemQuantity",
    "scheduleCategoryRe": "PLMScheduleCategoryRe"
  },
  "metrics": [
    {
      "title": "Item Quantity",
      "targetAttributeId": "PLMTargetItemQuantity",
      "plannedTotalAttributeId": "PLMPlannedItemQuantityTotal",
      "differenceAttributeId": "PLMTargetVersusPlannedItemQuantity"
    }
  ]
}

```

- PLMTargetVersusPlannedItemQuantity - when hovered over, a value of 3979000

```

"lineplans": {
  "lineplan": {
    "headerAttributesGrp": {
      "title": "Item Quantity",
      "targetAttributeId": "PLMTargetItemQuantity",
      "plannedTotalAttributeId": "PLMPlannedItemQuantityTotal",
      "differenceAttributeId": "PLMTargetVersusPlannedItemQuantity"
    }
  },
  "category": {
    "approvedAttributeId": "PLMApprovedItemQuantity",
    "scheduleCategoryRe": "PLMScheduleCategoryRe"
  },
  "metrics": [
    {
      "title": "Item Quantity",
      "targetAttributeId": "PLMTargetItemQuantity",
      "plannedTotalAttributeId": "PLMPlannedItemQuantityTotal",
      "differenceAttributeId": "PLMTargetVersusPlannedItemQuantity"
    }
  ]
}


```

In addition to calculated attributes being used in line plan column headers, they are also used in the design specification documents. See below for more on calculated attributes used in design specifications.

Attributes for Design Specifications

Note: Attributes created for design specifications can be calculated attributes, regular attributes, or updated through business rules based on your business needs. For the examples that follow, calculated attributes and regular attributes are used.

Design specifications are created by filling in various attributes and calculated attributes that are valid for the design specification object type.

	Title	Planned Item Units	Planned Cost, Style	Planned Item Revenue, Each	Planned Revenue, Style	Planned Item Gross Margin %
<input type="checkbox"/>	Style 115952	105000 <i>fx</i>	3045000 <i>fx</i>	46.00	4830000 <i>fx</i>	36.96 <i>fx</i>

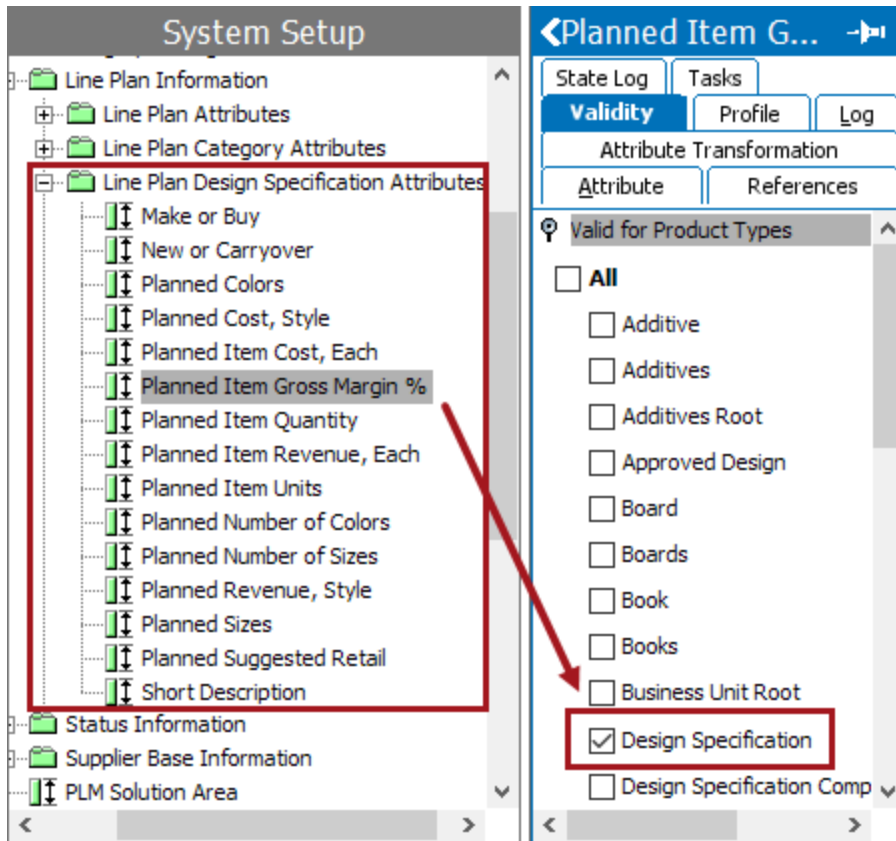
The values input into the design specification attributes and calculated attributes then generate information in the line plan column headers (see section above for more information).

To create design specification attributes, follow the directions below:

1. In workbench, navigate to System Setup and create an attribute group to hold design specification attributes.
2. Create any attributes or calculated attributes needed for design specifications.

Note: Some design specification attributes and calculated attributes may be uploaded via a PLM data package, and may need to be tweaked for company needs. If additional attributes need to be created, talk to your implementation team.

3. Make all of these attributes and calculated attributes valid for the design specification object type. In this example, it is called 'Design Specification.'



Once setup is finished in workbench for design specifications, setup in Web UI can take place. See the **Adding a Classification Screen** topic in this documentation.

For more on how to create attributes, calculated attributes, and set validity, see the **Attributes** topic in the **System Setup / Super User Guide** documentation.

Line Plan Setup in Web UI

Users interact with line plans only in the Web UI, thus it is important to have proper configuration so that the user has a seamless experience. There are a number of configurations and screens that need to be established for users to create, interact with, maintain, and delete line plans. They are the following:

- Adding Line Plans to a Links Widget
- Adding a Children Of Types Screen
- Adding a PLM Line Plan Screen
- Adding a Classification Screen

Adding Line Plans to a Links Widget

It is possible to add a link to a Links Widget for easy user access to line plans. The steps below outline how to add the link. For more information on Links Widgets, see the **Homepage Widgets** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

1. From the Web UI Designer, navigate to --[HOMEPAGE]-- > Widget Grid > Child Components. Under Child Components, add a Links Widget.

The screenshot displays the 'Properties' window for a 'Widget Grid'. It includes tabs for 'Configuration' and 'Web UI style'. Below the tabs are buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save'. The 'Widget Grid Properties' section contains a 'Component Description' (A component that can contain Web UI widgets in a grid layout), a 'StyleName' field, and a 'Css Class' field. The 'Child Components' section shows a list of widgets: 'Text Widget (Welcome)' and 'Links Widget (Shortcuts)'. The 'Links Widget (Shortcuts)' is highlighted with a red box. An 'Add Component' dialog is open, showing a list of components: 'Analytics Widget', 'Asset Import Widget', 'File Loading Widget', 'Html Asset Widget', 'Impersonate User Widget', 'KPI Widget', 'Links Widget' (highlighted in blue), and 'Mass Creation Widget'. A description for the 'Links Widget' is shown on the right: 'A widget that can contain a list of components and arranges them vertical when displayed.' Below the list is a 'Filter' field and a checkbox for 'Show deprecated components'. At the bottom are 'Add' and 'Cancel' buttons.

2. On the Links Widget Properties under Child Components, add a Node Navigation component.

The screenshot displays the configuration interface for a 'Links Widget'. The 'Properties' section is active, showing 'Configuration' and 'Web UI style' tabs. Below the tabs are buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save'. The 'Links Widget Properties' section includes a 'Component Description' and a 'StyleName' field. The 'Title' field is set to 'Shortcuts'. An 'Advanced' section is collapsed. The 'Child Components' section shows a list of components, with an 'Add..' button highlighted by a red box and a red arrow pointing to the 'Add Component' dialog. The dialog lists several components, with 'Node Navigation' selected. The dialog also includes a 'Filter' field, a 'Show deprecated components' checkbox, and 'Add' and 'Cancel' buttons.

3. Double click on the newly added Node Navigation component to open the Node Navigation Properties. Enter in the desired line plan label, and select the node that all line plans will be stored under. In this case, PLMLinePlansRoot is selected to be the parent node when line plans are created.

Properties

Configuration Web UI style

--[HOMEPAGE]-- Save Close New... Delete Rename Save as...

Node Navigation Properties [go to parent](#)

Component Description Add link to a node hierachy

StyleName

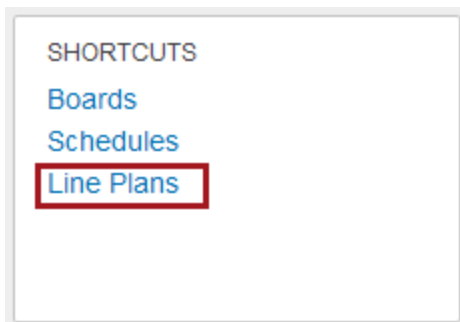
Context Help

Css Class

Label

Node* ...

- When finished configuring the link, click Save and close the designer. The link will appear in the Link Widget on the Web UI homepage.

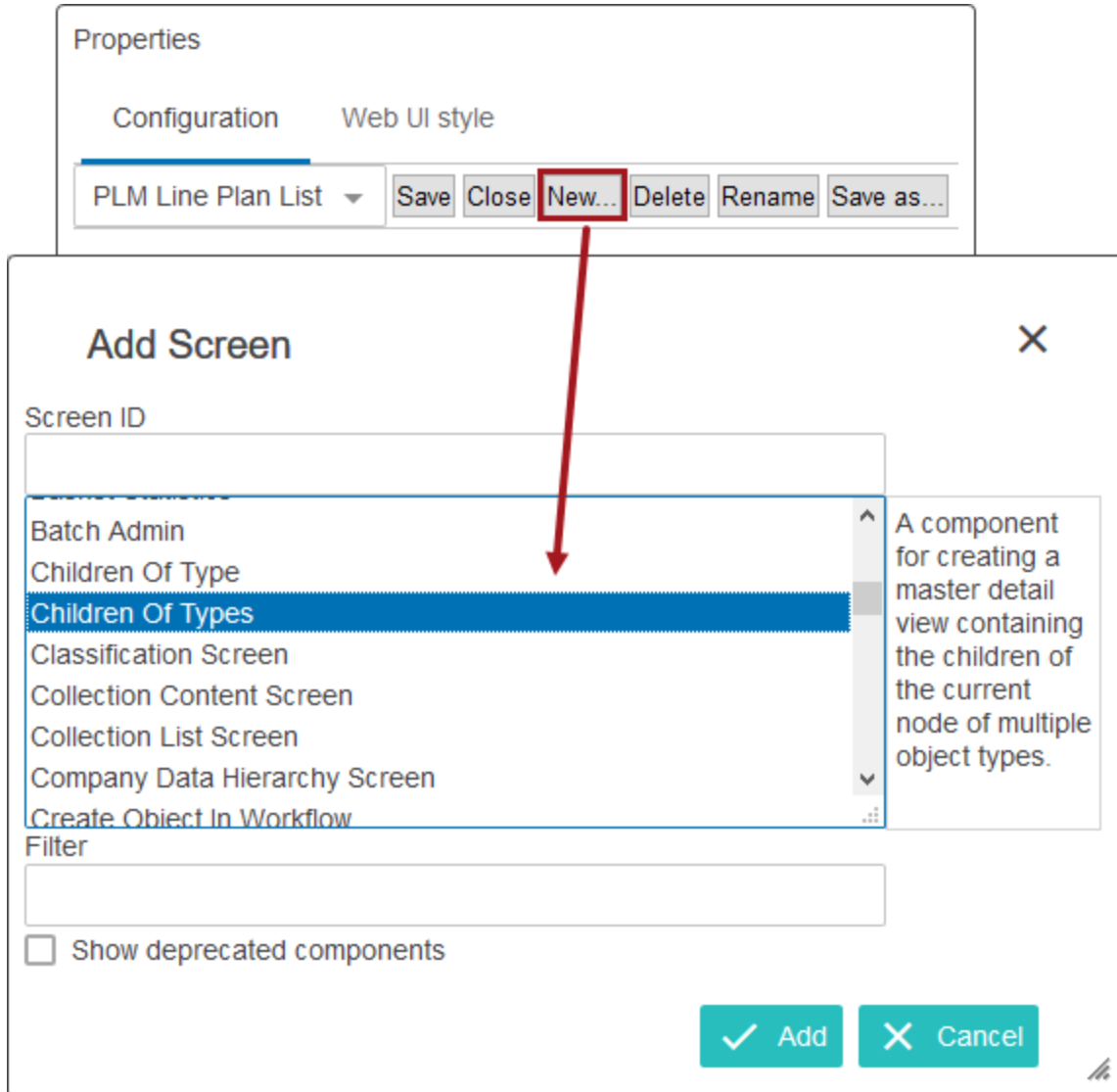


After the line plans link has been created, the Children of Types properties screen, which is the landing page for all line plans in Web UI, needs to be created. See the **Adding a Children Of Types Screen** topic.

Adding a Children Of Types Screen

The Children of Types screen is the landing page for all line plans in Web UI. From this page, users are able to select which line plan they need to work on. To configure this screen:

1. From the designer, select New... > **Children of Types** screen.



2. Enter in a Screen ID, and click **Add**. Specify a screen ID that will be easily identifiable when setting up screen mappings later in this process.

Add Screen [X]

Screen ID

PLM Line Plan List **1**

- Batch Admin
- Children Of Type
- Children Of Types**
- Classification Screen
- Collection Content Screen
- Collection List Screen
- Company Data Hierarchy Screen
- Create Object In Workflow

A component for creating a master detail view containing the children of the current node of multiple object types.

Filter

Show deprecated components

2 [Add] [Cancel]

3. On Children of Types Properties, click on the **Add** button under the **Object Types** field to select the appropriate PLMLinePlan node.

Note: Depending on your configuration in workbench, you may have a different ID than the example. Check with your administrator or implementation team.

Properties (edited)

Configuration Web UI style

PLM Line Plan List Save Close New... Delete Rename Save as...

Children Of Types Properties

Component Description A component for creating a master detail view containing the children of the current node of multiple object types.

Object Types*

Add...

Child Components

Component* Node

Select Node(s)

Browse Search

Line Plan (PLMLinePlan) Search

Line Plan (PLMLinePlan)

OK Cancel

4. In the Components field under Child Components, add a Node List.

Properties (edited)

Configuration Web UI style

PLM Line Plan List Save Close New... Delete Rename Save as...

Children Of Types Properties

Component Description A component for creating a master detail view containing the children of the current node of multiple object types.

Object Types* Line Plan (PLMLinePlan) Add... Remove Up Down

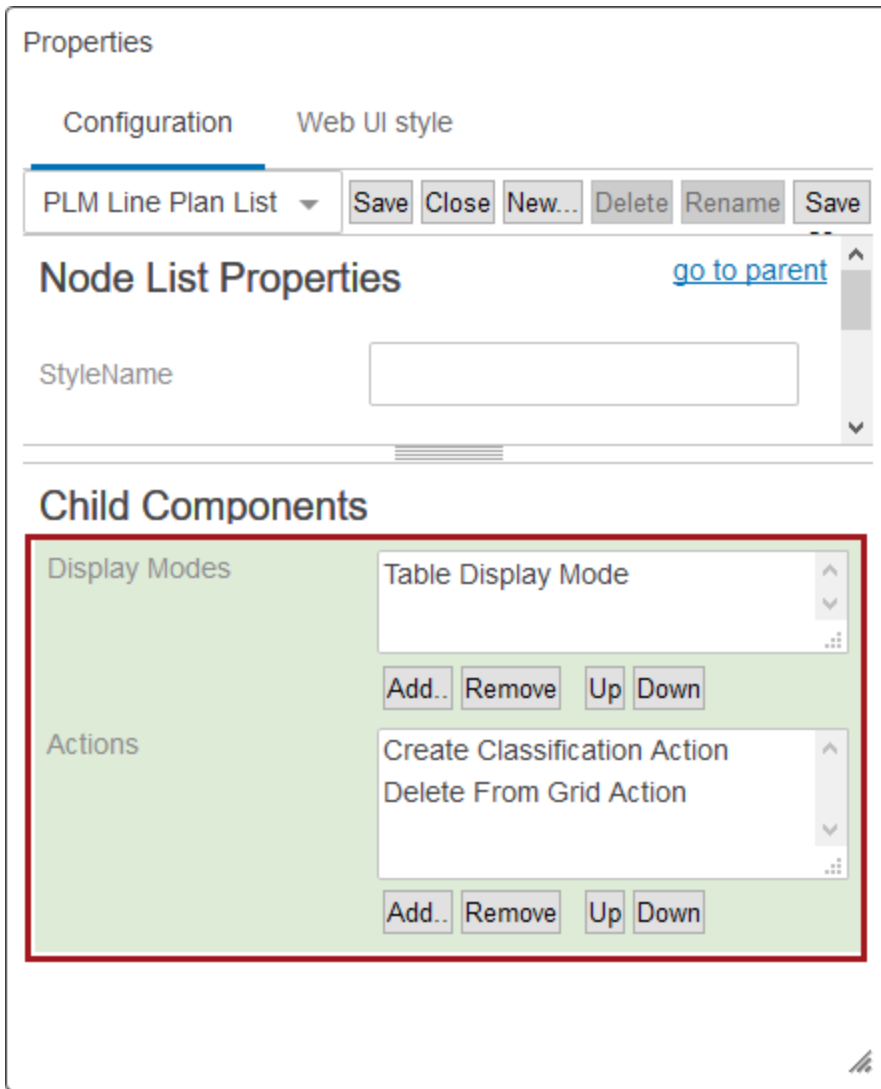
Child Components

Component* Node List [go to component](#)

5. Click on the 'go to component' next to the Node List to open the Node List Properties.
 - For the Display Modes parameter, add a Table Display Mode.
 - In the Actions field, add the Create Classification Action and the Delete From Grid Action.

Note: The Create Classification Action will have the default name of 'Create Classification.' It is considered recommended practice to edit this label so that it is easier for users to understand that clicking this action will create a new line plan.

For more on how to configure action buttons, see the **Action Buttons** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.



6. Double click on the Table Display Mode to navigate to the Table Display Mode Properties. On Table Display Mode Properties, add any needed Headers, such as Attribute Value Headers or Attribute Value Group Headers, for the line plan. In this example, a Title Header and a number of Attribute Value Headers have been added.

Properties

Configuration Web UI style

PLM Line Plan List Save Close New... Delete Rename Save as...

Table Display Mode Properties [go to parent](#)

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

StyleName

Context Help

Headers

- Title Header (/ true)
- Attribute Value Header (false / false / false / PLMLinePlanBusinessCategory / false .
- Attribute Value Header (false / false / false / PLMLinePlanYear / false // false / NotV
- Attribute Value Header (false / false / false / PLMLinePlanSeason / false // false / N
- Attribute Value Header (false / false / false / PLMLinePlanStatus / false // false / No

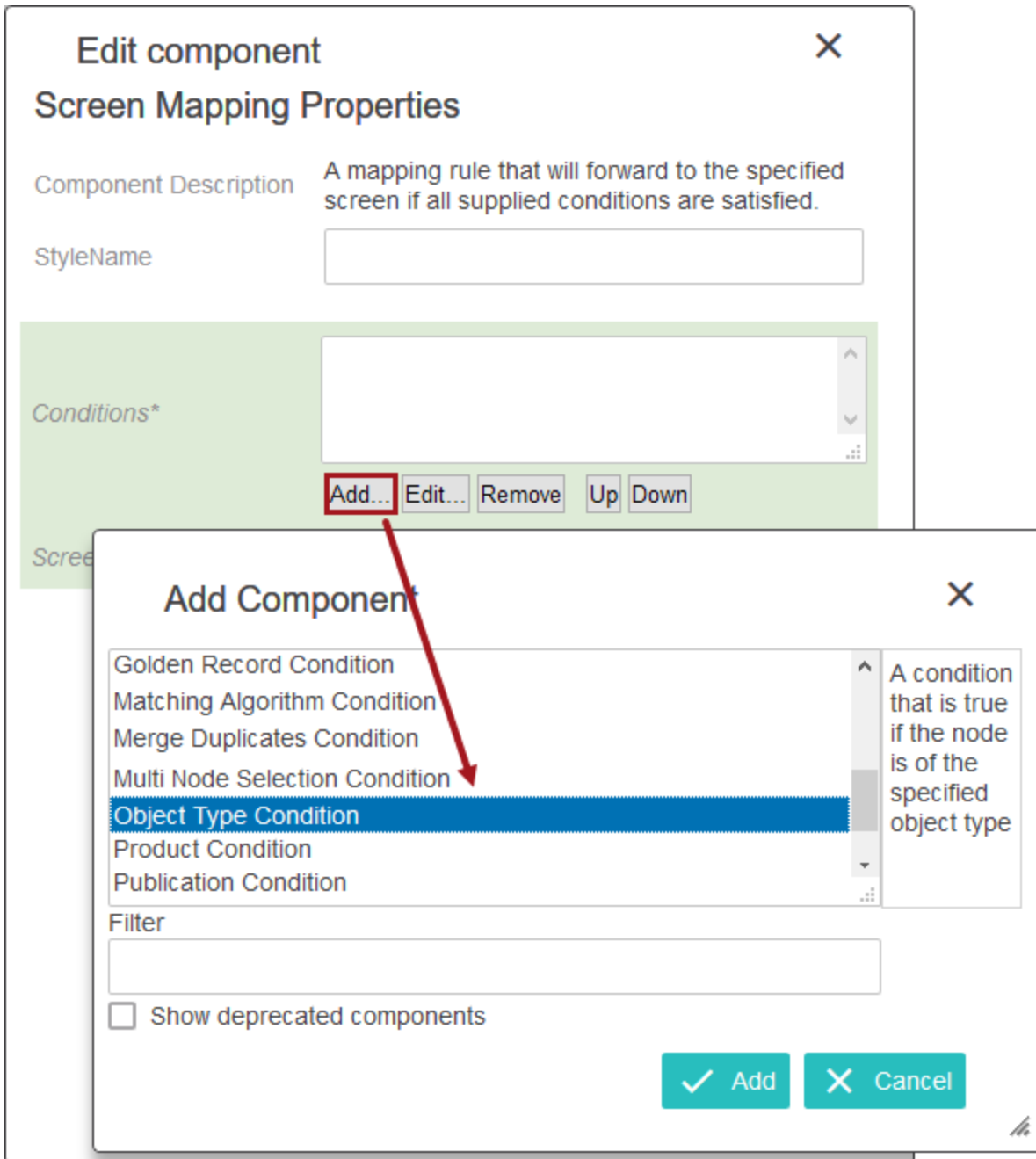
Add... Edit... Remove Up Down

Show Details

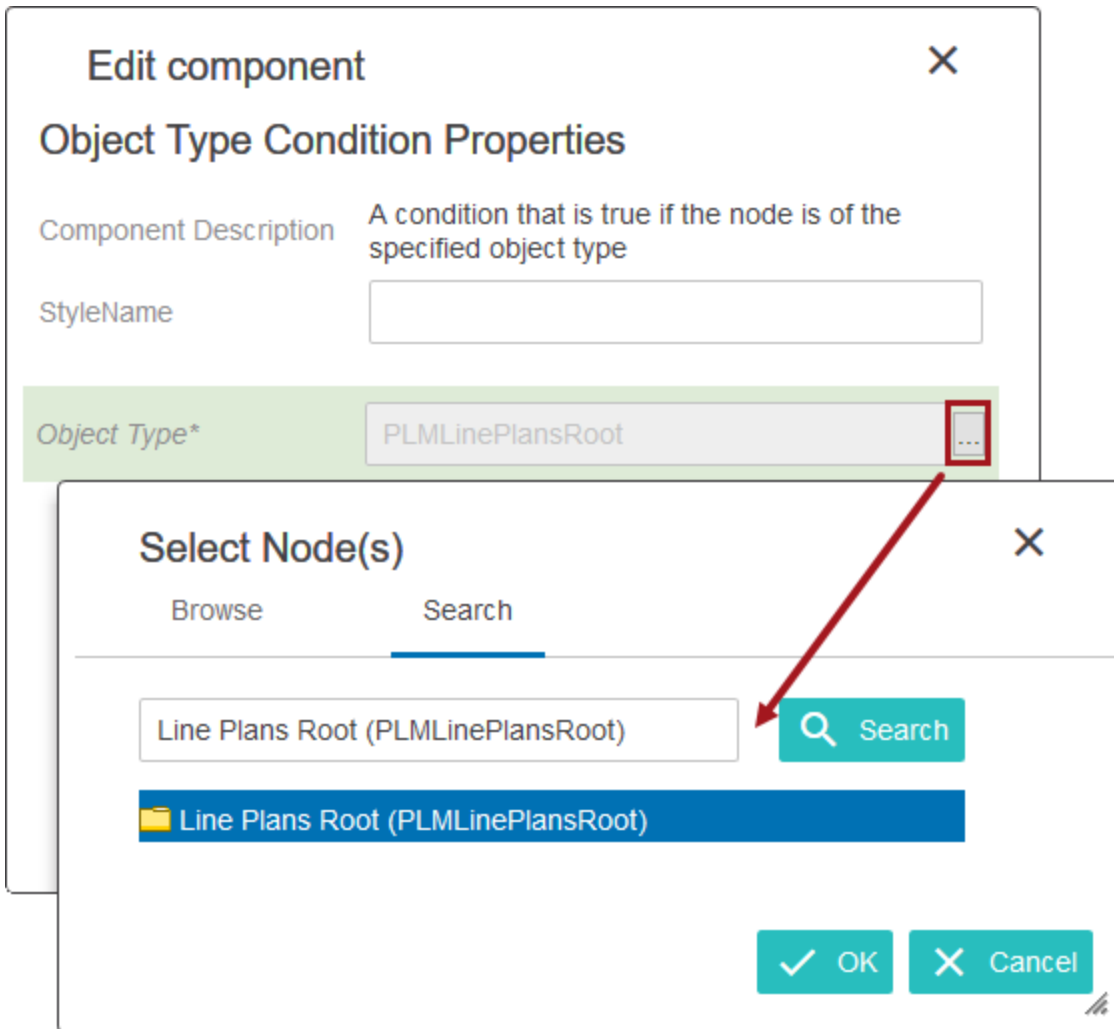
► Sizing and filtering

Child Components

- When all needed headers are added and configured, click Save.
- To use the screen, it needs to be mapped. Select --[MAIN]-- from the designer screen dropdown. Click Add in the Mappings field to bring up the Screen Mapping Properties.
- Click Add under the Conditions field, and select the **Object Type Condition** component.



10. On the Object Type Condition Properties, click the ellipsis button (...) to specify the **Object Type**. In this example, it is PLMLinePlansRoot. Click **OK** when finished.



11. In the Screen dropdown, choose the Child of Types screen that you created in step 2 as the landing page to display the line plans. Click **Save**.

Edit component ✕

Screen Mapping Properties

Component Description A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

StyleName

Conditions*

Object Type = PLMLinePlansRoot

Add...
Edit...
Remove
Up
Down

Screen*

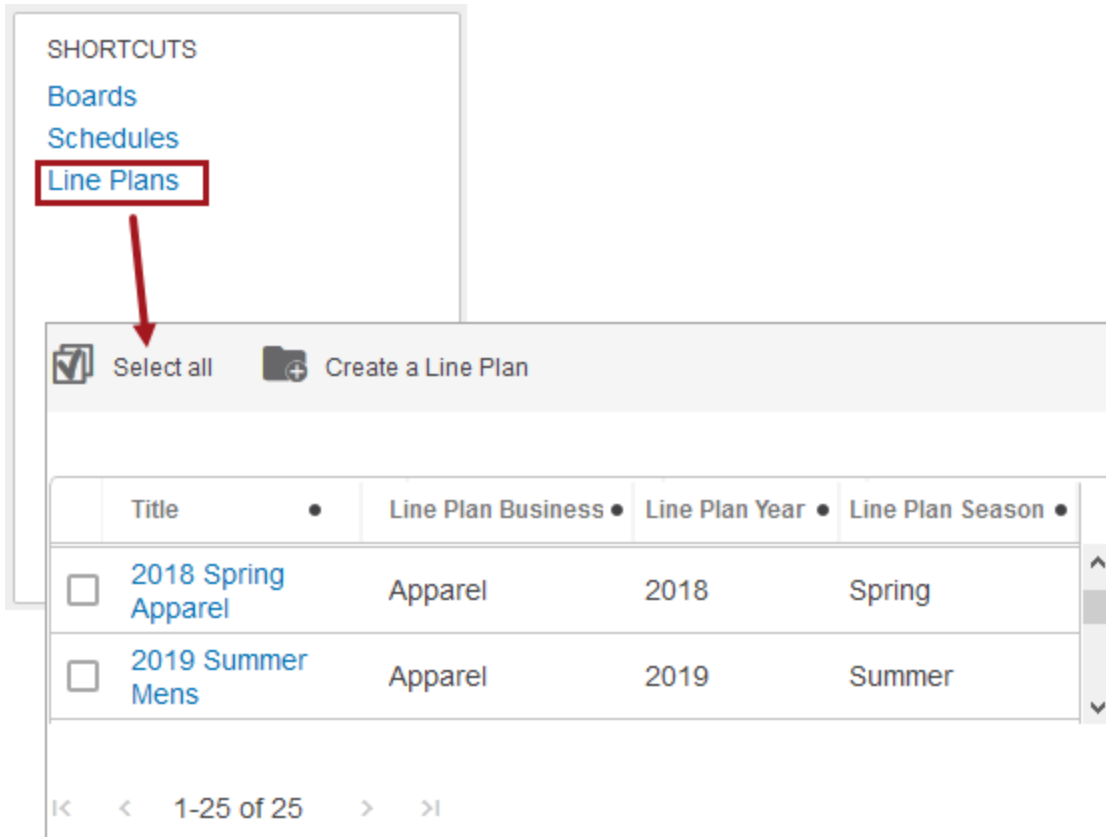
PLM Line Plan List
▼
Add

- homepage
- login
- Name and ID
- nodeDetails
- PLM Design Specs
- PLM Line Plan List
- PLM Line Plan Placeholder

✓ Save
✕ Cancel

12. Click **Save** in the designer window, and **Close** when finished.

If the newly created screen is mapped correctly, clicking the Line Plan quick link will direct the user to the Children of Types screen. For more on mapping screens, see the **Mappings** topic in **Main Properties Overview** section in the **Web User Interfaces / Web UI Setup and User Guide** documentation.



Once this screen is configured, a PLM Line Plan screen needs to be configured, so that users are able to see and work with specific line plan data. For more on how to add this screen, see **Adding a PLM Line Plan Screen** in this documentation.

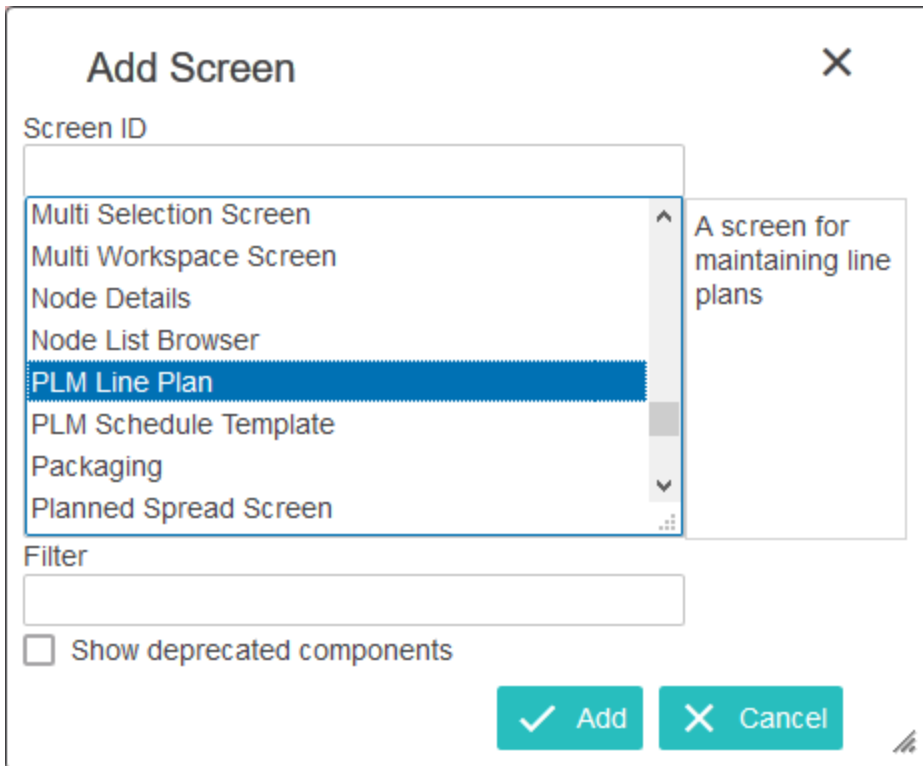
Adding a PLM Line Plan Screen

The PLM Line Plan screen is the screen that displays after an individual line plan has been selected.

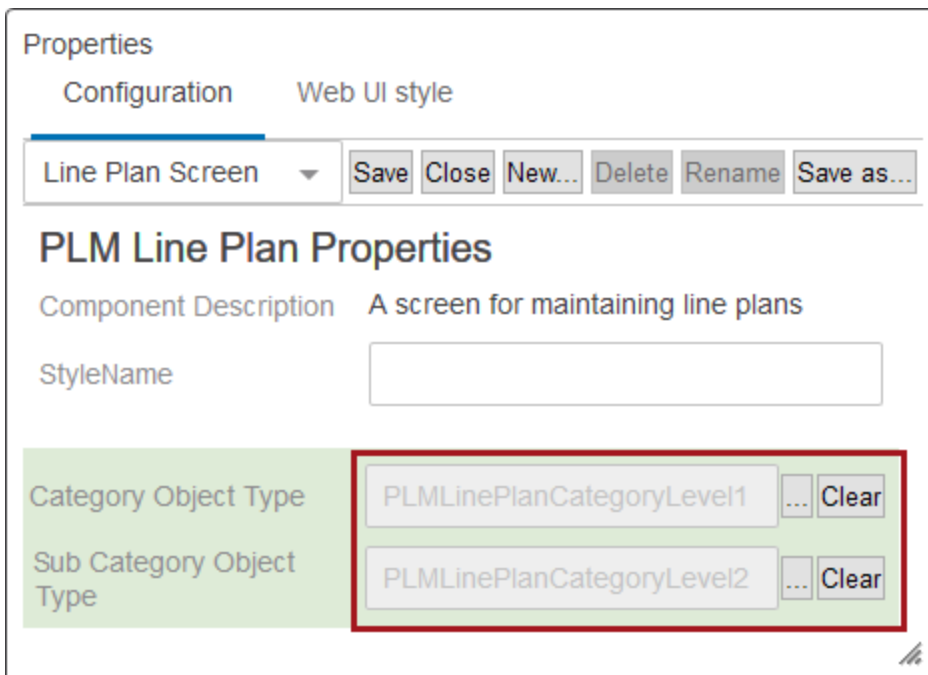
← 2019 Summer Mens		Line Plan Year:	2019
		Line Plan Start Date:	2018-02-05
		Line Plan Status:	In Progress
		Schedule Deadline:	2018-11-15
Edit Line Plan	926037200	3222982000 / 150000000	65.01 / 46
	Cost	Revenue	Gross Margin % Actions
^	Work From Home Collection	411384000	937278000 51.15 - + ✓
	Bottoms (72 styles)	158409000	349758000 47.01 -
	Shirts (32 styles)	166320000	384720000 51.91 -
	Sweaters (17 styles)	58695000	138000000 56.8 -
	Tees (23 styles)	27960000	64800000 58.93 -

From this detailed overview of the line plan, the user can add, edit, delete, and maintain line plans according to their user privileges. To add this screen:

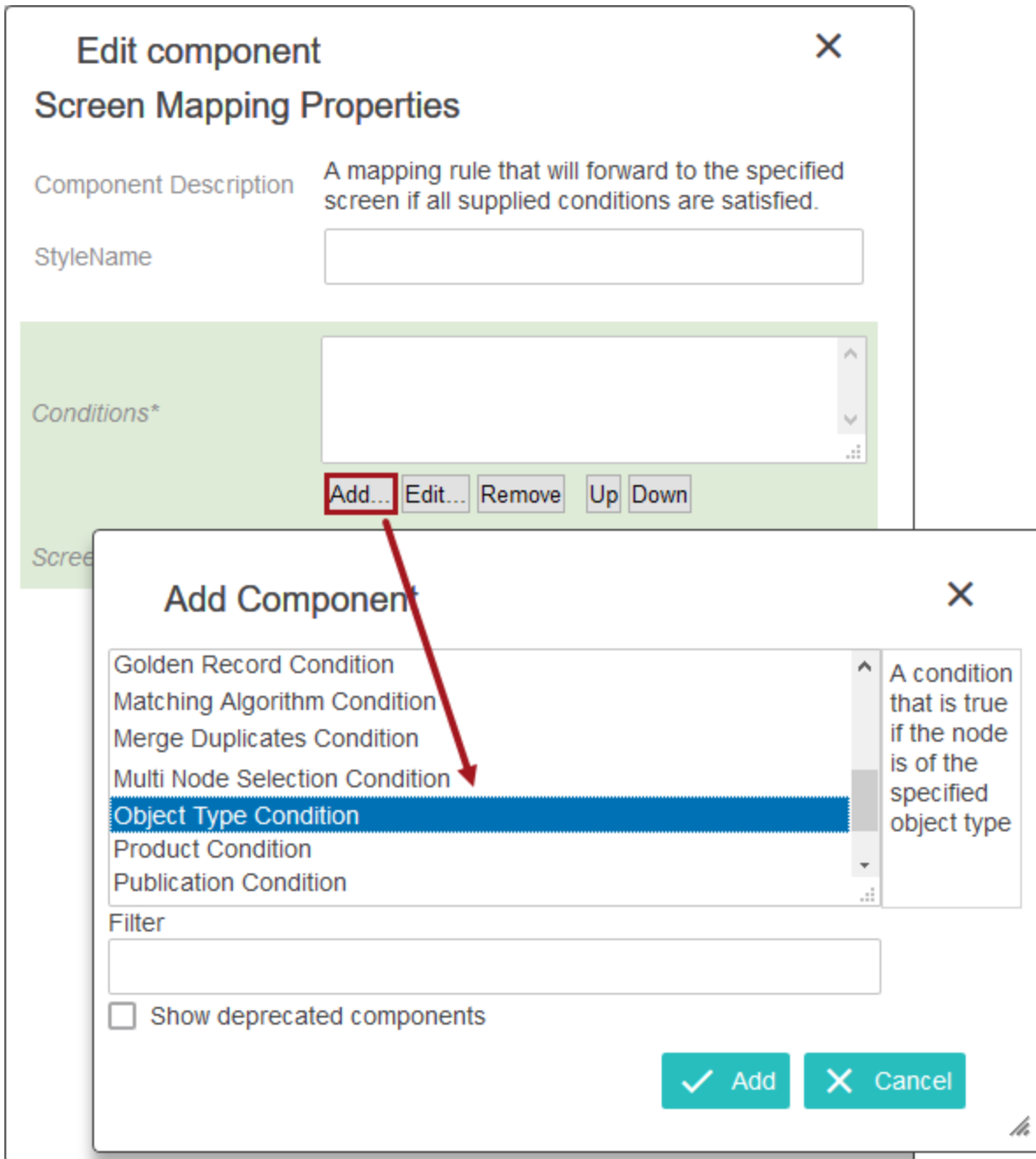
1. Open the designer, click on **New** and add a **PLM Line Plan** screen. *Specify a screen ID that will be easily identifiable when setting up screen mappings later in this process.*



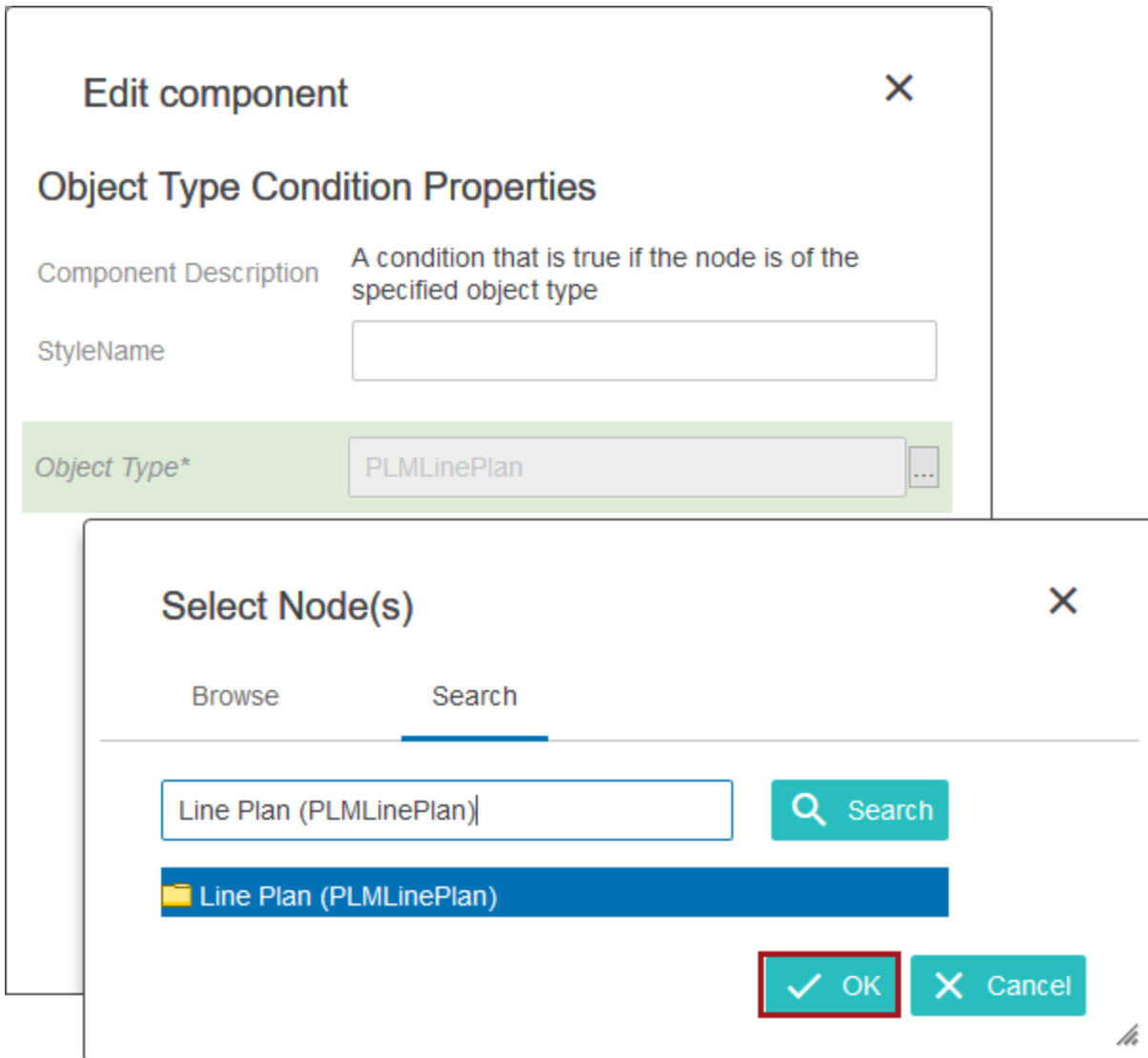
- In the PLM Line Plan Properties, click the ellipsis button (...) next to each field to fill in both the **Category Object Type** and **Sub Category Object type** parameters. Add the first and second levels of the line plan to these fields. In this example, it is PLMLinePlanCategoryLevel1 and PLMLinePlanCategoryLevel2.



3. Click Save, and using the screen dropdown, navigate to --[MAIN]--.
4. In the Mappings field on --[MAIN]--, map the newly created screen by first clicking Add...
5. Click Add under the Conditions parameter, and then select an **Object Type Condition** component.



6. In the Object Type Conditions Properties, click the ellipsis button (...) to specify the **Object Type**. In this example it is PLMLinePlan. Click **OK** when finished.



7. In the screen field, choose the PLM Line Plan screen that you created in step 1 as the landing page to display the line plan details. In this example, it is called Line Plan Screen. Click **Save**.

Edit component [X]

Screen Mapping Properties

Component Description: A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

StyleName:

Conditions*

ObjectType = PLMLinePlan

Add... Edit... Remove Up Down

Screen*

Line Plan Screen [Add]

- homepage
- assetdetails
- Line Plan Screen**
- Name and ID
- PLM Line Plan Placeholder

✓ Save [X] Cancel

8. Click **Save** in the designer window and then **Close** when finished.

If the newly created screen is mapped correctly, selecting one of the line plans will bring you to the PLM Line Plan screen. For more on mapping screens, see the **Mappings** topic in **Main Properties Overview** section in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Select all Create a Line Plan

	Title	Line Plan Business	Line Plan Year	Line Plan Status
<input type="checkbox"/>	2018 Spring Apparel	Apparel	2018	In Progress
<input type="checkbox"/>	2019 Summer Mens	Apparel	2019	In Progress
<input type="checkbox"/>	Christmas 2018	Apparel	2018	In Progress

1-25 of 25

← **Christmas 2018** Line Plan Business Cat... Apparel

Line Plan Year: 2018

Line Plan Season: Holiday

Line Plan Start Date: 2018-03-06

Schedule Deadline: 2018-04-06

Line Plan Status: In Progress

[Edit Line Plan](#)

	Item Quantity	Item Unit	Actions
^ Men	707	623	- + ✓
Jackets (9 styles)	202	22	-
Jumpers and Cardigans (2 styles)	16	210	-
Pants (2 styles)	42	19	-
Shirts (1 styles)	56	23	-
T-Shirts (7 styles)	327	285	-
Underwear (1 styles)	64	64	-

The user will now be able to add, delete, maintain, and modify the selected line plan's data according to user group privileges. For more information on user group privileges, see the **Context, Action Sets, and User Groups** topic in the **PLM for Admins** documentation.

Adding a Classification Screen

After a line plan has been selected and a specific line plan item in that line plan has been selected, a user is brought to a Classification Screen, which displays further details about the particular item. On this page, a user is able to add a design specification and fill out or change any data needed for the selected item in the table. Follow the steps below to create and configure the Classification screen.

Classification Screen

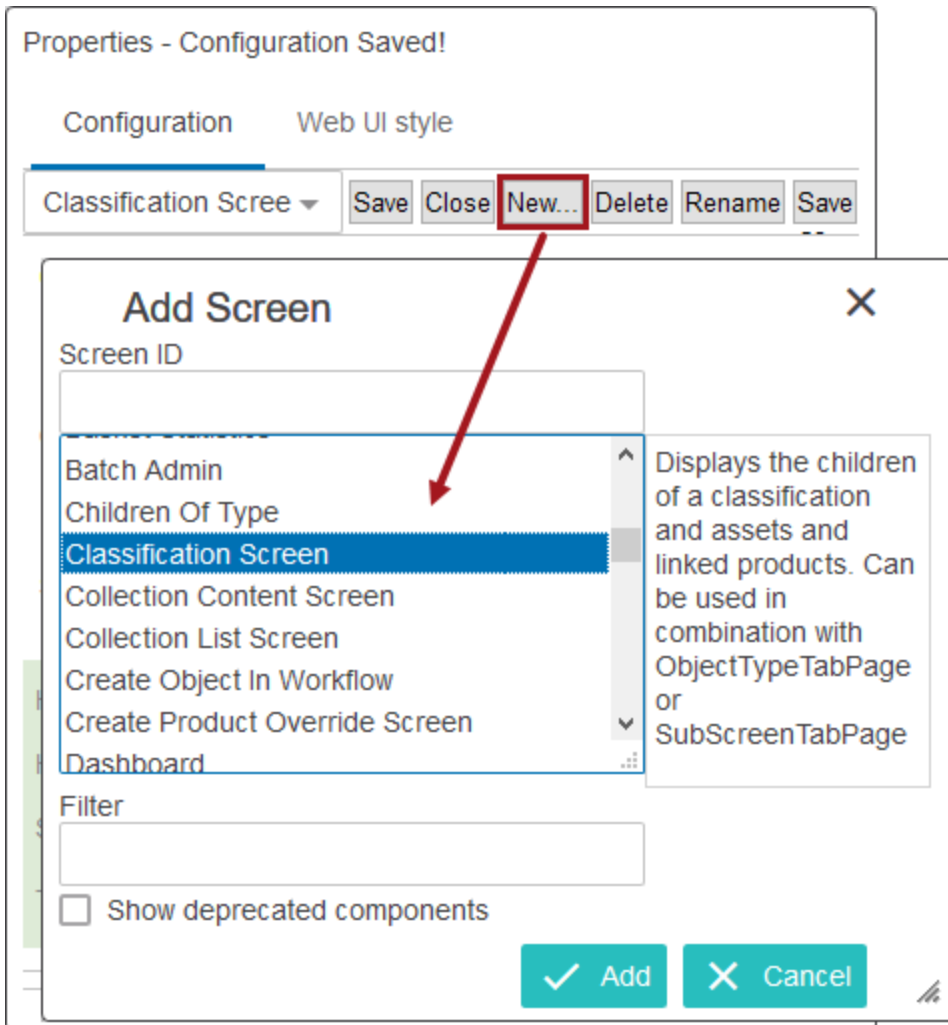
Select all
← Go Back
 Create Design Specification

	Title	Short Description	Planned Colors	Planned Number of Colors	Planned Sizes
<input type="checkbox"/>	Style 116418	Accessory 1	Blue Black Red	3 <i>fx</i>	One-size
<input type="checkbox"/>	Style 116421	Accessory 2	Blue Black Red	3 <i>fx</i>	One-size
<input type="checkbox"/>	Style 116422	Accessory 3	Blue Black Red	3 <i>fx</i>	One-size
<input type="checkbox"/>	Style 116423	Accessory 4	Blue Black	3 <i>fx</i>	One-size

←
→

Number of items : 16

1. Open the designer, click on **New...** and add a **Classification Screen**. *Specify a screen ID that will be easily identifiable when setting up screen mappings later in this process.*



2. In the Classification Screen Properties, under Child Components, select **Node List** from the Node List dropdown menu and click on **go to component**.

Properties - Configuration Saved!

Configuration Web UI style

Classification Scree ▾ Save Close New... Delete Rename Save

Classification Screen Properties

StyleName

Hide Assets

Hide Linked Products

Show Title

Title

Child Components

Node List Node List ▾ [go to component](#)

3. On the Node List Properties, confirm that the following parameters are enabled:

- Include Labels
- Lookup Screen Type For Navigation
- Enable Default Sorting

Properties

Configuration Web UI style

PLM Design Specs ▾ Save Close New... Delete Rename Save as...

Node List Properties [go to parent](#)

StyleName

Hide Standard Buttons

ID*

Include Labels

Lookup Screen Type For Navigation

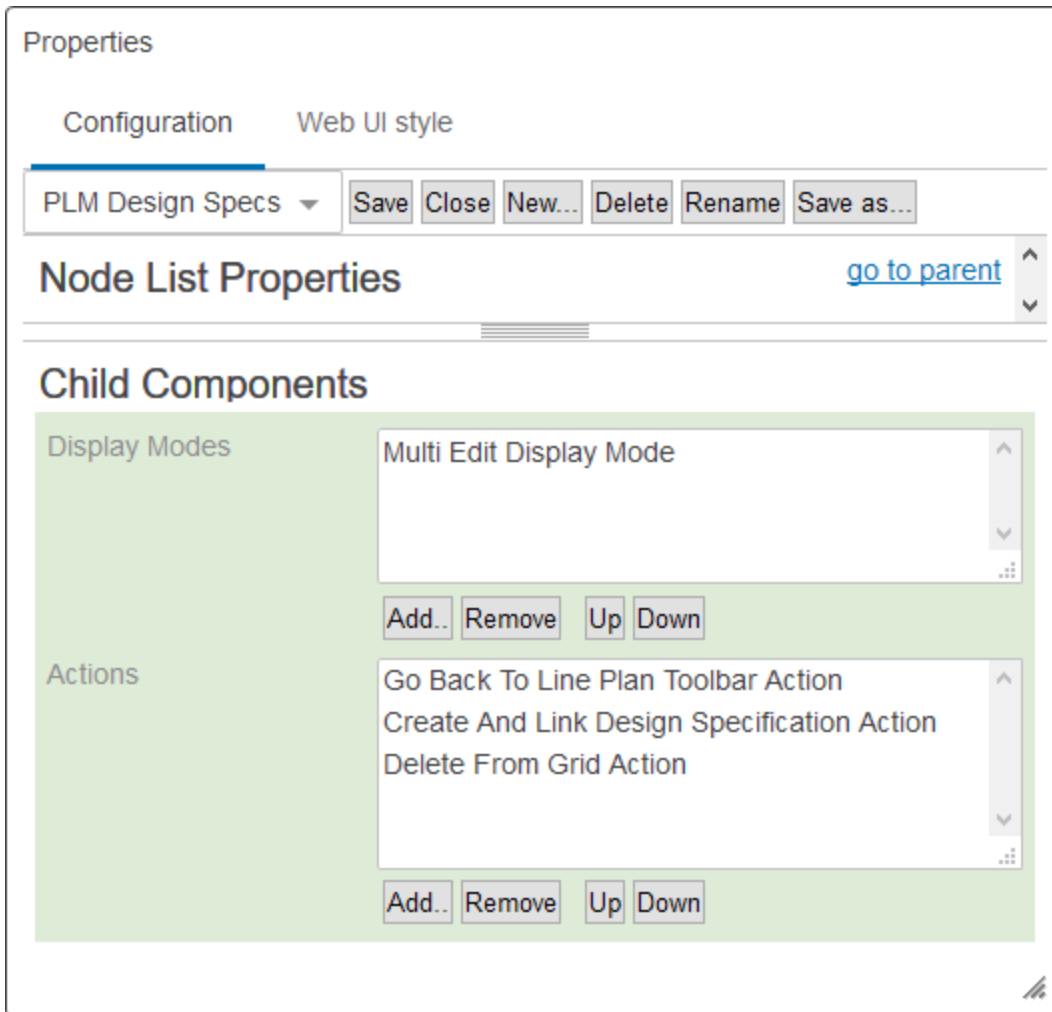
Page Size

Use Details Overlay

Default Sorting Order

Enable Default Sorting

4. Next, under Child Components, go to Display Modes and add a **Multi Edit Display Mode**. Additionally, under Actions, add:
- Go Back To Line Plan Toolbar Action
 - Create And Link Design Specification Action
 - Delete From Grid Action



Create And Link Design Specification Action

1. Configure the Create And Link Design Specification Action Properties:
 - Enter a button label.
 - Choose the object type that represents the design specifications. In this example it is PLMDesignSpecification.
 - Choose the object type that is the parent to the design specifications. In this example it is PLMDesignSpecificationsRoot.
 - Configure the context help field that displays when a user hovers the mouse over the action button.

Add component - configure required properties ✕

Required properties (*) must be set before the component can be added to the configuration.

Create And Link Design Specification Action Properties

Component Description Create a new Design Specification and link it into the current classification

Button Label	<input type="text" value="Create Design Spec"/>
Object Type *	<input style="background-color: #f0f0f0;" type="text" value="PLMDesignSpecification"/> ...
Parent *	<input style="background-color: #f0f0f0;" type="text" value="PLMDesignSpecificationsRoot"/> ...
Context Help	<input type="text" value="Click this to create a new design specification"/>

✓ Add
✕ Cancel

2. Back on Node List Properties, double click on 'Multi Edit Display Mode' to configure the fields that will display in the table.
3. In the Multi Edit Display Mode, click Add under the Headers field and repeat as necessary to add and configure as many headers as needed. In the example below, a Title Header and multiple Attribute Value Headers have been added.

Note: As part of the PLM configuration package, there are some attributes that need to be created and configured in workbench in order for design specifications to work properly. They then need to be added as attribute value headers (or as part of an attribute value group header) in order for design specifications to work in Web UI. See the **Setting Up Attributes for Line Plans** topic in this documentation for a list of attributes that need to be added for design specifications to work.

Properties

Configuration Web UI style

PLM Design Specs ▾ Save Close New... Delete Rename Save as...

Multi Edit Display Mode Properties [go to parent](#)

Component Description Displays the objects list in a Node List presented in an editable table.

Context Help i18n.stibo.portal.server.components.ma:

Headers

Title Header (true)
Attribute Value Group Header (false / fa

Add... Edit... Remove Up Down

Add Component ✕

- Approved Header
- Attribute Value Group Header
- Attribute Value Header
- Classification-Specific Attribute Value Group Header
- Classification-Specific Attribute Value Header
- Data Container Attribute Value Group Header
- Data Container Attribute Value Header
- Deduplication Header

Select a component to see its description

Filter

Show deprecated components

✓ Add
✕ Cancel

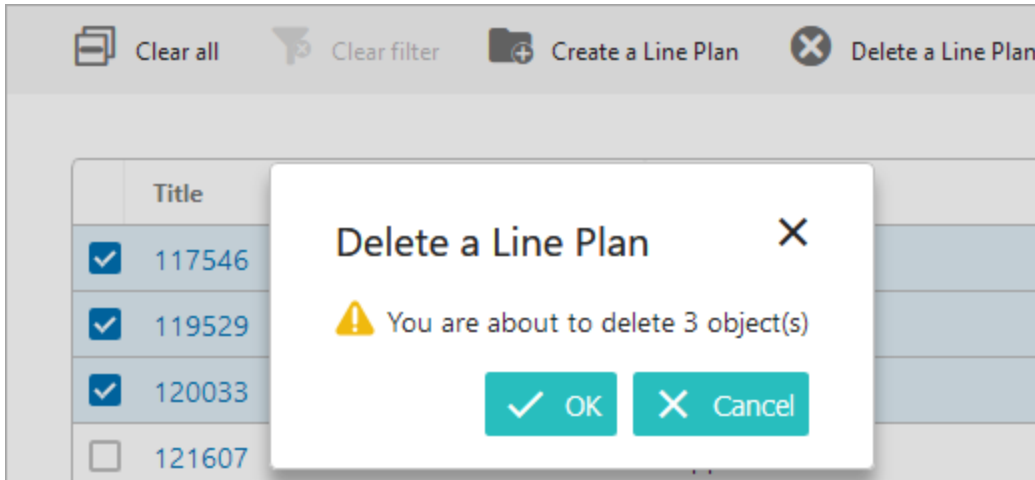
Delete From Grid Action

When configuring the Delete From Grid Action, if the 'Confirm Selection' checkbox is enabled, a confirmation dialog with selection details will appear when a user selects items from the table to be deleted.

The image shows two overlapping screenshots from a software application. The top screenshot is the 'Delete From Grid Action Properties' configuration window. It has tabs for 'Configuration' and 'Web UI style'. Below the tabs is a dropdown menu showing 'PLM Line Plan List' and several buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save'. The main title is 'Delete From Grid Action Properties' with a 'go to parent' link. Under 'Component Description', it says 'This action deletes the selected items in grid/table.' The configuration area includes: 'Approve Deletion' (checkbox), 'Button Label' (text input: 'Delete a Line Plan'), 'Cancel Button Label' (text input: 'i18n.stibo.portal.server.component:'), 'Confirm Selection' (checkbox, checked, highlighted with a red box), and 'Custom Icon' (text input with a 'Reset' button). A red arrow points from the 'Confirm Selection' checkbox to the bottom screenshot.

The bottom screenshot shows a 'Delete a Line Plan' dialog box over a grid. The grid has columns 'Title' and 'ID'. The first three rows are selected (checkbox checked): 117546, 119529, and 120033. The dialog box has a title bar 'Delete a Line Plan' with a close button. It contains a warning icon and the text 'You are about to delete 3 object(s)'. Below this are radio buttons for 'All' (checked) and 'None'. A list of the selected IDs is shown with checkboxes: 117546, 119529, and 120033. At the bottom are 'OK' and 'Cancel' buttons.

They can choose to delete only some of the initially selected items, All, or None. If the 'Confirm Selection' checkbox is not enabled, the user will just get a dialog asking them to confirm their initial selection.



If the newly created screen is mapped correctly, when a user clicks on a line plan item, they are able to see and interact with the item details according to user privileges. For more on mapping screens, see the **Mappings** topic in **Main Properties Overview** section in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

The screenshot shows a web application interface. At the top, there is a header for 'Christmas 2018' with a back arrow. Below this, there are several key-value pairs: Line Plan Business Cat... Apparel, Line Plan Year: 2018, Line Plan Season: Holiday, Line Plan Start Date: 2018-03-06, Schedule Deadline: 2018-04-06, and Line Plan Status: In Progress. A teal button labeled 'Edit Line Plan' is on the left. To the right of the button, there are two columns of data: '707 / 240000' and '623 / 120'. Below this is a table with columns 'Item Quantity', 'Item Unit', and 'Actions'. The table has three rows: 'Men' (707, 623, -, +, ✓), 'Jackets (9 styles)' (202, 22, -), and 'Jumpers and Cardigans (2 styles)' (16, 210, -). A red box highlights 'Jackets (9 styles)' with a red arrow pointing to a 'Classification Screen' modal. The modal has a title 'Classification Screen' and a toolbar with 'Select all', 'Go Back', and 'Design spec creation'. It contains a table with columns: Title, Planned Colors, Planned Number of Colors, Planned Sizes, and Planne Quar. The table has two rows: 'Long Quilted Jacket' (Blue Black, 2, fx, S M, 200) and 'Quilted Coat' (, 0, fx, ,). A scrollbar is visible on the right side of the table. At the bottom of the modal, it says 'Number of items : 9'.

If a user needs to edit a reference on a design specification, a Node Details screen needs to be created, configured, and mapped.

In the Node Details Properties (Child Components > Main), add a Multi Reference component configured with a Node List that uses Multi Edit Display Mode. Configure the Multi Edit Display Mode as needed. For more on how to configure this, see the **Multi Reference Editor** topic in the **Using a Web UI** section of the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Once configured, this will need to be mapped correctly. For information on mapping screens, see the **Mappings** topic in **Main Properties Overview** section in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Setting Up Schedules in Workbench

Schedules assist managers in attaining deadlines and goals outlined by the line plan, helping to ensure that a product goes to market on time. For schedules to work correctly in Web UI though, proper setup first needs to happen in the workbench.

Prerequisites

- The PLM configuration file is uploaded to STEP. See **Configuration Setup for Line Plans and Schedules** in this documentation.
- Line plans must be set up on the system. This includes the ability to create design specifications, and the ability to approve line plans that are deemed complete. See the topics **Setting Up Line Plans in Workbench** and **Adding a Classification Screen** in this documentation for more information.
- If using workflows, create any workflows needed for schedules. For more on how to configure a workflow, see the **Workflows** topic in the **Workflows** documentation.

Additional setup needed

Read the following topics on how to set up schedules properly in the workbench:

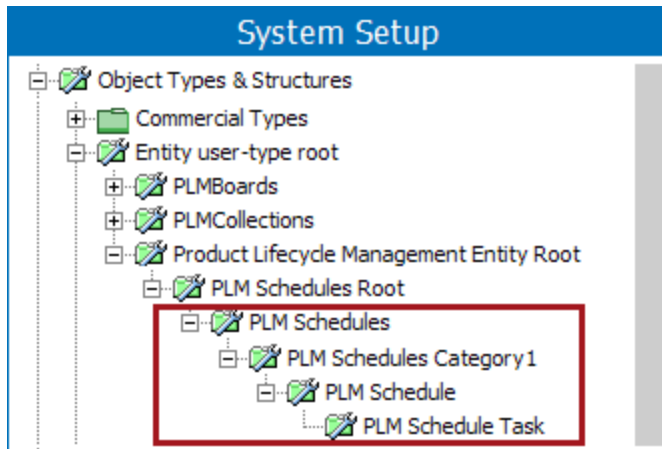
- Creating Schedule Object Types
- References Needed for Schedules
- Setting Up Attributes for Schedules

Creating Schedule Object Types

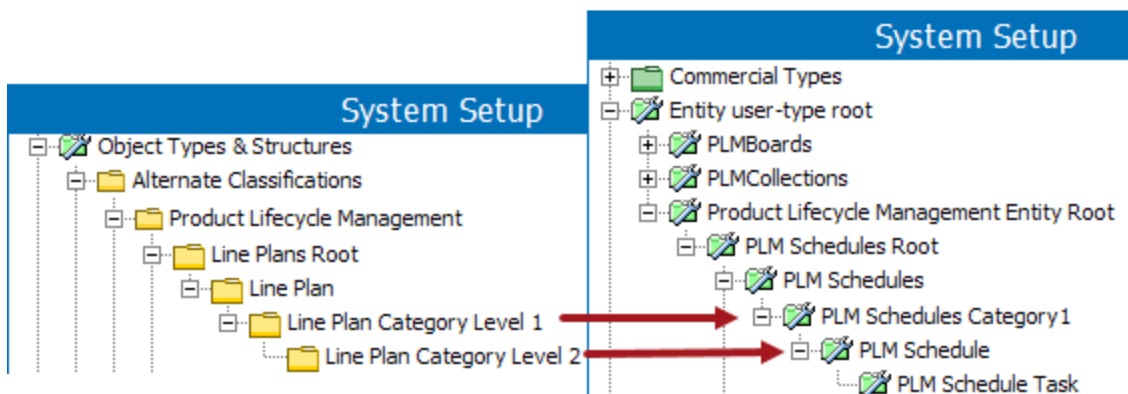
There are a number of entity object types necessary for schedules to function properly in Web UI. The following sections describe what entity object types need to be created.

Creating PLM Schedules

Schedules are entity object types that live in a hierarchy structure like the one shown below.



In the example structure, every time a user approves a Line Plan Category 1 object type, it creates a schedule in the hierarchy structure as a PLM Schedules Category 1 object type. Additionally, for each Line Plan Category 2 object type, a PLM Schedule object type is created.



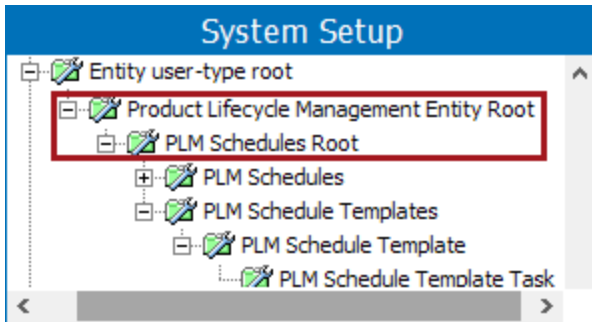
For more on schedule task templates and how to create them, see the next section of this topic.

Note: It is important that the object type IDs used in workbench for schedules are the same used in the uploaded PLM configuration file and in the Web UI designer, otherwise schedules will not work correctly. Talk to your implementation team to ensure they are in alignment.

For more on how to create entity object types in System Setup, see the **Object Maintenance in Tree** topic in the **Getting Started / User Guide** documentation.

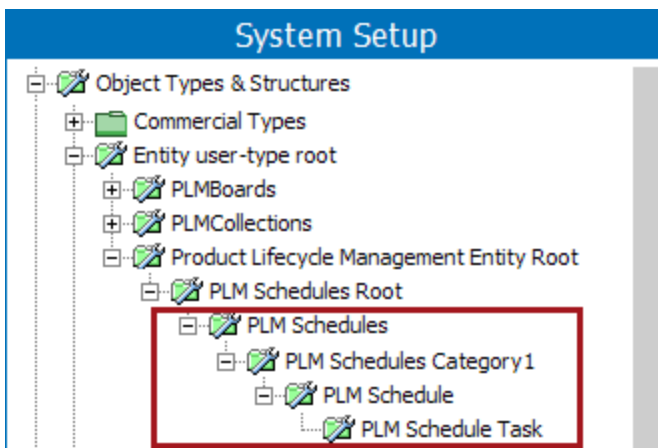
To create the PLM Schedules structure:

1. Create the Product Lifecycle Management Entity Root node and its child PLM Schedules Root if they do not already exist.

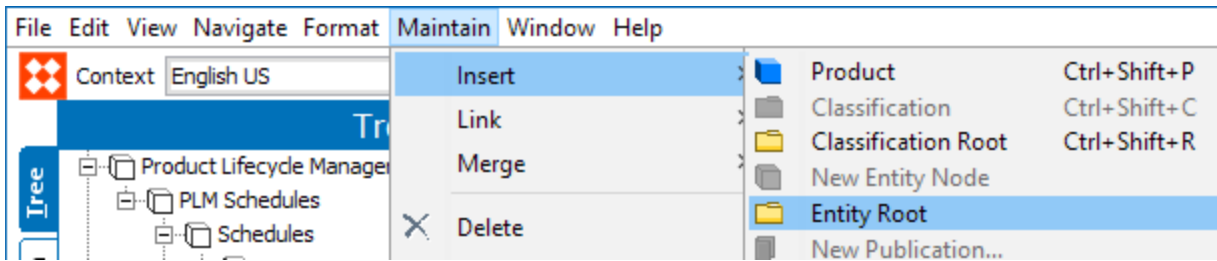


Note: This top-level parent Product Lifecycle Management Entity Root folder and its child PLM Schedules Root will not just hold PLM Schedules, but will hold PLM Schedule Templates as well. For more on schedule templates and how to create them, see the next section of this topic.

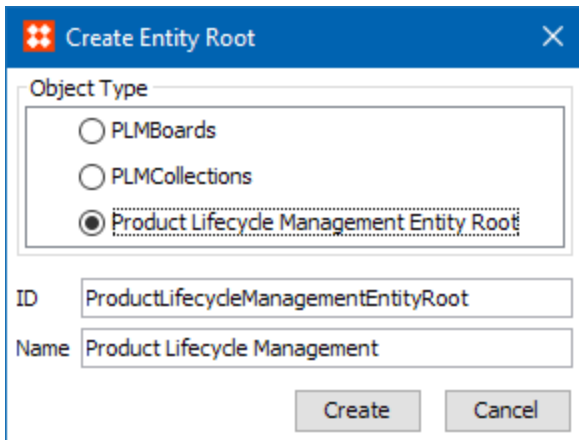
2. Under the Product Lifecycle Management Entity Root node, create the needed hierarchy structure for PLM Schedule object types.



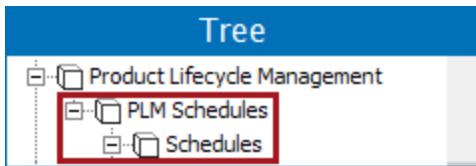
3. To add the schedule structure to Tree, go to Maintain > Insert > click Entity Root.



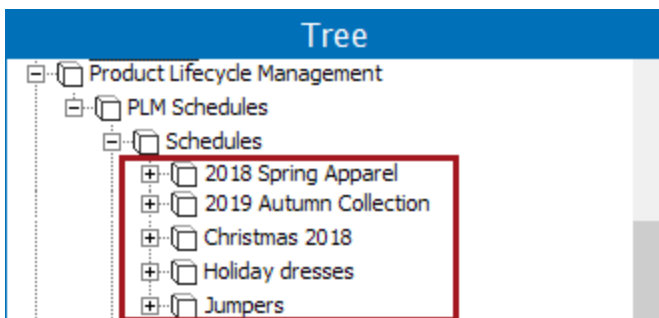
- The 'Create Entity Root' dialog will appear. Select the object type created to hold all entity schedule object types. In this case it is ProductLifecycleManagementEntityRoot.



- Once added, add the nodes PLM Schedules and its child Schedules.



All future schedules and their subcategories will be created automatically under the Schedules node as a result of approved line plans. For more on line plan approval, see **Setting up Attributes for Line Plans** in the **PLM for Admins** documentation, or the **Creating Line Plans** topic in **PLM for Users** documentation.



Creating Schedule Template Tasks

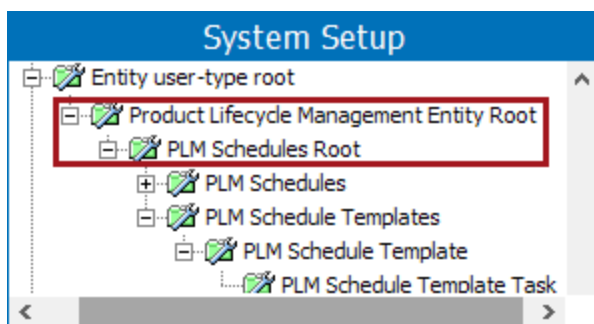
Schedule Template tasks are the templates used when creating schedules. Each template has a set of tasks that may have dependencies on one another, and help define the schedule. In order for schedules to work properly in Web UI, schedule templates need to be created using entity object types. Schedule templates can be created one of two ways:

- Import and mapping upon import
- Building the template in the workbench

For more information on how to import and properly map inbound data, see the **Import Manager** and **Data Mapping** topics in the **Data Exchange** documentation.

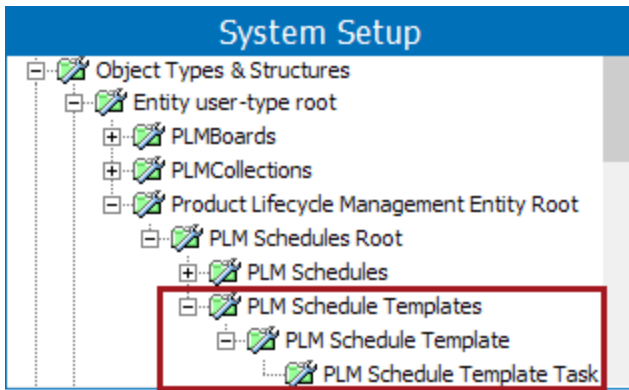
Note: It is important that the object type IDs used in workbench for schedule templates tasks are the same used in the uploaded PLM configuration file and in the Web UI designer, otherwise schedules will not work correctly. Talk to your implementation team to ensure they are in alignment.

1. If the Product Lifecycle Management Entity Root folder and its child PLM Schedules Root do not already exist, create these nodes.

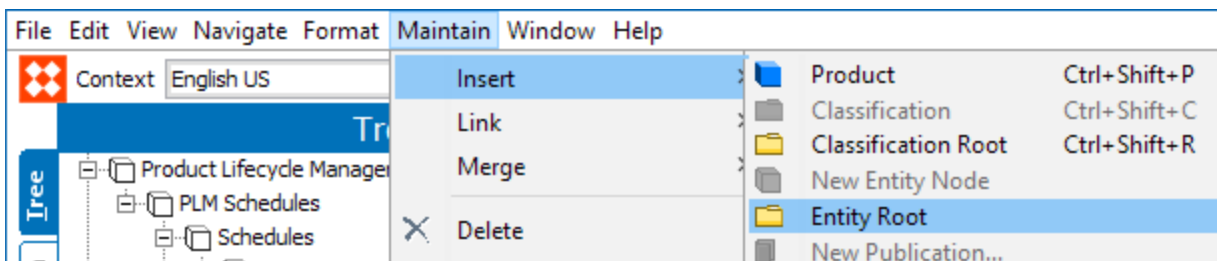


Note: This top level parent Product Lifecycle Management Entity Root folder and its child PLM Schedules Root will not just hold PLM Schedule Template, but will hold PLM Schedule as well. For more on schedules and how to create them, see the above section of this topic

2. Add the needed hierarchy structure for PLM Schedule Templates according to business needs. Below is an example hierarchy structure for PLM Schedule Templates.

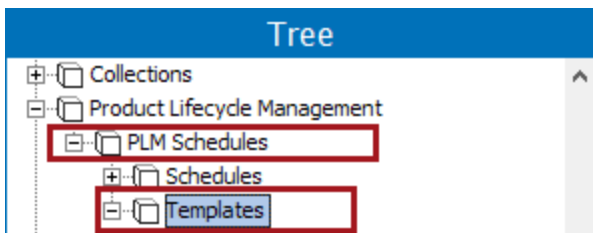


3. To add the schedule templates to Tree, go to Maintain > Insert > click Entity Root.

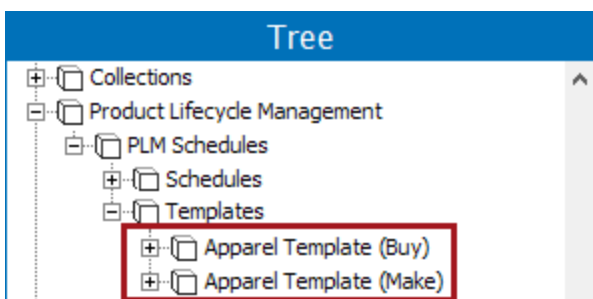


4. The 'Create Entity Root' dialog will appear. Select the object type created to hold all entity schedule object types, if it does not already exist in the system. In this case it is ProductLifecycleManagementEntityRoot.

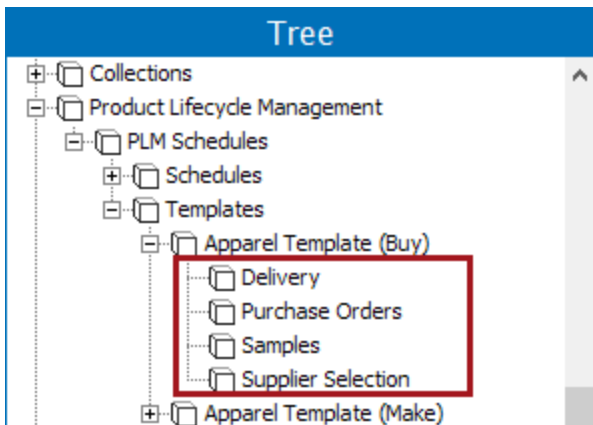
5. Once added, add the nodes PLM Schedules and its child Templates if it does not already exist on the system.



6. Add as many templates as needed under the Templates node. These templates will become available to select from when creating schedules. See the **Creating Schedules** topic in the **PLM for Users** documentation.



7. Under each template, create the number of needed template tasks.



In Web UI, when a user is creating a schedule and chooses one of the templates, a copy of these schedule template tasks then gets created for each individual line plan.

Note: Schedule Template Tasks use the reference 'PLM Schedule Template Task Dependency,' to ensure that each template task has the appropriate task dependencies. If the reference dependencies are not configured properly, schedules will not work. See the topic **References Needed for Schedules** in this documentation for more information.

References Needed for Schedules

There are three entity references and one product reference needed for schedules to work properly in Web UI. The three entity references are:

- Schedule Template
- PLM Schedule Template Task Dependency
- Schedule Task Dependency

The Product reference needed is:

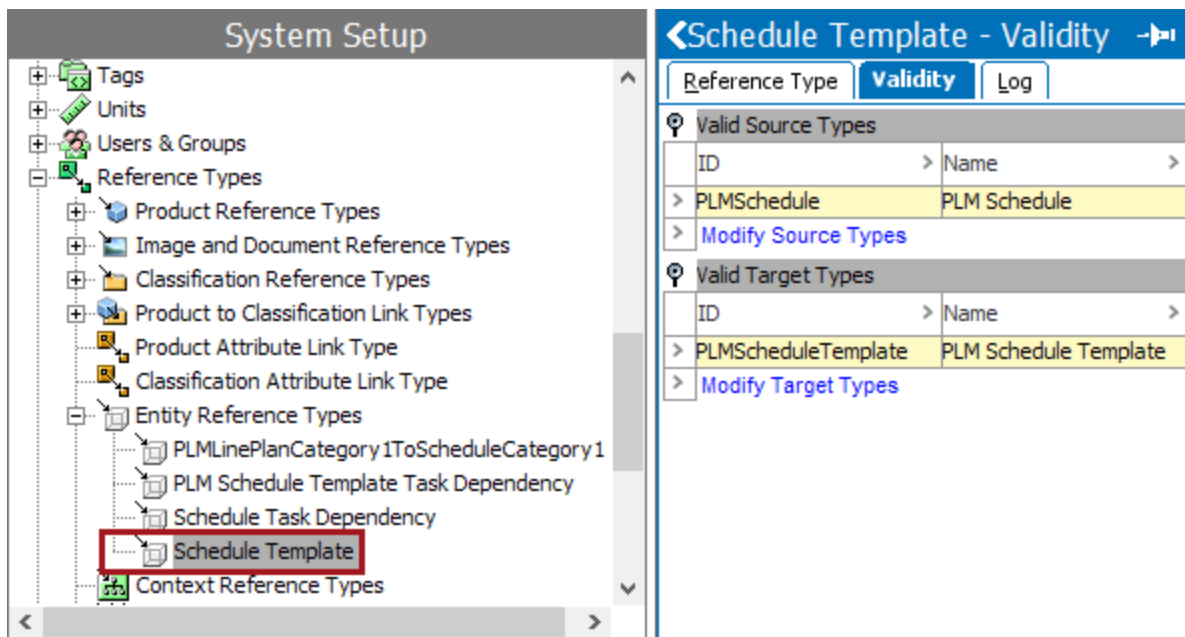
- Schedule Task

These references enable schedules to work with templates, tasks, and design specifications to allow for a seamless experience with schedules.

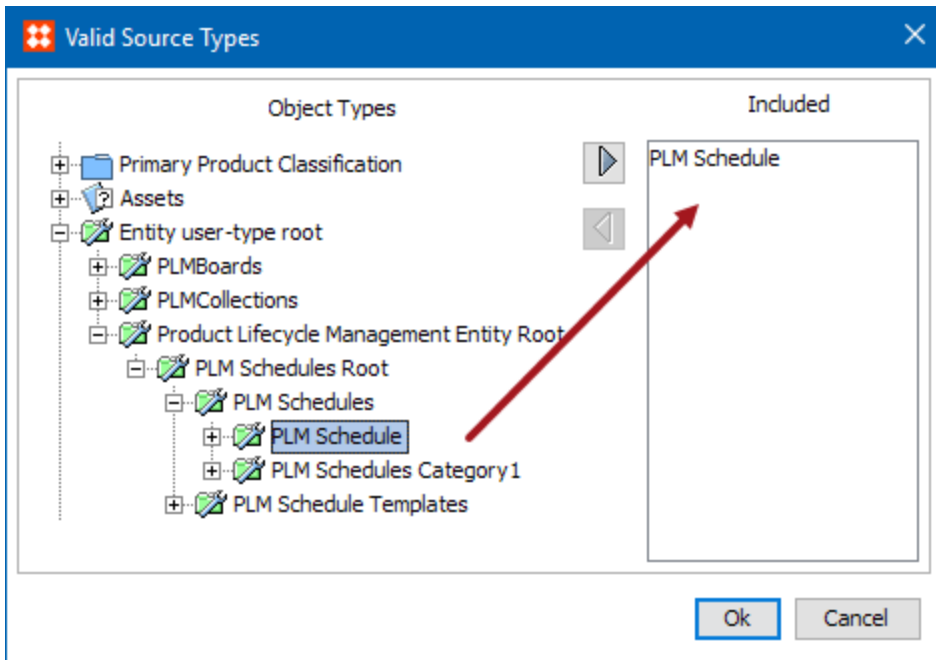
Entity Reference Types

Schedule Template

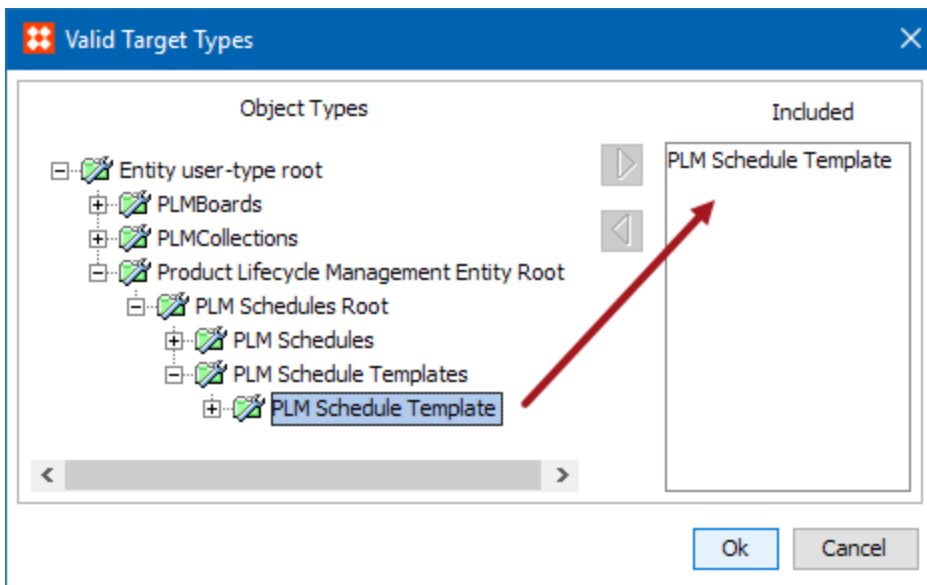
The Schedule Template entity reference is a reference between the schedule and the schedule templates. Each time a template is selected for the creation of a schedule, a copy of the templates is created for the schedule.



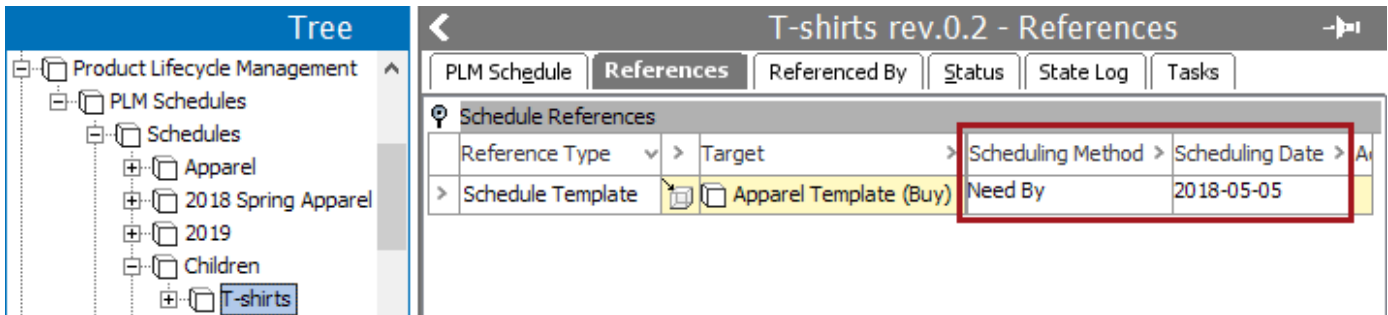
The Valid Source Types is the object type that represents schedules, in this case it is PLM Schedule.



The Valid Target Type is the object type that represents schedule templates, in this case it is called PLM Schedule Template.

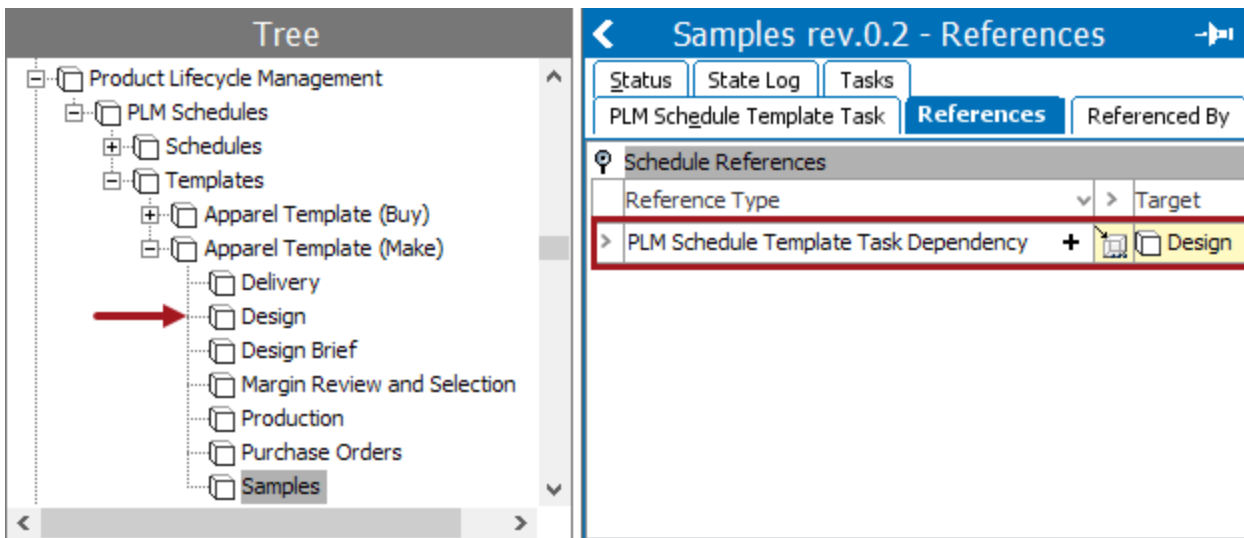


Additionally, this reference has two attributes on it that save the selected Scheduling Method and the Scheduling Date. For more on the Scheduling Method and Scheduling Date attributes, see the **Scheduling Method and Scheduling Date** topic in this documentation.

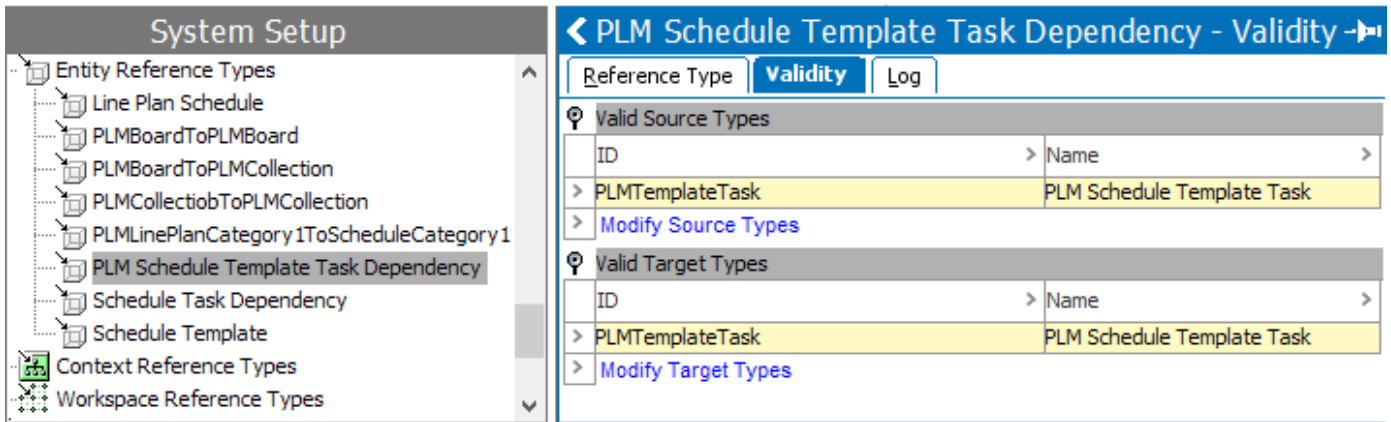


PLM Schedule Template Task Dependency

The PLM Schedule Template Task Dependency reference determines the order, or dependencies, of the schedule template tasks for the schedules. For example, when looking at the schedule template 'Apparel Template (Make)' each task created in the template has a defined dependency on the other tasks in the template. Looking at the 'Sample' template task, you can see that once this task is complete, the Design template task will begin.



This entity reference is used to establish the order of tasks so that scheduled dates can be calculated, based on dependent tasks and their durations. Notice that the validity for the Valid Source Types and Valid Target Types are both the Entity 'PLM Template Task' object type.

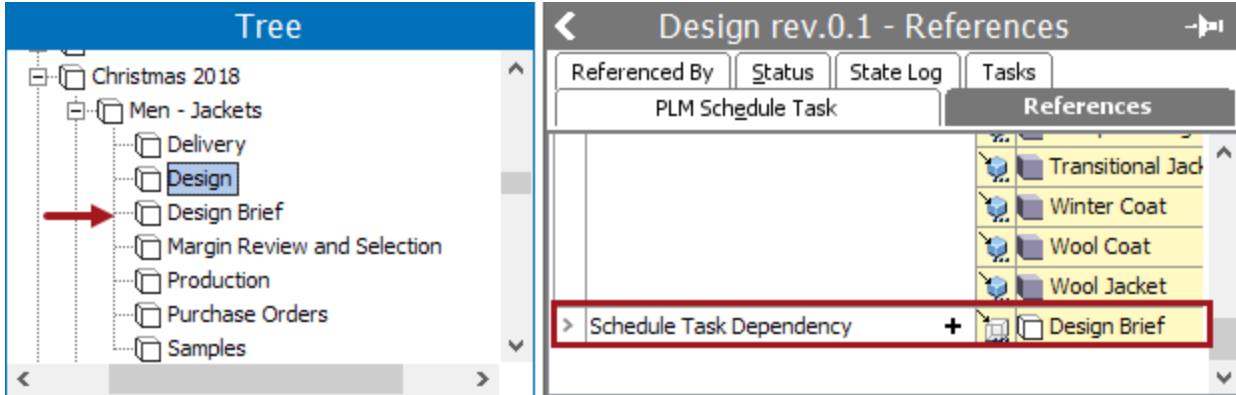


Note: When a user chooses which template to use when creating a schedule, a copy of the template tasks and reference are created for each individual schedule. The reference that mimics the PLM Schedule Template Task Dependency reference for the actual schedule is called Schedule Task Dependency.

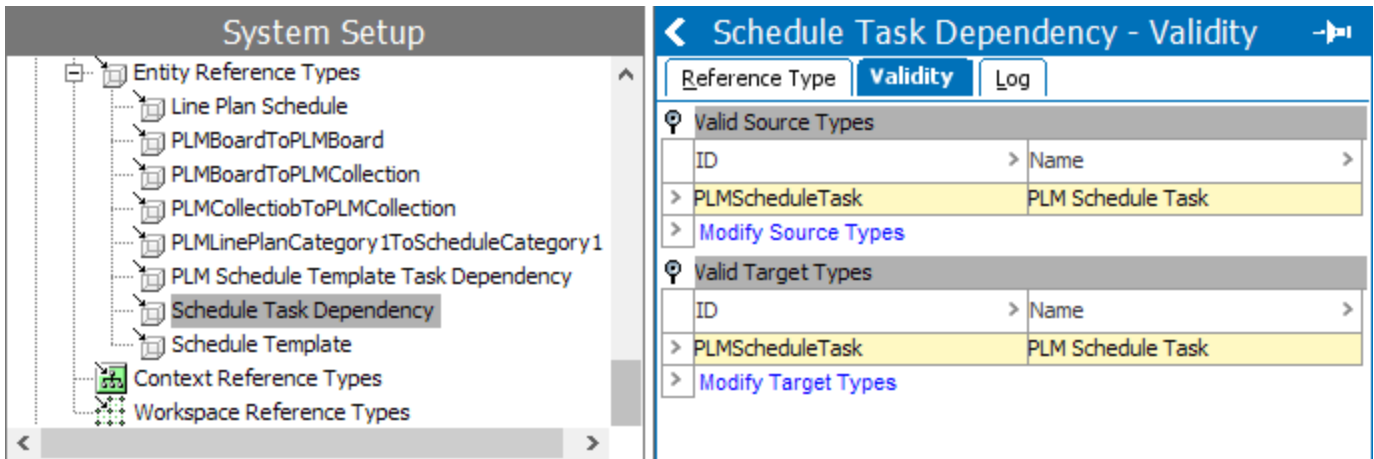
Schedule Task Dependency

This reference determines the order, or dependencies, of the tasks in the schedules. In the example below, the name of the reference is Schedule Task Dependency.

In this example, when looking at the task assigned to the manufacturing of a men's jacket, we can see that after the 'Design' phase takes place, the next task is to create 'Design Brief.'



This entity reference is used to establish the order of tasks so that scheduled dates can be calculated, based on dependent tasks and their durations. Notice that the validity for the Valid Source Types and Valid Target Types are both the 'PLM Schedule Task' entity object type.



Product Reference Type

Schedule Task

This reference enables schedules and design specifications to work together seamlessly. In the example below, the name of the reference is 'Schedule Task.'

System Setup

- Reference Types
 - Product Reference Types
 - Idea Board
 - Line Plan Item
 - Package Label
 - Packaging Material
 - Parameter
 - PBoardToCollection
 - PLMBoardToProductContent
 - ProductContentHeroImage
 - Related Specification
 - Requirement
 - Schedule Task**
 - Image and Document Reference Types
 - Classification Reference Types
 - Product to Classification Link Types
 - Product Attribute Link Type
 - Classification Attribute Link Type
 - Entity Reference Types
 - Context Reference Types
 - Workspace Reference Types
 - Workspaces

Schedule Task - Reference Type

Reference Type | Validity | Log

Description

Name	Value
ID	PLMScheduleTask
Name	Schedule Task
Last edited by	2018-01-18 14:23:47.0 by STEPSYS
Externally Maintained	No
Allow multiple references	Yes
Mandatory	No
Inheritance	None

Aspects

In Attribute Groups

ID	Name
PLMScheduleActualsAttributeGr...	Schedule Actuals Attributes
PLMScheduleReferences	Schedule References

Valid Attributes

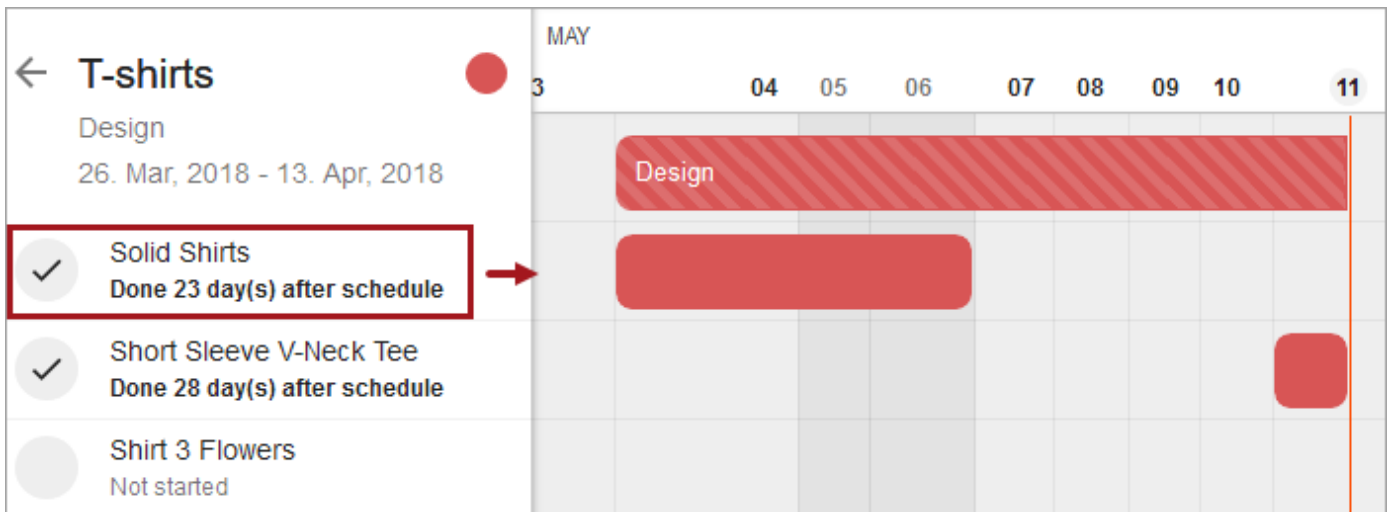
ID	Name
PLMProjectStartDateActual	Actual Start
PLMProjectEndDateActual	Actual End
PLMScheduleTaskDurationActual	Actual Duration

When a design specification is finished with a task on a schedule, through business rules, the actual start and end dates of that task can be recorded on the Schedule Task reference via the 'PLMProjectStartDateActual' and 'PLMProjectEndDateActual' attributes.

The screenshot shows a 'Tree' view on the left with 'Product Lifecycle Management' expanded to 'Design Specifications', where 'Solid Shirts' is selected. The main view is titled 'rift rev.0.1 - Referenced By' and contains a table with the following data:

Reference Type	Source	Actual Start	Actual End
Schedule Task	Delivery		
	Design	2018-05-04	2018-05-06
	Design Brief		
	Margin Review and Selection	2018-05-07	
	Production		
	Purchase Orders	2018-05-07	
	Samples	2018-05-07	2018-05-07

This then generates in the Web UI to show a complete picture of where a design specification is in relation to the schedule.



For more on attributes needed for schedules to work, see the **Setting Up Attributes for Schedules** topic in this documentation.

When creating the Schedule Task product reference type, make the Valid Source Types valid for the 'PLM Schedule Task' entity type. Make the Valid Target Type valid for the design specification object type.

System Setup

- Reference Types
 - Product Reference Types
 - Idea Board
 - Line Plan Item
 - Package Label
 - Packaging Material
 - Parameter
 - PBoardToCollection
 - PLMBoardToProductContent
 - ProductContentHeroImage
 - Related Specification
 - Requirement
 - Schedule Task**

Schedule Task - Validity

Reference Type | **Validity** | Log

Valid Source Types

ID	Name
PLMScheduleTask	PLM Schedule Task
Modify Source Types	

Valid Target Types

ID	Name
PLMDesignSpecification	Design Specification
Modify Target Types	

Setting Up Attributes for Schedules

When using schedules, there are numerous attributes that need to be configured. These attributes help schedules:

- Identify if the schedule being created is a 'Start from date' vs. 'Need by date'
- The planned duration a task should take
- After the schedule is submitted, what are the estimated planned start and planned end dates for each task
- The actual start and actual end dates a design specification takes to complete a task in a schedule
- Which workflow should be initiated for tasks in a schedule, if using workflows

The sections below detail what attribute setups are need. For more on how to create attributes, see the **Attributes** topic in the **System Setup / Super User** documentation.

- Scheduling Method and Scheduling Date
- Planned Start and Planned End
- Planned Duration
- Schedule Is Submitted
- Actual Start and Actual End
- Schedule Deadline
- Workflow and State ID

Scheduling Method and Scheduling Date

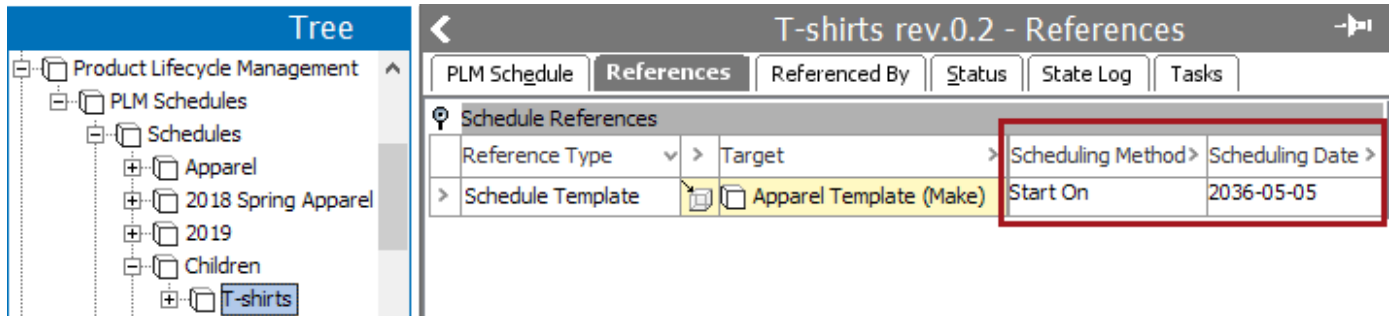
When creating a schedule in Web UI, a user is asked to select the Scheduling Method, indicating if the schedule being created is either a 'Start from date' or 'Need by date.'

The image shows two screenshots of a web UI form for 'T-shirts'. The top screenshot shows the 'Need by date' option selected in a dropdown menu, with the date '05. May, 2018' displayed next to it. A red arrow points from this dropdown to the bottom screenshot. The bottom screenshot shows the same dropdown menu with 'Start from date' and 'Need by date' options. 'Need by date' is highlighted in grey, and the date '05. May, 2018' is visible next to it.

Depending on the chosen selection, the date (Scheduling Date) next to the selection indicates either the start from or need by date. In the example below, a 'Start from date' was chosen, indicating that May 5, 2036, will be the date that this schedule starts.

The image shows a screenshot of a web UI form for 'T-shirts'. The 'Start from date' option is selected in the dropdown menu, and the date '05. May, 2036' is displayed next to it. The entire dropdown menu and date field are highlighted with a red box.

In workbench, the attributes are recorded on the Schedule Template reference.

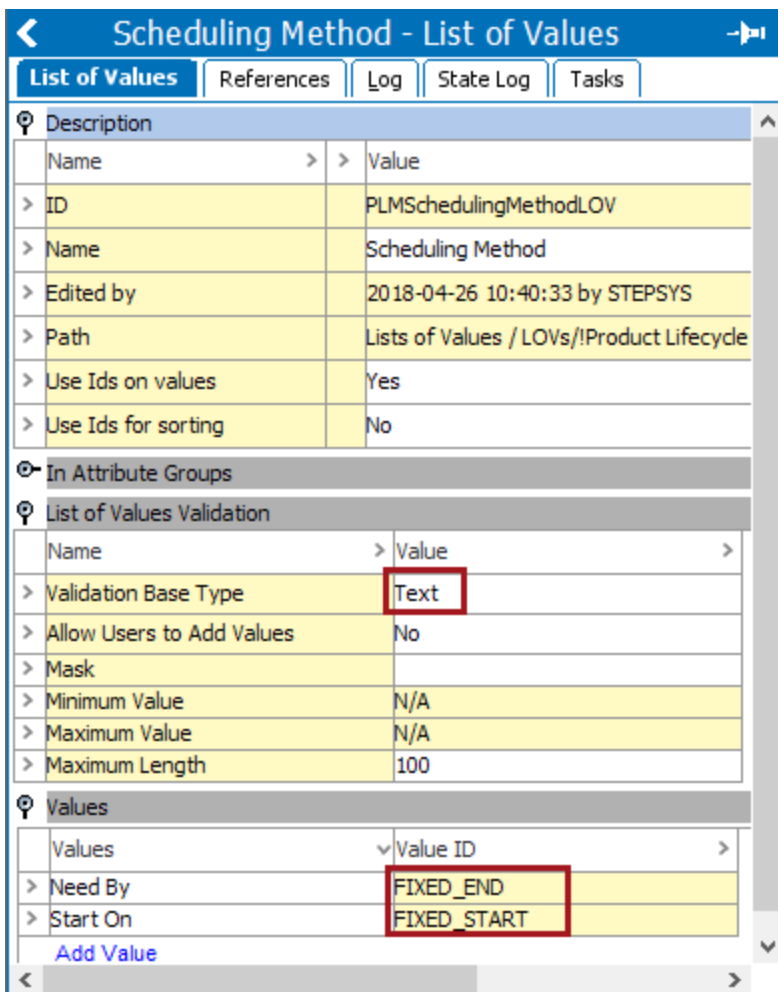


To configure these two attributes, see the direction below:

Scheduling method

1. Create a text-based List Of Value with the values of FIXED_END and FIXED_START in the Values field.

Note: The name and ID for this List Of Value can vary, but the values for the list of value must be FIXED_END and FIXED_START.



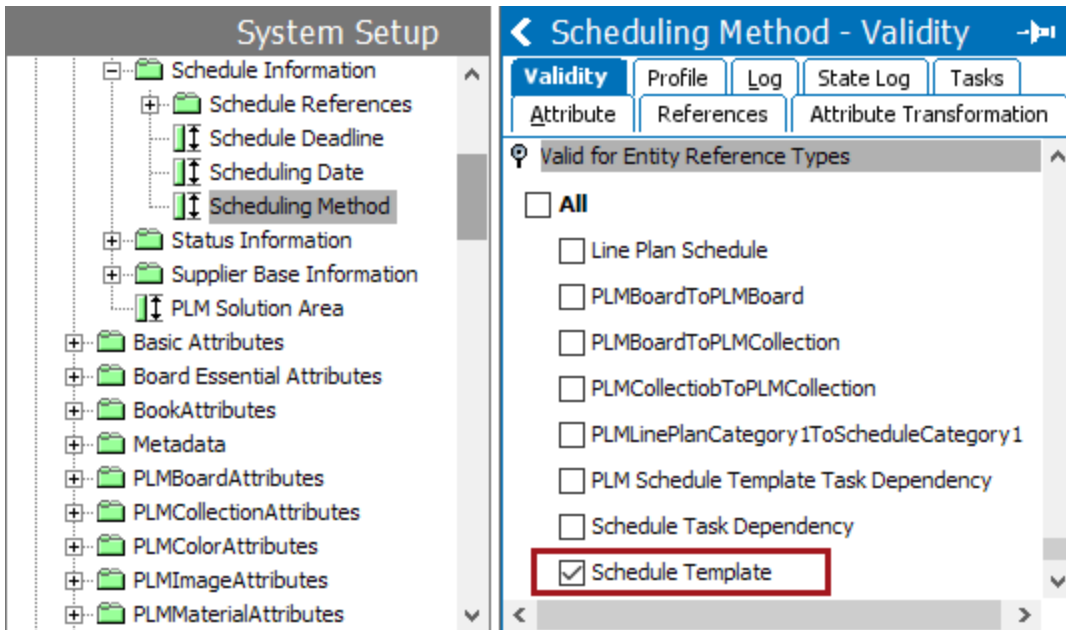
- Under the desired parent folder, create a new description attribute to represent the scheduling method. This attribute is externally maintained with a 'List Of Values' validation base type. Make the List of Values created in the previous step the chosen List of Values for this attribute.

The screenshot shows the configuration for a 'Scheduling Method - Attribute'. The 'Attribute Validation' section is highlighted with a red box. The configuration is as follows:

Name	Value
> Validation Base Type	List Of Values
> List Of Values	Scheduling Method
> Multi Valued	No

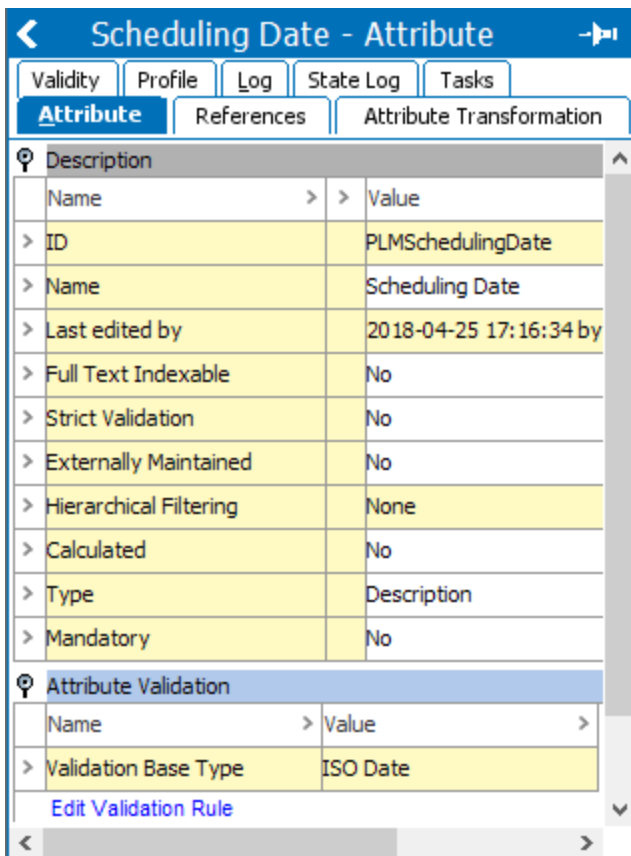
Below the table, there is a link labeled 'Edit Validation Rule'.

- The attribute you just created should be valid for the reference type that represents the schedule template. In this example, the attribute is called Scheduling Method, and the reference type is Schedule Template.

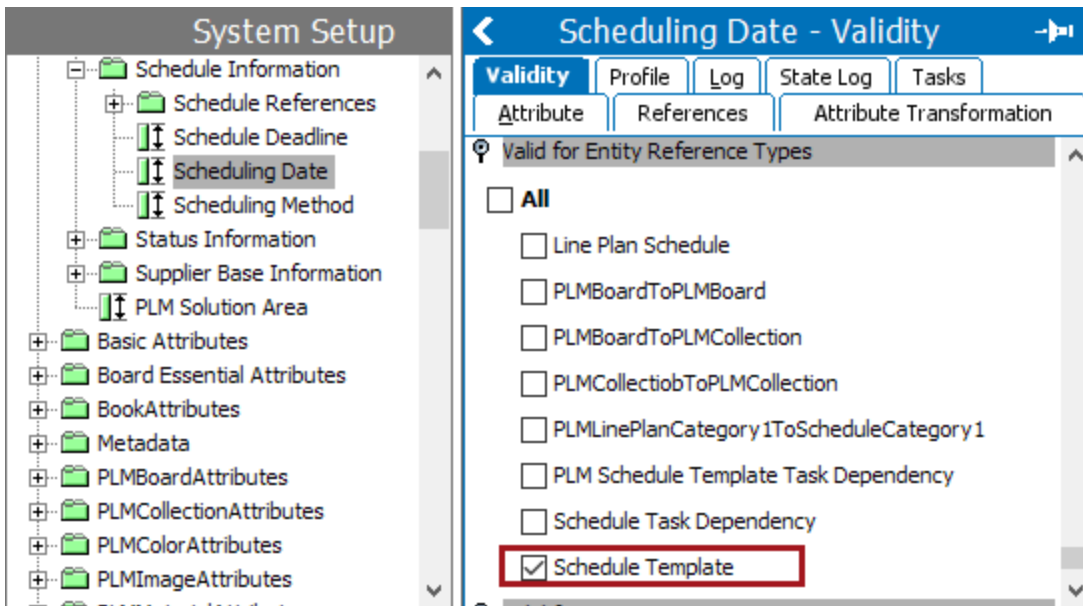


Scheduling date

1. Create a description attribute with an ISO Date validation base type.



- The attribute to represent the scheduling date should be valid for the reference type that represents the schedule template. In this example, the attribute is Scheduling Date and the reference type is Schedule Template.



Planned Start and Planned End

When creating a schedule, a planned start date and a planned end date for each schedule task needs to be defined. This is done when a user creating the schedule selects the attributes that represent the scheduling method, scheduling date, and the template type.

← Men - Jackets

Start from date ▼ 06. May, 2018

Select template ▼

Design Brief 03/01/2018 - 12/01/2018	8
Design 15/01/2018 - 01/02/2018	14
Samples 02/02/2018 - 02/03/2018	21
Margin Review and Selec... 05/03/2018 - 08/03/2018	4
Purchase Orders 05/03/2018 - 06/03/2018	2
Production 09/03/2018 - 09/03/2018	1
Delivery 12/03/2018 - 30/03/2018	15

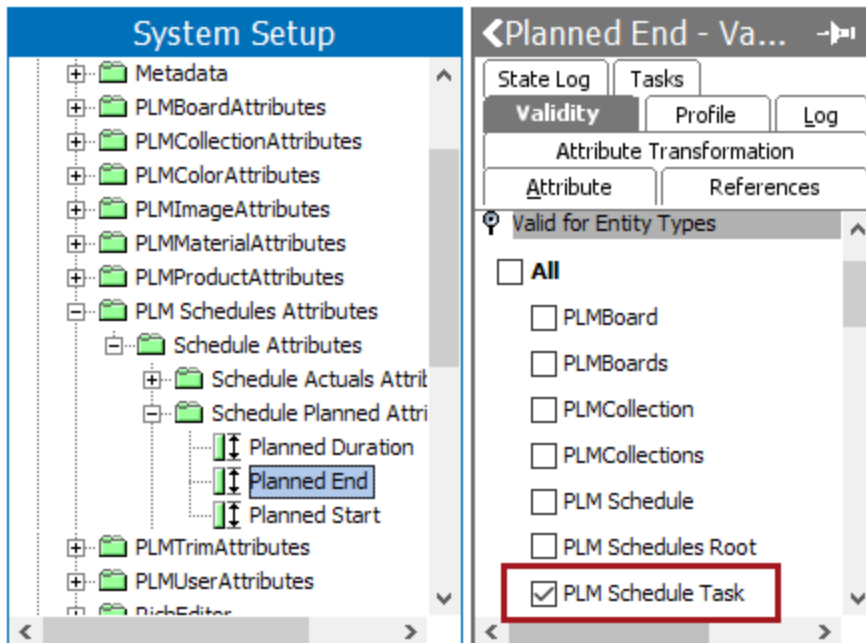
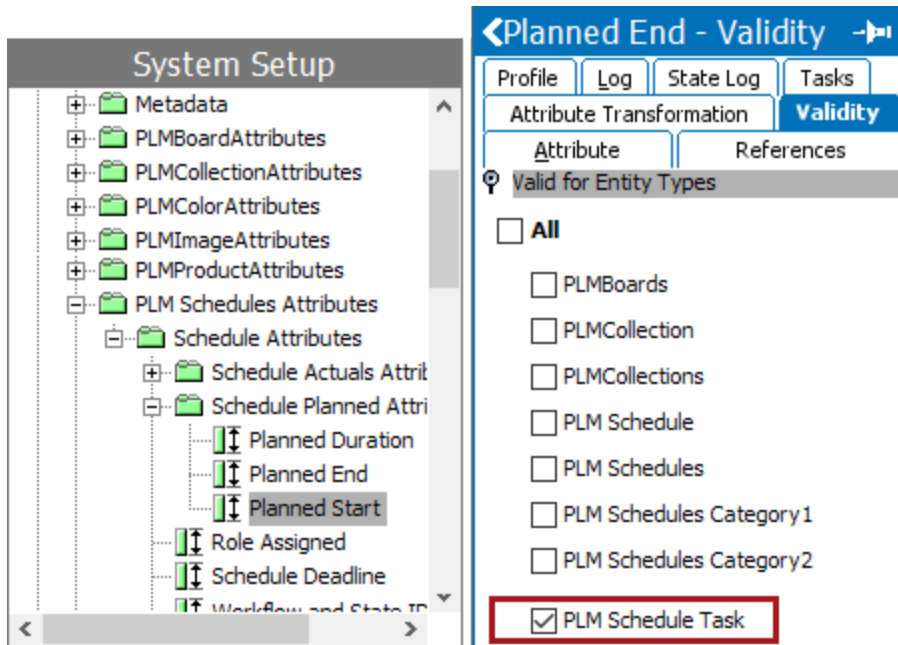
Submit

Additionally, each template has a set number of tasks associated with the template. Each template task has a defined duration of days allotted for completing the task. If a user wishes to change the default number of days for a task, they are able to do so when creating the schedule. For more on how to create schedule templates, see the **Creating Schedule Object Types** topic in this documentation.

The screenshot shows a mobile application interface for 'Men - Jackets'. At the top, there is a back arrow and the title 'Men - Jackets'. Below the title, there is a 'Start from date' dropdown menu set to '06. May, 2018' and a 'Select template' dropdown menu. The main content area lists several tasks with their durations in a column on the right. The durations are: 8, 14, 21, 4, 2, 1, and 15. A red box highlights this column of durations. At the bottom, there is a 'Submit' button.

Task	Duration
Design Brief 03/01/2018 - 12/01/2018	8
Design 15/01/2018 - 01/02/2018	14
Samples 02/02/2018 - 02/03/2018	21
Margin Review and Selec... 05/03/2018 - 08/03/2018	4
Purchase Orders 05/03/2018 - 06/03/2018	2
Production 09/03/2018 - 09/03/2018	1
Delivery 12/03/2018 - 30/03/2018	15

Once the schedule is submitted, depending on the selections chosen for the attributes that represent the Scheduling Method, scheduling date, template type, the task dependencies, and task day durations, the planned start and planned end dates for the schedule are defined. In this example, these dates are recorded in the PLMProjectStartDateScheduled and PLMProjectEndDateScheduled attributes valid for entity type PLM Schedule Task.



In the example below, 'Men-Jackets' has been submitted as a schedule. 'Design Brief' is the first task, with nine days being determined as the duration of business working days needed to complete the task.

The screenshot displays a software interface with two main panels. On the left is a 'Tree' view showing a hierarchical structure under 'Christmas 2018'. The 'Design Brief' item is selected. On the right is a data table titled 'Design Brief rev.0.1 - PLM Schedul...'. The table has columns for 'Referenced By', 'Status', 'State Log', 'Tasks', and 'References'. The main data area is a table with columns 'Name' and 'Value'. The 'Planned Start' and 'Planned End' rows are highlighted with a red border.

Name	Value
ID	PLMScheduleTask123648
Name	Design Brief
Object Type	PLM Schedule Task
Revision	0.1 Last edited by USERL on
Path	Entity hierarchy root/Produc
Planned Start	2018-05-06
Planned End	2018-05-17
Role Assigned	
Workflow and State ID	PLMProductDevelopment_De

To create both the Planned Start and Planned End Date attributes:

1. Go to System Setup, and create these attributes in the desired attribute group.
2. Make them both description attributes with a ISO Date validation base type, and a validity for the entity type PLM Schedule Task.

Planned Duration

The attribute to represent the planned duration's value determines the baseline number of days that a particular template task should take. For example, in the Apparel Template (Buy), the template task 'Delivery' has a planned duration of 20 days as its baseline.

The screenshot displays the Stibo Systems web UI. On the left is a 'Tree' view showing the hierarchy: Product Lifecycle Management > PLM Schedules > Templates > Apparel Template (Buy) > Delivery. On the right is a details panel for 'Delivery rev.0.2 - PLM Schedule Template Task'. The panel includes tabs for Status, State Log, Tasks, References, and Referenced By. The 'Tasks' tab is active, showing a table of attributes for the 'Delivery' task. The 'Planned Duration' attribute is highlighted with a red box, showing a value of '123 20 d'.

Description	
Name	Value
ID	PLMScheduleTemplateTask112439
Name	Delivery
Object Type	PLM Schedule Template Task
Revision	0.2 Last edited by STEPSYS on Thu Nov 30 10:00:00 AM 2018
Path	Entity hierarchy root/Product Lifecycle Management/PLM Schedules/Templates/Apparel Template (Buy)/Delivery
Planned Duration	123 20 d
Role Assigned	Suppliers
Workflow and State ID	PLMSupplierPurchasedItems_Delivery

When a user creates a schedule in Web UI, and picks the 'Apparel Template (Buy)' schedule template to use, the tasks associated with the template populate with their values pre-populated from the attribute that represents the Planned Duration attribute.

← T-shirts

Start from date ▼ 05. May, 2036

Apparel Template (Make) ▼

Design Brief 05/05/2036 - 15/05/2036	9
Design 16/05/2036 - 12/06/2036	20
Samples 13/06/2036 - 24/07/2036	30
Margin Review and Selec... 25/07/2036 - 31/07/2036	5
Purchase Orders 25/07/2036 - 31/07/2036	5
Production 01/08/2036 - 04/09/2036	25
Delivery 05/09/2036 - 02/10/2036	20

Submit

Should the user wish to alter these pre-populated values when they are creating the schedule, they are able to do so before clicking 'Submit.'

To create the attribute to represent the Planned Duration:

1. Go to System Setup and create the attribute in the desired attribute folder.
2. Make the attributes a description attribute, with a Number validation base type, that is valid for the PLM Schedule Template Task Entity type. In the example below, the attribute created is called 'Planned Duration.'

The screenshot displays the 'System Setup' interface. On the left, a tree view shows the hierarchy: Attribute Groups > Schedule Attributes > Schedule Planned Attributes > Planned Duration. The 'Planned Duration' attribute is selected. On the right, the 'Planned Duration - Validity' configuration panel is shown. It has tabs for 'Log', 'State Log', and 'Tasks'. Under 'Tasks', there are sub-tabs for 'Attribute Transformation', 'Validity', and 'Profile'. The 'Validity' sub-tab is active, showing 'Attribute' and 'References' sections. The 'Valid for Entity Types' section contains a list of checkboxes: 'All', 'PLM Schedules', 'PLM Schedules Category1', 'PLM Schedules Category2', 'PLM Schedules Root', 'PLM Schedule Task', 'PLM Schedule Template', 'PLM Schedule Templates', 'PLM Schedule Template Task' (which is checked and highlighted with a red box), and 'Product Lifecycle Management Entity Ro'. Below this is the 'Valid for Publication Types' section.

Schedule Is Submitted

When a schedule is submitted in the Web UI, the schedule is no longer able to be edited and is ready for use.

Item	Start Date	End Date	Value
Design Brief	08/05/2018	21/05/2018	10
Design	22/05/2018	18/06/2018	20
Samples	19/06/2018	30/07/2018	30
Margin Review and Selec...	31/07/2018	06/08/2018	5
Purchase Orders	31/07/2018	06/08/2018	5
Production	07/08/2018	10/09/2018	25
Delivery	11/09/2018	08/10/2018	20

Submit

The ability to submit a schedule is due to the Schedule Is Submitted attribute.

To create this attribute:

1. Go to System Setup and create the an attribute to represent the Schedule Is Submitted attribute in the desired attribute group.
2. Make the attribute a description attribute with an Integer as a validation base type.
3. The minimum value should be zero, and the maximum value should be one.
4. The validity for the Schedule Is Submitted attribute is for the PLM Schedule entity type.

Schedule Is Submitted - Attribute	
Attribute	
Description	
Name	Value
ID	PLMScheduleSubmitted
Name	Schedule Is Submitted
Last edited by	2017-12-08 09:05:47 by STEPSYS
Full Text Indexable	No
Externally Maintained	No
Hierarchical Filtering	None
Calculated	No
Type	Description
Mandatory	No
Attribute Validation	
Name	Value
Validation Base Type	Integer
List Of Values	N/A
Multi Valued	No
Minimum Value	0
Maximum Value	1
Maximum Length	N/A

Schedule Is Submitted - Validity	
Validity	
Valid for Product Types	
Valid for Classification Types	
Valid for Asset Types	
Valid for Entity Types	
<input type="checkbox"/> All	
<input type="checkbox"/> PLMBoard	
<input type="checkbox"/> PLMBoards	
<input type="checkbox"/> PLMCollection	
<input type="checkbox"/> PLMCollections	
<input checked="" type="checkbox"/> PLM Schedule	
<input type="checkbox"/> PLM Schedules	
<input type="checkbox"/> PLM Schedules Category1	
<input type="checkbox"/> PLM Schedules Category2	
<input type="checkbox"/> PLM Schedules Root	
<input type="checkbox"/> PLM Schedule Task	
<input type="checkbox"/> PLM Schedule Template	
<input type="checkbox"/> PLM Schedule Templates	
<input type="checkbox"/> PLM Schedule Template Task	
<input type="checkbox"/> Product Lifecycle Management Entity Root	

If a schedule has been submitted, the fields in Web UI are not able to be edited, and if looked at in the workbench, the value of '1' is in the Schedule Is Submitted field. If a change to the schedule needs to be made, you will need to delete the value of '1' in the Schedule Is Submitted attribute field. This will activate the schedule again, where the user is able to make any needed corrections.

← **Men - T-shirts**

Start from date ▼ 08. May, 2018

- Design Brief**
22/01/2018 - 31/01/2018 8
- Design**
01/02/2018 - 20/02/2018 14
- Samples**
21/02/2018 - 22/03/2018 22
- Margin Review and Selec...**
23/03/2018 - 27/03/2018 3
- Purchase Orders**
23/03/2018 - 25/03/2018 1
- Production**
28/03/2018 - 29/03/2018 2
- Delivery**
30/03/2018 - 18/04/2018 14

Submitted

Men - T-shirts rev.0.2 - PLM Schedule

PLM Schedule	References	Referenced By	Status	State Log	Tasks
Description					
Name	>	>	Value		
> ID	PLMSchedule113984				
> Name	Men - T-shirts				
> Object Type	PLM Schedule				
> Revision	0.2 Last edited by STEPSYS on Mon Jan 22 12:23:4				
> Path	Entity hierarchy root/Product Lifecycle Managemen				
> Schedule Deadline	31				
> Schedule Is Submitted	123	1			

Actual Start and Actual End

Through business rules, the Actual Start and Actual End attributes record when a design specification genuinely starts and finishes with a task in a schedule. The dates are recorded on the Schedule Task reference via the attributes that represent the Actual Start and Actual End dates.

Reference Type	Source	Actual Start	Actual End
Schedule Task	Delivery		
	Design	2018-05-04	2018-05-06
	Design Brief		
	Margin Review and Selection	2018-05-07	
	Production		
	Purchase Orders	2018-05-07	
	Samples	2018-05-07	2018-05-07

When looking at the schedules in Web UI, you can then see a complete visual picture of what deadlines are being met or are running over.



For more on the Schedule Task reference type, see the **References Needed for Schedules** topic in this documentation.

To create the attributes to represent the Actual Start and Actual End:

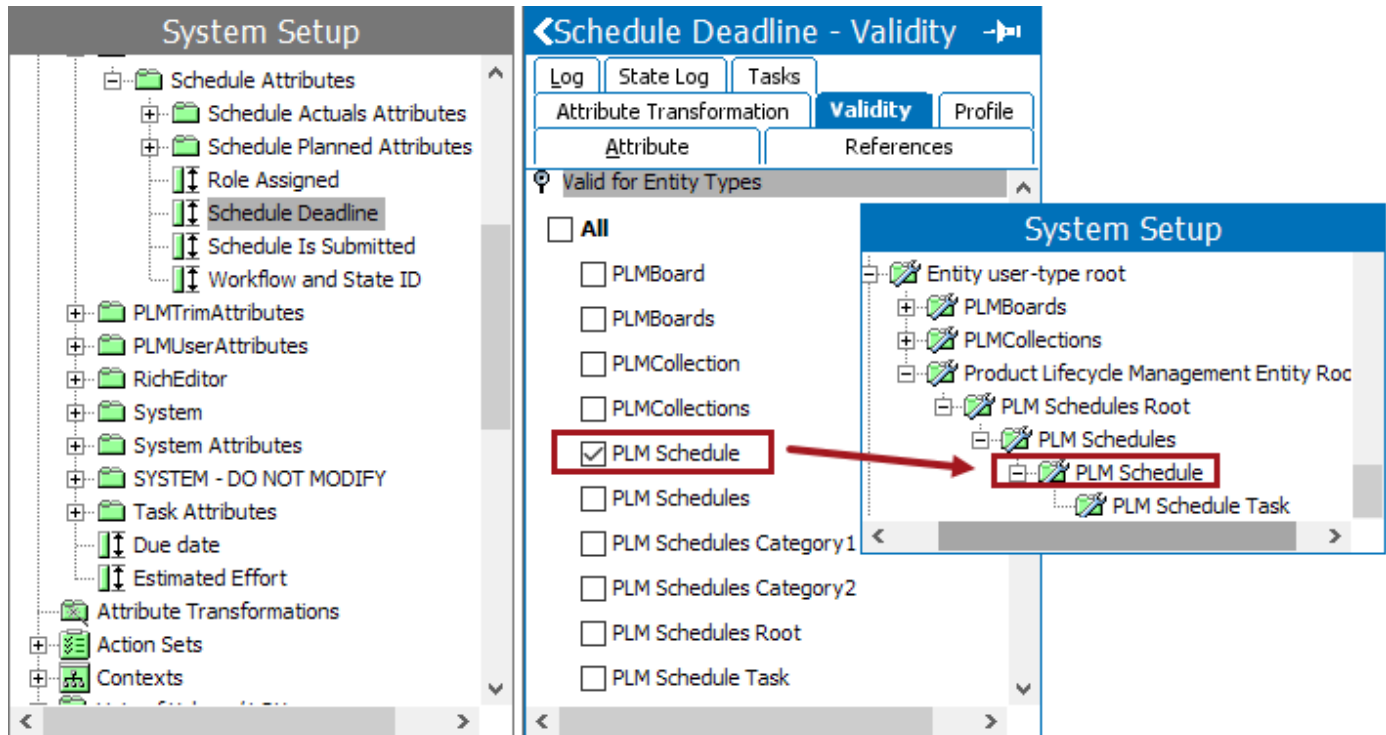
1. Go to System Setup and create the attribute in the desired attribute group.
2. Create the Actual Start and Actual End attributes as description attribute, with an ISO Date validation base type, that is valid for the product reference type Schedule Task.

For more on business rules, see the **Business Rules** documentation.

Schedule Deadline

This attribute is used to represent the last date of the schedule.

In this example, it is called Schedule Deadline. It is a description attribute, with a Validation Base Type for an ISO Date. It is valid for the entity type that represents the PLM Schedule.



Workflow and State ID

While it is not required to have workflows when using schedules, it is possible to use workflows in conjunction with schedules. When a design specification goes through the tasks in a schedule, the design specification is often also progressing through a workflow. As the design specification enters and exits each workflow state and transitions to the next state, business rules applied to states and transitions can capture the actual start and actual end dates of each task. These actual start and actual end dates can then be recorded on attributes on the Schedule Task reference and also display visually on the schedule. See the above topic in this documentation for more on actual start and actual end date attributes. For more on workflows see the **Workflows** topic in the **Workflows** documentation. For more on business rules see the **Business Rules** topic in the **Business Rules** documentation.

In order for schedule template tasks and workflows to work together seamlessly, the schedule task template needs to be told what workflow and state ID to look at for the entry and exit of tasks in workflow states, thus helping to provide the actual start and actual end dates. This is accomplished via the attribute that represents the Workflow and State ID.

The screenshot displays the Stibo Systems interface. On the left is a 'Tree' view showing a hierarchy: Product Lifecycle Management > PLM Schedules > Schedules > Templates > Apparel Template (Buy) > Design Brief. The main area shows a 'Design Brief rev.0.2 - PLM Schedule Te...' window with tabs for Status, State Log, and Tasks. The 'Tasks' tab is active, showing a table for 'PLM Schedule Template Task'. The table has columns for Name and Value. The 'Workflow and State ID' attribute is highlighted with a red box and a red arrow pointing to the workflow diagram below. The workflow diagram, titled 'New Product Development (example) (PLMProductDevelopment)', shows a 'Design Brief' node with a 'Submit' transition leading to a 'Design' node.

Name	Value
ID	PLMScheduleTemplateTask112429
Name	Design Brief
Object Type	PLM Schedule Template Task
Revision	0.2 Last edited by STEPSYS on Thu Nov
Path	Entity hierarchy root/Product Lifecycle M
Planned Duration	123 10 d
Role Assigned	Designers
Workflow and State ID	PLMProductDevelopment_DesignBrief

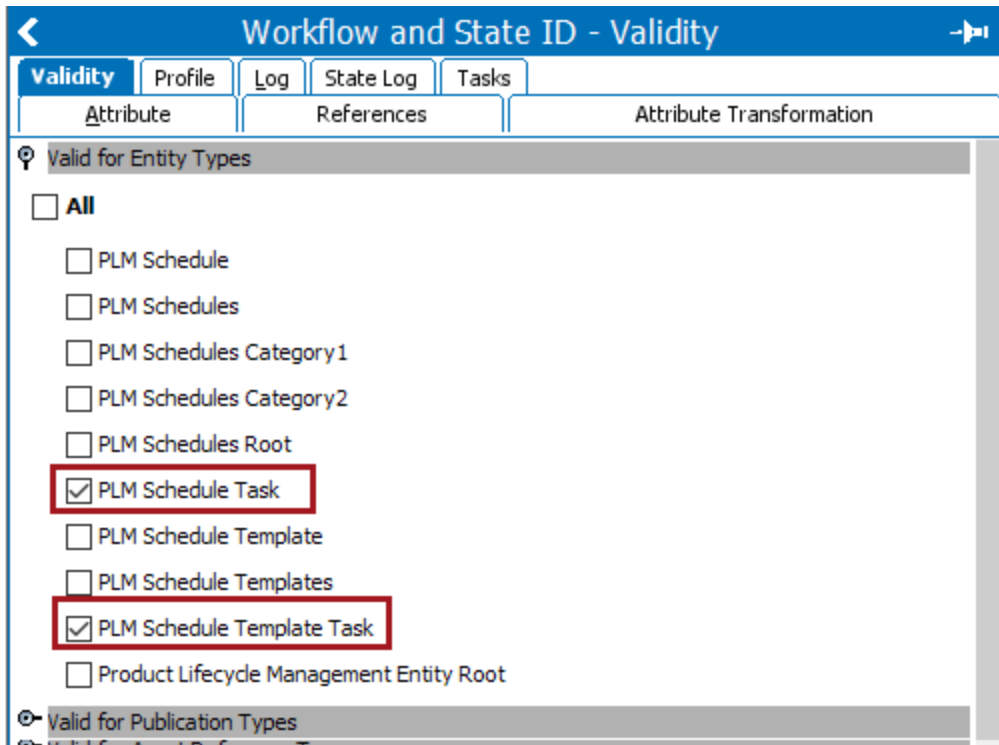
To configure the Workflow and State ID attribute:

1. Go to System Setup and create an attribute to represent the Workflow ID and State ID List of Values in the desired folder.

2. Make the Workflow ID and State ID List of Values a Text validation base type and add the values. The values need to be the workflow ID in accompaniment to every workflow state ID that needs to be captured. The ID pattern 'Workflow ID_State ID' is used for the values in this example.

Workflow ID and State ID - List of Values	
List of Values References Log State Log Tasks	
Description	
Name	Value
ID	PLMWorkflowIDAndStateID
Name	Workflow ID and State ID
Edited by	2017-12-06 10:55:01 by STEPSYS
Path	Lists of Values / LOVs/Product Lifecycle ...
Use Ids on values	No
Use Ids for sorting	No
In Attribute Groups	
List of Values Validation	
Name	Value
Validation Base Type	Text
Allow Users to Add Values	No
Mask	
Values	
Values	
<ul style="list-style-type: none"> > PLMProductDevelopment_Delivery > PLMProductDevelopment_Design > PLMProductDevelopment_DesignBrief > PLMProductDevelopment_MarginReviewAndSelection > PLMProductDevelopment_Production > PLMProductDevelopment_PurchaseOrders > PLMProductDevelopment_Samples > PLMSupplierPurchasedItems_Delivery > PLMSupplierPurchasedItems_Purchase Orders > PLMSupplierPurchasedItems_Samples > PLMSupplierPurchasedItems_SupplierSelection 	
Add Value	

3. Next, in the desired attribute group, create a description attribute with a 'List Of Values' validation base type.
4. Select the List of Values created to hold the workflow ID and state ID that you want the attribute to refer to.
5. Make the validity for the Workflow and State ID attribute valid for the PLM Schedule Task and PLM Schedule Template Task entity object types.



6. To apply the Workflow and State ID after creating a schedule template, click on one of the tasks in the schedule template.
7. Navigate to the Workflow and State ID attribute, and select the desired workflow and state ID from the dropdown menu.

Supplier Selection rev.0.2 - PLM Schedule Template Task		
PLM Schedule Template Task		
References		
Referenced By		
Status		
State Log		
Tasks		
Description		
Name	>	Value >
> ID		PLMScheduleTemplateTask112438
> Name		Supplier Selection
> Object Type		PLM Schedule Template Task
> Revision		0.2 Last edited by STEPSYS on Wed Dec 06 05:06:50 UTC 2017
> Path		Entity hierarchy root/Product Lifecycle Management/PLM Schedules...
> Planned Duration	123	5 d
> Role Assigned		Buyer
> Workflow and State ID		<div style="border: 1px solid black; padding: 2px;"> PLMSupplierPurchasedItems_SupplierSelection </div> <ul style="list-style-type: none"> PLMProductDevelopment_MarginReviewAndSelection PLMProductDevelopment_Production PLMProductDevelopment_PurchaseOrders PLMProductDevelopment_Samples PLMSupplierPurchasedItems_Delivery PLMSupplierPurchasedItems_Purchase Orders PLMSupplierPurchasedItems_Samples <li style="background-color: #0070C0; color: white;">PLMSupplierPurchasedItems_SupplierSelection

Schedule Setup in Web UI

Users interact with schedules only in the Web UI, thus it is important to have proper configuration so that the user has a seamless experience.

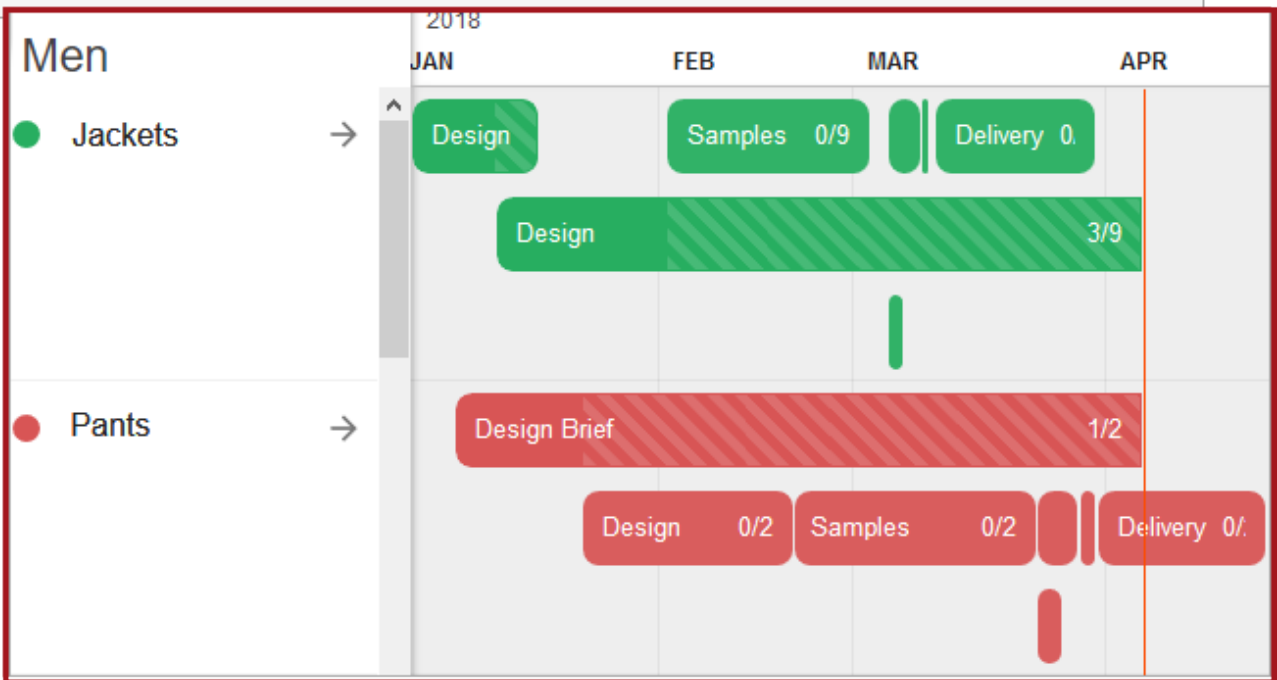
Prerequisite

Before any Web UI setup can occur, proper configuration in workbench must be in place. Be sure to read through all of the setup schedule topics for workbench in this documentation before attempting to configure schedules in Web UI.

PLM Schedule Template

The PLM Schedule Template screen is the landing page for schedules after a user clicks on the '**Schedule**' hyperlink in the approved line plan.

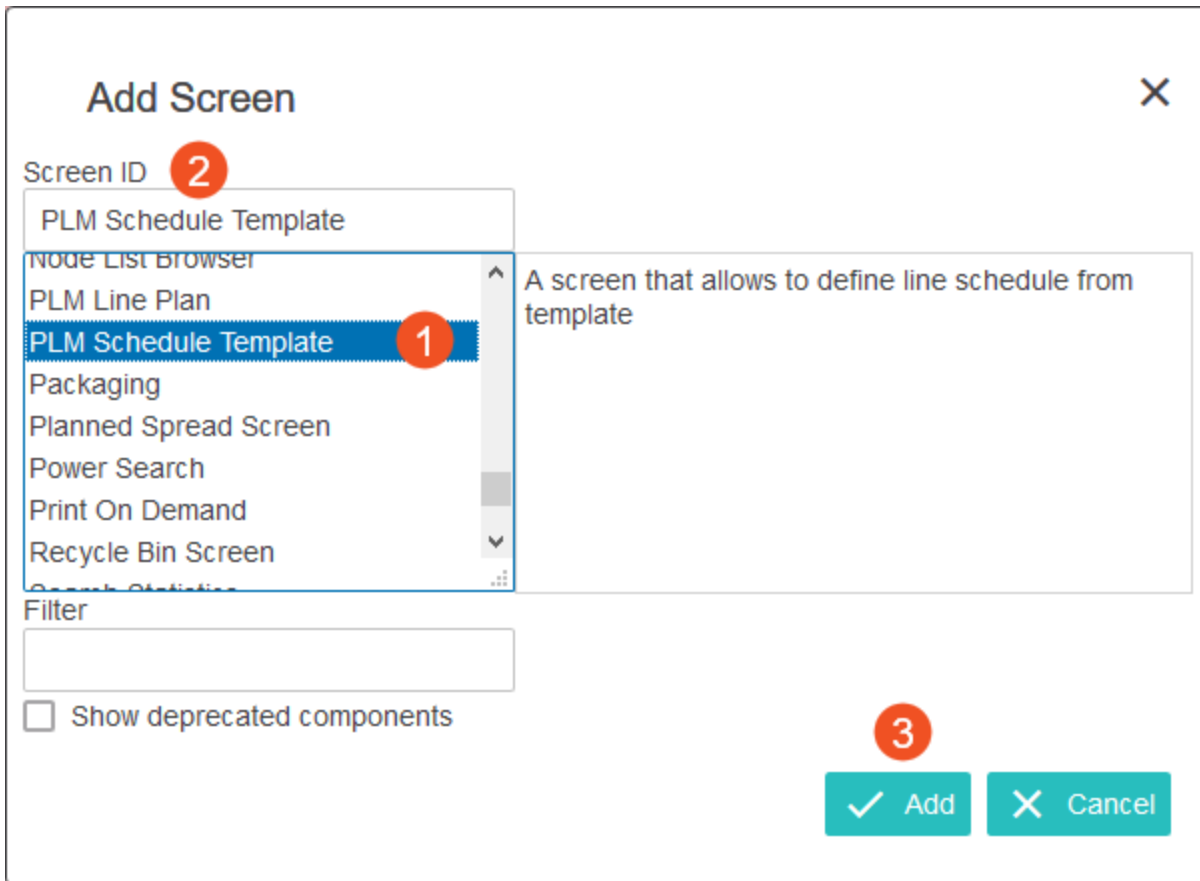
← Christmas 2018		Business Category:	Apparel	
		Line Plan Start Date:	2018-03-06	
		Schedule Deadline:	2018-06-06	
		Line Plan Status:	In Progress	
Edit Line Plan	682153.96	549542.74 / 2000000	3.57 / 54	
	Cost	Revenue	Gross Margin %	Actions
^ Men	649489.96	501524.74	5.36	Schedule
Jackets (9 styles)	642574	493682	-3.87	↓
Pants (1 styles)	319.02	543.14	41.26	



This screen displays the approved line plan in a schedule format, with all of its subcategories, and any task bar graphs for submitted subcategory schedules.

To create this PLM Schedule Template screen, follow the directions below:

1. In Web UI, open the designer and create a new PLM Schedule Template screen. Enter in a recognizable Screen ID, and click **Add**.



2. In the PLM Schedule Template Properties, click the ellipsis button (...) to the right of each parameter field to select the appropriate attributes, object types, and references. A complete list of what is needed is labeled below.

Add component - configure required properties ✕

Required properties (*) must be set before the component can be added to the configuration.

PLM Schedule Template Properties

Component Description A screen that allows to define line schedule from template

Actual End Date *	<input type="text"/>	...
Actual Start Date *	<input type="text"/>	...
Line Plan Schedule Task *	<input type="text"/>	...
Planned Duration *	<input type="text"/>	...
Planned End Date *	<input type="text"/>	...
Planned Start Date *	<input type="text"/>	...
Schedule *	<input type="text"/>	...
Schedule Deadline *	<input type="text"/>	...
Schedule Is Submitted *	<input type="text"/>	...
Schedule Task *	<input type="text"/>	...
Schedule Task Dependency *	<input type="text"/>	...
Schedule Task Design Specification *	<input type="text"/>	...
Schedule Task Group *	<input type="text"/>	...
Schedule Task Template *	<input type="text"/>	...

The screenshot shows a form with the following fields:

- Schedule Task Template Dependency
- Schedule Template
- Schedule Templates Root
- Schedule To Template
- Scheduling Date
- Scheduling Method
- Workflow And State

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

- **Actual End Date:** Through business rules, this is the attribute that records when a design specification genuinely finishes with a task in a schedule.
- **Actual Start Date:** Through business rules, this is the attribute that records when a design specification genuinely starts with a task in a schedule.
- **Line Plan Schedule Task:** The reference that connects the classification object type for line plan category level 2 to entity type schedule level 2.
- **Planned Duration:** The attribute that represents the baseline number of days that a particular template task should take.
- **Planned End Date:** The attribute created to hold the value for the planned end date that a task in a schedule should have.
- **Planned Start Date:** The attribute created to hold the value for the planned start date that a task in a schedule should have.
- **Schedule:** The alternate classification object type for line plan category level 1.
- **Schedule Deadline:** The attribute used to represent the last date of the schedule.
- **Schedule Is Submitted:** The attribute created for when the schedule is submitted.
- **Schedule Task:** The object type of the tasks in the schedule.
- **Schedule Task Dependency:** The entity reference type created that determines the order, or dependencies, of the tasks in the schedules.

- **Schedule Task Design Specification:** The reference type created that enables schedules and design specifications to work together.
 - **Schedule Task Group:** The entity type that represents the second level in the schedule.
 - **Schedule Task Template:** The entity type created to represent the third level of the schedule task templates.
 - **Schedule Task Template Dependency:** The entity reference type that determines the order, or dependencies, of the schedule template tasks for the schedules.
 - **Schedule Template:** The entity type created to represent the second level of the schedule task templates.
 - **Schedule Templates Root:** The entity type created to be the root node for templates.
 - **Schedule To Template:** The entity reference used between the schedule and the schedule templates.
 - **Scheduling Date:** The attribute created to indicate the actual date that is either the start from or need by date.
 - **Scheduling Method:** The attribute that indicates if the schedule being created is either a 'Start from date' or 'Need by date.'
 - **Workflow And State:** The attribute that is used to point to what workflow and state IDs should be used in conjunction with schedules.
3. Once all configurations are set, click Add.
 4. Now that the PLM Schedule Template Screen is configured, it needs to be saved and mapped. Click **Save** and go to --[MAIN]-- in the designer.
 5. Under Mappings, click **Add...** to add a new screen mapping.
 6. In Screen Mapping Properties, add an Object Type Condition.

Edit component ✕

Screen Mapping Properties

Component Description A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

Conditions*

Screen*

Add Component ✕

- Collection Group Condition
- Compare Boms Condition
- Entity Condition
- Golden Record Condition
- Matching Algorithm Condition
- Merge Duplicates Condition
- Multi Node Selection Condition
- Object Type Condition**

A condition that is true if the node is of the specified object type

Filter

Show deprecated components

7. In the Object Type Condition, add the first level entity type for schedules, and click **OK** then **Add**.

Add component - configure required properties ✕

Required properties (*) must be set before the component can be added to the configuration.

Object Type Condition Properties

Component Description A condition that is true if the node is of the specified object type

Object Type*

Select Node(s) ✕

Browse Search

- Entity user-type root (Entity user-type root)
 - PLMBoards (PLMBoards)
 - PLMCollections (PLMCollections)
- Product Lifecycle Management Entity Root (ProductLifecycle...)
 - PLM Schedules Root (PLMSchedulesRoot)
 - PLM Schedules (PLMScheduleRoot)
 - PLM Schedule (PLMSchedule)**
 - PLM Schedules Category1 (PLMSchedulesCategory1)**
 - PLM Schedule Templates (PLMScheduleTemplateRoot)
- Publication section types (Section root)

8. In the Screen dropdown field, select the screen for PLM Schedule Template, and click Save.

Edit component ✕

Screen Mapping Properties

Component Description A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

Conditions *

ObjectType = PLMSchedulesCategory1

Add...
Edit...
Remove
Up
Down

Screen *

Add

PLM Schedule Template

✓ Save
✕ Cancel

9. Adjust the screen up or down in the mappings as needed.
10. Click **Save** in the designer before closing it out.

For more information on attributes, object types, and references needed for schedule setup in the PLM Schedule Template screen, see the following topics in this documentation:

- [Creating Schedule Object Types](#)
- [References Needed for Schedules](#)
- [Setting Up Attributes for Schedules](#)
- [References Needed for Line Plans](#)

For more on how to set up and use schedules after configuring the PLM Schedule Template screen, see the **Creating Schedules** topic in the **PLM for Users** documentation.

Private Label Food Solution

The private label food solution enables companies to create products from the ground up. They can create a product idea, decide upon the flavors of the product, and create and agree upon a recipe with their suppliers for the regions they plan to sell the product.

There are a number of object types, attributes, and reference types that need to be created and properly set up in workbench, and a number of component tabs needed in Web UI for the private label food solution to function properly. For more information, see the following sections below on how to properly set up the private label food solution in workbench and Web UI.

- Private Label Food Solution Setup in Workbench
- Private Label Food Solution Setup in Web UI

Once proper set up of the private label food solution has been established, it is also possible to set up Change Reports. This allows users to see a report of changes to data between a specific event and the current data. For more information on how to set up Change Reports, see the **Change Reports** topic in this documentation.

Change Reports

Users can use Change Reports to see a report of changes to data between a specific event and the current data. Change Reports are populated via highly configurable 'snapshots'. These snapshots can take place when there is a change in a workflow state, a trigger by an inbound or outbound integration endpoint, or a change by derived events through an Event Processor. Change reports can be added on a Node Details screen via a Product Summary Card.

For more on Product Summary Cards, see the **Below Title Component** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Change Reports highlight any changes that have been made during user-defined events so important changes are not overlooked accidentally. This is different than revision history in that administrators have full control of when Change Reports are created, and what they want to capture, such as data that was added, deleted, or changed on the object, the reference target of an object, or on reference metadata. Snapshots have the added benefits of not being impacted by changes to the data model. All of this helps product teams notice important changes to the data that may otherwise be overlooked while collaborating with other users.

Change Report Limitations

- Change Reports do not support snapshots of publications, assets, data containers, children, or data model (set up) changes.
- Only one version of the snapshot will be kept.
- Sort order of the target of the changes within the report is alphanumeric and cannot be changed.

Note: To access and use the full set of Change Report functionality, including snapshot configuration, a 'change-reports' add-on component must both be activated on your system. See your Stibo Systems representative for details.

Configuring Change Reports requires set up in both workbench and Web UI.

Set up performed in Workbench

The following topics explain the setup and configurations needed in workbench for Change Reports.

- Object, References, and Attributes for Change Reports
- Snapshot Configurations
- Snapshot Recorders
- Business Rules and Snapshots

Set up performed in Web UI

When implementing Change Reports in Web UI, Change Reports can be added on a Node Details screen via a Product Summary Card. The following topics explain the setup, configuration, and use of Change Reports.

- For more information on how to add and configure the Product Summary Card, see the **Below Title Component** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

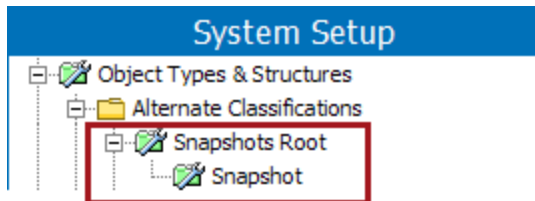
- Using Change Reports

Object Types, References, and Attributes for Change Reports

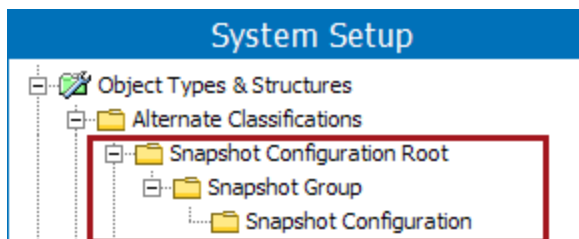
There are a number of object types, references, and attributes needed for Change Reports to work. An XML file is available for implementation purposes. Please talk to your Stibo Systems representative for more information on the XML file. After implementation, all IDs and ID patterns should be exactly like the ones provided bellow.

Note: While Change Reports are used in Web UI, set up for Change Reports in the creation of object types, references, and attributes can only be done in workbench.

Classifications

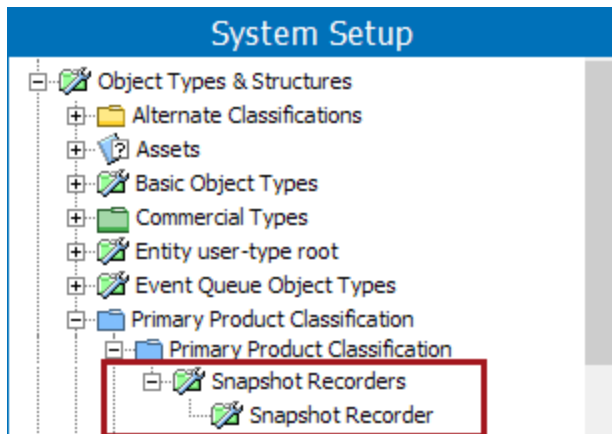


Object Type ID	ID Pattern	Purpose
SnapshotsRoot	SnapshotsRoot	Root level for storage of snapshots
Snapshot	ss-[id]	Stores a snapshot in JSON format



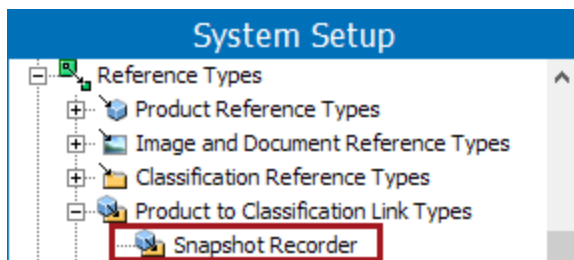
Object Type ID	ID Pattern	Purpose
SnapshotConfigurationRoot	SnapshotConfigurationRoot	Root level for snapshot configuration
SnapshotGroup	ssg-[id]	A self-referenced object type, allowing for organization of Snapshot Configurations
SnapshotConfiguration	sscnf-[id]	Defines the context and event ID

Products



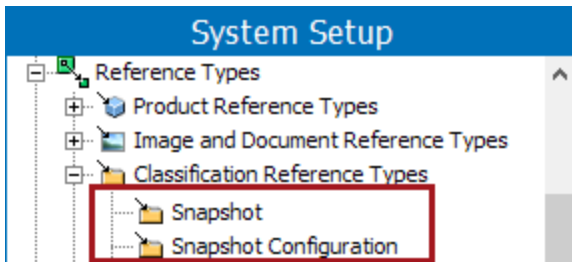
Object Type ID	ID Pattern	Purpose
SnapshotRecorderRoot	SnapshotRecorderRoot	Stores the recorder and tab name for the Change Report
SnapshotRecorder	ssrec-[id]	Stores the recorder and tab name for the Change Report

Reference Types



Object Type ID	ID Pattern	Valid Target	Purpose
SnapshotRecorder	SnapshotRecorder	SnapshotConfiguration	Link a Snapshot Recorder to one of many Snapshot Configuration types

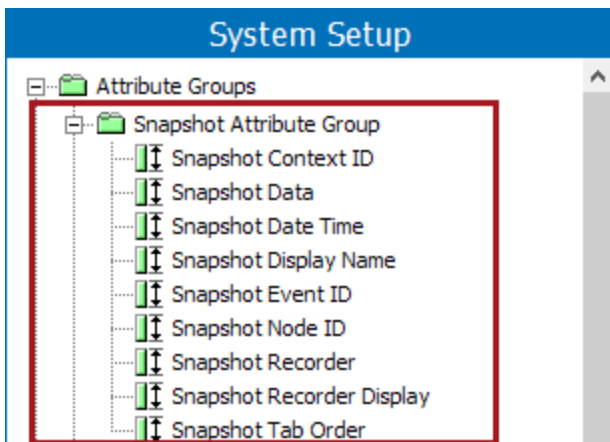
Classification Reference Types



Object Type ID	Valid Source	Valid Target	Purpose
Snapshot	Valid from any object that a snapshot is taken of	Snapshot	Relates the object that has a snapshot to its snapshot
SnapshotConfiguration	Snapshot	SnapshotConfiguration	Links the Snapshot Configuration with the snapshot

Attributes

All attributes are description attributes.



Attribute ID	Type	Valid For	External	Purpose
SnapshotContextID	LOV with ID Multi Valued	SnapshotConfiguration	Yes	Which context(s) the snapshot should be taken in

Attribute ID	Type	Valid For	External	Purpose
SnapshotData	Text	Snapshot	Yes	Store the JSON snapshot
SnapshotEventID	LOV with ID	Snapshot, SnapshotConfiguration	Yes	Event ID for the Snapshot
SnapshotNodeID	Text	Snapshot	Yes	Node ID the snapshot was done for
SnapshotRecorder	Text	SnapshotRecorder	Yes	Specifies which values to store for the snapshot
SnapshotDataTime	ISO Date and Time	Snapshot	Yes	When the snapshot was taken
SnapshotDisplayName	Text	Link Type: SnapshotRecorder	No	Name of the tab in the change report, to be translated
SnapshotRecorderDisplay	LOV (values Yes or No)	Link Type: SnapshotRecorder	Yes	Indicates if the recorder tab should be included in the change report
SnapshotTabOrder	Number	Link Type: SnapshotRecorder	Yes	Order of the tab in the change report

Snapshot Configurations

Snapshot Configurations are used in the Change Reports data model to help capture changes to data that were made at specific events. Change Reports are populated via highly configurable 'snapshots'.

Snapshot Configurations are set up as classifications in workbench and used for screens in Web UI. They determine which contexts to capture data from (take a snapshot), and any customer-defined change in events. This could be a change in a workflow state, a trigger by an inbound or outbound integration endpoint, or a change by derived events through an Event Processor. When the event takes place, the Snapshot Recorder captures the data at that point in time if configured by the Snapshot Configuration.

For more on Snapshot Recorders, see the **Snapshot Recorders** topic in this documentation.

For more information on Change Reports, see the **Change Reports** topic in this documentation.

Important: While Change Reports are used in Web UI, set up for Snapshot Configurations can only be done in workbench.

Recipe Specification rev.0.2 - Classification	
Referenced By	Images & Documents
Tables	Status
State Log	Tasks
Classification	Sub Products
	References
Description	
Name	Value
ID	sscnf-149070
Name	Recipe Specification
Object Type	Snapshot Configuration
Revision	0.2 Last edited by USERL on Thu Jun 20 17:28:17 EDT 2019
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Snapshot Configuration/Snapshot Group/Recipe Specification
Visibility	
Snapshot Context ID	Context1 Context2
Snapshot Event ID	Supplier Response

Snapshot Configurations store context IDs (SnapshotContextID), a mandatory attribute that indicates which contexts the snapshots will be taken in.

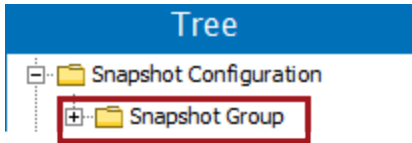
Additionally, an event ID (SnapshotEventID) is stored on the Snapshot Configuration, also a mandatory attribute. This attribute determines what event will trigger a snapshot. Snapshots compare the data at the time of the event with the current data. For example, as seen pictured above, the event ID could be the 'Supplier Response'.

For a list of all data scenarios that can be in a snapshot, see the **Elements in a Snapshot** topic in this documentation.

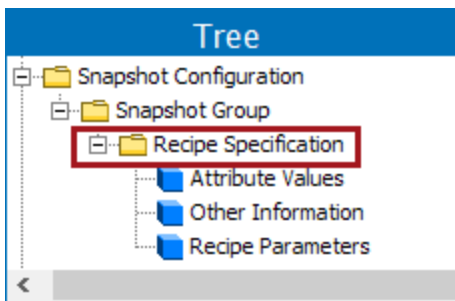
Create Snapshot Configurations

Below are the steps to create a Snapshot Configuration.

1. In Tree, in Classifications, under the parent 'SnapshotConfigurationRoot', add a Snapshot Group to hold all Snapshot Configurations for a needed project.



2. Under your Snapshot Group, create as many child Snapshot Configurations as needed. A Snapshot Configuration will hold all needed Snapshot Recorders.



For more on Snapshot Recorders, see the **Snapshot Recorders** topic in this documentation.

Snapshot Recorders

Snapshot Recorders are used in the Change Reports data model to help capture data at a specific event. Change Reports are populated via highly configurable 'snapshots,' where the Snapshot Recorders aid in capturing the change for the Change Report.

Snapshot Recorders are Product object types that store a recorder text in the format of a JSON string that defines which data should be captured in the snapshot.

For more information on Change Reports, see the **Change Reports** topic in this documentation.

Note: While Change Reports are used in Web UI, setup for Snapshot Recorders can only be done in workbench.

Name	Value
ID	ssrec-149312
Name	Attribute Values
Object Type	Snapshot Recorder
Revision	0.1 Last edited on Fri Jun 14 10:56:11 EDT 2019
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Primary Product Hierarchy/Product Lifecycle Management/Snapshot Recorders/Attribute Values
Snapshot Recorder	abc { "attributes": ["PLMDesignSpecificationDescription", "PLMSpecificationName", "PLMPlannedFlavorVariations"] }

They can be re-used for multiple Web UI tabs or multiple Web UIs where the same information should be captured by linking them into one or more Snapshot Configurations via the classification link type 'SnapshotRecorder'. See below in this topic on how to configure Snapshot Recorders and link to Snapshot Configurations.

For more information on Snapshot Configurations, see the **Snapshot Configurations** topic in this documentation.

Attribute Values rev.0.1 - Product		
Commercial	Tables	Proof View
Status	State Log	Tasks
Product	References	Referenced By
Images & Documents		
Description		
Name	>	Value
> ID		ssrec-149312
> Name		Attribute Values
> Object Type		Snapshot Recorder
> Revision		0.1 Last edited on Fri Jun 14 10:56:11 EDT 2019
> Approved		✘ Never Been Approved
> Translation		Not Translated
> Path		Primary Product Hierarchy/Product Lifecycle Management/Snapshot Recorders/Attribute Values
> Snapshot Recorder	abc	{ "attributes": ["PLMDesignSpecificationDescription", "PLMSpecificationName", "PLMPlannedFlavorVariations"] }

Snapshot Recorders can be created for each Web UI tab or for processing logic, such as in a workflow, and are configured by each customer as customer needs differ.

On each Snapshot Recorder, on the Product to Classification Link Type 'SnapshotRecorder,' there are metadata attributes maintained. These determine factors about the Change Report so that each time the snapshot recorder is re-used, the information can be different.

The necessary attributes used as metadata are:

- **Snapshot Display Name** (SnapshotDisplayName): Contains the value that will be displayed in the change comparison dialog. It can be translated into multiple languages using the standard processes for translating products if needed.
- **Snapshot Recorder Display** (SnapshotRecorderDisplay): Is a 'Yes / No' LOV which determines if the Snapshot Recorder should be displayed in the Web UI.
- **Snapshot Tab Order** (SnapshotTabOrder): Determines the display order that the tab should appear in Web UI.

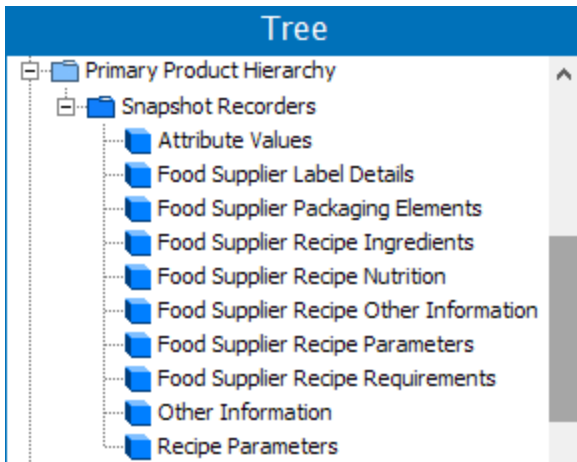
Attribute Values rev.0.1 - References				
Images & Documents	Commercial	Tables	Proof View	Status
State Log	Tasks			
Product	References	Referenced By		
Ungrouped Classification Links				
Reference Type	>	Target	>	Snapshot Display Name > Snapshot Recorder Display > Snapshot Tab Order
> Snapshot Recorder	+	Recipe Specification		Attribute Values Yes 30

For more information on attributes needed for Snapshot Recorders and for Change Reports see the **Objects Types, References, and Attributes for Change Reports** topic in this documentation.

Create Snapshot Recorders

Below are the steps to create a Snapshot Recorder.

1. In Tree, in the Primary Product Hierarchy, under the parent 'SnapshotRecordersRoot,' create as many children Snapshot Recorders as needed.



2. Create the needed recorder text, in the format of a JSON string, for the Snapshot Recorders attribute.

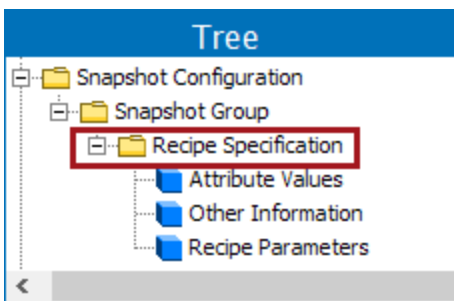
Product	References	Referenced By	Images & Documents	Commercial	Tables	Proof View	Status	State Log	
Description									
Name	>	>	Value						>
ID			ssrec-149312						
Name			Attribute Values						
Object Type			Snapshot Recorder						
Revision			0.1 Last edited on Fri Jun 14 10:56:11 EDT 2019						
Approved			✘ Never Been Approved						
Translation			Not Translated						
Path			Primary Product Hierarchy/Product Lifecycle Management/Snapshot Recorders/Attribute Values						
Snapshot Recorder		abc	<pre>{ "attributes": ["PLMDesignSpecificationDescription", "PLMSpecificationName", "PLMPlannedFlavorVariations"] }</pre>						

3. On the Reference tab, select the target Snapshot Configuration, and fill out the metadata attributes: Snapshot Display Name, Snapshot Recorder Display, and Snapshot Tab Order.

Attribute Values rev.0.1 - References					
Images & Documents	Commercial	Tables	Proof View	Status	State Log
Product		References		Referenced By	
Ungrouped Classification Links					
Reference Type	>	Target	>	Snapshot Display Name	>
>	Snapshot Recorder	+	Recipe Specification	Attribute Values	Yes
				Snapshot Recorder Display	>
				Snapshot Tab Order	>
					30

For more information on attributes needed for Change Reports, see the **Object Types, References, and Attributes for Change Reports** topic in this documentation.

When configured correctly, the Snapshot Recorder will display under the specified Snapshot Configuration.



For more information on Snapshot Configurations, see the **Snapshot Configurations** topic in this documentation.

Business Rules and Snapshots

Change Reports are used to see a report of changes to data that were made between a specific event and the current data. Change Reports use snapshots and business rules to determine these changes.

Prerequisites

All object types, references, and attributes for Change Reports need to be created first before business rules for snapshots can be used. Additionally, all configurations need to be in place before business rules can work. See the **Change Reports** topic in this documentation for more details.

Snapshot Bind

Business rules for snapshots are created by customers and will differ depending on customer needs. They determine when snapshots for Change Reports should take place and can be applied on workflow transitions, or any other event that supports executing business rules.

For more on business rules in general, see the **Business Rules** documentation.

All business rules used for setup need to include the 'snapshot' bind so that it is possible to obtain a bind to the instance of a snapshot. This bind is applicable for Business Actions, Business Conditions, and Business Functions. With this 'snapshot' bind, the configured business rule has access to the public methods for creating a snapshot and to flag changes.

This bind has two public methods that can be used in a business rules. These methods are:

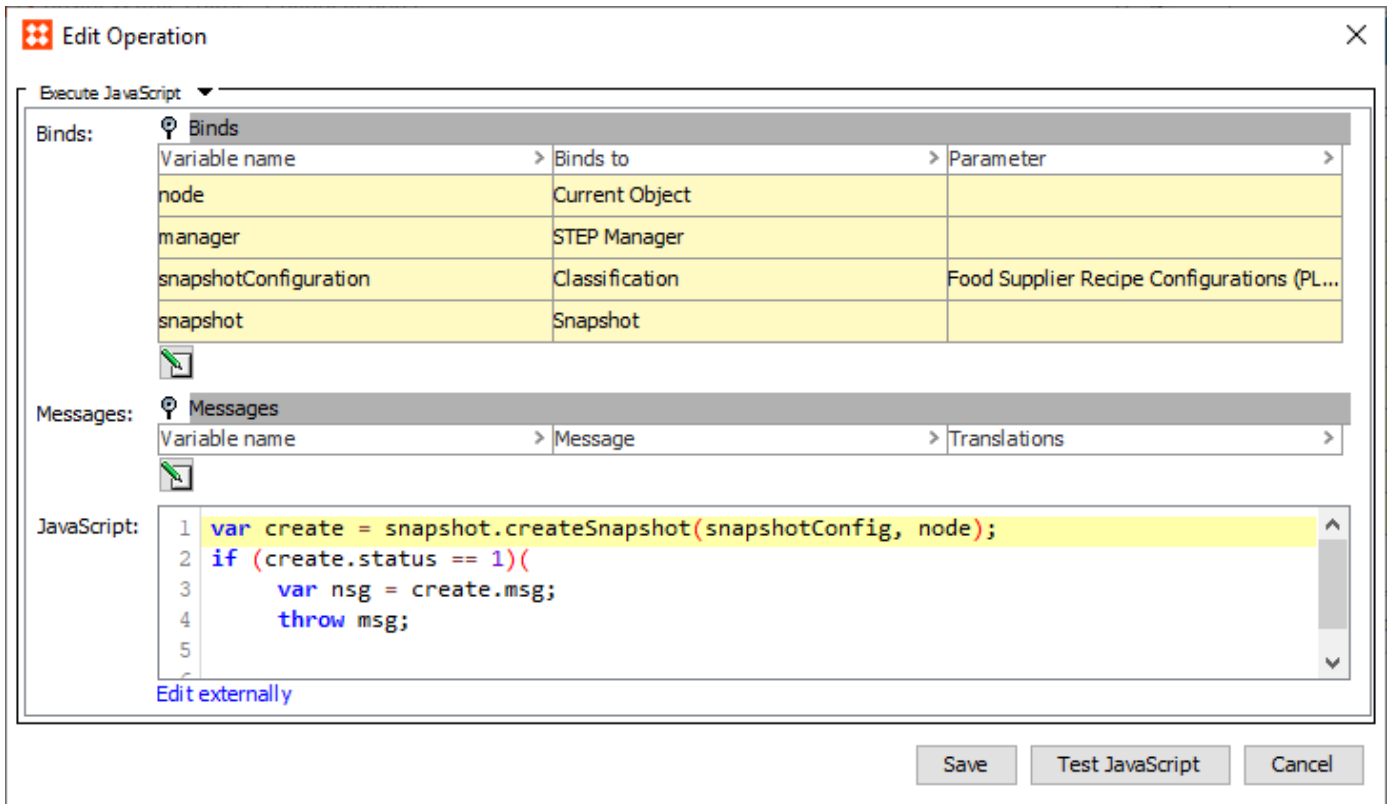
- Create Snapshot (createSnapshot)
- Flag Changes (hasChanges)

Important: While Change Reports are used in Web UI, the configuration outlined in this topic can only be done in workbench.

Creating Snapshots

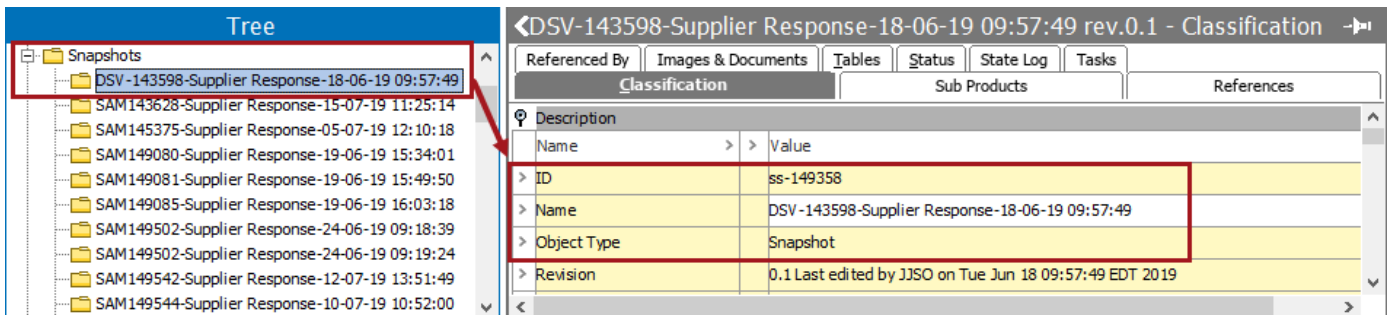
The public method for creating a snapshot, 'createSnapshot', has two arguments:

- A classification bind to the desired Snapshot Configuration.
- An instance of the node the snapshot should be taken of the object of interest that will have changes.



When using this method, not only is a snapshot created, but also the following will occur:

1. In Tree, under the 'Snapshots Root' classification folder, a new child with the object type 'Snapshot' is created. This child classification is named using the standard naming conventions of 'node ID + Event ID + Date / Time,' where the 'node ID' is the ID of the object that is being monitored for a snapshot. See image below.



2. The attribute Event ID 'SnapshotEventID' is both valid for the 'Snapshot' and 'SnapshotConfiguratin'. During the snapshot, the Event ID 'SnapshotEventID' is populated by copying the value from the desired Snapshot Configuration's Event ID, 'SnapshotEventID'.
3. The attribute Node ID 'SnapshotNodeID' is populated with the ID of the node that is being monitored for changes.
4. The Date Time attribute, 'SnapshotDateTime', is populated with the current date and time in the ISO Date and Time format.

DSV-143598-Supplier Response-18-06-19 09:57:49 rev.0.1 - Classification		
Referenced By	Images & Documents	Tables
Status	State Log	Tasks
Classification		References
Description		
Name	>>	Value >
> ID		ss-149358
> Name		DSV-143598-Supplier Response-18-06-19 09:57:49
> Object Type		Snapshot
> Revision		0.1 Last edited on Tue Jun 18 09:57:49 EDT 2019
> Approved		Never Been Approved
> Translation		Not Translated
> Path		Classification 1 root/Snapshots/DSV-143598-Supplier Response-18-06-19 09:57:49
> Visibility		
> Snapshot Data	abc	
> Snapshot Date Time		2019-06-18 09:57:49
> Snapshot Event ID		Supplier Response
> Snapshot Node ID	abc	DSV-143598

5. A 'SnapshotConfiguration' reference is created from the snapshot classification to the desired Snapshot Configuration.

Tree

- [-] Snapshot Group
 - [-] Recipe Specification**
 - [-] Attribute Values
 - [-] Other Information
 - [-] Recipe Parameters
- [-] Snapshots
 - [-] DSV-143598-Supplier Response-18-06-19 09:57:49

DSV-143598-Supplier Response-18-06-19 09:57:49		
Referenced By	Images & Documents	Tables
Status	State Log	Tasks
Classification	Sub Products	References
Ungrouped Classification References		
Reference Type	>	Target >>
> Snapshot Configuration	+	Recipe Specification

- Existing snapshot with the same Event ID and for the current Node ID will be deleted. Only one snapshot is stored for an Event ID / Node ID combination.
- Snapshot data will be captured in the 'SnapshotData' attribute on the snapshot.

DSV-143598-Supplier Response-18-06-19 09:57:49 rev.0.1 - Classification		
Referenced By	Images & Documents	Tables
Status	State Log	Tasks
Classification		References
Description		
Name	>	Value
ID		ss-149358
Name		DSV-143598-Supplier Response-18-06-19 09:57:49
Object Type		Snapshot
Revision		0.1 Last edited Tue Jun 18 09:57:49 EDT 2019
Approved		Never Been Approved
Translation		Not Translated
Path		Classification 1 root/Snapshots/DSV-143598-Supplier Response-18-06-19 09:57:49
Visibility		
Snapshot Data	abc	<pre>{"contexts":{"Context2":{"recorders":{"ssrec-149312":{"nodeID":"DSV-143598","nodeName":"Dark Chocolate Chip","objectTypeID":"PLMDesignSpecificationVariant","objectTypeName":"Design"}}<!--}}</pre--></pre>
Snapshot Date Time		2019-06-18 09:57:49
Snapshot Event ID		Supplier Response
Snapshot Node ID	abc	DSV-143598

8. The 'createSnapshot' method will return a JSON status message of either:

- **Successful Snapshot:** {"status":0;"msg": "Snapshot created successfully"}

A status field marked with a 0 (zero) indicates that the snapshot was created successfully, and the 'msg' field will have the success message.

- **Snapshot with Errors:** {"status": 1; "msg": "An error message"}

A status field marked with a 1 (one) signals that an error occurred while the snapshot was being created. The 'msg' field will contain the error message. No snapshot was created.

Flagging Changes

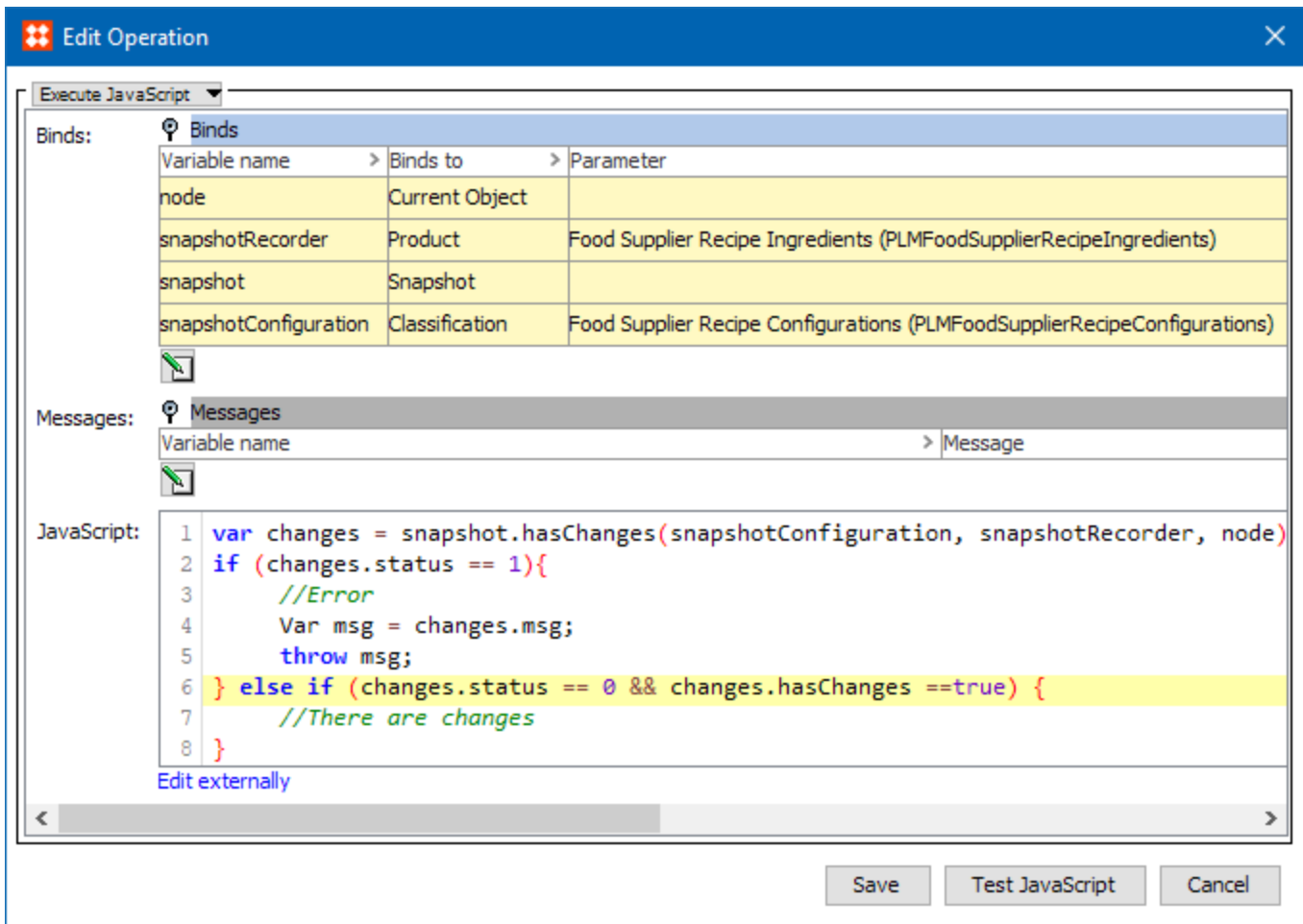
This public method flags if there are any changes based on what the Snapshot Recorder has defined. Using the defined Event ID for the specified node, it compares the current values with the values of the last snapshot.

Note: If there are no previous snapshots, then there are no changes.

The name of the method is 'hasChanges,' and it has three arguments:

- A classification bind to the Snapshot Configuration
- A product bind to a Snapshot Recorder node

- An instance of the node where flag changes are executed



Note: The Event ID is defined in the Snapshot Configuration instance and from the specified node in which there are references to snapshots.

The following actions take place when this is being executed to see if there are any Flag Changes:

1. A check is made to the specified Snapshot Recorder to see if it is linked to the selected Snapshot Configuration. If it is not, an error occurs.
2. The Event ID is retrieved from the Snapshot Configuration instance.
3. From the node, all the snapshots being referenced are:
 - filtered by Event ID
 - retrieved for comparison
4. The snapshot is then compared with the current values on the node, with only the values specified in the Snapshot Recorder being compared. The following outcomes could occur and return the corresponding JSON strings:
 - **No Changes:** {"status": 0, "msg": "No Changes", "hasChanges: false}

The 0 (zero) indicates that the method was executed successfully, the msg has a 'No changes' message, and the 'hasChanges' result is false, indicating that there were no changes.

- **Has Changes:** {"status": 1, "msg": "Has changes", "hasChanges: true}

The 1 (one) indicates that the method was executed successfully, the msg has a 'Has changes' message, and the 'hasChanges' result is true, indicating that there were changes.

- **Node does not have any snapshots:** {"status": 0, "msg": "No snapshots exists", "hasChanges: false}

This JSON string returns when the node being monitored does not have a snapshot for the Event ID.

- **Errors:** {"status": -1, "msg": "Description of the error"}

A status field marked with a -1 (minus one) signals that an error occurred while executing the hasChanges method. The 'msg' field will contain the error message.

Elements in a Snapshot

Below is a list of all data scenarios that can be monitored via a snapshot:

STEP Element	Example of Recorder
STEP Object ID	The STEP object ID is stored but not shown in report. It is not part of the recorder.
STEP Object Name	"name": "true"
STEP Object Type ID	The Object Type ID is stored but not shown in report. It is not part of the recorder.
STEP Object Type Name	The Object Type Name is stored but not shown in report. It is not part of the recorder.
STEP Reference Type ID	The Reference Type Name is stored but not shown in report. It is not part of the recorder.
STEP Reference Type Name	"referenceTypeName": "true"
STEP Name of the attribute	The Attribute Name is stored but not shown in report. It is not part of the recorder.
Attribute value on a node, plus its language Dimension Dependency	{ "attributes": ["PLMDesignSpecificationDescription", "PLMSpecificationName"] }
Attribute value on a Reference, plus its language dimension dependency	{ "references": { "PLMParameter": { "attributes": ["PLMMethod", "PLMSuppliersExplanation"] } } }
Attribute value on a Referenced By plus its language dimension dependency	{ "referencedBy": { "PLMRelatedRecipe": { "objectTypeName": "true", "source": { "name": "true", "attributes": ["PLMSpecificationName"] } } } }
Attribute value on a parent plus its language dimension dependency	{ "parent": { "attributes": ["PLMProductName"] } }
Attribute value on a Classification Link	{ "classificationLinks": { "SnapshotRecorder": { "attributes": ["SnapshotDisplayName", "SnapshotRecorderDisplay", "SnapshotTabOrder"] } } }

STEP Element	Example of Recorder
Attribute value on a referenced target node plus its language dimension dependency	<pre>{ "classificationLinks": { "PLMProductCategory": { "target": { "attributes": ["PLMCategoryName", "PLMGlobalProductClassificationCode"] } } } }</pre>
Attribute value with units of measure plus its language dimension dependency	<pre>{ "attributes": [" PLMPlannedPackagingSizes"] }</pre>
Multi Valued Attributes plus its language dimension dependency	<pre>{ "attributes": [" PLMPlannedFlavorVariations"] }</pre>
Attributes with LOV ID's plus its language dimension dependency	LOV IDs are not captured. Only the values are captured.
Be able to follow a reference from a target node, for example: Capture data points on a node any number of nested levels away from the current node by following a reference (or reverse reference).	<pre>{ "referencedBy": { "PLMRelatedRecipe": { "objectTypeName": "true", "source": { "name": "true", "attributes": ["PLMSpecificationName"], "referencedBy": { "PLMLabelVariantSample": { "source": { "attributes": ["PLMSpecificationName"] } } } } } } }</pre>

Private Label Food Solution Setup in Workbench

There are a number of object types, attributes, and reference types that need to be created and properly set up in workbench in order for the private label food solution to function properly in Web UI. For more information, see the following sections below on how to properly set up the private label food solution object types, reference types, and attributes in workbench.

- Creating Private Label Food Solution Object Types
- References Needed for Compare Tabs
- Attributes Needed for Compare Tabs

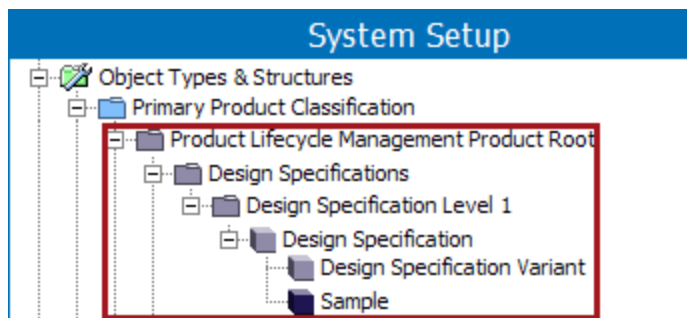
Creating Private Label Food Solution Object Types

The following sections describe what Primary Product Classifications and Alternative Classifications object types are needed for the private label food solution to function properly in Web UI.

Creating Primary Product Classification Object Types

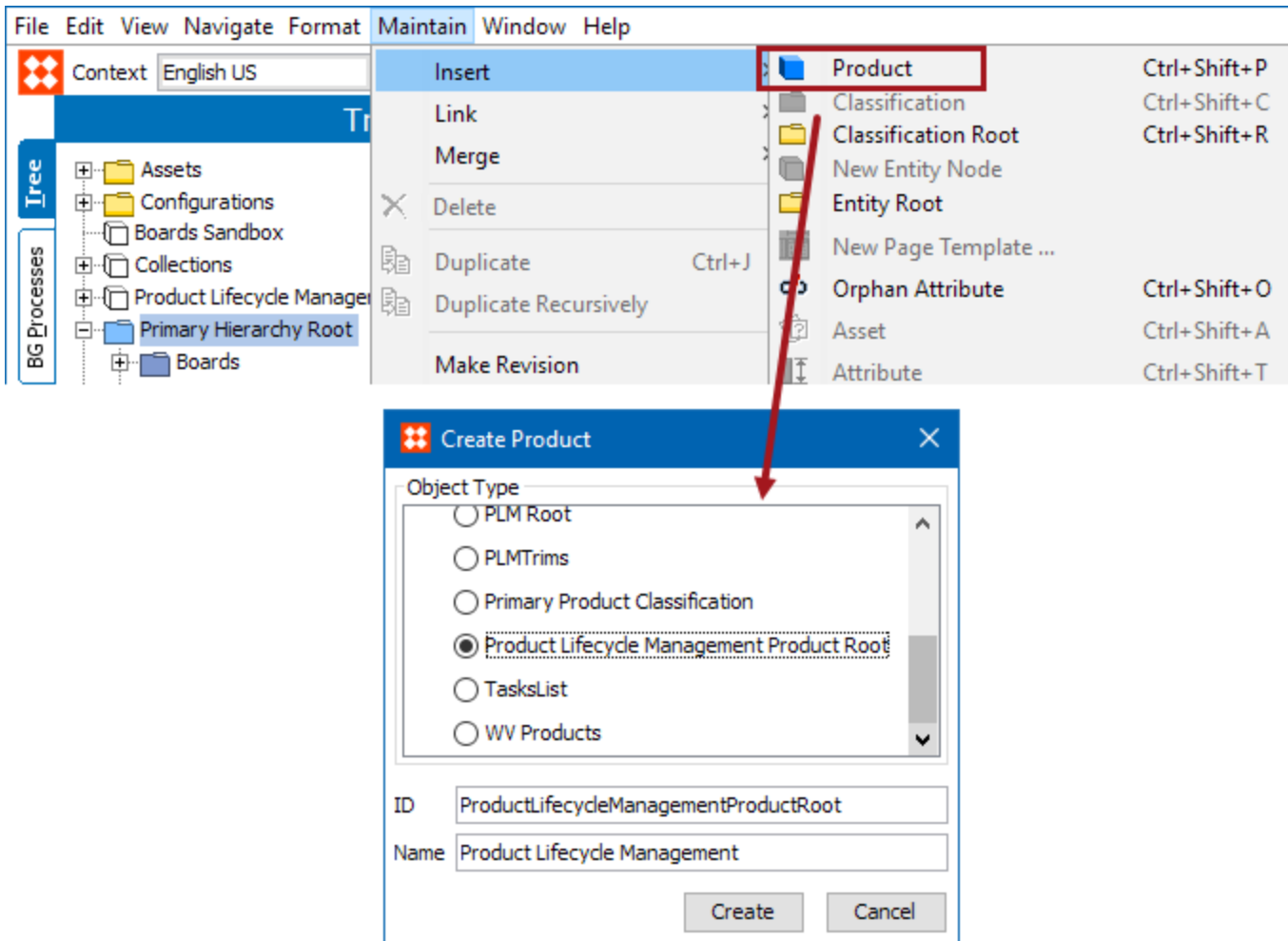
Design Specification Variants and Samples live in the Primary Product Classification object type structures, and have the same Design Specification parent object type.

In System Setup, there should be a structure created like the one pictured below that uses the following IDs and names for the created object types:



ID	Name
ProductLifecycleManagementProductRoot	Product Lifecycle Management Product Root
PLMDesignSpecificationsRoot	Design Specifications
PLMDesignSpecificationLevel1	Design Specification Level 1
PLMDesignSpecification	Design Specification
PLMDesignSpecificationLabelVariant	Design Specification Label Variant
PLMDesignSpecificationPackagingVariant	Design Specification Packaging Variant
PLMDesignSpecificationVariant	Design Specification Variant
PLMSample	Sample

After the structure has been created in System Setup, it needs to be added to Tree. In Tree, click on a Primary Product Classification folder and, go to Maintain > Insert > Product > select the object type to hold the **Design Specification Variants** and **Samples**.

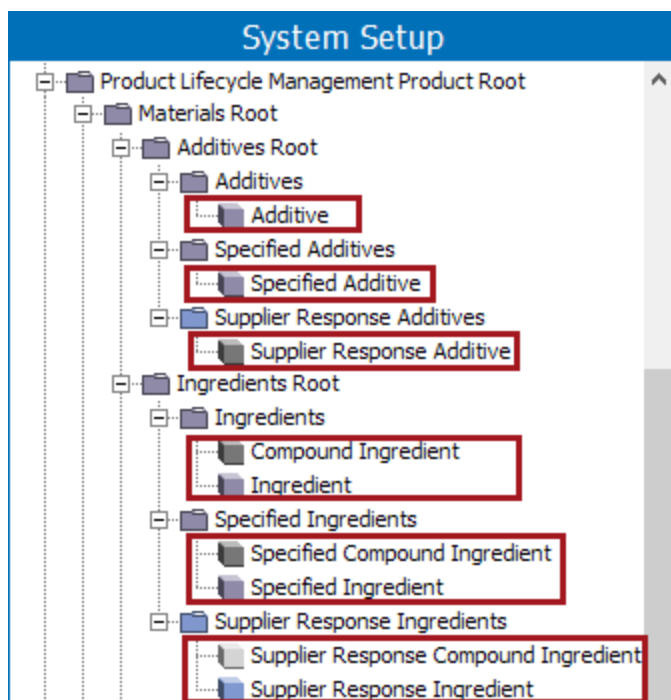


Once the hierarchy structure for the PLMDesignSpecificationVariant and PLMSample has been created and added to Tree, references need to be created between design specification variants and sample object types. See the **References Needed for Private Label Food Solution** topic in this documentation.

In Tree, when a recipe specification is created, it will be a **Design Specification Variant** object type. The Design Specification Variant object type holds the requirements for the recipe specification being created. Each supplier recipe option is created as a **Sample** object type.

Additional Primary Product Hierarchy Object Types

When working with design specification variants, there are a number of additional object types needed when creating recipes. They allow for companies to communicate with their suppliers about ingredients, compound ingredients, and additives, and provides a way for suppliers to communicate back with the companies.



- **Additive:** Represents the library of substances that are added to recipes to improve or preserve.
- **Specified Additive:** a copy of an additive that is used in a specification that provides instruction about the additive.
- **Supplier Response Additive:** Represents the supplier's response to the substances that are added to improve or preserve the specification recipe.
- **Compound Ingredient:** An ingredient used in the recipe that has sub-ingredients that is part of the ingredient library. The developed component will copy this as specified ingredient or supplier response ingredient.
- **Ingredient:** Foods or substances used in a recipe that is part of the library. The developed component will copy this as specified ingredient or supplier response ingredient.
- **Specified Compound Ingredient:** A copy of a compound ingredient that has sub-ingredients used in a specification that provides instruction about the compound ingredient.
- **Specified Ingredient:** A copy of an ingredient, such as a foods or substance, that is used in a specification recipe that provides instruction about the ingredient.
- **Supplier Response Compound Ingredient:** An ingredient that has sub-ingredients used in a recipe provided by the supplier.
- **Supplier Response Ingredient:** Foods or substances used in a recipe provided by the supplier.

The following IDs and names need to be used when creating these object types:

Important: The following IDs need auto IDs entered into the ID Pattern field: PLMSpecifiedAdditive, PLMSpecifiedIngredient, PLMSpecifiedCompoundIngredient, PLMSupplierResponseAdditive, PLMSupplierResponseIngredient, PLMSupplierResponseCompoundIngredient. Auto IDs are needed when

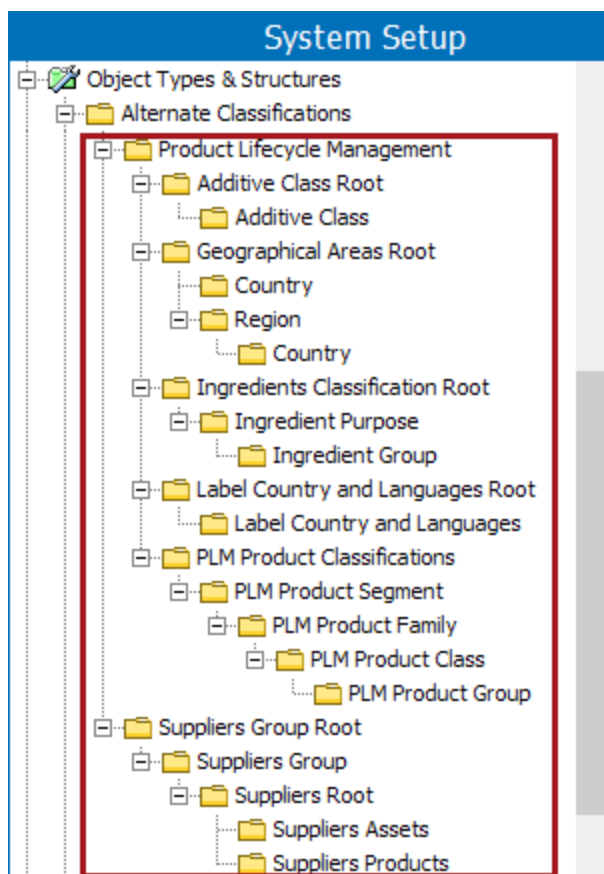
adding ingredients to the Design Specification Variant and Sample object types. For more on how to add auto IDs see the **Autogenerate Using Name Pattern and ID Pattern** topic in the **Object Types and Structures** section of the **System Setup / Super User Guide** documentation.

ID	Name
PLMMaterialsRoot	Materials Root
PLMAdditivesRoot	Additives Root
PLMAdditives	Additives
PLMAdditive	Additive
PLMSpecifiedAdditives	Specified Additives
PLMSpecifiedAdditive	Specified Additive
PLMSupplierResponseAdditives	Supplier Response Additives
PLMSupplierResponseAdditive	Supplier Response Additive
PLMIngredientsRoot	Ingredients Root
PLMIngredients	Ingredients
PLMCompoundIngredient	Compound Ingredient
PLMIngredient	Ingredient
PLMSpecifiedIngredients	Specified Ingredients
PLMSpecifiedCompoundIngredient	Specified Compound Ingredient
PLMSpecifiedIngredient	Specified Ingredient
PLMSupplierResponseIngredientRoot	Supplier Response Ingredients
PLMSupplierResponseCompoundIngredient	Supplier Response Compound Ingredient
PLMSupplierResponseIngredient	Supplier Response Ingredient

Creating Alternative Classification Object Types

Alternative Classifications are where the private label food solution object types are categorized. These categorizations enable recipes to be created for multiple regions, or multiple product categories, and through business rules, automatically acquire any region, category, parameter, or requirement specifications needed. The Product Lifecycle Management Classification root folder will need to be created for all private label food solution root object types to live under.

When finished, the private label food solution classification structure will look similar to the one pictured below.



- **Additive Class:** A way of indicating what the additives are used for in a food product. It is used by developed components to capture the purpose for using the additive.
- **Region:** A broad geographic area distinguished by similar features.
- **Country:** Indicates which countries a product is planned for sale. Also used to classify requirements and parameters that should be applied to products through business rules that will be sold in that country.
- **Ingredient Purpose:** A number of ingredients that are all related to one another in some way. It also controls where ingredients are searched from.
- **Ingredient Group:** A number of ingredients that are all related to one another in some way.
- **Label Country and Languages:** Different labels with the various languages the labels support.
- **PLM Product Group:** A product classification that holds default requirements and parameters that can be applied via business rules when ingredients are added to recipes.
- **Suppliers Products:** All recipes samples, responses, ingredients, additives, compound ingredients, etc. that are created by a particular supplier.

ID	Name
ProductLifecycleManagementClassifRoot	Product Lifecycle Management
PLMAdditiveClassRoot	Additive Class Root
PLMAdditiveClass	Additive Class
PLMGeographicalAreasRoot	Geographical Areas Root
PLMCountry	Country
PLMRegion	Region
PLMIngredientsClassificationRoot	Ingredients Classification Root
PLMIngredientPurpose	Ingredient Purpose
PLMIngredientGroup	Ingredient Group
PLMLabelCountryAndLanguagesRoot	Label Country and Languages Root
PLMLabelCountryAndLanguages	Label Country and Languages
PLMProductClassificationsRoot	PLM Product Classifications
PLMProductSegment	PLM Product Segment
PLMProductFamily	PLM Product Family
PLMProductClass	PLM Product Class
PLMProductGroup	PLM Product Group
SupplierGroupRoot	Suppliers Group Root
SuppliersGroup	Suppliers Group
SuppliersRoot	Suppliers Root
SuppliersAssets	Suppliers Assets
SuppliersProducts	Suppliers Products

References Needed for Private Label Food Solution

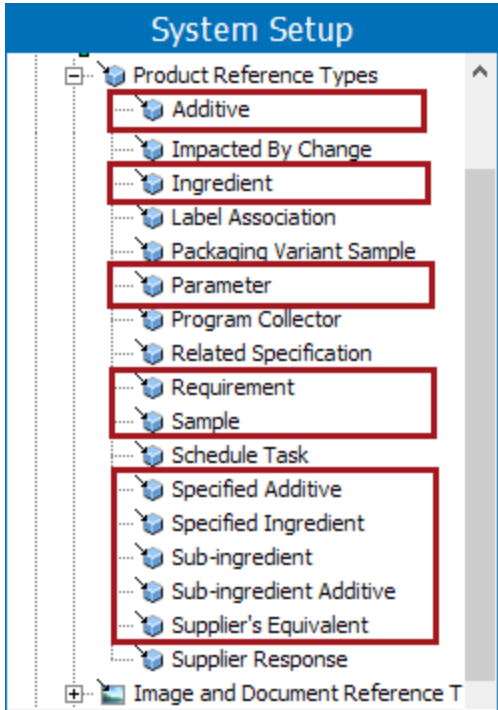
The following reference types are required for the private label food solution to work properly:

- Product Reference Types
- Classification Reference Types
- Product to Classification Link Types

See the above mentioned topics for more information on how to create the necessary reference types.

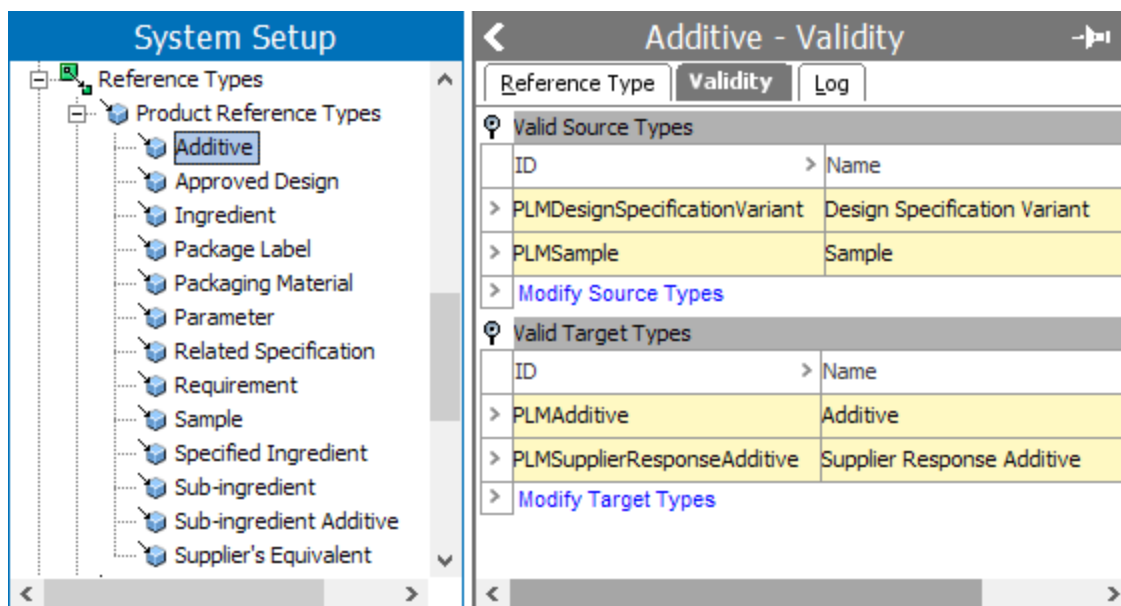
Product Reference Types

There are a number of Product Reference Types needed for private label tabs to work. The references needed are pictured below and described in further detail in this section.



Additive

PLMAdditive is used as a reference to connect a PLMAdditive to a PLMDesignSpecification variant object type or a PLMSupplierResponseAdditive to a PLMSample object type. The PLMAdditive reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:

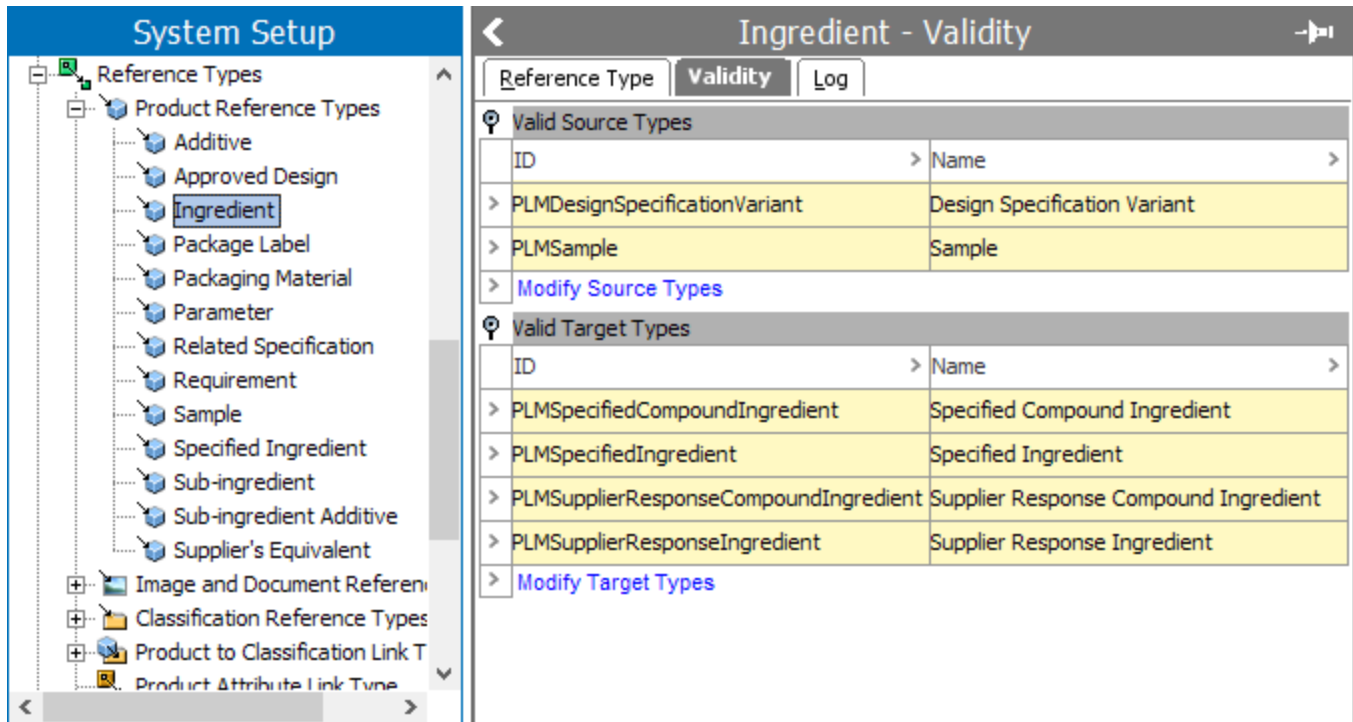


Note: While PLMAdditive is mandatory, it is possible to have more than one additive reference type. However, each additional additive reference type still must have the same attributes as PLMAdditive.

Ingredient

PLMIngredient is used as a reference to connect a PLMDesignSpecificationVariant to a PLMSpecifiedCompoundIngredient or a PLMSpecifiedIngredient. Additionally it is used as a reference between a PLMSample and a PLMSupplierResponseCompoundIngredient or a PLMSupplierResponseIngredient.

The PLMIngredient reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Note: While PLMIngredient is mandatory, it is possible to have more than one ingredient reference type. However, each additional ingredient reference type still must have the same attributes as PLMIngredient.

Parameter

PLMParameter is used as a reference to connect the following object types to a PLMParameter object type:

- PLMCompoundIngredient
- PLMDesignSpecificationVariant
- PLMIngredient
- PLMSample
- PLMSpecifiedCompoundIngredient
- PLMSpecifiedIngredient
- PLMSupplierResponseCompoundIngredient
- PLMSupplierResponseIngredient

The PLMParameter reference should have the following Valid Source Types and Valid Target Types as seen in the picture below.

The screenshot shows the 'System Setup' application interface. On the left, a tree view under 'Reference Types' has 'Parameter' selected. On the right, the 'Parameter - Validity' configuration window is open, showing a table with two sections: 'Valid Source Types' and 'Valid Target Types'.

ID	Name
> PLMCompoundIngredient	Compound Ingredient
> PLMDesignSpecificationVariant	Design Specification Variant
> PLMIngredient	Ingredient
> PLMSample	Sample
> PLMSpecifiedCompoundIngredient	Specified Compound Ingredient
> PLMSpecifiedIngredient	Specified Ingredient
> PLMSupplierResponseCompoundIngredient	Supplier Response Compound Ingredient
> PLMSupplierResponseIngredient	Supplier Response Ingredient
Modify Source Types	
ID	Name
> PLMParameter	Parameter
Modify Target Types	

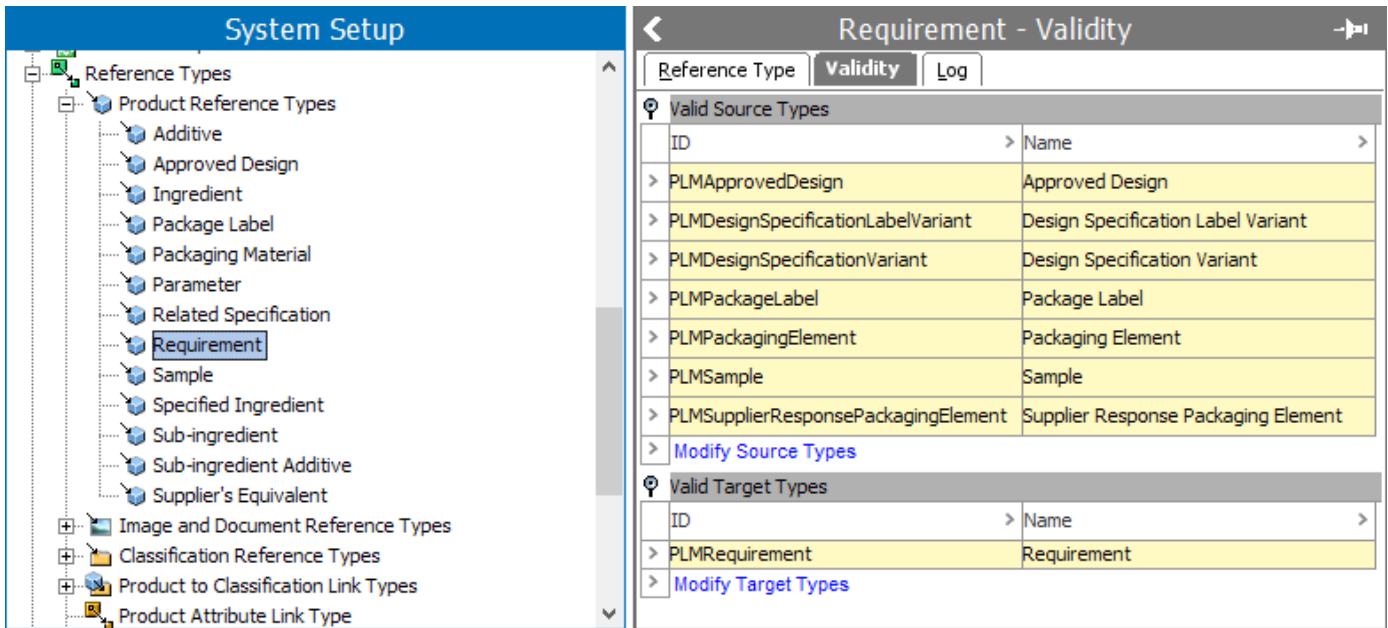
Note: It is possible to have more than one parameter reference type. However, each additional parameter reference type still must have the same source, target, and attributes as the original PLMParameter, though it could have additional source, target, and attribute types as well.

Requirement

PLMRequirement is used as a reference to connect the following object types to a PLMRequirement object type:

- PLMDesignSpecificationVariant
- PLMSample

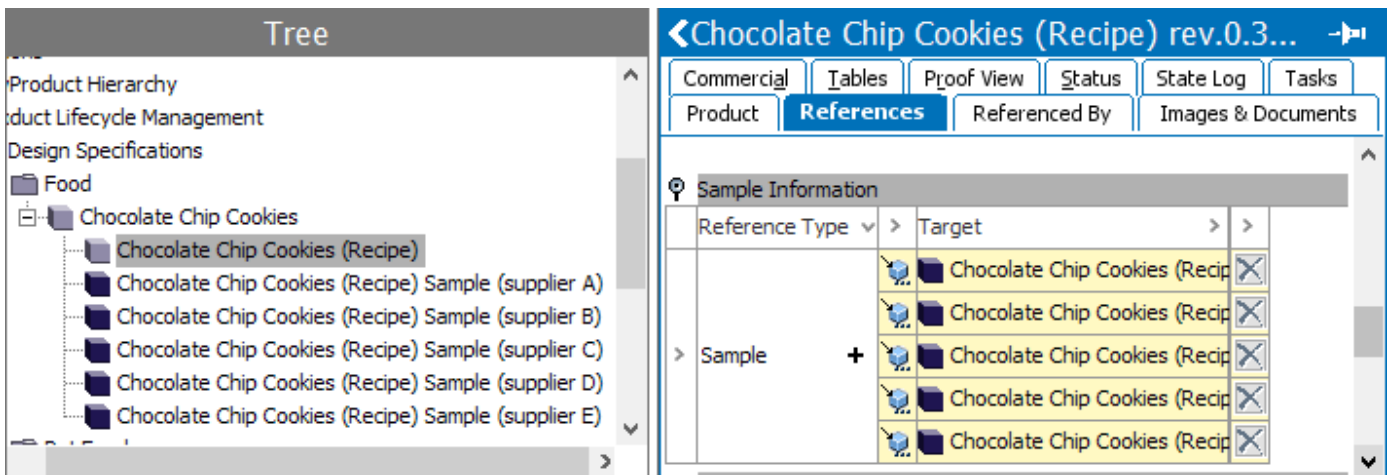
The PLMRequirement reference should have the following Valid Source Types and Valid Target Types as seen in the picture below.



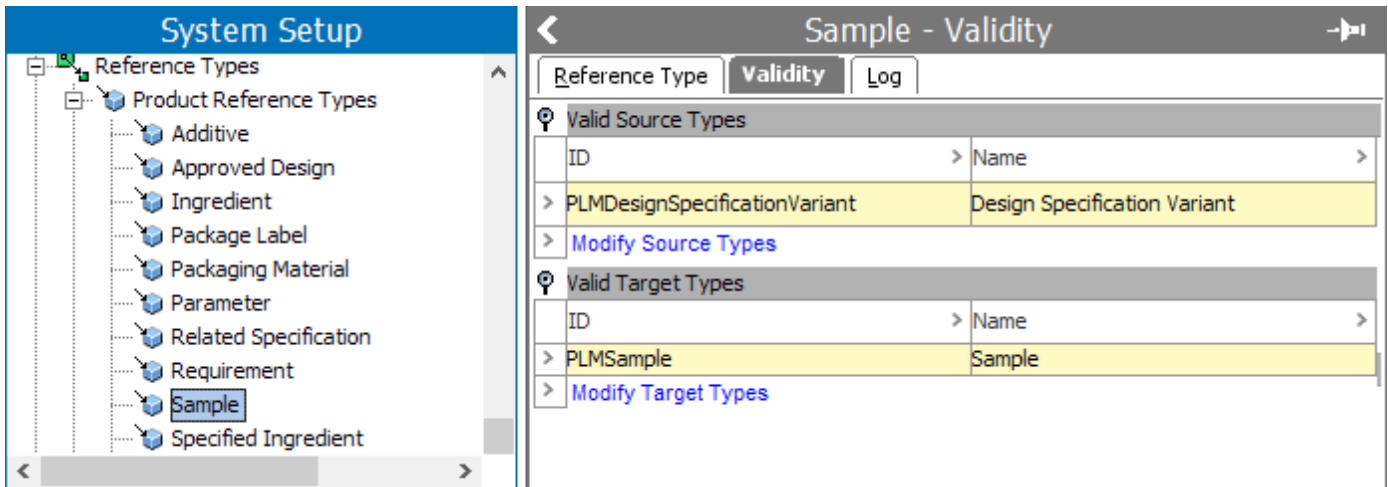
Note: It is possible to have more than one requirement reference type. However, each additional requirement reference type still must have the same source, target, and attributes as the original PLMRequirement, though it could have additional source, target, and attribute types as well.

Sample

PLMSample is used as a reference from the PLMDesignSpecificationVariant object types to the PLMSample object types.



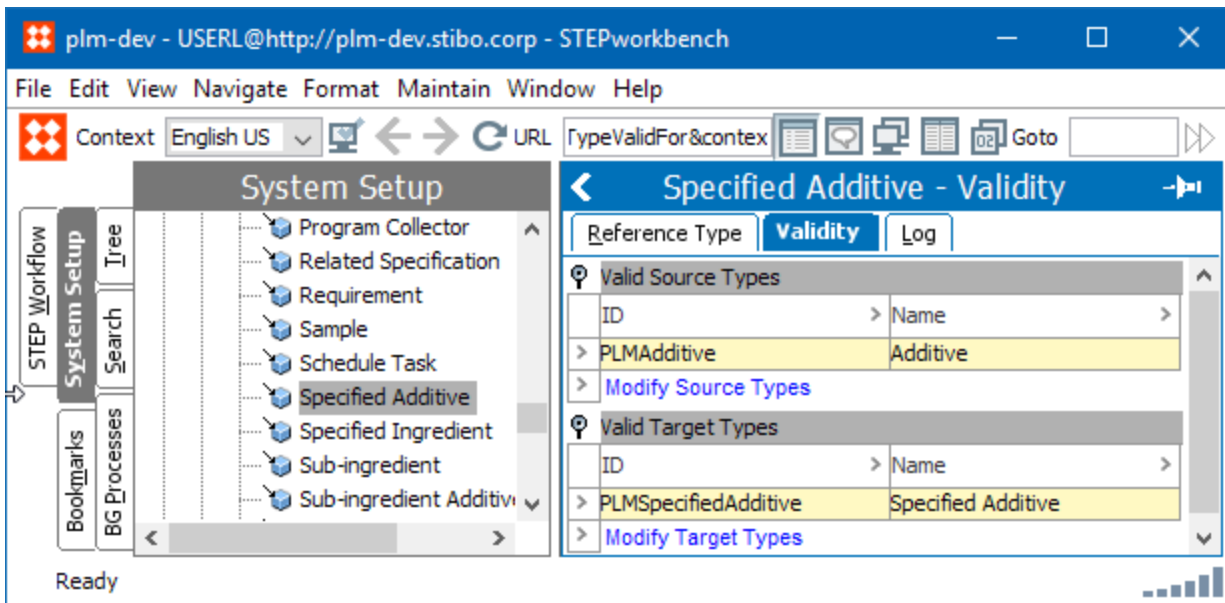
The PLMSample reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Specified Additive

PLMSpecifiedAdditive is used to connect a PLMAdditive to a PLMSpecifiedAdditive.

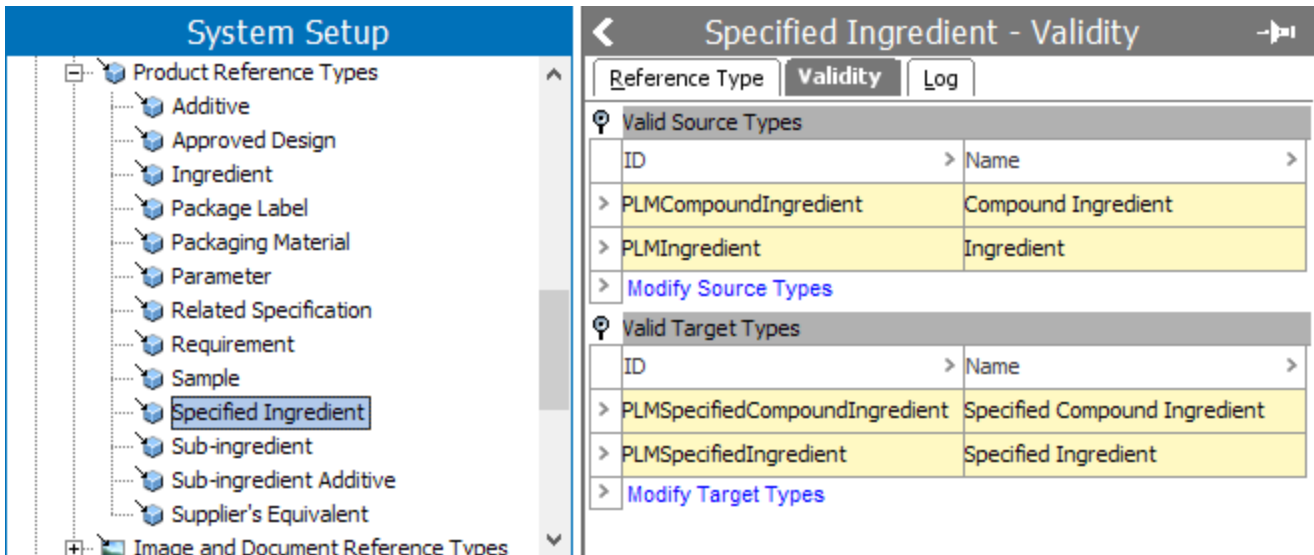
The PLMSpecifiedAdditive reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Specified Ingredient

PLMSpecifiedIngredient is used to connect a PLMIngredient to a PLMSpecifiedIngredient, and to connect a PLMCompoundIngredient to a PLMSpecifiedCompoundIngredient.

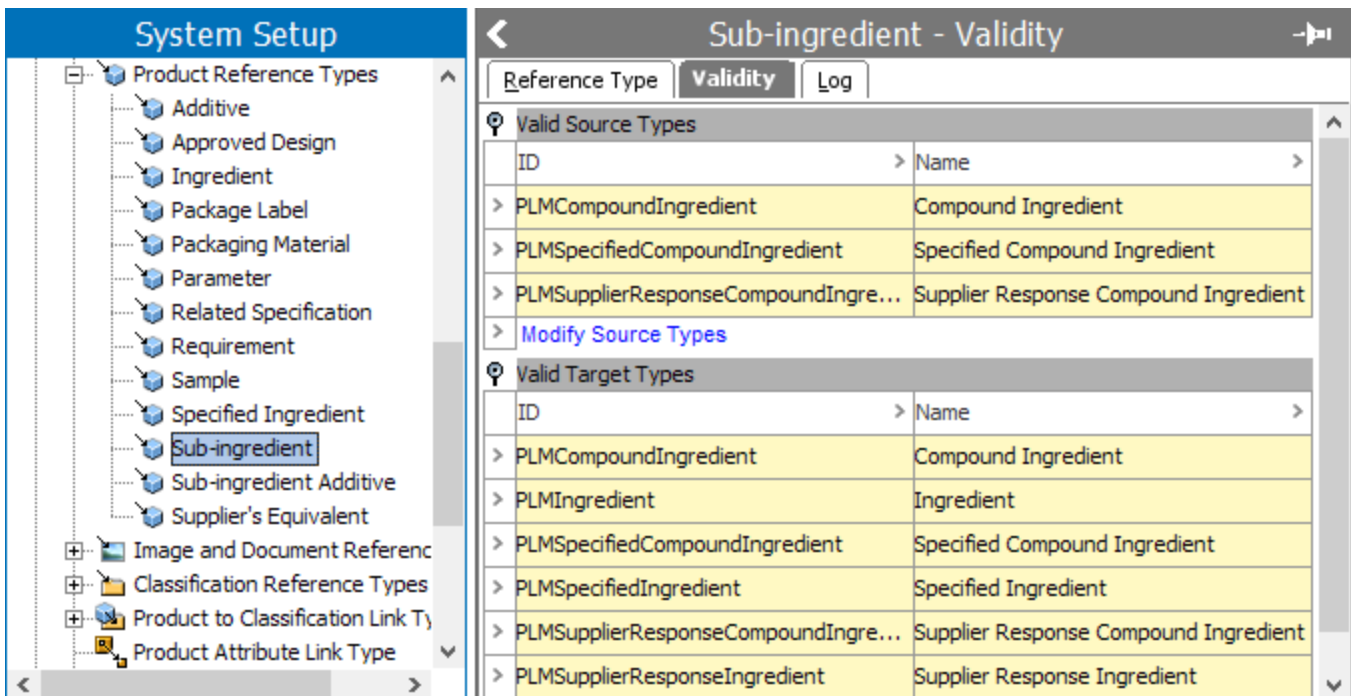
The PLMSpecifiedIngredient reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Sub-Ingredient

PLMSubIngredient reference is used to connect PLMSpecifiedCompoundIngredient to PLMSpecifiedIngredient and PLMSupplierResponseCompoundIngredient to PLMSupplierResponseIngredient.

The PLMSubIngredient reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Sub-Ingredient Additive

PLMSubIngredientAdditive reference is used to connect PLMSpecifiedCompoundIngredient to PLMSpecifiedAdditive and PLMSupplierResponseCompoundIngredient to PLMSupplierResponseAdditive.

The PLMSubIngredientAdditive reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:

The screenshot shows the 'System Setup' navigation pane on the left with 'Sub-ingredient Additive' selected. The main window displays the 'Sub-ingredient Additive - Validity' configuration page. The 'Validity' tab is active, showing two tables: 'Valid Source Types' and 'Valid Target Types'.

Valid Source Types	
ID	Name
> PLMSpecifiedCompoundIngredient	Specified Compound Ingredient
> PLMSupplierResponseCompoundIngredient	Supplier Response Compound Ingredient
Modify Source Types	

Valid Target Types	
ID	Name
> PLMSpecifiedAdditive	Specified Additive
> PLMSupplierResponseAdditive	Supplier Response Additive
Modify Target Types	

Supplier's Equivalent

The PLMSuppliersEquivalent references is used to connect PLMCompoundIngredient to PLMSupplierResponseCompoundIngredient, PLMIngredient to PLMSupplierResponseIngredient, and PLMAdditive to PLMSupplierResponseAdditive.

The PLMSuppliersEquivalent reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:

System Setup

- Product Reference Types
 - Additive
 - Approved Design
 - Ingredient
 - Package Label
 - Packaging Material
 - Parameter
 - Related Specification
 - Requirement
 - Sample
 - Specified Ingredient
 - Sub-ingredient
 - Sub-ingredient Additive
 - Supplier's Equivalent**
- Image and Document Referenc
- Classification Reference Types
- Product to Classification Link Ty
- Product Attribute Link Type

Supplier's Equivalent - Validity

Reference Type Validity Log

Valid Source Types

ID	Name
> PLMAdditive	Additive
> PLMCompoundIngredient	Compound Ingredient
> PLMIngredient	Ingredient
> Modify Source Types	

Valid Target Types

ID	Name
> PLMSupplierResponseAdditive	Supplier Response Additive
> PLMSupplierResponseCompoundIngredient	Supplier Response Compound Ingredient
> PLMSupplierResponseIngredient	Supplier Response Ingredient
> Modify Target Types	

Classification Reference Types

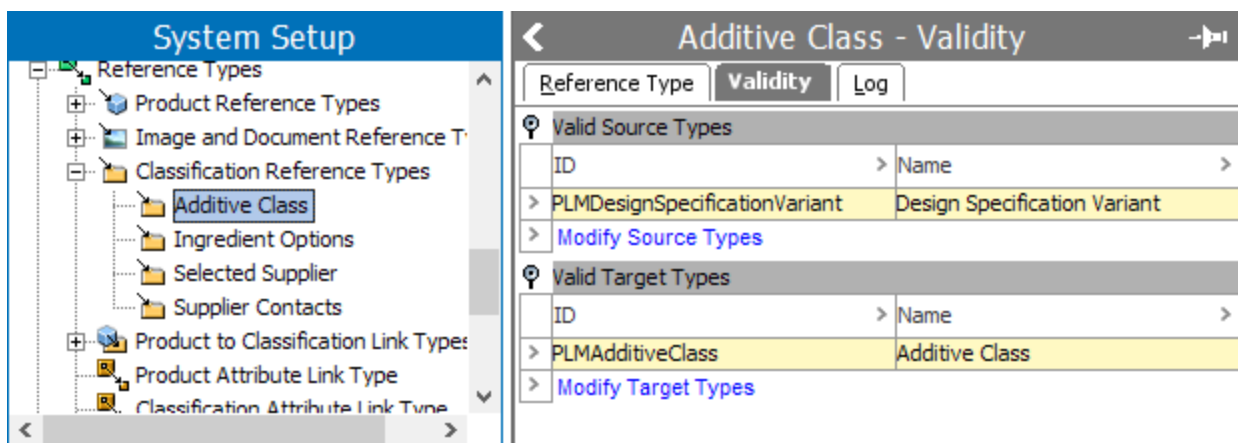
The Product to Classification Link Type is used to indicate which suppliers are bidding on the new product.

Additive Class

The classification reference can be used by customers to specify criteria about an entire group of additives rather than individually specify all of them. This allows the supplier to see what is in the group so that they can meet the specification.

The PLMAdditiveClass reference is used to connect the product PLMDesignSpecificationVariant object type to the classification PLMAdditiveClass object type.

The reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:

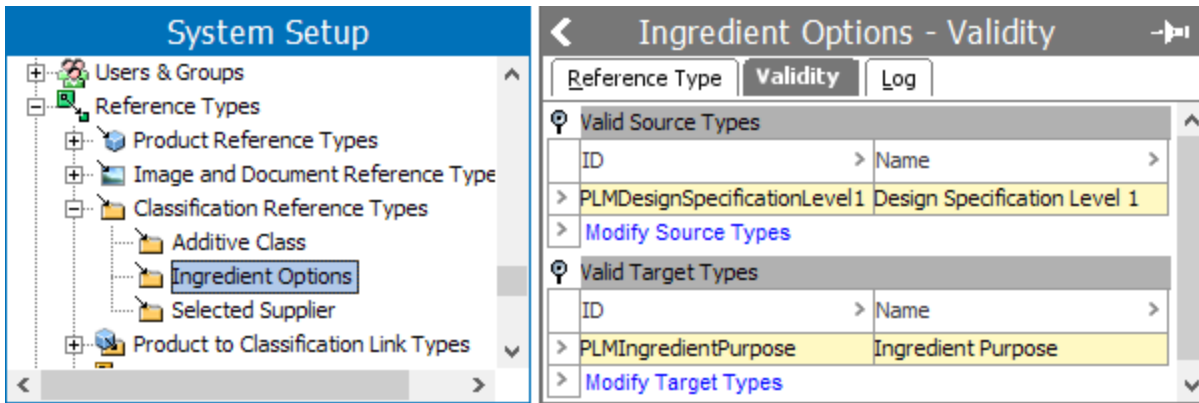


Ingredient Options

The ingredient Options reference allows customers to classify ingredients for different purposes, such as food vs pet food, and then limits where a user can choose ingredients to specify, or limits what supplier can choose to build recipes. Developed component looks for the parent of the design specification and connects all design specs in that category to the right ingredient classification.

The PLMIngredientOptions reference is used to connect the product PLMDesignSpecificationLevel1 object types to the classification PLMIngredientPurpose object type.

The reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:

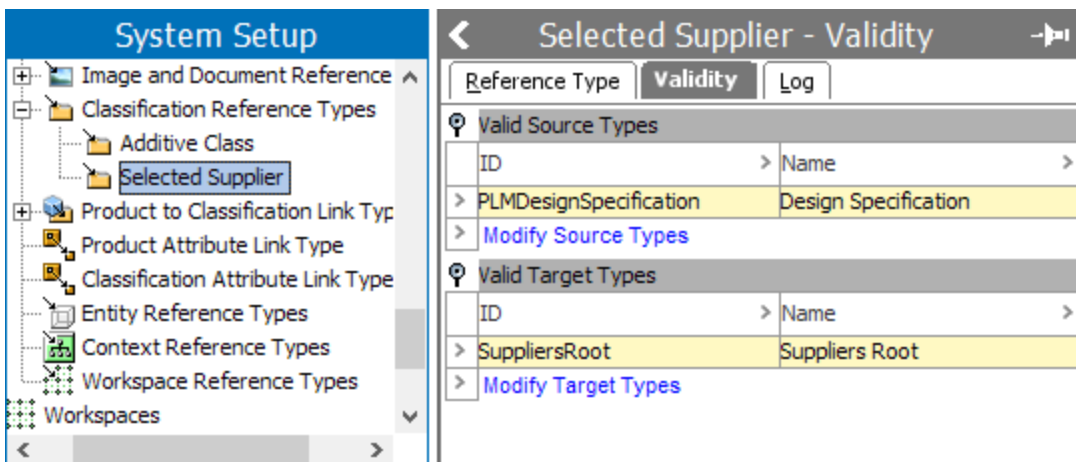


Selected Supplier

Note: The following reference type is not used in the developed component, but is used in the private label food solution.

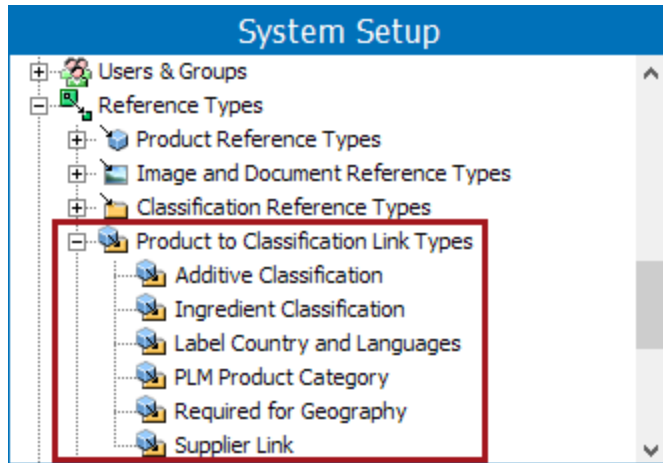
The PLMSelectedSupplier reference is used to connect the product PLMDesignSpecification object types to the classification SupplierRoot object type.

The reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Product to Classification Link Types

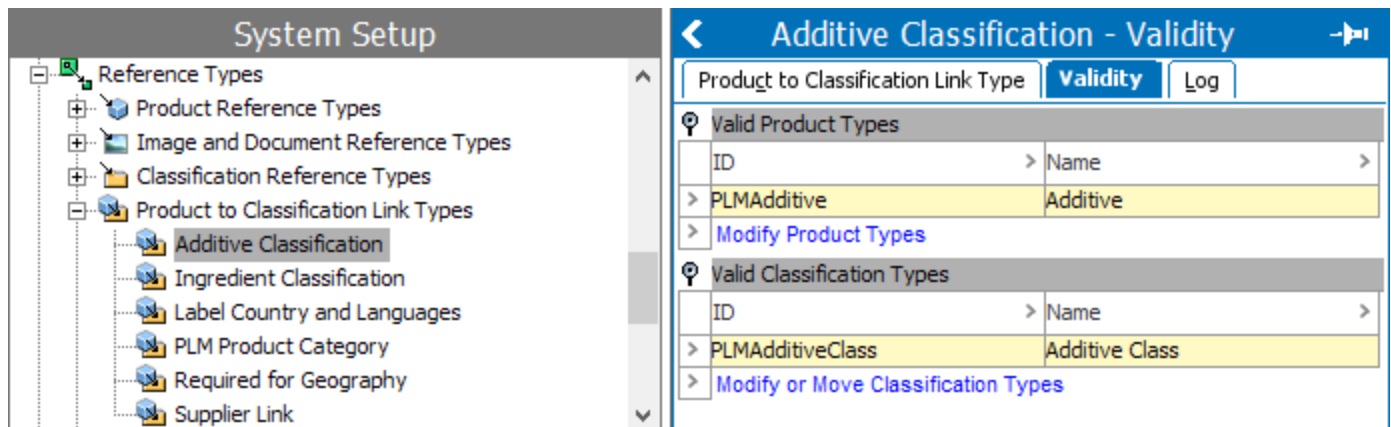
Product to classification link types are used to help classify which product object types are to be sorted into which classification group. It is possible for an object to be linked to more than one classification group.



Additive Classification

PLMAdditiveClassification is used to sort additive product types into various additive class folders. It is also possible for a PLMAdditiveClassification to be part of more than one additive class.

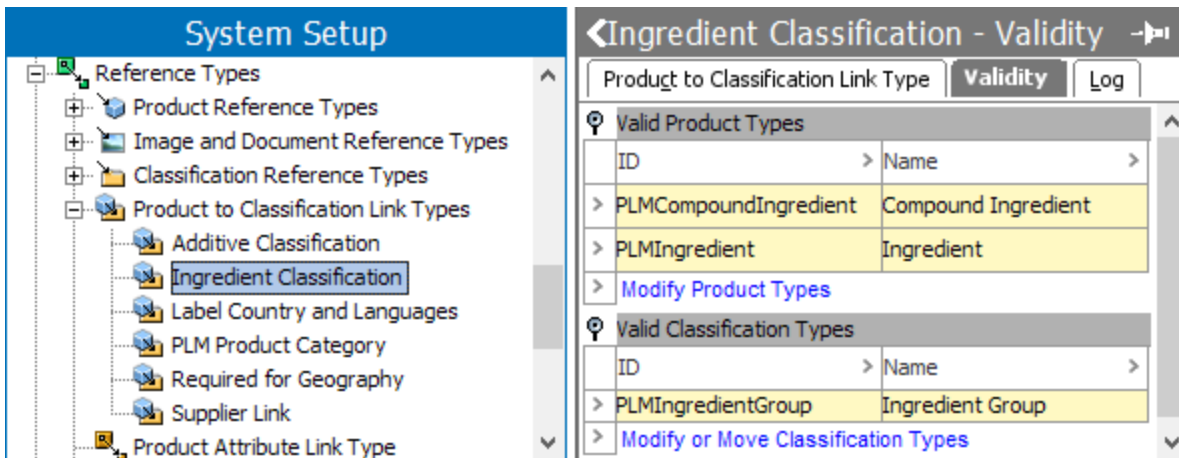
The PLMAdditiveClassification reference should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Ingredient Classification

PLMIngredientClassification is used to control which ingredient and compound ingredient product types can be added into various ingredient classification folders, for example, food versus pet food. It is possible for PLMIngredient and PLMCompoundIngredient product types to be part of more than one ingredient class.

The PLMIngredientClassification should have the following Valid Source Types and Valid Target Types as seen in the picture below:

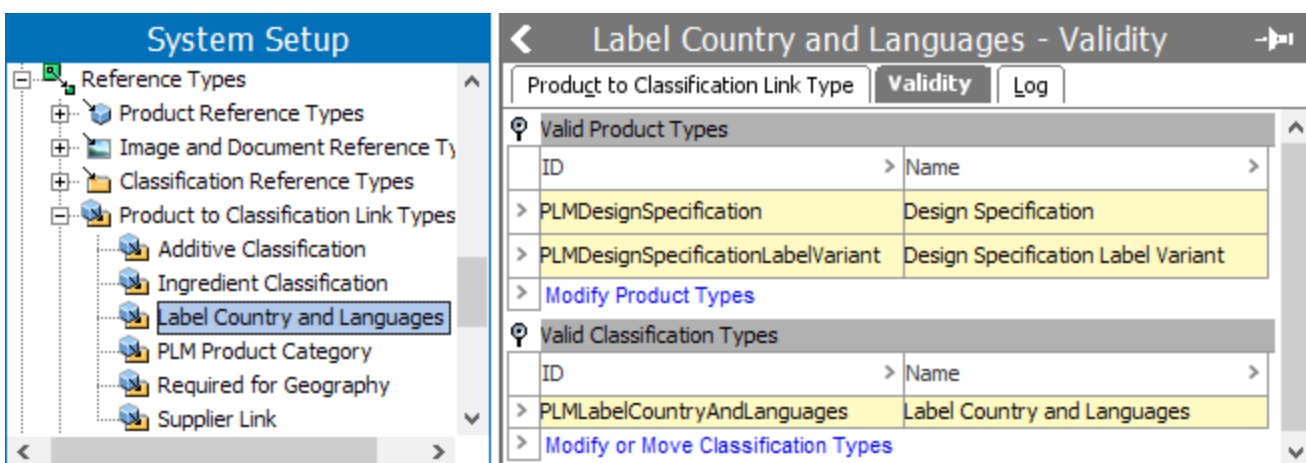


Label Country and Languages

Note: This reference is not part of the developed delivered components, but is used in the private label food solution.

The PLMLabelCountryAndLanguages reference is used to indicate which language bundles will be produced on a product label. It sorts PLMDesignSpecification and PLMDesignSpecificationLabelVariant product types into various PLMLabelCountryAndLanguages classes. It is possible for PLMDesignSpecification and PLMDesignSpecificationLabelVariant product types to be part of more than one label country and languages class bundle.

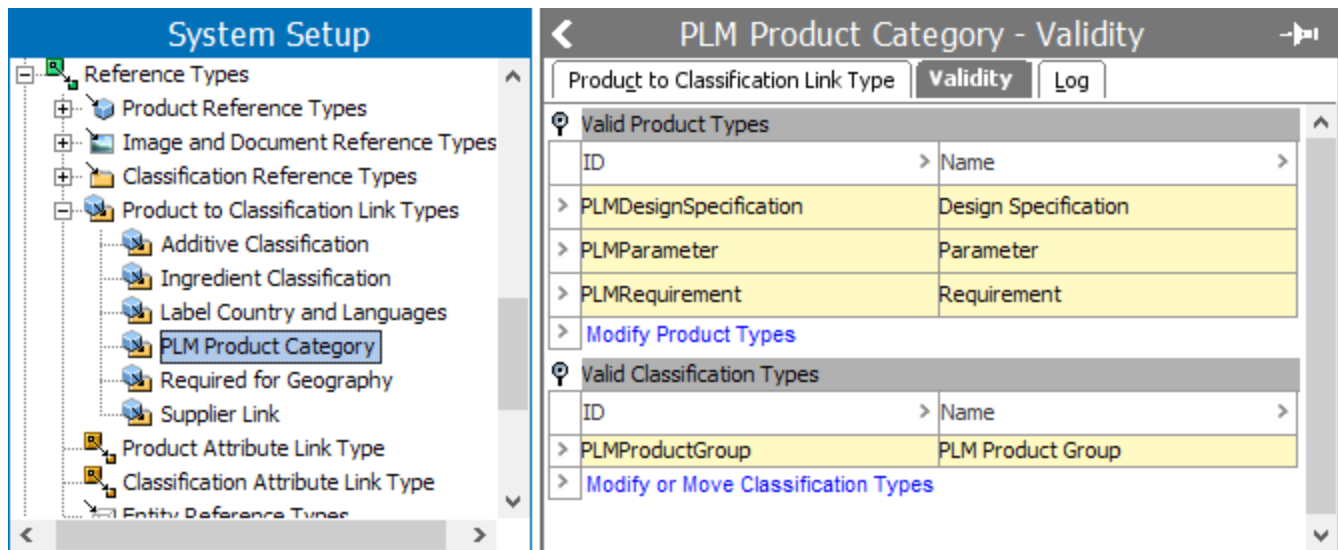
The PLMLabelCountryAndLanguages should have the following Valid Source Types and Valid Target Types as seen in the picture below:



PLM Product Category

The PLMProductCategory is used to sort PLMDesignSpecification, PLMDesignSpecificationLabelVariant, PLMParameter, and PLMRequirement object types into various PLMProductCategory classes. In other words, it enables customers to associate a design specification with a product category, and then link any necessary requirements and parameters. It is possible for PLMDesignSpecification, PLMDesignSpecificationLabelVariant, PLMParameter, and PLMRequirement product types to be part of more than one label country and languages class.

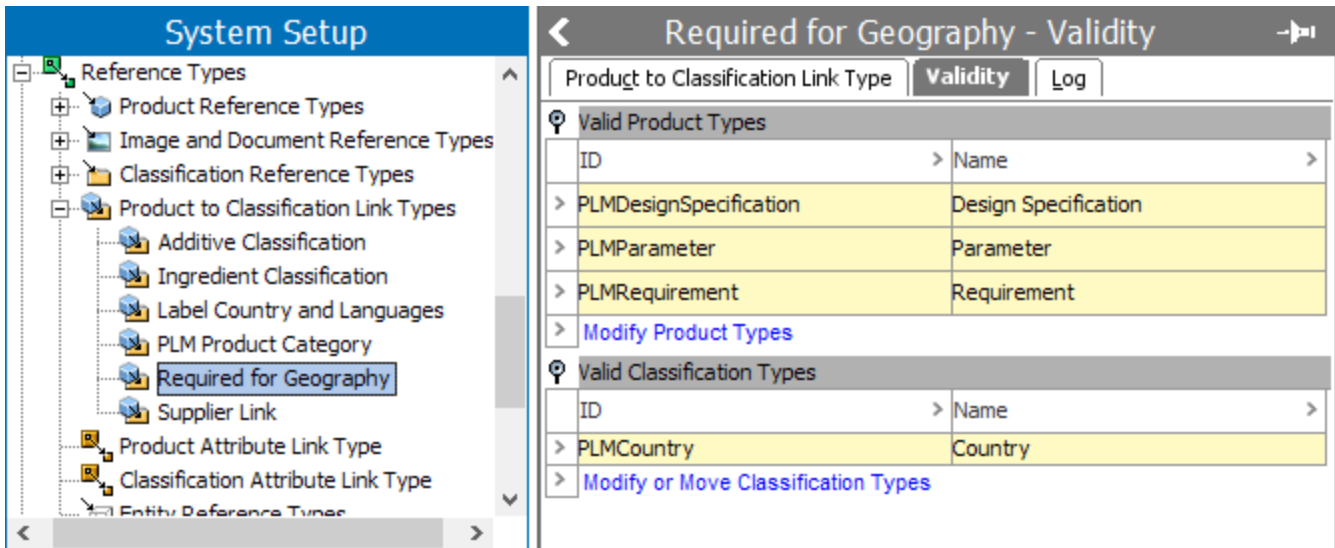
The PLM Product Category product to classification link type should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Required for Geography

PLMRequiredForGeography is used to sort PLMDesignSpecification, PLMParameter, and PLMRequirement object types into various required for geography classes, thus indicating which countries the new product is intended to be sold. Additionally, through business rules, it is used to link in requirements and parameters that should be applied to all new products for sale in that country. It is possible for PLMDesignSpecification, PLMParameter, and PLMRequirement product types to be part of more than one required for geography class.

The PLMRequiredForGeography should have the following Valid Source Types and Valid Target Types as seen in the picture below:

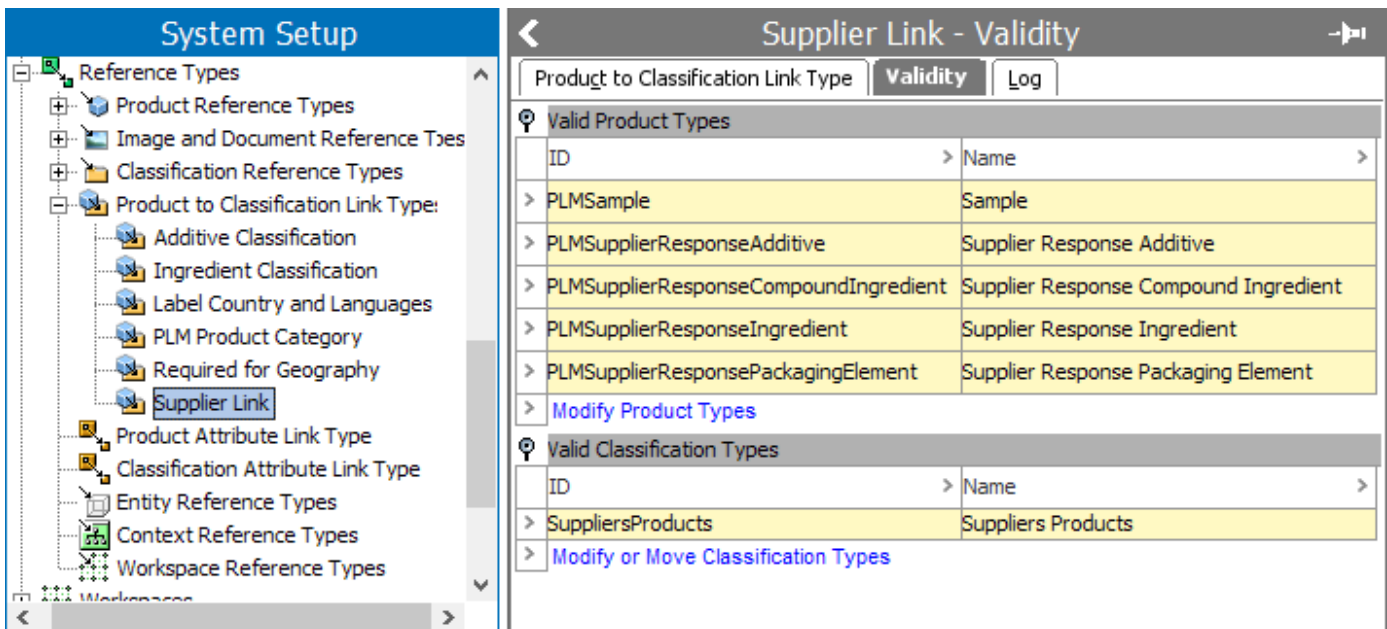


Supplier Link

Note: In workbench, in Users & Groups under the Web UI Setting flipper, the name of the 'Link type for vendor classification to product link' may be different than this example which uses 'SupplierLink.' Be sure to check your setting in workbench for the correct classification to product link, as this will need to be used for all components and business rules. Talk to your enablement team if changes need to be made.

SupplierLink is used to sort PLMSamples, PLMSupplierResponseAdditive, PLMSupplierResponseCompoundIngredient, PLMSupplierResponseIngredient, and PLMSupplierResponsePackagingElements into various supplier link classes.

The SupplierLink should have the following Valid Source Types and Valid Target Types as seen in the picture below:



Attributes Needed for Private Label Food Solution

When comparing recipes from suppliers, the table below details the required attribute groups and attributes.

All attributes listed in the table are description attributes, unless otherwise noted, with many being valid for multiple Reference Types. While the names for these attributes can vary, the IDs for the attributes needed for the private label food solution must be entered in exactly as displays in the table below:

Note: Even though an attribute may be valid for more than one reference type, this does not mean that the attribute needs to hold a value. Many references are used for multiple object types, and not all object types need all attributes to hold a value. This is because the same attributes are used on both suppliers and samples, and not all attributes need values for both of these object types at the same time.

Note: There are some attribute groups and attributes included in the table below that are used by Stibo Systems' private label food solution and workflows, but are not needed for the developed components. Attributes or attribute groups not needed for the developed components are identified by an asterisk.

Attribute Groups

Attribute Group IDs	Definition	Name	Attributes in Group
PLMCompareDetailsParameter	The attributes that appear in the show details dialog in the Compare Parameters Tab in Web UI.	Compare Details, Parameter	<ul style="list-style-type: none"> • PLMMeetsRequirement • PLMSuppliersExplanation • PLMDefiningAttribute • PLMMethod
PLMCompareDetailsRequirement	The attributes that appear in the show details dialog in the Compare requirements Tab in Web UI	Compare Details, Requirement	<ul style="list-style-type: none"> • PLMMeetsRequirement • PLMDefiningAttribute • PLMSuppliersExplanation
PLMCopiedAdditiveValues	The PLMSpecifiedAdditive or the PLMSupplierResponseAdditive are created and the attributes values from the attributes in this attribute group are copied from the generic PLMAdditive to the created objects (PLMSpecifiedAdditive/PLMSupplierResponseAdditive)	Copied Additive Values	<ul style="list-style-type: none"> • Open for various attribute types

Attribute Group IDs	Definition	Name	Attributes in Group
PLMSpecifiedIngredientAdditionallInfo	These attributes display as additional info for the Specified Ingredients Side Panel. Additionally, they display in the Specified Ingredients Tab after the PLMSpecifiedIngredientStaticInformation attributes in the dialog for adding and editing ingredients.	Specified Ingredient Additional Information	<ul style="list-style-type: none"> • PLMSpecificationDetails • Open to other various attribute types
PLMSupplierIngredientAdditionallInfo	In the Compare Ingredients Tab, these attributes display as additional information for the sample ingredients. Additionally, in the Supplier Ingredients Tab, the attributes display after the PLMSampleIngredientStaticInformation attributes in the dialog for adding and editing ingredients.	Supplier Ingredient Additional Information	<ul style="list-style-type: none"> • PLMGuaranteedCountryOfOrigin • PLMSuppliersExplanation • Open to other various attribute types
PLMSpecifiedIngredientStaticInformation	In the Specified Ingredients Tab these attributes are the static information in the dialog for adding and editing ingredients. All the attributes are needed.	Specified Ingredient Static Information	<ul style="list-style-type: none"> • PLMSpecifiedIngredientAllowance • PLMSpecifiedIngredientPrecision • PLMSpecifiedIngredientQuantity
PLMSupplierIngredientStaticInformation	In the Supplier Ingredients Tab these attributes are the static information in the dialog for adding and editing ingredients. All the attributes are needed.	Supplier Ingredient Static Information	<ul style="list-style-type: none"> • PLMSuppliersIngredientQuantity

Attributes

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
PLMAdditiveClassID	Used by PLM developed web UI components for specifying a recipe and for suppliers to enter their recipe additives. After selecting an additive and class for the additive, the STEP ID is written to this attribute because that ensures uniqueness of the class. The additive class name is written to a different attribute (PLMAdditive Class).	Text	Product Reference Types <ul style="list-style-type: none"> • PLMAdditive 	None
PLMAlternateName	An alternate name used in place of an ingredient or compound ingredient for searching, e.g. searching for	Text	Primary Product Types <ul style="list-style-type: none"> • PLMCompoundIngredient • PLMIngredient 	Language

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	an 'eggplant' will also show results with 'aubergine,' the alternate name for eggplant.			
PLMEuropeanNumberingSystem Number Note: This is a specification attribute	Number codes for substances that are permitted to be used as food additives if used within the European Union and European Free Trade Association. The recipe creation components use this as an alternate search term.	Text	Primary Product Types <ul style="list-style-type: none"> • PLMAdditive • PLMSupplierResponseAdditive 	None
PLMGuaranteedCountryOfOrigin Note: Part of PLMSupplierIngredientAdditionalInfo attribute group	Indicates the country where the ingredient, additive, or compound ingredient is from.	List of Values	Product Reference Types <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMSubIngredient • PLMSubIngredientAdditive 	None
PLMHelpText	Directions that assist the user	Text	Product Types	Language

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	to answer requirements and parameters.		<ul style="list-style-type: none"> • PLMParameter • PLMRequirement <p>Product to Classification Link Types</p> <ul style="list-style-type: none"> • PLMProductCategory • PLMRequiredForGeography <p>Product Reference Types</p> <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMParameter • PLMRequirement • PLMSubIngredient • PLMSubIngredientAdditive 	
PLMInternationalNumberingSystemNumber* Note: This is a specification attribute	An international numbering system for food additives which provide a short designation of what may be a lengthy name. You can search using this number.	Text	<p>Primary Product Types</p> <ul style="list-style-type: none"> • PLMAdditive • PLMSupplierResponseAdditive 	None
PLMMandatorySupplierResponseAdditives Note: This is a specification attribute	An attribute that defines the mandatory attributes for	List of Values Note:	<p>Primary Product Types</p> <ul style="list-style-type: none"> • PLMSupplierResponseAdditives 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	additives in the add ingredient dialog for the supplier sample	List of Values must use IDs that include the ID of the attributes that require responses		
PLMMandatorySupplierResponseIngredients Note: This is a specification attribute	An Attribute that defines the mandatory attributes for ingredients and compound ingredients in the add ingredient dialog for the supplier sample	List of Values Note: List of Values must use IDs that include the ID of the attributes that require responses	Primary Product Types <ul style="list-style-type: none"> • PLMSupplierResponseIngredients • PLMSupplierResponseIngredient • PLMSupplierResponseCompoundIngredient 	None
PLMMandatorySupplierResponseSParam	Holds attribute IDs of attributes that	List of Values	Primary Product Types <ul style="list-style-type: none"> • PLMParameter • PLMRequirement 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	are mandatory. Can be used by business rules to validate whether responses have been given.	Note: List of Values must use IDs that include the ID of the attributes that require responses	Product to Classification Link Type <ul style="list-style-type: none"> • PLMProductCategory • PLMRequiredForGeography Product Reference Types <ul style="list-style-type: none"> • PLMParameter • PLMRequirement 	
PLMMandatorySupplierResponseReq	Holds attribute IDs of attributes that are mandatory. Can be used by business rules to validate whether responses have been given.	List of Values Note: List of Values must use IDs that include the ID of the attributes that require responses	Primary Product Types <ul style="list-style-type: none"> • PLMParameter • PLMRequirement Product to Classification Link Type <ul style="list-style-type: none"> • PLMProductCategory • PLMRequiredForGeography Product Reference Types <ul style="list-style-type: none"> • PLMParameter • PLMRequirement 	None
PLMMeetsRequirement Note: Part of the	The supplier's answer on the specified	List of Values	Product Reference Types <ul style="list-style-type: none"> • PLMParameter 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
PLMCompareDetailsRequirement and PLMCompareDetailsParameter attribute groups.	parameter / requirement.	Note: List of Values use IDs for compare logic	<ul style="list-style-type: none"> PLMRequirement 	
PLMMethod Note: Part of the PLMCompareDetailsParameter attribute group.	An explanation of how the measurement was done in order to meet the request.	Text	Product Reference Types <ul style="list-style-type: none"> PLMParameter 	Language
PLMParameterDescription	Describes the parameter being used, or gives further information on the viewed parameter.	Text	Primary Product Types <ul style="list-style-type: none"> PLMParameter Product to Classification Link Types <ul style="list-style-type: none"> PLMProductCategory PLMRequiredForGeography Product Reference Types <ul style="list-style-type: none"> PLMParameter 	Language
PLMParameterType	Used to group different types of parameters.	List of Values	Primary Product Types <ul style="list-style-type: none"> PLMParameter Classification Reference Types <ul style="list-style-type: none"> PLMProductCategory PLMRequiredForGeography 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
			Product Reference Type <ul style="list-style-type: none"> • PLMParameter 	
PLMRecipeNumber Note: This is a specification attribute	A unique identifier for a supplier's recipe.	Text	Primary Product Types <ul style="list-style-type: none"> • PLMSample 	None
PLMRequirementDescription	The explanation of a requirement.	Text	Primary Product Types <ul style="list-style-type: none"> • PLMRequirement Product to Classification Link Types <ul style="list-style-type: none"> • PLMProductCategory • PLMRequiredForGeography Product Reference Type <ul style="list-style-type: none"> • PLMRequirement 	Language
PLMRequirementType	A grouping mechanism for different types of requirements.	List of Values	Primary Product Types <ul style="list-style-type: none"> • PLMRequirement Product to Classification Link Type <ul style="list-style-type: none"> • PLMProductCategory • Required for Geography Product Reference Type <ul style="list-style-type: none"> • PLMRequirement 	None
PLMSortOrder	Used to specify the	Number	Primary Product Types <ul style="list-style-type: none"> • PLMParameter 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	<p>order that parameters and requirements should be listed.</p> <p>For recipes, the supplier adds a sort order to indicate the descending order of ingredients and additives.</p>		<ul style="list-style-type: none"> • PLMRequirement <p>Product to Classification Link Type</p> <ul style="list-style-type: none"> • PLMProductCategory • PLMRequiredForGeography <p>Product Reference Types</p> <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMParameter • PLMRequirement • PLMSubIngredient • PLMSubIngredientAdditive 	
<p>PLMSpecificationDetails</p> <p>Note: Part of the PLMSpecifiedIngredientAdditionalInfo attribute group.</p>	<p>Provides further information, such as instructions, places of origin to exclude, brand to use, etc. on specified additives, ingredients, and sub-ingredient.</p>	Text	<p>Product Reference Type</p> <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMSubIngredient 	None
<p>PLMSpecifiedIngredientAllowance</p>	<p>Defines whether a recipe 'May Contain,' 'Must</p>	List of Values	<p>Product Reference Type</p> <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	Contain,' or 'Must Not Contain' an ingredient, compound ingredient, or additive. It is used together with 'Specified Ingredient Precision' and 'Specified Ingredient Quantity (%)' to generate statements like 'Must Contain Exactly 8%.'		<ul style="list-style-type: none"> • PLMSubIngredient • PLMSubIngredientAdditive 	
PLMSpecifiedIngredientPrecision	A specification of the amount of the ingredient, compound ingredient or additive you want in you recipe. It can be 'Approximately', 'Exactly', 'Maximum' or 'Minimum'. Used together with 'Specified Ingredient Allowance'	List of Values	Product Reference Type <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMSubIngredient • PLMSubIngredientAdditive 	None

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
	and 'Specified Ingredient Quantity (%)' to generate statements like 'Must Contain Exactly 8%.'			
PLMSpecifiedIngredientQuantity	Used together with 'Specified Ingredient Allowance' and 'Specified Ingredient Precision' to generate statements like 'Must Contain Exactly 8%.'	Number	Product Reference Type <ul style="list-style-type: none"> • PLMAdditive • PLMIngredient • PLMSubIngredient • PLMSubIngredientAdditive 	None
PLMDefiningAttribute Note: Part of the PLMCompareDetailsRequirement and PLMCompareDetailsParameter attribute groups.	Provides an area that the supplier is able to respond if the supplier must add more detail to their answer.	LOV	Product Reference Type <ul style="list-style-type: none"> • PLMParameter • PLMRequirement 	Language
PLMSuppliersExplanation Note: Part of the PLMSupplierIngredientAdditionalInfo, PLMCompareDetailsRequirement, and the PLMCompareDetailsParameter,	Primarily used if the supplier wants to explain why they added another ingredient, or	Text	Product Reference Type <ul style="list-style-type: none"> • Additive • Ingredient • Parameter • Requirement • Sub-ingredient 	Language

Attribute IDs	Definition	Validation Base Type	Validity	Dependencies
attribute groups	amount of the ingredient, other than the one specified. Additionally, it is used if the supplier wants to add something to the answer of a requirement or parameter.		<ul style="list-style-type: none"> Sub-ingredient Additive 	
PLMSuppliersIdentificationNumber*	A unique number that a supplier itself is given.	Text	Primary Product Type <ul style="list-style-type: none"> Sample 	None
PLMSuppliersIngredient Quantity	Gives a quantity of additives, ingredients, sub-ingredients, or sub-ingredient additives in the suppliers sample / recipe.	Number	Product Reference Type <ul style="list-style-type: none"> Additive Ingredient Sub-ingredient Sub-ingredient Additive 	None
PLMSuppliersName*	The name of the supplier.	Text	Product Reference Type <ul style="list-style-type: none"> Sample 	None
PLMVersionNumber* Note: This is a specification attribute	The recipe version number sent.	Number	Product Reference Type <ul style="list-style-type: none"> Sample 	None

List Of Values for Attributes

LOVs IDs	Name	LOV for which Attributes
PLMMandatorySupplierResponsesAdditiveLOV	Mandatory Supplier Responses, Additives	<ul style="list-style-type: none"> PLMMandatorySupplierResponsesAdditives
PLMMandatorySupplierResponses, IngredLOV	Mandatory Supplier Responses, Ingredient	<ul style="list-style-type: none"> PLMMandatorySupplierResponsesIngredients
PLMMandatorySupplierResponsesParamLOV	Mandatory Supplier Responses, Parameter	<ul style="list-style-type: none"> PLMMandatorySupplierResponsesParam
PLMMandatorySupplierResponsesReqLOV	Mandatory Supplier Responses, Requirements	<ul style="list-style-type: none"> PLMMandatorySupplierResponsesReq
PLMCountryCodeISO3166-1_2013	Country Code - ISO_3166-1 2013	<ul style="list-style-type: none"> PLMGuaranteedCountryOfOrigin
PLMMeetsRequirementLOV	Meets Requirement	<ul style="list-style-type: none"> PLMMeetsRequirement
PLMParameterTypeLOV	Parameter Type	<ul style="list-style-type: none"> PLMParameterType
PLMRequirementTypeLOV	Requirement Type	<ul style="list-style-type: none"> PLMRequirementType
PLMSpecifiedIngredientAllowanceLOV	Specified Ingredient Allowance	<ul style="list-style-type: none"> PLMSpecifiedIngredientAllowance
PLMSpecifiedIngredientPrecisionLOV	Specified Ingredient Precision	<ul style="list-style-type: none"> PLMSpecifiedIngredientPrecision

Private Label Food Solution Setup in Web UI

The private label food solution enable the customer to look at a product from two or more suppliers and view the similarities and differences of the product's makeup from one supplier to the next. Additionally, it allows the customer to compare the supplier recipes in relation to their own recipe specification. There are a number of component tabs and reference types that need to be created and properly setup in Web UI for the private label food solution to function properly.

Read the following sections below on how to properly set up the private label food solution in Web UI.

- Adding the Compare BOMs Action Button
- Adding and Mapping Tabs for Private Label Food Solution

Adding the Compare BOMs Action Button

There is a pivotal action button needed for the private label food solution, the **Compare BOMs Action** button. This action button enables users to select recipes that suppliers have returned, and evaluate the recipes against other suppliers and the original recipe specification. Users can review the ingredients, compound ingredients, and sub-ingredients used in the recipe, and evaluate the parameters and requirements to help them make a decision on which recipe to select.

This action button can be added to any Node List Properties or Task List Properties in conjunction with the compare tab child components via a Node Details screen.

Important: PLMSamples are the only object type that render data on a Node List Properties or Task List Properties properly. If other object types are used or selected, the compare tabs will not function as expected.

See the following topics in the **Web User Interface / Web UI Setup and User Guide** for more information:

- Node Details Screen
- Node List Component
- Task List Properties

Adding the Compare BOMs Action

1. Navigate to the desired Node List Properties or Task List Properties. In the following example, a Node List Properties is used.
2. Under Child Components, click on the **Add** button to add the **Compare BOMs Action** button.

Properties
Configuration Web UI style

PLM Supplier Sampl Save Close New... Delete Rename Save

Node List Properties [go to parent](#)

Child Components

Display Modes Table Display Mode

Add.. Remove Up Down

Actions

Add.. Remove Up Down

Add Component X

Bulk Update Template Action

Cancel Asynchronous Job Action

Change Reference Target Action

Compare Boms Action

Confirm Duplicate From Grid Action

Create And Link Design Specification Action

Create Asset Action

Create Classification Action

Filter

Show deprecated components

✓ Add X Cancel

Note: If adding a Compare BOMs Action Button to a Task List Properties know that you can not submit any item in the workflow when on any of the compare tabs. For more on the compare tabs, see **Private Label Food Solution in the Private Label Food Solution** section of the **PLM for Users** documentation. You can only submit an item in a workflow from a Node Details when accessed from a Task List Properties.

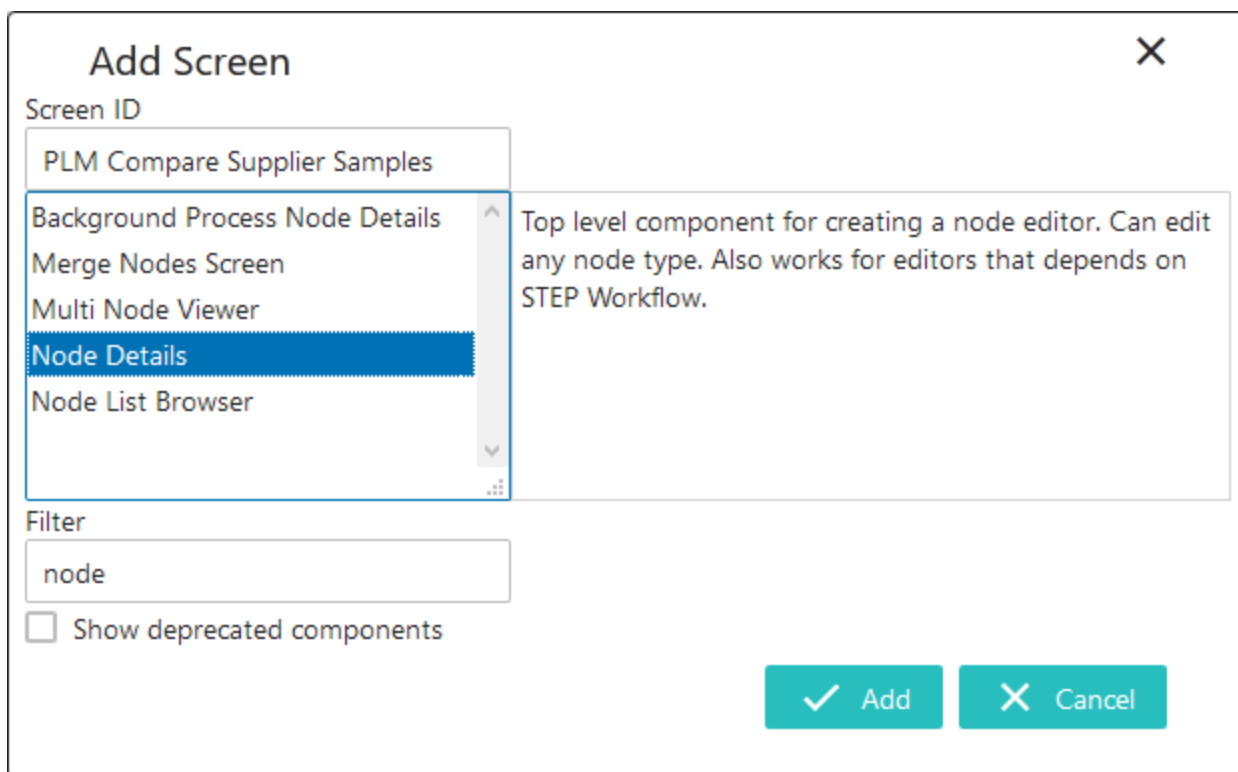
Once the Compare BOMs Action is added, the desired compare tabs need to be added and proper mapping needs to take place. For more on how to add the compare tabs or how to map everything, see the **Adding and Mapping Tabs for Private Label Food Solution** topic in this section.

Adding and Mapping Tabs for Private Label Food Solution

To support the process of the private label food solution, various tabs need to be added and configured. The private label food solution component supports Bill of Material (BOMs) creation for the customer, the supplier, and the ability for customers to compare all BOMs against their own recipe specifications. Follow the directions in the sections below to add, configure, and map the private label food solution tabs.

Adding Tabs

1. Open the Designer in Web UI, and create a new Node Details Properties screen. In the example below, the screen is called 'PLM Compare Supplier Samples.'



2. Under Child Components > Main > select Tab Control > click **go to component**.

Properties

Configuration Web UI style

PLM Compare Suppl ▼ Save Close New... Delete Rename Save as...

Node Details Properties

Child Components

Below Title	<Select a child component> ▼	go to component
Main	Tab Control ▼	go to component
Buttons	<Select a child component> ▼	go to component

3. On the Tab Control Properties under Child Components in the Tab Pages field, add the following tabs for the private label food solution depending on business needs:
- Specify Ingredients Tab
 - Supplier Ingredients Tab
 - Compare Ingredients Tab
 - Compare Parameters Tab
 - Compare Requirements Tab

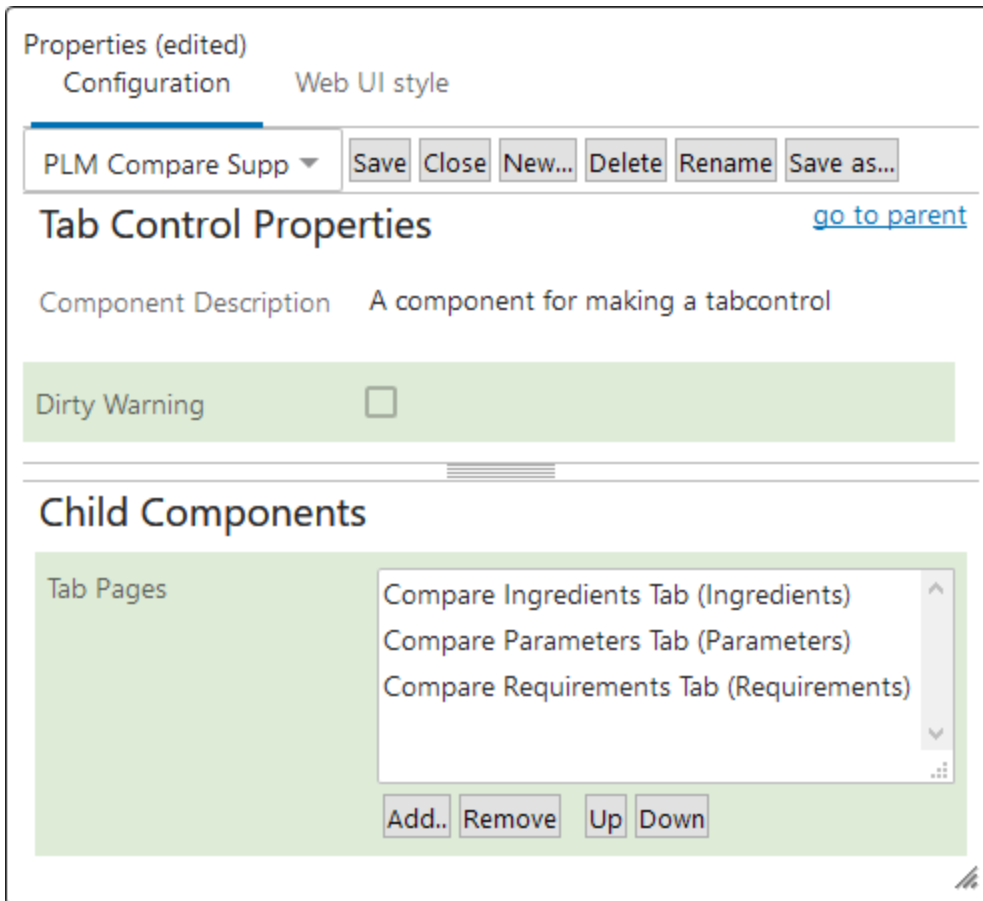
The image shows a software interface for configuring a 'Tab Control'. The main window is titled 'Properties' and has two tabs: 'Configuration' and 'Web UI style'. The 'Configuration' tab is active, showing a dropdown menu with 'PLM Compare Supp' and buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. Below this is the 'Tab Control Properties' section, which includes a 'Component Description' field with the text 'A component for making a tabcontrol' and a 'Dirty Warning' checkbox. The 'Child Components' section contains a list of tabs: 'Compare Ingredients Tab (Ingredients)', 'Compare Parameters Tab (Parameters)', and 'Compare Requirements Tab (Requirements)'. Below the list are buttons for 'Add..', 'Remove', 'Up', and 'Down'. A red arrow points from the 'Add..' button to a dialog box titled 'Add Component'. This dialog box has a close button (X) in the top right corner. It features a list of components: 'Compare Ingredients Tab', 'Compare Parameters Tab', 'Compare Requirements Tab', 'Deduplication List Tab Page', 'Object Type Tab Page', and 'Referenced By Tab Page'. The first three items are highlighted with a red box. To the right of the list is a text field with the placeholder 'Select a component to see its description'. Below the list is a 'Filter' input field and a checkbox labeled 'Show deprecated components'. At the bottom right are two buttons: 'Add' (with a checkmark icon) and 'Cancel' (with an X icon).

4. Once a tab type is added, double click on it to configure. For more on how to configure each tab type, see the following topics:

- Configuring the Specify Ingredients Tab
- Configuring the Supplier Ingredients Tab
- Configuring the Compare Tabs

Note: The Compare Tabs topic describes the configurations for the Compare Ingredients Tab, Compare Parameters Tab, and Compare Requirements Tab.

5. Repeat step three and four to add any other additional private label food solution tabs needed.



Mappings

In order for the private label food solution tabs to display correctly in Web UI, they need to be mapped correctly. Below explains how to map each private label food solution tab. For more details on mappings, see the **Mappings** topic in the **Using a Web UI** section of the **Web User Interfaces / Web UI Setup and User Guide** documentation.

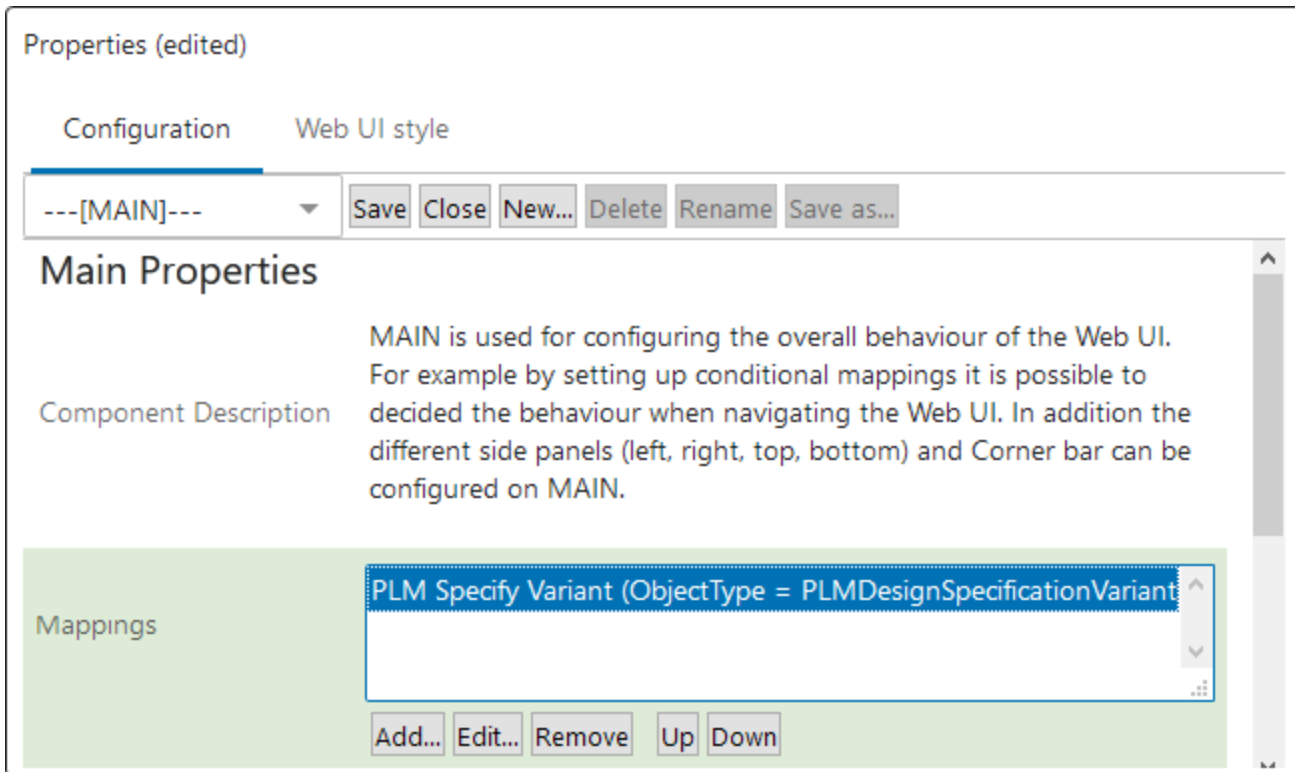
Specify Ingredients Tab

For the Specify Ingredients Tab to work properly in Web UI, the following mapping needs to take place:

1. In the designer under ---[MAIN]--- > Mappings > Add > Conditions > Add an **Object Type Condition**.
2. Select the object type that represents the Design Specification Variant, in this example it is called PLMDesignSpecificationVariant.
3. Next, select the designated Node Details screen that was created for the Specify Ingredients Tab, in this case the Node Details screen is called PLM Specify Variant. Click **Save**.

The screenshot shows a dialog box titled "Edit component" with a close button (X) in the top right corner. Below the title is the section "Screen Mapping Properties". Under "Component Description", it says "A mapping rule that will forward to the specified screen if all supplied conditions are satisfied." The "Conditions" section, marked with a red asterisk, contains a text field with the value "ObjectType = PLMDesignSpecificationVariant" and a list of control buttons: "Add...", "Edit...", "Remove", "Up", and "Down". The "Screen" section, also marked with a red asterisk, contains a dropdown menu with "PLM Specify Variant" selected and an "Add" button. At the bottom right, there are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon). The "Save" button is highlighted with a red rectangular border.

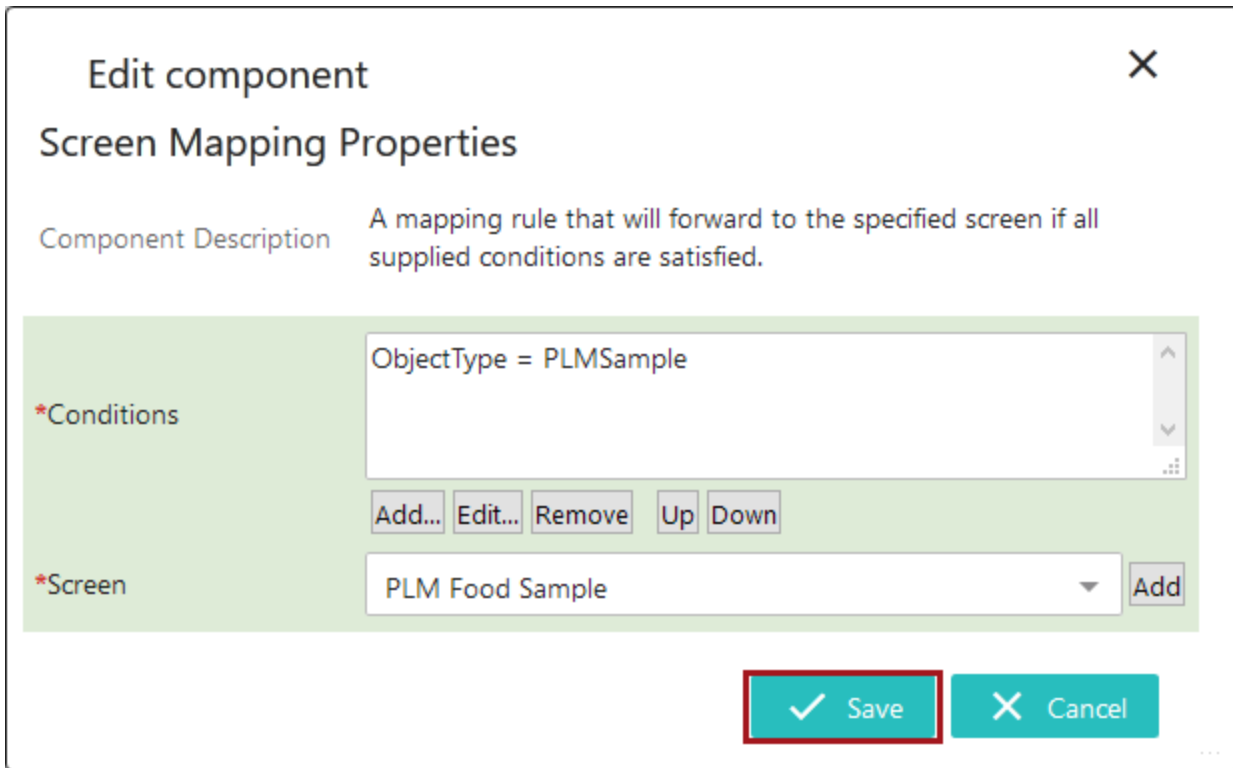
4. When finished, the mapping should look similar to the picture below.



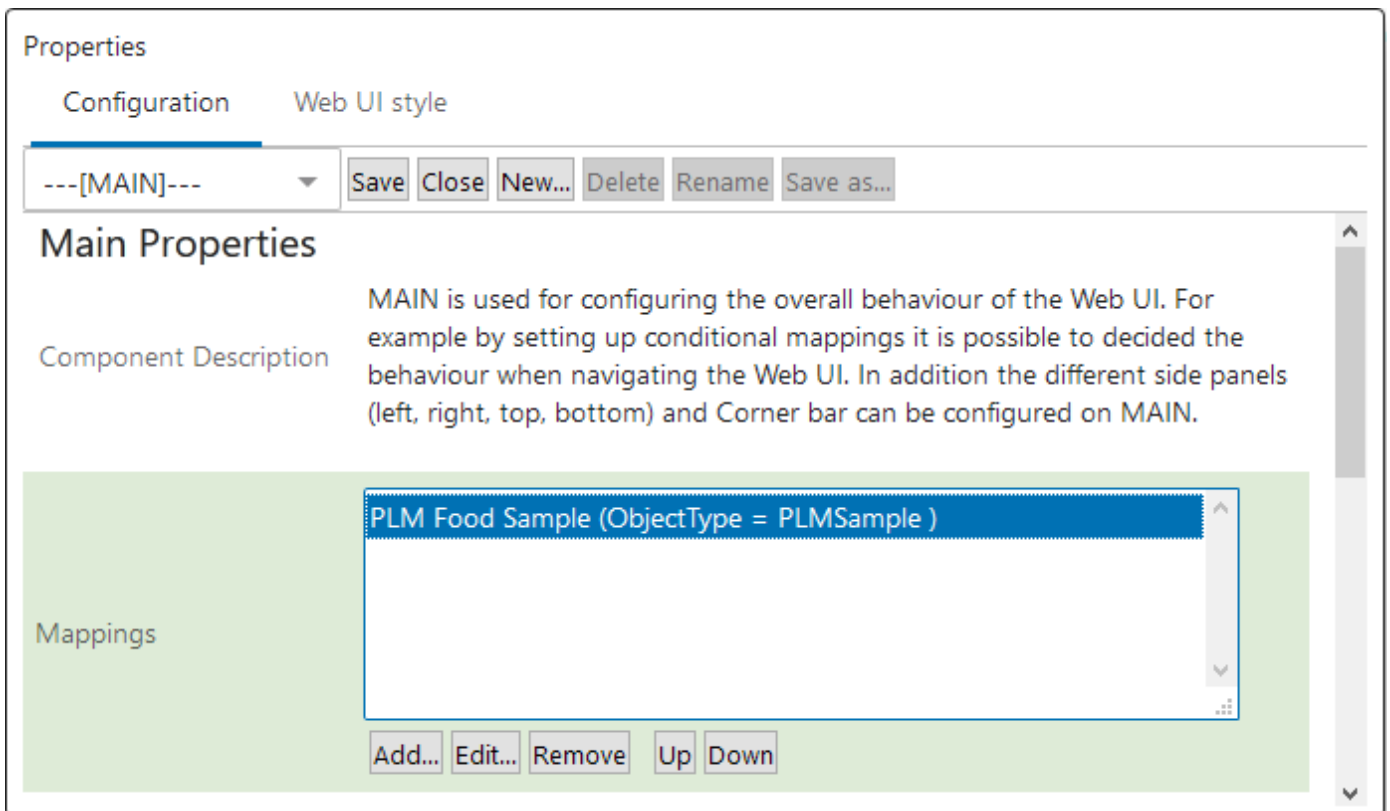
Supplier Ingredients Tab

For the Supplier Ingredients Tab to work properly in Web UI, the following mapping needs to take place.

1. In the designer under ---[MAIN]--- > Mappings > Add > Conditions > Add an **Object Type Condition**.
2. Select the object type that represents the sample. In this example it is called PLMSample.
3. Next, select the designated Node Details screen that was created for the Supplier Ingredients Tab. In this case the Node Details screen is called PLM Food Sample. Click **Save**.



4. When finished, the mapping should look similar to the picture below.



Compare Tabs

In order for the Compare Ingredients Tab, Compare Parameters Tab, and Compare Requirements Tab to work properly in Web UI, the following mapping needs to take place:

1. In the designer under ---[MAIN]--- > Mappings > Add > Conditions > Add the **Compare BOMs Condition**.
2. Next, select the designated Node Details screen that was created for the compare tabs, in this case the Node Details screen is called PLM Compare Supplier Samples. Click **Save**.

Edit component ✕

Screen Mapping Properties

Component Description A mapping rule that will forward to the specified screen if all supplied conditions are satisfied.

*Conditions

Compare BOMs Condition

Add... Edit... Remove Up Down

*Screen

PLM Compare Supplier Samples Add

✓ Save
✕ Cancel

3. When finished, the mapping should look similar to the picture below.

Properties

Configuration Web UI style

---[MAIN]---

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

Main Properties

Component Description MAIN is used for configuring the overall behaviour of the Web UI. For example by setting up conditional mappings it is possible to decided the behaviour when navigating the Web UI. In addition the different side panels (left, right, top, bottom) and Corner bar can be configured on MAIN.

Mappings

PLM Compare Supplier Samples (Compare BOMs Condition)

Add... Edit... Remove Up Down

Configuring the Specify Ingredients Tab

Recipe specifications from customers aid suppliers in knowing exactly what to include or exclude in their sample recipes back to customers.

To set up the Specify Ingredients tab, and customize information provided to the supplier, a number of fields need to be configured in the designer:

Properties

Configuration Web UI style

PLM Specify Varian ▾ Save Close New... Delete Rename Save as...

Specify Ingredients Tab Properties [go to parent](#)

Component Description A tab screen to specify ingredients

***Edit Dialog Attributes**

- PLMSpecifiedIngredientAllowance
- PLMSpecifiedIngredientPrecision
- PLMSpecifiedIngredientQuantity

Add... Remove Up Down

Ingredients Table Columns

Add... Remove Up Down

Ingredients Table Title

Read Only

Read Only Exceptions ... Clear

Show Ingredients Table Title

Title

- **Edit Dialog Attributes:** Controls which attributes are added to the 'Add Ingredients' dialog in Web UI, and allows for them to be ordered according to needs.

Important: The attributes with the IDs PLMSpecifiedIngredientAllowance, PLMSpecifiedIngredientPrecision, and PLMSpecifiedIngredientQuantity must be in this group in order for validations to work against the supplier's recipe and the Compare Tabs.

- **Ingredients Table Columns:** Allows for customizable columns in the recipe specification.

Note: The columns for 'Ingredient Name' and 'Ingredient Type' are default. They cannot be removed from the table or changed in Web UI.

- **Ingredients Table Title:** Enter a name for the title of the recipe specification table.
- **Read Only:** When enabled, all fields are not able to be edited unless there is an attribute group selected for the Read Only Exceptions.
- **Read Only Exceptions:** Select an attribute group that has description attributes valid for the PLMIngredient reference type. Any description attributes in this group that were added to the 'Edit Dialog Attributes' field can still be edited even when the 'Read Only' parameter is selected. However, if the 'Read Only' parameter is not selected, then any attributes in this group are not able to be edited.
- **Show Ingredients Table Title:** Enabling this shows the Ingredients Table title.
- **Title:** Enter a name for the Specification Tab.

Configuring the Supplier Ingredients Tab

Recipe samples from suppliers detail exactly what was put into the sample product. It is important to customize the display and sequence for the suppliers' view to ensure that the supplier provides back to the customer any necessary information on the ingredient, additive, or compound ingredient being added to their sample recipe.

To set up the Supplier Ingredients tab properly, a number of fields need to be configured in the designer:

Properties

Configuration Web UI style

PLM Food Sample Save Close New... Delete Rename Save as...

Supplier Ingredients Tab Properties [go to parent](#) ^

Component Description A tab screen to supply ingredients

Additive Reference Type PLMAdditive ... Clear

Additive Root step://classification?id=PLMA ... Clear

*Edit Dialog Attributes

- PLMSuppliersIngredientQuantity
- PLMGuaranteedCountryOfOrigin
- PLMSuppliersExplanation
- Organic

Add... Remove Up Down

Ingredient Reference Type PLMIngredient ... Clear

Ingredient Root step://classification?id=PLMF ... Clear

Ingredients Table Columns

- PLMSuppliersIngredientQuantity

Add... Remove Up Down

Ingredients Table Title i18n.stibo.spireplm.SupplierIngredien

Read Only

Read Only Exceptions PLMReadOnlyAttributes ... Clear

Show Ingredients Table Title

Title Recipe Ingredients (1)

- **Additive Reference Type:** Add the appropriate reference for the Additive Reference Type.
- **Additive Root:** Select the appropriate Additive Root.
- **Edit Dialog Attributes:** Controls which attributes are added to the 'Add Ingredients' dialog in Web UI, and allows for them to be ordered according to needs.

Important: The attribute with the ID PLMSuppliersIngredientQuantity must be in this group in order for the validations and alerts to work. Additionally, the display order in the pop-up dialog must follow the sort order of the parameter.

- **Ingredient Reference Type:** Add the appropriate reference for the Ingredient Reference Type.
- **Ingredient Root:** Select the appropriate Ingredient Root.
- **Ingredients Table Columns:** Add and order any Ingredient Table Columns needed.

Note: The column for Ingredient Name is default. It cannot be removed from the table or changed in Web UI.

- **Ingredient Table Title:** Fill in the field with an appropriate name for the table.
- **Read Only:** When enabled, all fields are not able to be edited unless there is an attribute group selected for the Read Only Exceptions.
- **Read Only Exceptions:** Select an attribute group that has description attributes valid for the PLMIngredient reference type. Any description attributes in this group that were added to the 'Edit Dialog Attributes' field can still be edited even when the 'Read Only' parameter is selected. However, if the 'Read Only' parameter is not selected, then any attributes in this group are not able to be edited.
- **Title:** Fill in the field with an appropriate name for the tab.

Configuring the Compare Tabs

While the compare tabs can be used individually, they are often used together to help a customer see the similarities and differences from the suppliers' recipe samples in comparison to the recipe specification. To configure each compare tab see below.

Compare Ingredients Tab

This tab enables the customer to directly compare the suppliers' recipes against their own recipe specification.

Properties

Configuration Web UI style

PLM Compare Supp ▾ Save Close New... Delete Rename Save as...

Compare Ingredients Tab Properties [go to parent](#)

Component Description A tab screen for comparing ingredients across samples

Supplied Additive Ingredient Reference Types

PLMAdditive

PLMAdditiveGroup2

^ v

Add... Remove Up Down

Supplied Ingredient Reference Types

PLMIngredient

PLMIngredientGroup2

^ v

Add... Remove Up Down

Title

Ingredients

- **Supplied Additive Ingredient Reference Types:** References used for supplier additives. Add the appropriate references.
- **Supplied Ingredient Reference Types:** References used for supplier ingredients. Add the appropriate references.
- **Title:** Enter in a title for the Compare Ingredients tab.

Note: More than one additive or ingredient reference type can be added. If more than one additive or ingredient reference type is added, it does not matter what order they are displayed in.

Compare Parameters Tab

This tab enables the customer to compare the supplier's parameters against one another and against the recipe specification.

- **Sample Parameters:** Add the appropriate sample parameter references.

- **Specified Parameters:** Add the appropriate specified parameter references.
- **Title:** Add an appropriate title for the Compare Parameters tab.

Note: More than one parameter reference type can be added. If more than one reference type is added, it does not matter what order they are displayed in.

Compare Requirements Tabs

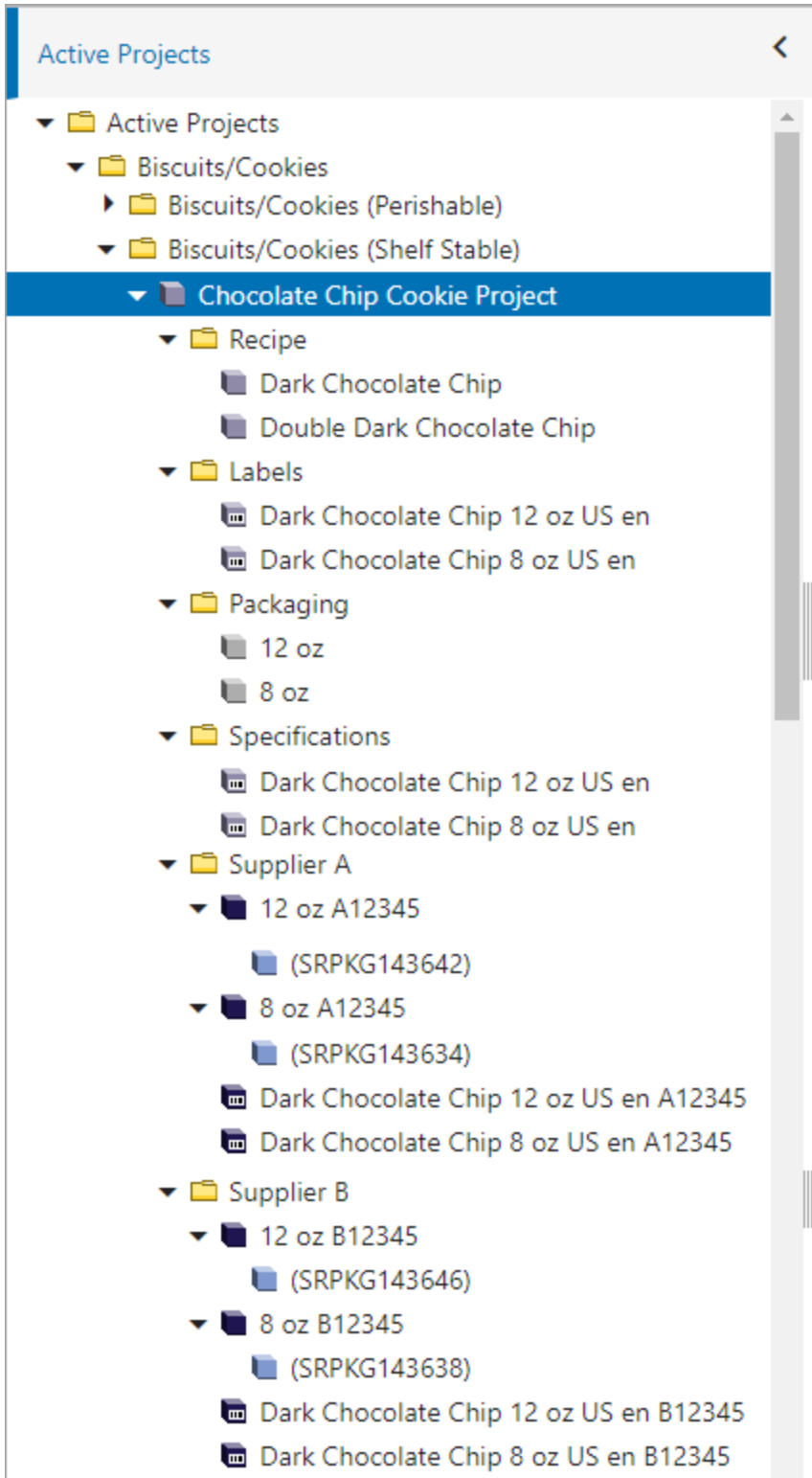
This tab enables the customer to directly compare the suppliers' requirements against one another and against the recipe specification.

- **Recipe Requirements:** Add the appropriate recipe references.
- **Specified Requirements:** Add the appropriate references for both the Specified Parameters and Specified Requirements fields.
- **Title:** Add an appropriate title for the Compare Requirements tab.

Note: More than one requirement reference type can be added. If more than one reference type is added, it does not matter what order they are displayed in.

Configuring Project Navigator

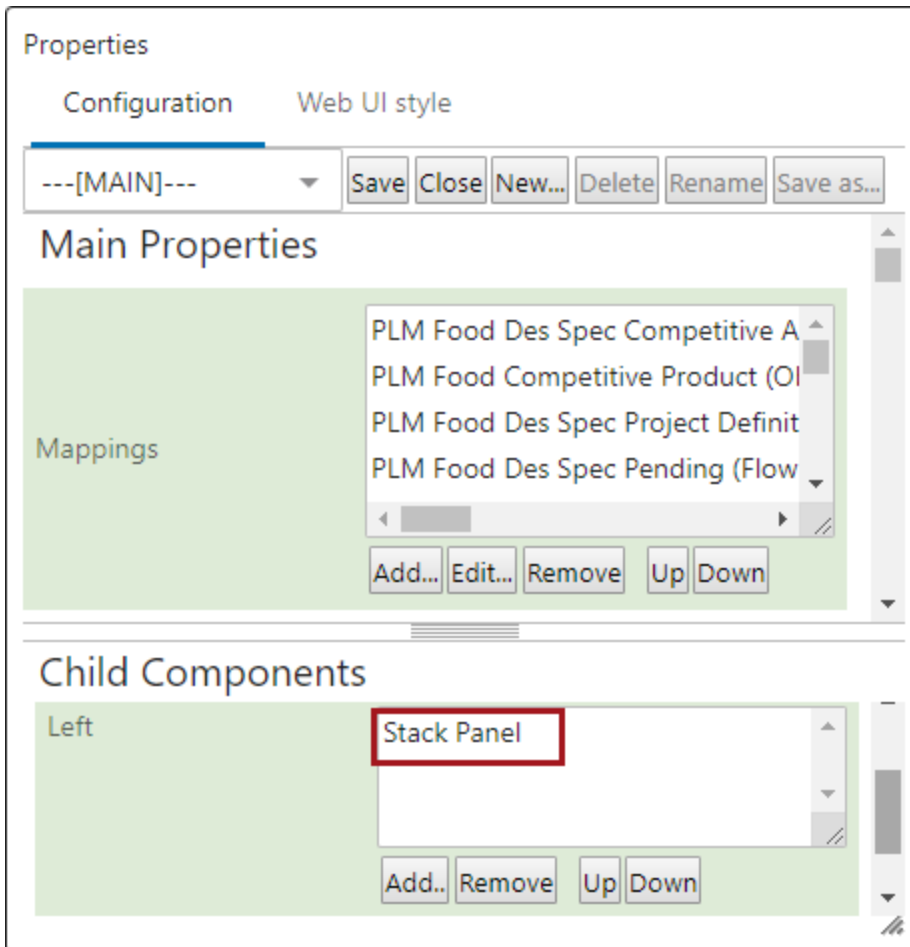
Configure Project Navigator to access design specifications (active projects) in workflows via a classification folder in the Tree navigation. Users get a complete view of all the projects, objects, and references associated to the design specification, such as recipes, packaging, labels, or suppliers. This enables users to quickly navigate to the Tree where they can select the classification folder configured to house active projects.



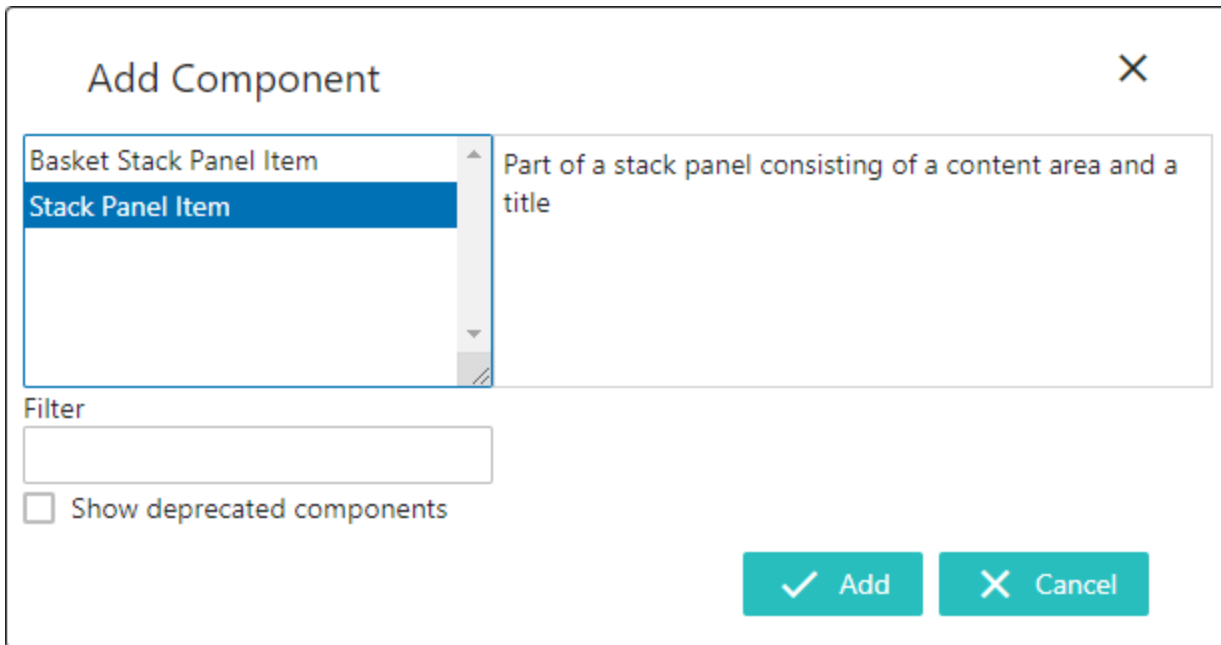
To configure Project Navigator, follow the directions below:

Note: Suppliers will only have access to the active projects they are associated with and will not have access to other supplier's active projects.

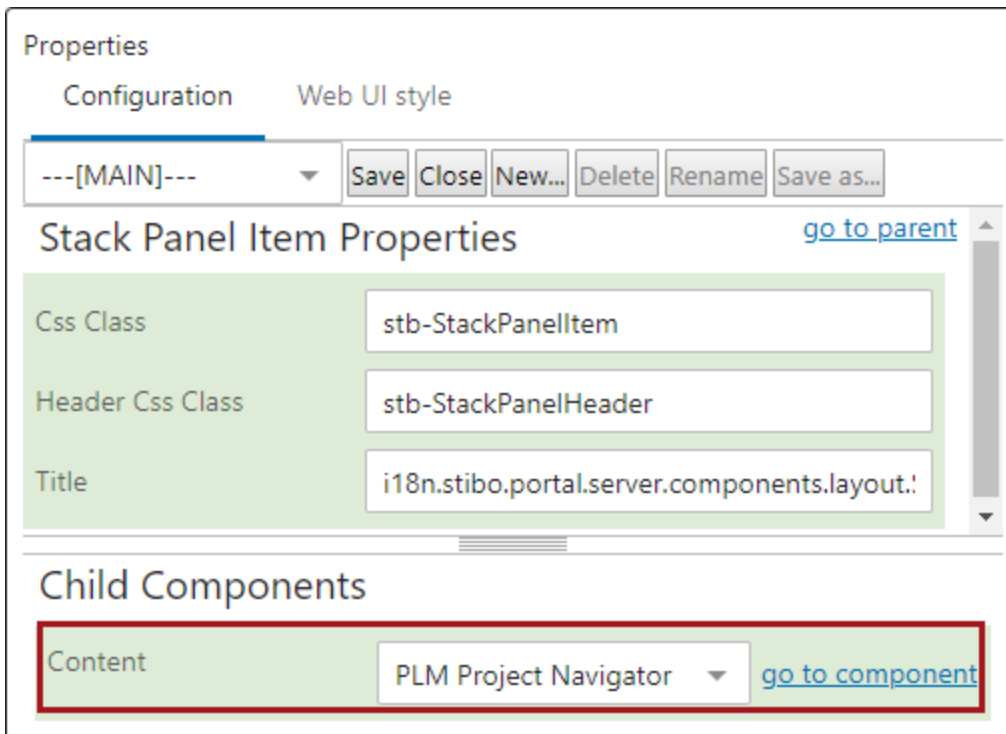
1. In Web UI, go to the designer and select --[MAIN]-- from the dropdown. Under Child Components, add a **Stack Panel** to either the Right or Left field.



2. Double click the Stack Panel and add a **Stack Panel Item**.



3. Double click the Stack Panel Item, and in the Child Components > Content dropdown field, select **PLM Project Navigator**, and then click on **go to components**.



4. There are two sections in the PLM Project Navigator Properties: Active Projects and Current Project. Fill out the fields in both of these sections appropriately.

Active Projects Flipper

Expand the Active Project flipper and fill out the fields in this section:

The screenshot shows the 'PLM Project Navigator Properties' dialog box. At the top, there are tabs for 'Configuration' and 'Web UI style'. Below the tabs is a dropdown menu showing '---[MAIN]---' and several buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main title is 'PLM Project Navigator Properties' with a 'go to parent' link. The 'Active Projects' section is highlighted with a red border and contains the following fields:

- Active Projects Label:** A text input field containing 'i18n.stibo.plm.webui.navigator.ActiveProjects.Label'.
- *Active Projects Root:** A dropdown menu showing 'step://classification?id=PLMProductClassificationsRoot' with a '...' button.
- *Project Object Type:** A dropdown menu showing 'PLMDesignSpecification' with a '...' button.
- *Number Of Display Levels:** A text input field containing '2'.
- Project Name Attribute:** A text input field with a 'Clear' button.

Below the 'Active Projects' section is a 'Current Project' section with a right-pointing arrow.

- **Active Projects Label:** Enter in the name for the folder that will hold active projects.
- **Active Projects Root:** Select the root for all active project. This folder is used for the different classification groupings.
- **Project Object Type:** The object type selected to display under the selected active project root. In this example, the 'PLMDesignSpecification' object type is used.
- **Number of Display Levels:** The level of folders up from the selected 'Product Object Type' that will be displayed in the classification structure when users browse to find projects..
- **Project Name Attribute:** Select an attribute to display a different name for the active project. This displays instead of the 'Project Object Type' name.

Current Project Flipper

Expand the Current Project flipper and fill out the fields in this section:

Properties

Configuration Web UI style

---[MAIN]---

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

▶ Active Projects

▼ Current Project

Groups

- Related Group ([PLMRelatedSpecificatio
- Related Group ([PLMRelatedSpecificatio
- Related Group ([PLMRelatedSpecificatio
- Related Group ([PLMRelatedSpecificatio

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

- Related Supplier Responses (PLMSampl
- Related Supplier Responses (PLMLabelV
- Related Supplier Responses (PLMPackag

Add... Edit... Remove Up Down

No Suppliers Group Name

i18n.stibo.plm.webui.navigator.CurrentPi

Related Groups Attributes

Add... Remove Up Down

Groups

This field is used to configure the groups you want to display in the active projects classification folder. For example, you could have groupings for specifications, labels, and packaging.

Properties

Configuration Web UI style

---[HOMEPAGE]---

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

▶ Active Projects

▼ Current Project

Groups

Related Group ([PLMRelatedSpecification] / [PLMRecipeNumber] / Recipe /

Related Group ([PLMRelatedSpecification] / Labels / [PLMDesignSpecificatic

Related Group ([PLMRelatedSpecification] / Packaging / [PLMDesignSpecific

Related Group ([PLMRelatedSpecification] / Specifications / [PLMDesignSpe

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PLMSuppliersName / PLMSuppli

Related Supplier Responses (PLMLabelVariantSample / PLMSuppliersName

Related Supplier Responses (PLMPackagingVariantSample / PLMSuppliersN

Add... Edit... Remove Up Down

No Suppliers Group Name

i18n.stibo.plm.webui.navigator.CurrentProject.NoSuppliersGroup

Related Groups Attributes

Add... Remove Up Down

To configure this field, click **Add**. Configure the following fields as necessary:

Edit component

✕

Related Group Properties

Component Description The Related Group component allows you to define groups and the object types you wish to display within each group.

***Group Label**

***Reference Types**

***Target Object Types**

Related Groups Attributes

Add...

Remove

Up

Down

✓ Save

✕ Cancel

Group Label: Enter the display name for the group.

Reference Types: Select the reference type needed for the group. The reference needed are from the project (for example design specifications), to the specifications in the project.

Target Object Type: Select the object types to display within each group.

Related Group Attributes: Select the attributes to display when a user hovers over the related group node.

Group Supplier Responses By Supplier

When selected, this will group supplier samples by each supplier instead of in one main grouping. The name of the supplier groupings is dependent on the attribute selected when configuring the Related Supplier Responses field.

Note: If unselected, then the following fields are disabled: Supplier Name, Related Supplier Responses, and Supplier Response Display Name.

Properties

Configuration Web UI style

---[HOMEPAGE]--- Save Close New... Delete Rename Save as...

▶ Active Projects

▼ Current Project

Groups

Related Group ([PLMRelatedSpecification] / [PLMRecipeNumber] / Recipe / ...

Related Group ([PLMRelatedSpecification] / Labels / [PLMDesignSpecificatic

Related Group ([PLMRelatedSpecification] / Packaging / [PLMDesignSpecific

Related Group ([PLMRelatedSpecification] / Specifications / [PLMDesignSpe

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PLMSuppliersName / PLMSuppli

Related Supplier Responses (PLMLabelVariantSample / PLMSuppliersName

Related Supplier Responses (PLMPackagingVariantSample / PLMSuppliersN

Add... Edit... Remove Up Down

No Suppliers Group Name

i18n.stibo.plm.webui.navigator.CurrentProject.NoSuppliersGroup

Related Groups Attributes

Add... Remove Up Down

Related Supplier Responses

This field is used to configure the sample object types to display under each supplier. In this example, the object types are sample, packaging sample, or label sample.

Properties

Configuration Web UI style

---[HOMEPAGE]--- Save Close New... Delete Rename Save as...

▶ Active Projects

▼ Current Project

Groups

Related Group ([PLMRelatedSpecification] / [PLMRecipeNumber] / Recipe /

Related Group ([PLMRelatedSpecification] / Labels / [PLMDesignSpecificatic

Related Group ([PLMRelatedSpecification] / Packaging / [PLMDesignSpecific

Related Group ([PLMRelatedSpecification] / Specifications / [PLMDesignSpe

◀ ▶

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PLMSuppliersName / PLMSuppli

Related Supplier Responses (PLMLabelVariantSample / PLMSuppliersName

Related Supplier Responses (PLMPackagingVariantSample / PLMSuppliersN

◀ ▶

Add... Edit... Remove Up Down

No Suppliers Group Name:

Related Groups Attributes

Add... Remove Up Down

To configure this field, click **Add** and configure the following fields as necessary.

Edit component
✕

Related Supplier Responses Properties

Component Description The Related Supplier Responses component allows you to define which supplier response object types you wish to display under the supplier groups.

Name Attribute

... Clear

*Reference Type

...

*Target Object Type

...

Related Object Types

Add...
Edit...
Remove
Up
Down

Related Groups Attributes

Add...
Remove
Up
Down

Supplier Name Attribute

... Clear

✓ Save

✕ Cancel

Attribute Name: Select this attribute to display a different attribute name instead of the Target Object Type ID.

Reference Type: Select the appropriate reference type for the group. This reference type is acting as the source which must be the project (for example, design specification).

Target Object Type: Select the object types to display within the group.

Related Object Types: Select other object types to further break down what was selected for the target object type.

Related Groups Attributes: Select the attribute to display when a user hovers over the related groups node.

Supplier Name Attribute: Select the attribute to use as the display name for the supplier.

Note: The Supplier Name Attribute is also the name used when grouping by supplier responses.

Packaging variant or packaging sample can have nested levels in the PLM data model. To configure nesting, once either packaging variant or packaging sample is configured, double click on it, and configure the dialog that displays with the necessary nested level. Continue to do this for each necessary nested level.

Properties (edited)

Configuration Web UI style

---[MAIN]---

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

▼ Current Project

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PLMSuppliersf ^

Related Supplier Responses (PLMLabelVariantSample / PL

Related Supplier Responses (PLMPackagingVariantSampl

Edit component
Related Supplier Responses Properties

Name Attribute ... Clear

*Reference Type PLMSupplierResponse ...

*Target Object Type PLMPackagingVariantSample ...

Related Objects (PLMSupplierResponsePackagingElement / PLM

Edit component
Related Objects Properties

Name Attribute ... Clear

*Reference Type PLMPackagingElement ...

*Target Object Type PLMSupplierResponsePackagingElement ...

Related Object Types

Add... Edit... Remove Up Down

Related Groups Attributes

Add... Remove Up Down

✓ Save ✕ Cancel

No Suppliers Group Name

A customer may receive supplier responses but not know which supplier sent the response. If this is the case, these responses need to be grouped together under one folder. This field provides a name to the folder to hold unclaimed supplier responses. The default title for this folder is called 'No Supplier.'

Properties

Configuration Web UI style

---[MAIN]---

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

▶ Active Projects

▼ Current Project

Groups

Related Group ([PLMRelatedSpecification] / [^

Related Group ([PLMRelatedSpecification] / l

Related Group ([PLMRelatedSpecification] / f

Related Group ([PLMRelatedSpecification] / s

◀ ▶

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PI ^

Related Supplier Responses (PLMLabelVariar

Related Supplier Responses (PLMPackagingv

◀ ▶

Add... Edit... Remove Up Down

No Suppliers Group Name

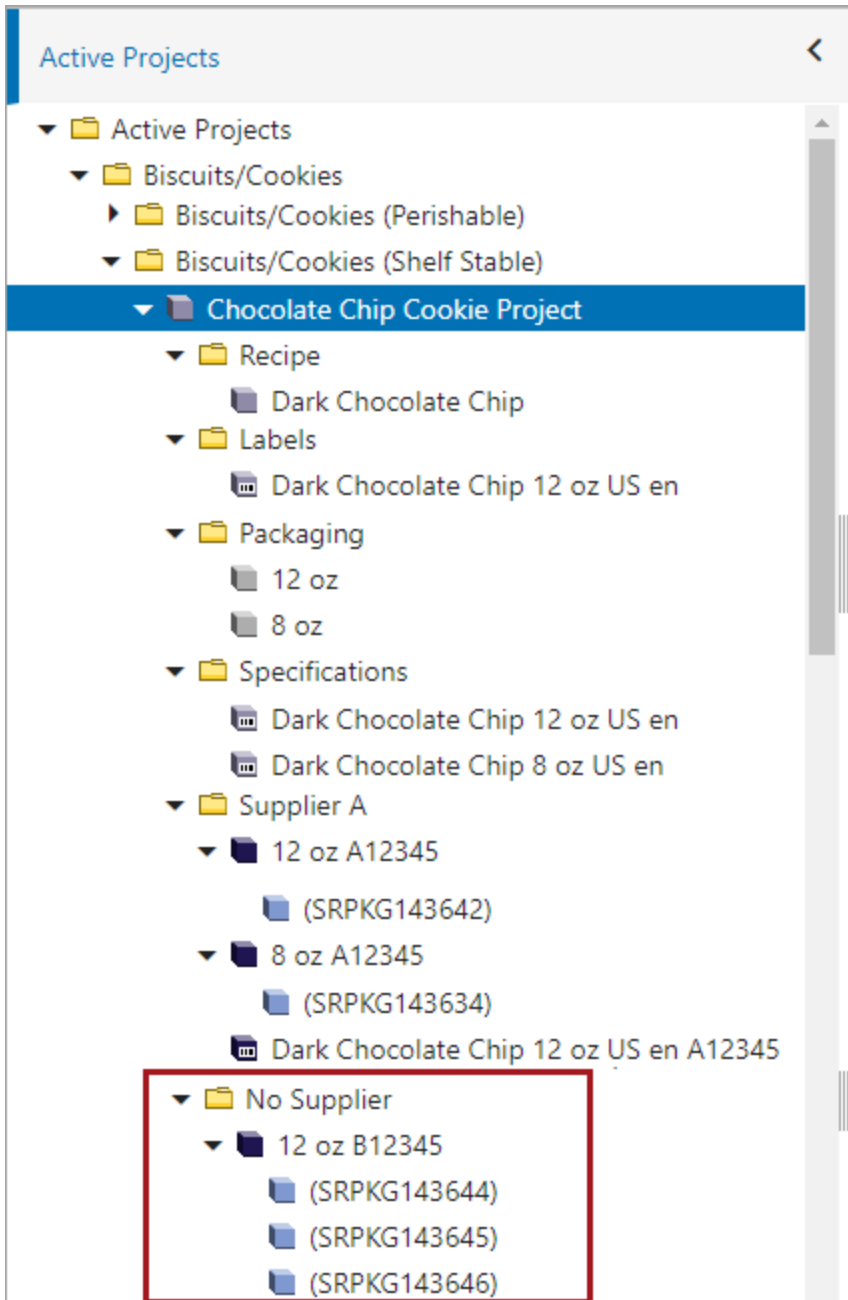
i18n.stibo.plm.webui.navigator.CurrentProjec

Related Groups Attributes

◀ ▶

Add... Remove Up Down

For example, if a supplier responded, but their name was not associated with the response, their response would appear in the 'No Suppliers' group name folder.



Related Groups Attributes

Select the attributes to display when a user hovers over the related groups' node.

Properties

Configuration Web UI style

---[MAIN]---

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

grouped by supplier.

▶ Active Projects

▼ Current Project

Groups

Related Group ([PLMRelatedSpecification] / [^

Related Group ([PLMRelatedSpecification] / l

Related Group ([PLMRelatedSpecification] / f

Related Group ([PLMRelatedSpecification] / s

Add... Edit... Remove Up Down

Group Supplier Responses By Supplier

Related Supplier Responses

Related Supplier Responses (PLMSample / PI ^

Related Supplier Responses (PLMLabelVariar

Related Supplier Responses (PLMPackaging\

Add... Edit... Remove Up Down

No Suppliers Group Name

i18n.stibo.plm.webui.navigator.CurrentProjec

Related Groups Attributes

Add... Remove Up Down

Once configured, map to the needed screen. For more on mapping, see the **Mappings** topic in the **Using a Web UI** section of the **Web User Interfaces / Web UI Setup and User Guide**.

For more on how to use project navigation in Web UI, see the **Using Project Navigator** topic in the **PLM for Users** section of the **Product Lifecycle Management** documentation.

Storyboard Setup

Storyboards allows users to create idea concepts for early product development. When setup properly, a user is able to interact with storyboards, and upload content of various object types. To set up this interface for users, follow the directions in this documentation.

Important: It is recommended that admin users read through the **PLM for Users** documentation before starting setup. It is important to understand how PLM works prior to beginning any configuration. Additionally, it is important to be familiar with standard STEP functionality.

All of the setup described in this documentation is done in the STEP Workbench. If the steps are not followed (including naming conventions, except where notated), then PLM will not function as expected.

Users of PLM will not see the workbench, and will only interact with PLM through the web. Proper workbench setup is vital for the user having a seamless experience while working.

Configurations, Object Types, and Business Rules

All of the setup described below is done in the STEP Workbench. If the steps are not followed (including naming conventions, except where notated), then PLM will not function as expected.

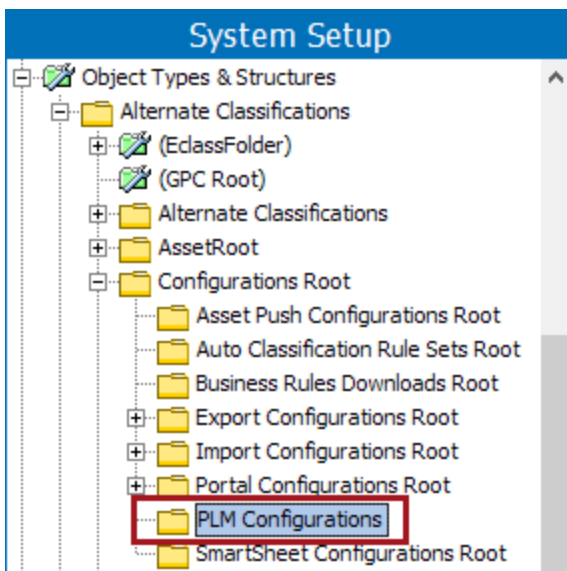
Below are directions on how to get started implementing PLM.

PLM Configurations Setup

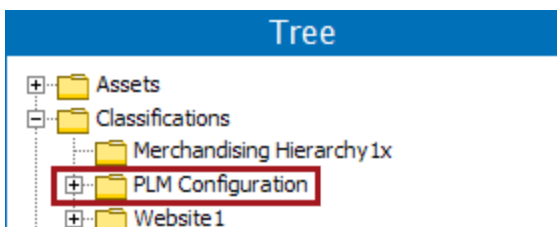
Follow the steps below to upload the configuration files.

Important: Talk to your implementation team before uploading the provided configuration files and configuring anything else for PLM.

1. In **System Setup**, go to Object Types & Structures > Alternate Classifications > Configurations Root > and create a folder to house PLM configurations.

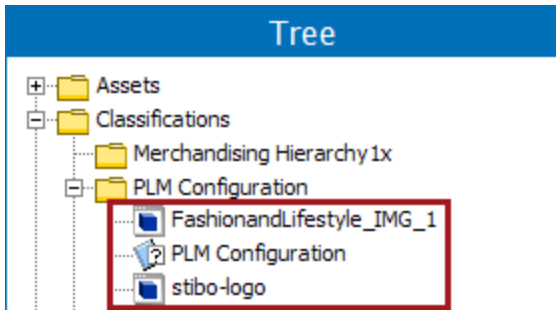


2. Next, in **Tree**, below the classifications node, create a new classification folder to house the PLMConfiguration.



3. Into this folder, import the background login screen image, the PLM configuration file, and the desired logo using file names as STEP IDs. Make sure that all changes that are needed to be made to the PLM

configuration file are made before the file is uploaded. This includes changing any IDs necessary; otherwise, PLM will not work properly.



Note: Depending on your implementation team, these steps may or may not be handled by them. If the implementation team does not handle the steps above, they will be the ones to provide the configuration files. Additionally, both the background image on the login screen and the logo are configurable.

Creating PLM Storyboard Object Types

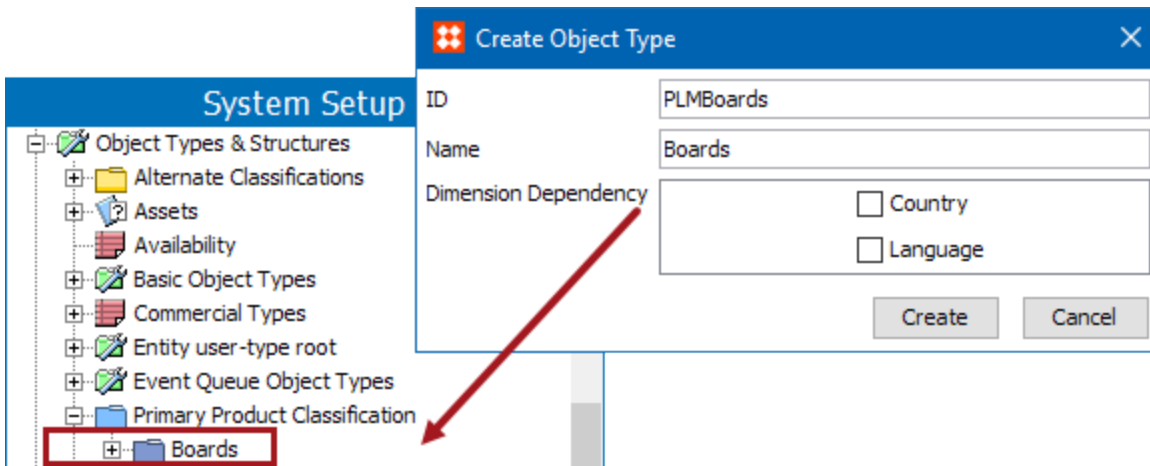
This section describes how to create object types that are needed for the PLM setup. While the object types are different, the steps to create these object types are all the same. The following object types will need to be created:

- PLMBoards
- PLMBoard
- PLMBoardCollectionsRoot
- PLMBoardCollection
- PLMColorsRoot
- PLMColorType
- PLMColor
- PLMMaterials
- PLMMaterial
- PLMProducts
- PLMProduct
- PLMTrims
- PLMTrim

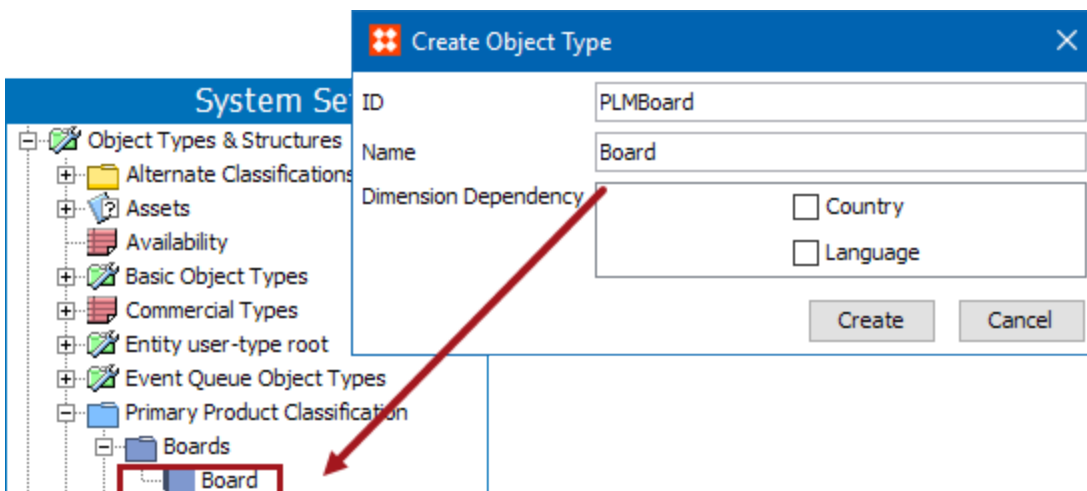
Note: The IDs / names of the above object types can be changed according to company needs. Notify the implementation team of any changes, so updates can be made to the uploaded configuration documents.

In the example below, the 'Boards' and 'Board' object types are used.

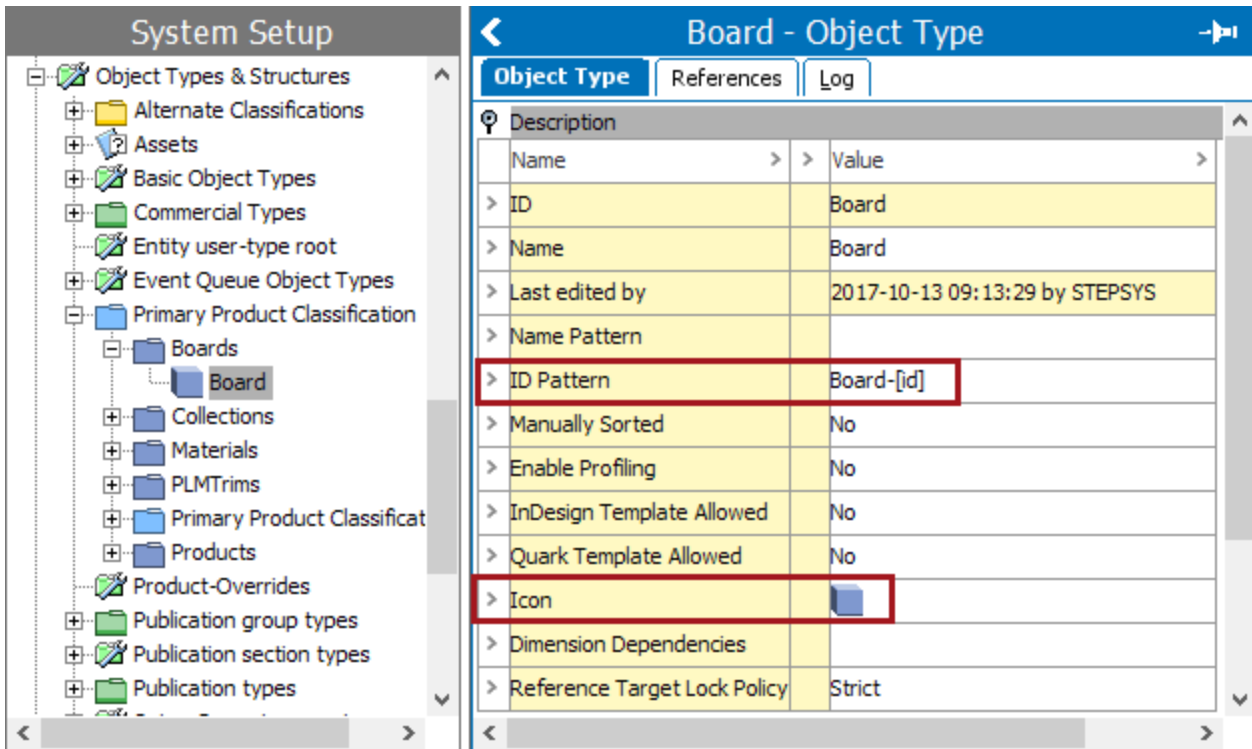
1. In **System Setup** under Object Types & Structures > Primary Product Classification> create a new product object type called **Boards** with the ID of **PLMBoards**.



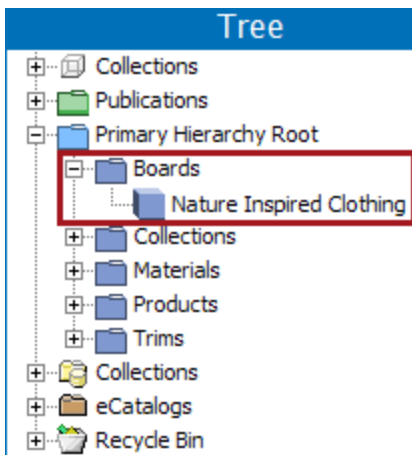
2. Below the new Boards object type create a child called object type **Board** with the ID **PLMBoard**.



3. Make sure that the object type Board has an auto ID of **Board-[id]** in the ID Pattern field, and pick an appropriate icon. For more on how to create an auto ID or how to add icons, see **Autogenerate Using Name Pattern and ID Pattern** topic in the **Object Types and Structures** section of the **System Setup / Super User Guide** documentation.



4. In **Tree**, under the Primary Product Hierarchy, make a folder to hold the **Boards** object type created in PLM.



Adding a Hero Image Business Rule

For users of PLM, the 'hero' image is the feature image of the storyboard. This is the image that is displayed at the top of the storyboard, and is the one that represents the storyboard when being viewed in the board gallery.

In order to make the hero image function properly, a business rule needs to be created and applied in System Setup > Global Business Rules > Actions. It should have the ID **PLMEnsureHero Image**.

The screenshot displays the 'System Setup' interface on the left and the configuration details for a business rule on the right.

System Setup (Left Panel):

- Attribute Groups
- Attribute Transformations
- Action Sets
- Contexts
- InDesign Queue
- Lists of Values / LOVs
- Completeness Metrics
- Global Business Rules
 - Actions
 - PLMEnsureHeroImage**
 - Conditions
 - Libraries
- Inbound Integration Endpoints
- Match Codes and Matching Algorithms
- Outbound Integration Endpoints
- Web UIs
- Workflow Profiles
- Workflows
- Derived Events
- Table

SpirePLMEnsureHeroImage rev.0.1 - Business Rule (Right Panel):

Business Rule | Usage | Statistics | Log | Status

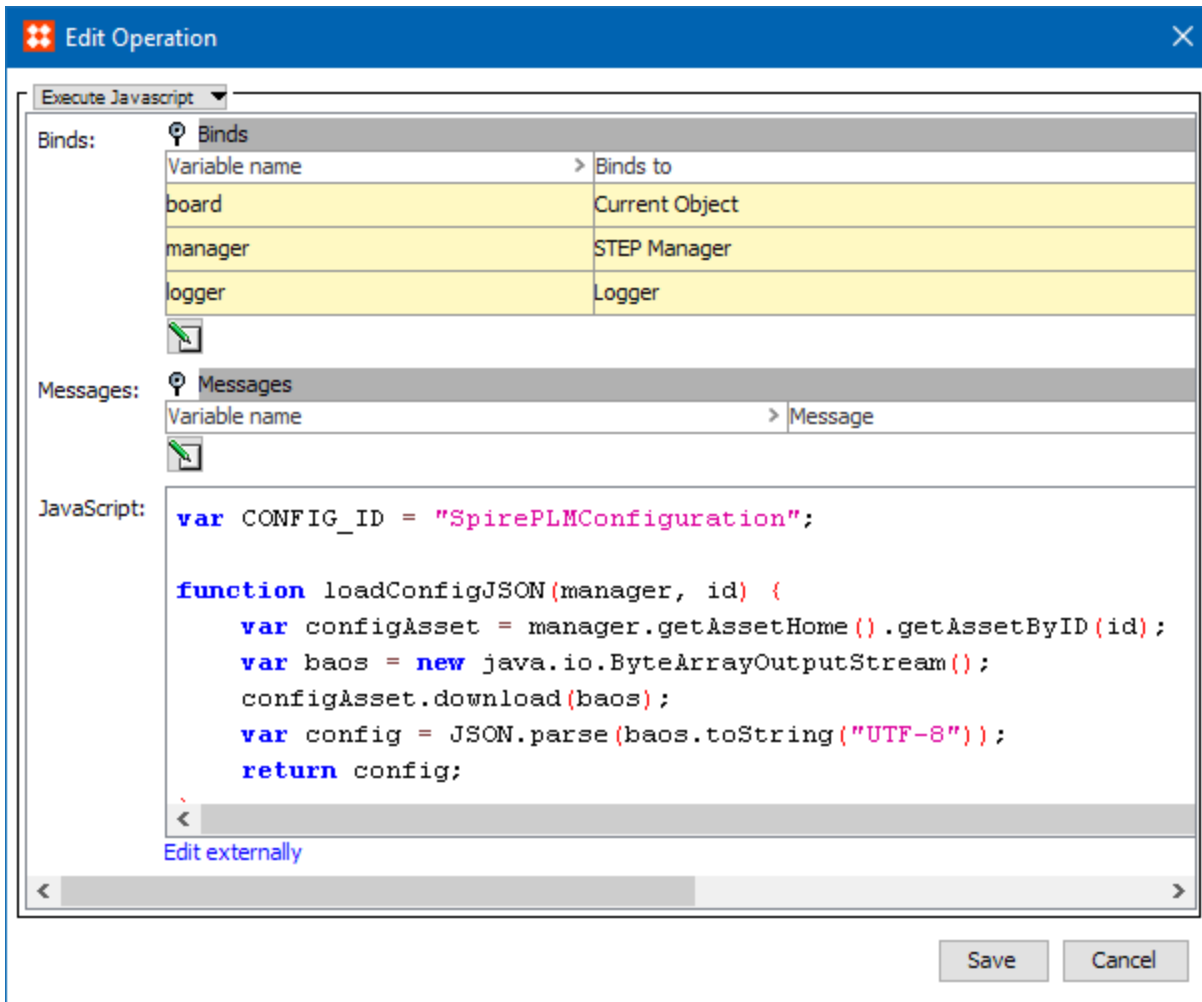
Name	Value
ID	PLMEnsureHeroImage
Name	PLM Ensure Hero Image
Revision	0.3 Last edited by STEPSYS on Fri Feb 23 17:14:00 UTC 2018
Description	
Type	Action
Valid Object Types	No object types valid
On Approve	Not Executed
Scope	Global
Run as privileged	<input type="checkbox"/>

Operations | Dependencies | Applies if

JavaScriptBusinessActionWithBinds: Bindings, 0 messages, var CONFIG_ID = "Project11..."

[Edit Business Rule](#)

Below is a picture of the business rule configurations for the hero image:



Important: The following script is only an example and should not be used as-is without thorough testing, including updating to match object and link types that exist on your system.

```
var CONFIG_ID = "SpirePLMConfiguration";
function loadConfigJSON(manager, id) {
    var configAsset = manager.getAssetHome().getAssetByID(id);
    var baos = new java.io.ByteArrayOutputStream();
    configAsset.download(baos);
    var config = JSON.parse(baos.toString("UTF-8"));
    return config;
}
function removeDuplicates(list) {
    return list.filter(function(item, pos) {
    return list.indexOf(item) === pos;
    });
};
```

```

}
function lookupReferenceType(manager, id) {
return manager.getReferenceTypeHome().getReferenceTypeByID(id);
}
var config = loadConfigJSON(manager, CONFIG_ID);
var contentModel = config.applications.spireplm.model.boards.boardContent;
var allContentReferenceTypeIds = [
contentModel.image.boardReferenceId,
contentModel.trim.boardReferenceId,
contentModel.material.boardReferenceId,
contentModel.product.boardReferenceId
];
var allHeroImageReferenceTypeIds = [
contentModel.image.heroImageReferenceId,
contentModel.trim.heroImageReferenceId,
contentModel.material.heroImageReferenceId,
contentModel.product.heroImageReferenceId
];
logger.info("content types ids" + JSON.stringify(allContentReferenceTypeIds));
var contentReferenceTypeIds = removeDuplicates(allContentReferenceTypeIds);
var heroImageReferenceTypeIds = removeDuplicates(allHeroImageReferenceTypeIds);
logger.info("content types ids" + JSON.stringify(contentReferenceTypeIds));
logger.info("hero types ids" + JSON.stringify(heroImageReferenceTypeIds));
var contentReferenceTypes = contentReferenceTypeIds.map(function (id) { return
lookupReferenceType(manager, id); });
var heroImageReferenceTypes = heroImageReferenceTypeIds.map(function (id) {
return lookupReferenceType(manager, id); });
function getReferences(source, referenceTypes) {
var result = new java.util.ArrayList();
for (var i = 0; i < referenceTypes.length; i++) {
var refs = source.getReferences(referenceTypes[i]);
result.addAll(refs);
}
return result;
}
function getHeroImageReferenceTypeFor(reference) {

```

```

var refTypeId = reference.getReferenceType().getID();
var idx = -1;
for (var i = 0; i < allContentReferenceTypeIds.length; i++) {
if (allContentReferenceTypeIds[i] == refTypeId) {
idx = i;
break;
}
}
logger.info("Index of " + refTypeId + " is " + idx);
return heroImageReferenceTypeIds[idx];
}

var heroImageReferences = getReferences(board, heroImageReferenceTypes);
if (heroImageReferences.size() > 1) logger.warning("Board has more than one
hero image");
if (heroImageReferences.size() === 0) {
logger.info("Board has no hero images");
var contentReferences = getReferences(board, contentReferenceTypes);
if (contentReferences.size() > 0) {
var anyReference = contentReferences.get(0);
var refTypeId = getHeroImageReferenceTypeFor(anyReference);
var anyContent = anyReference.getTarget();
board.createReference(anyReference.getTarget(), refTypeId);
logger.info("Created hero image reference " + refTypeId + " to " +
anyContent.getTitle());
}
} else {
var contentReferences = getReferences(board, contentReferenceTypes);
if (contentReferences.size() === 0) {
logger.info("Has hero image, but no content. Going to remove hero images");
for (var i = 0; i < heroImageReferences.size(); i++) {
var ref = heroImageReferences.get(i);
logger.info("Deleting reference to " + ref.getTarget().getTitle());
ref.delete();
}
} else {
for (var i = 0; i < heroImageReferences.size(); i++) {

```

```
var heroImage = heroImageReferences.get(i).getTarget();
var found = false;
for (var j = 0; j < contentReferences.size(); j++) {
var content = contentReferences.get(j).getTarget();
if (heroImage.equals(content)) {
found = true;
break;
}
}
if (!found) {
logger.info("Hero image is not content. Deleting reference to " +
heroImageReferences.get(i).getTarget().getTitle());
heroImageReferences.get(i).delete();
if (i === 0) {
var anyReference = contentReferences.get(0);
var refTypeId = getHeroImageReferenceTypeFor(anyReference);
var anyContent = anyReference.getTarget();
board.createReference(anyReference.getTarget(), refTypeId);
logger.info("Created hero image reference " + refTypeId + " to " +
anyContent.getTitle());
}
}
}
}
}
```

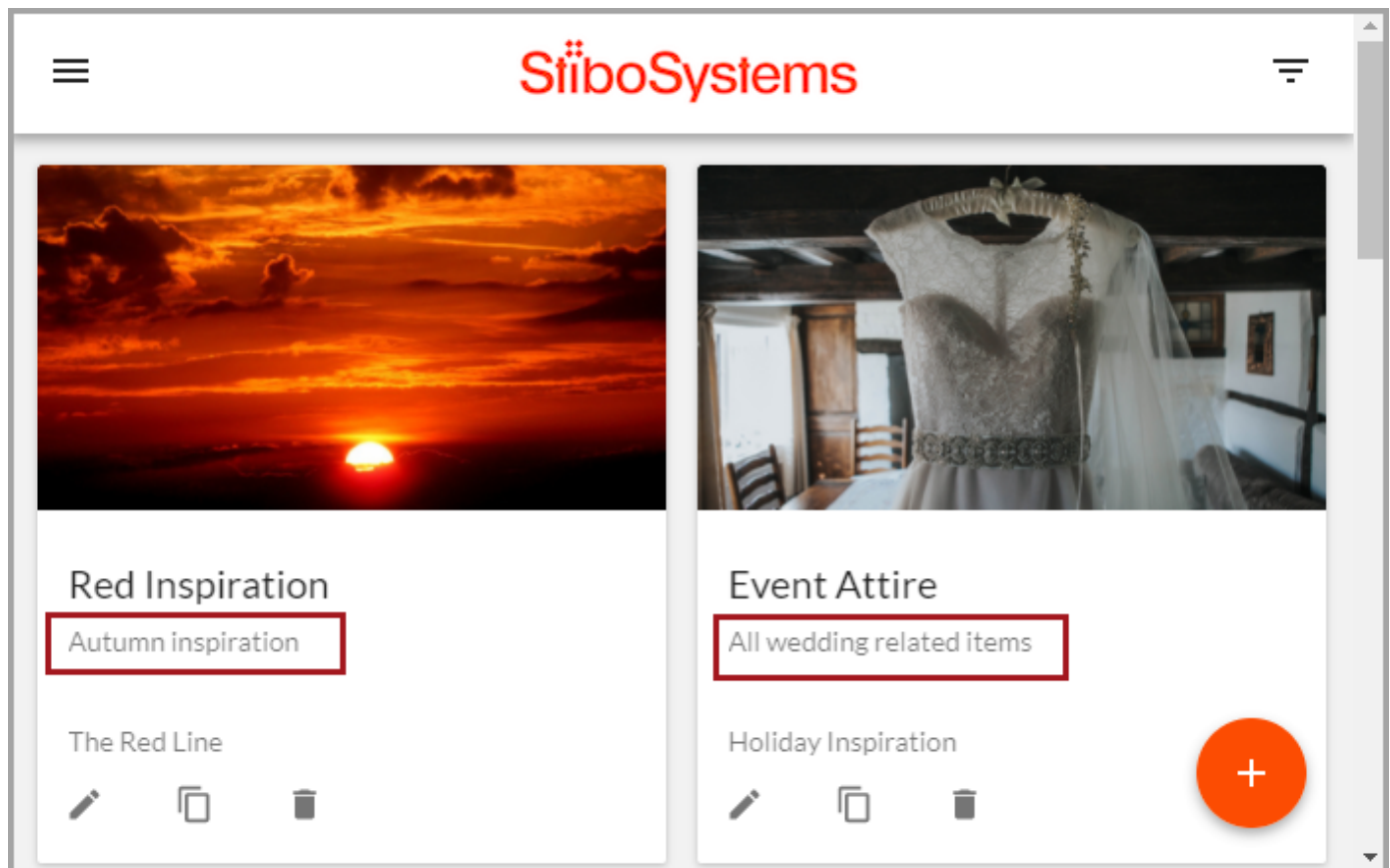
To learn more about business rules, see the **Business Rules** topic in the **Business Rules** documentation.

Setting Up Storyboard Attributes

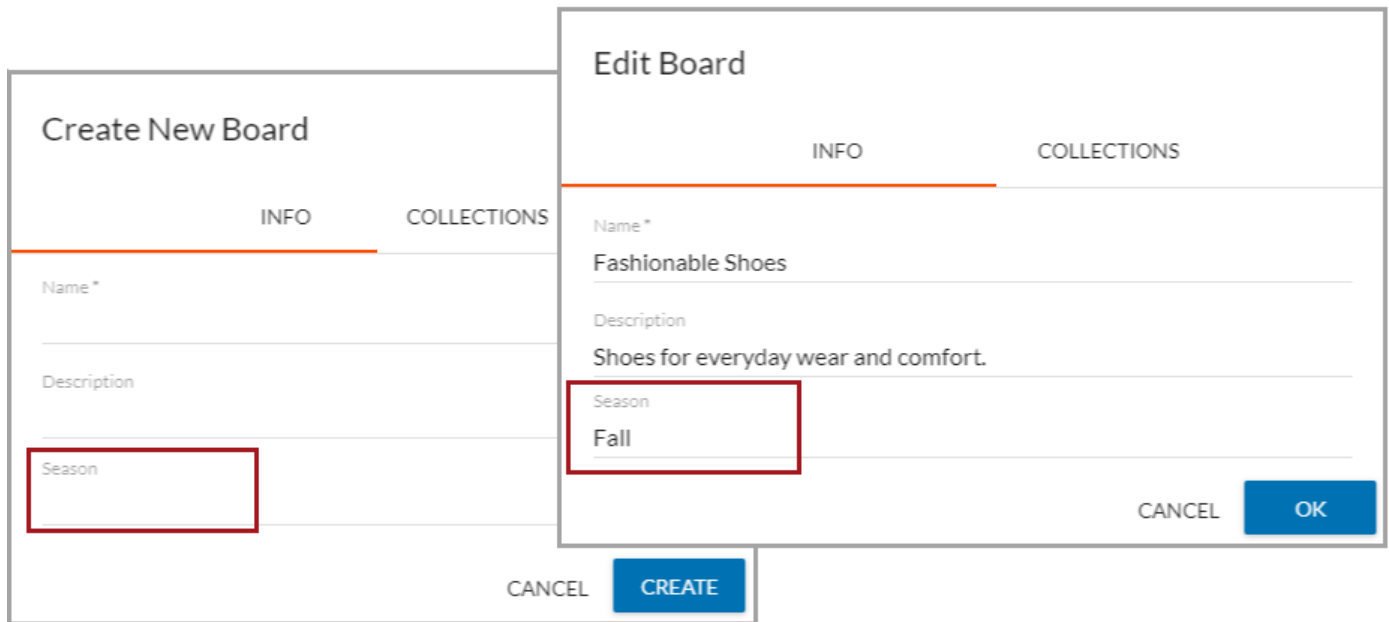
In order for the end user to create data for storyboards, attributes need to be created.

Storyboard Attributes

When creating attributes for storyboards, it is important to keep in mind that the 'Description' attribute is the only attribute that will show on the storyboard when in the board gallery. This attribute ID is used in the uploaded PLM configuration documents, so if the ID needs to be changed, it is important to let the implementation team know; otherwise, this attribute will not work properly.

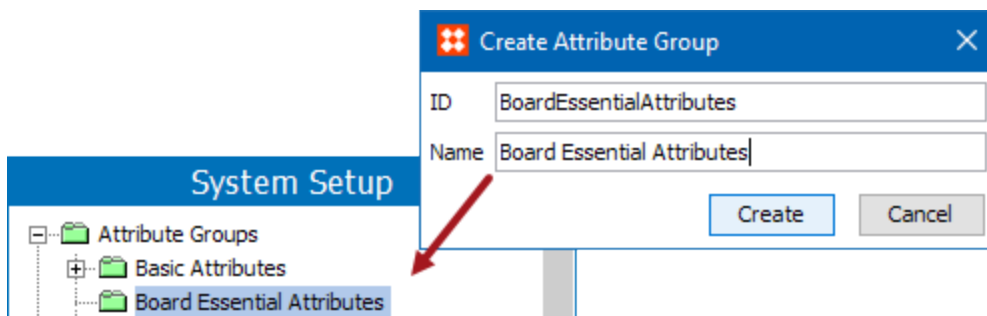


All other attributes for storyboards will only display on the Create New Board or Edit Board dialogs. See below for how to implement Storyboard attributes.



Configuring the Description Attribute

1. In **System Setup**, create a new attribute group to hold all necessary attributes for storyboards called 'Board Essential Attributes.'



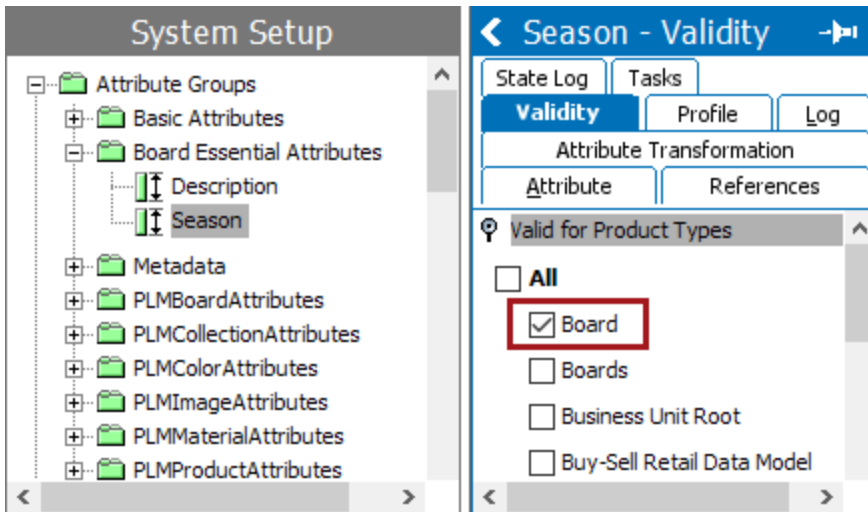
2. Next, in the configuration file that is uploaded to STEP, make sure that the correct attribute ID displays in the file under the 'descriptionAttribute' field on the board object. In the example below, the ID 'Description' is used for the 'descriptionAttribute.' It is usually a Text base, Description type attribute that is valid for Boards.

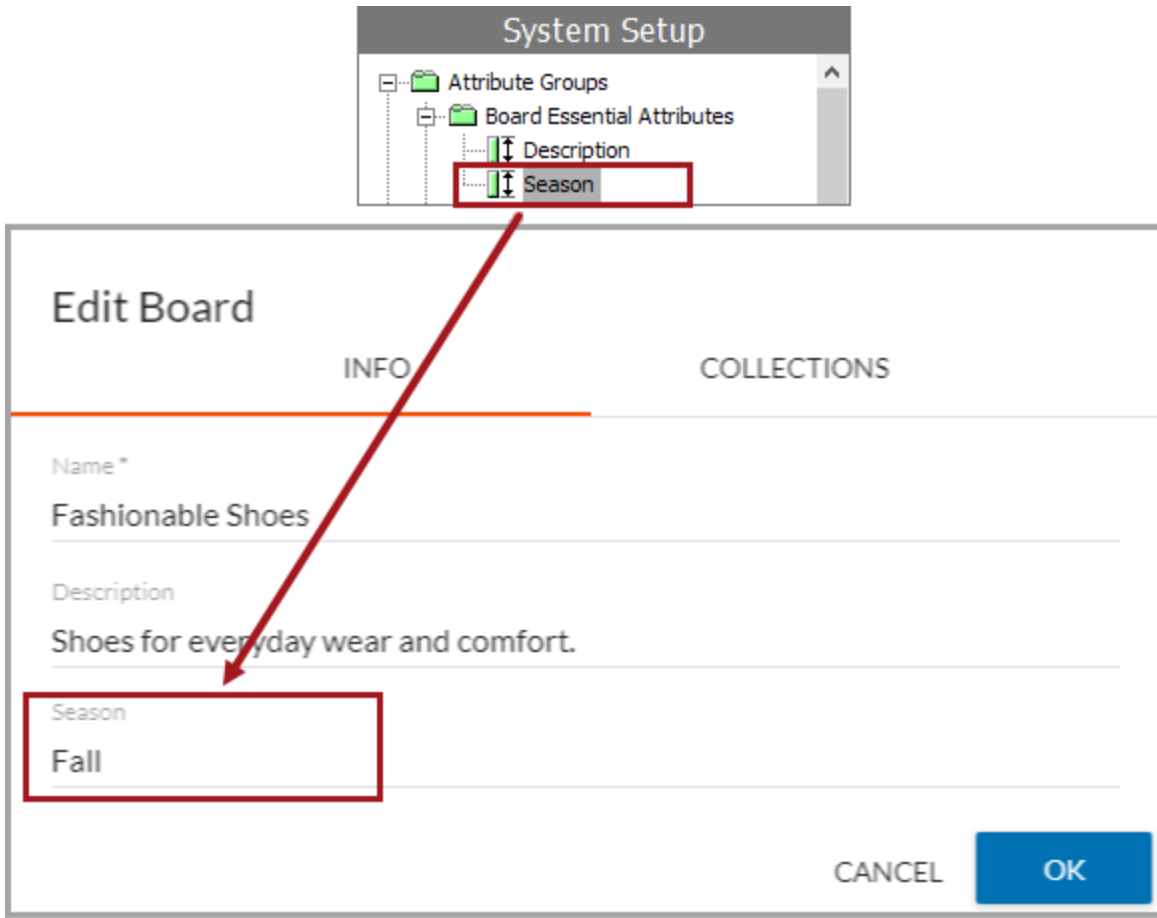
This attribute is the only attribute that displays on the storyboard itself when viewed in the board gallery.

Configuring other storyboard attributes

All other description type attributes that are created and have the 'Board Essential Attributes' folder as their parent will show up on the Create New Board or Edit Board dialog only.

Create any needed description attributes in the 'Board Essential Attributes' folder. Make the attributes valid for the 'Board' object type, and link the attributes to 'Boards'.





For more information on how to create attributes, see the **Attributes** topic in the **System Setup / Super User Guide** documentation.

Creating Tag Attributes

Applying tags to images, materials, trims, colors, and other object types placed on storyboards in PLM is a useful tool to help users organize and find content easier. Each time a user creates a new tag, it is stored in a List of Values (LOV) that is applied to a multi-valued attribute.

Creating the Tag Multi-Valued Attribute

In order for PLM users to create tags, the proper multi-valued attribute needs to be created first. Follow the steps below to create the attribute.

Creating an LOV for a Tag Attribute

In System Setup (in the appropriate folder set up to house LOVs), create an LOV to hold the tags that users will create when using PLM. The validation base type should be set to 'text' to obtain optimal performance, though it is possible to set the validation base type to the following depending on company needs: number, fraction, number range, numeric text, and numeric text (exclude tags). For more on how to create LOVs, see the **List of Values (LOVs)** topic in the **System Setup / Super User Guide** documentation.

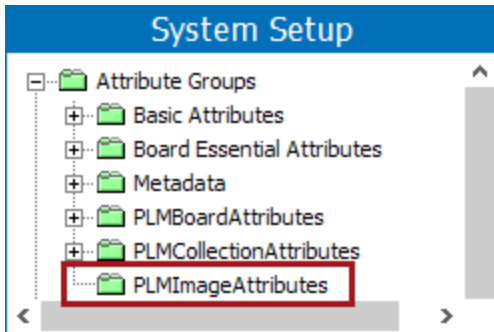
It is important to note that when creating the LOV to hold tags, the value to **Allow Users to Add Values** must be set to **'Yes.'** This allows PLM users to add any needed values or 'tags' to content that might not already exist in the system.

The screenshot shows the 'System Setup' interface on the left and the 'PLMTagLOVs - List of Values' configuration window on the right. The configuration window has tabs for 'List of Values', 'References', 'Log', 'State Log', and 'Tasks'. The 'List of Values' tab is active, showing a table with the following data:

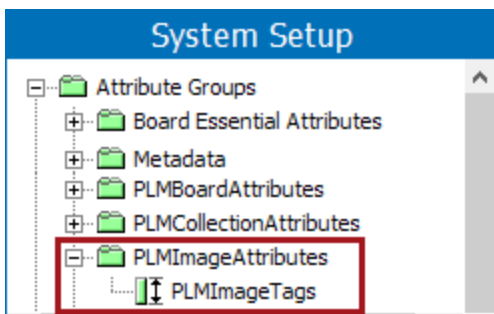
Description	
Name	Value
ID	PLMTagLOVs
Name	PLMTagLOVs
Edited by	2017-10-18 15:07:45 by STEPSYS
Path	Lists of Values / LOVs/PLMTagLOVs
Dimension Dependencies	
In Attribute Groups	
List of Values Validation	
Name	Value
Validation Base Type	Text
Allow Users to Add Values	Yes
Mask	
Minimum Value	N/A
Maximum Value	N/A
Maximum Length	100

Creating a Tag Attribute

1. Go to System Setup and create an attribute group to hold PLM image attributes.



2. In this attribute group, create a multi-valued attribute. See the **Single and Multi-Valued Attributes** topic in the **Attributes** section of the **System Setup / Super User Guide** documentation to learn more on how to create a multi-valued attribute.
3. When prompted to select an LOV, select the LOV created to hold tags in PLM (created in the previous section). Make it valid for the following object types:
 - PLMMaterial
 - PLMProduct
 - PLMTrim
 - All Asset Types

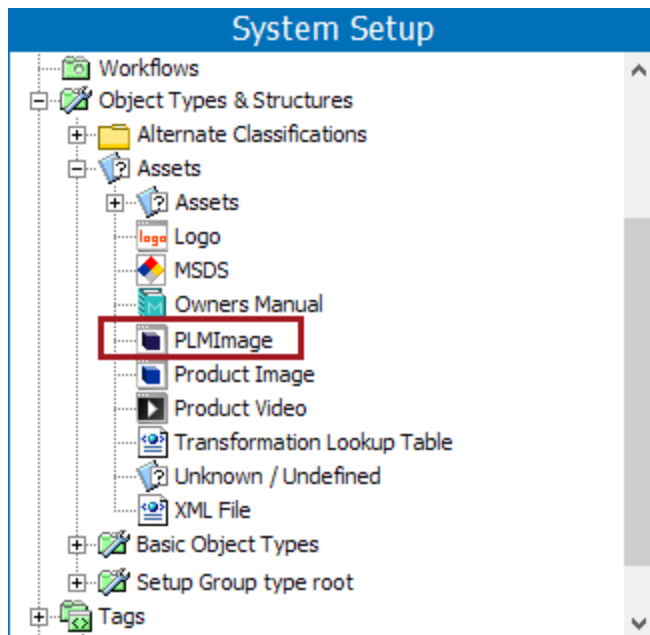


Creating Storyboard Assets

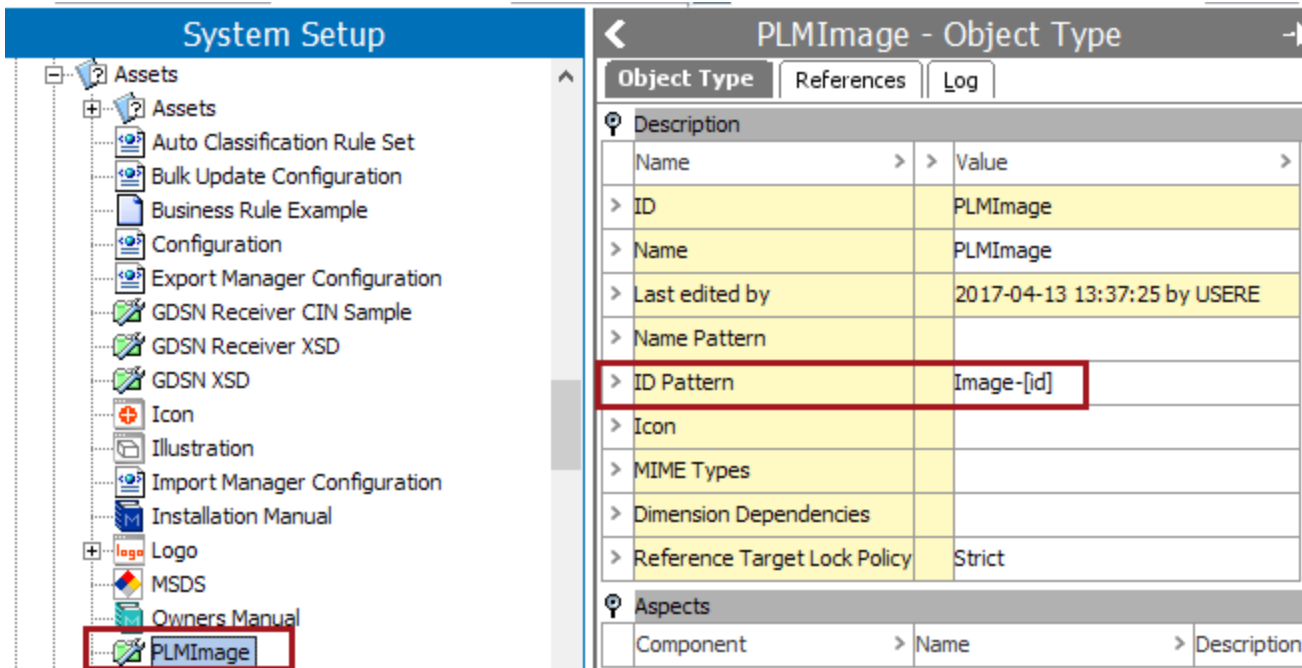
In order for users to import images and colors, assets need to be set up in STEP. All of the setup described in this topic is done in the STEP Workbench.

The following asset object type will need to be created:

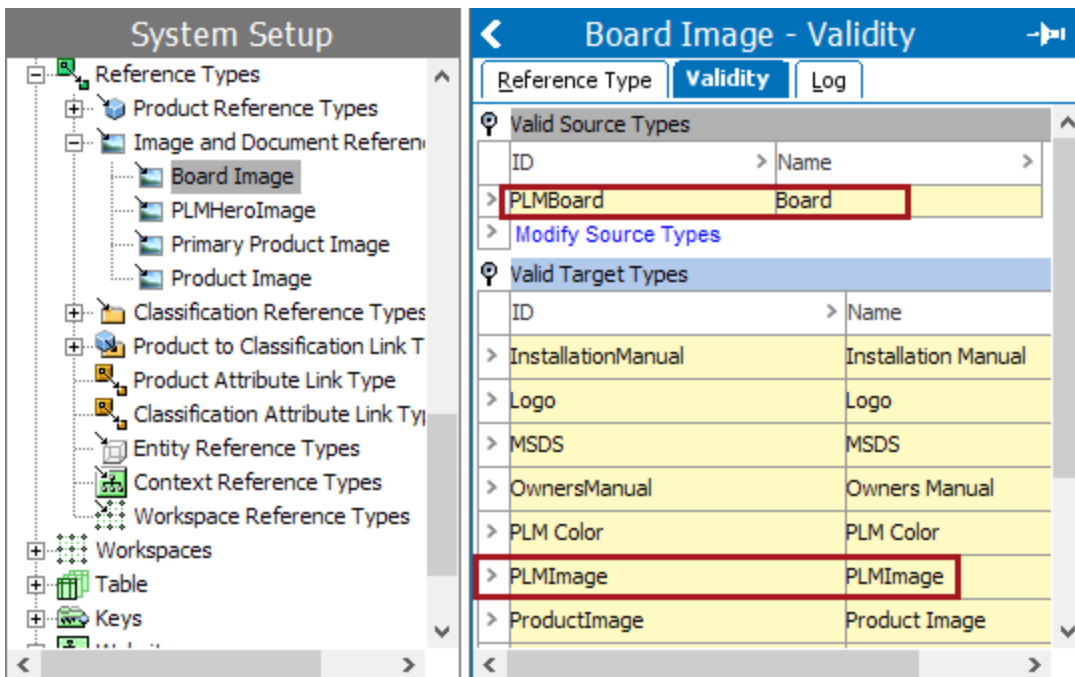
- PLMImage



1. In System Setup, go to Object Types and & Structures > Assets > create a new asset object type with **PLMImage** as the ID. Set the ID Pattern field to have the following auto generated ID: **Image-[id]**.

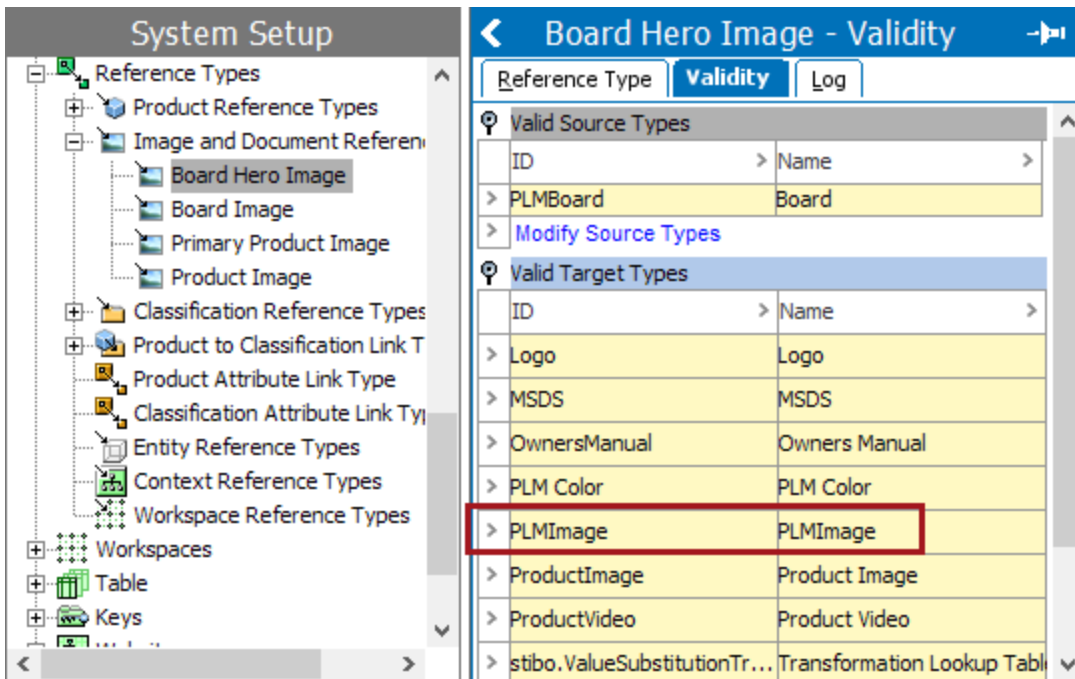


- Next, go to System Setup > Reference Types > Images and Document Reference Types > create a new reference called **PLMBoardImage**. Ensure that **Board** is a valid source type of this reference. **PLMImage** and all other asset object types should be valid targets.

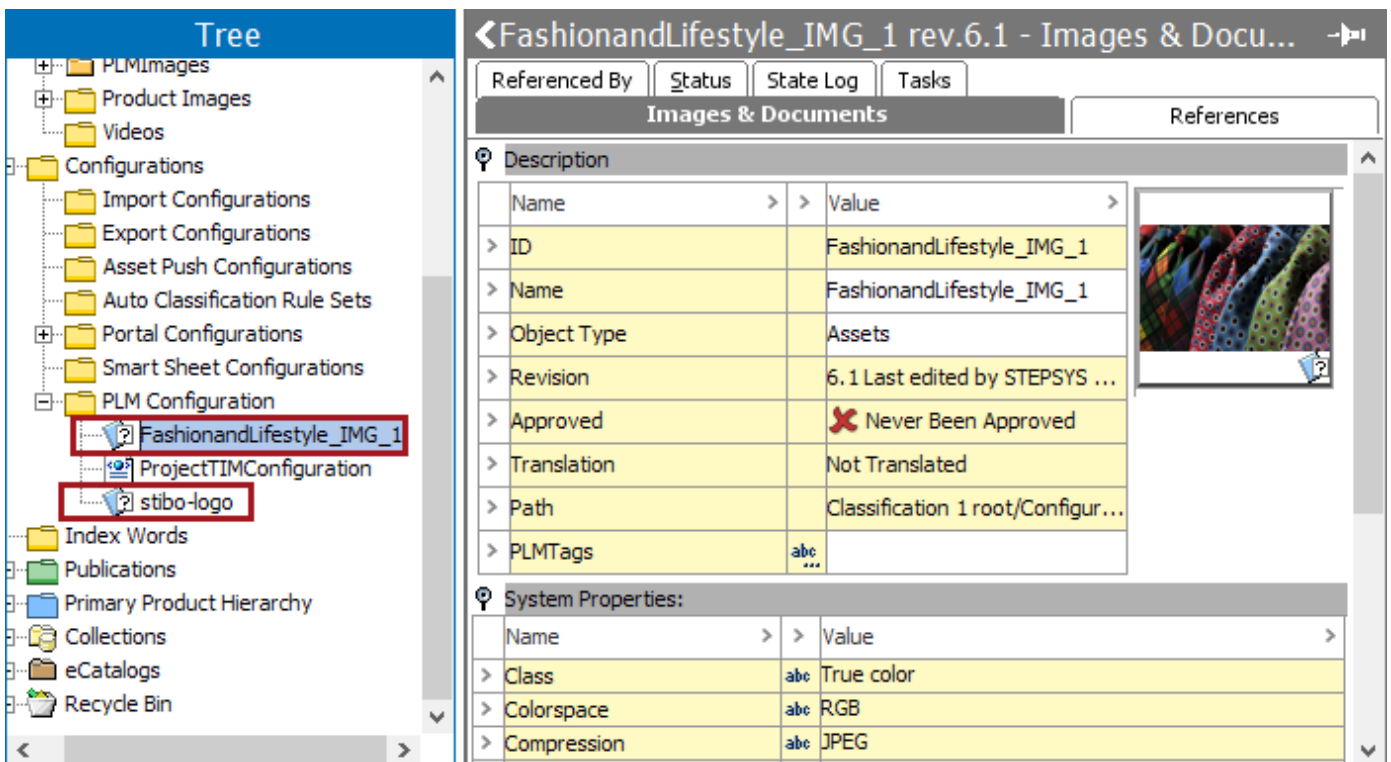


- Also under Image and Document Reference Types, create a new asset cross reference with the ID **PLMHeroImage**. Ensure that **Board** is a valid source type of this reference. **PLMImage** and all other asset

object types should be valid targets.



4. Upload the PLM Configuration asset content. Once complete, setup for using assets on storyboards is finished.



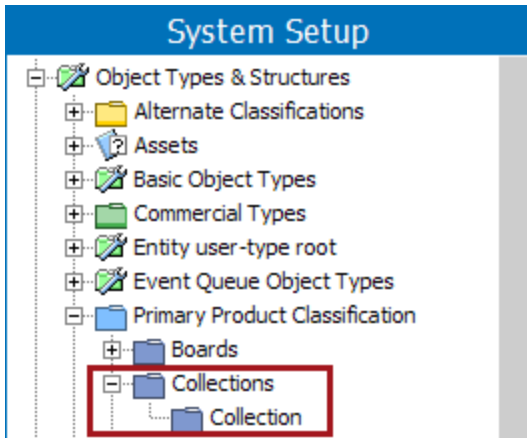
Note: Talk to your implementation team for the PLM Configuration asset content file if you do not already have it on your system.

Creating Storyboard Collection Filters

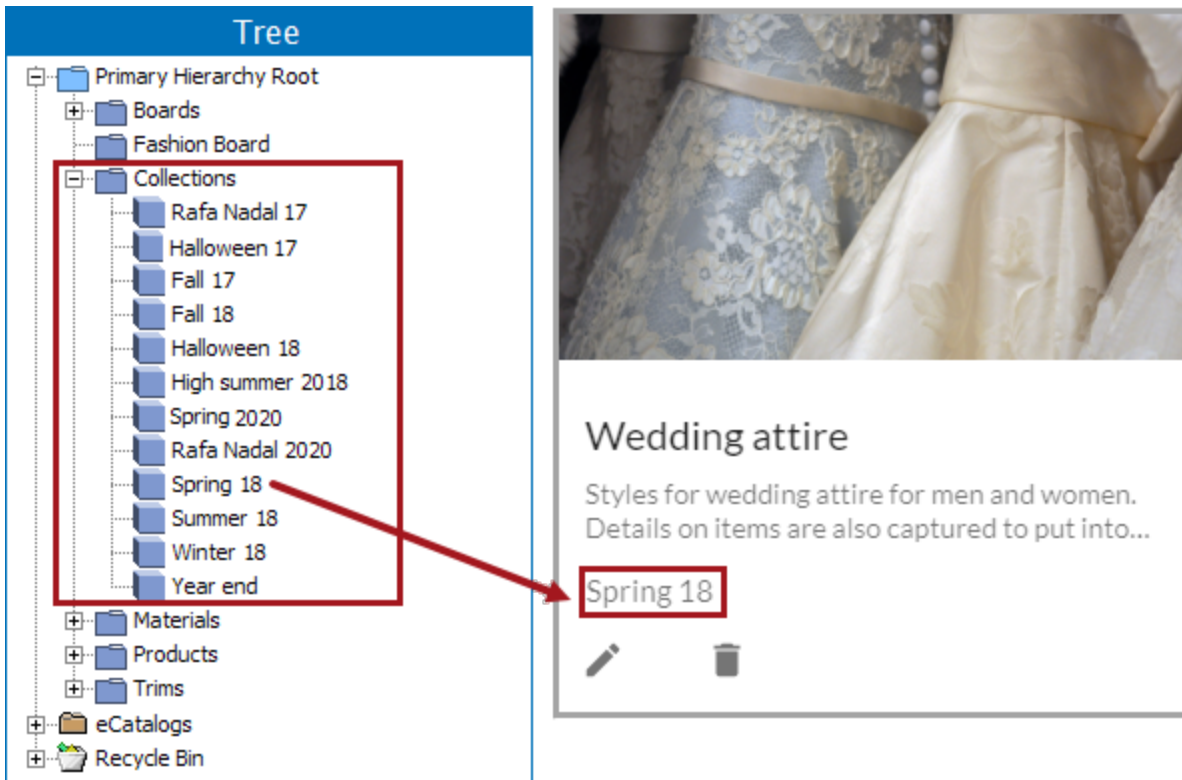
When working with boards in PLM, users can add and filter applied collections to help them find certain storyboards. Collection labels are created on the administration STEP Workbench side ONLY, and are accessed by the user on PLM via the provided web address.

To create collection labels for users:

1. In **System Setup**, go to Object Types & Structures > Primary Product Classifications > create the object type **Collections** with a child called **Collection**.



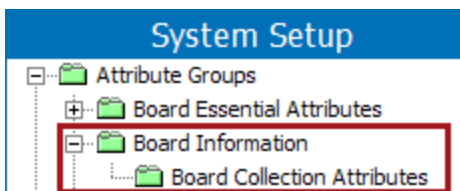
2. Go to **Tree** > Primary Hierarchy Root > add the **Collections** folder and create any needed 'collection children' under this parent folder. The names of these collection children are what will appear on the storyboards in the board gallery on PLM.



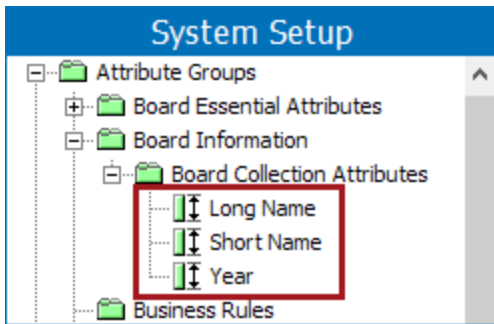
Option to Use Concatenated Attribute Values as Collection Filters

It is sometimes necessary to concatenate attribute values to create new collection filter options. If this is the case, follow the steps below:

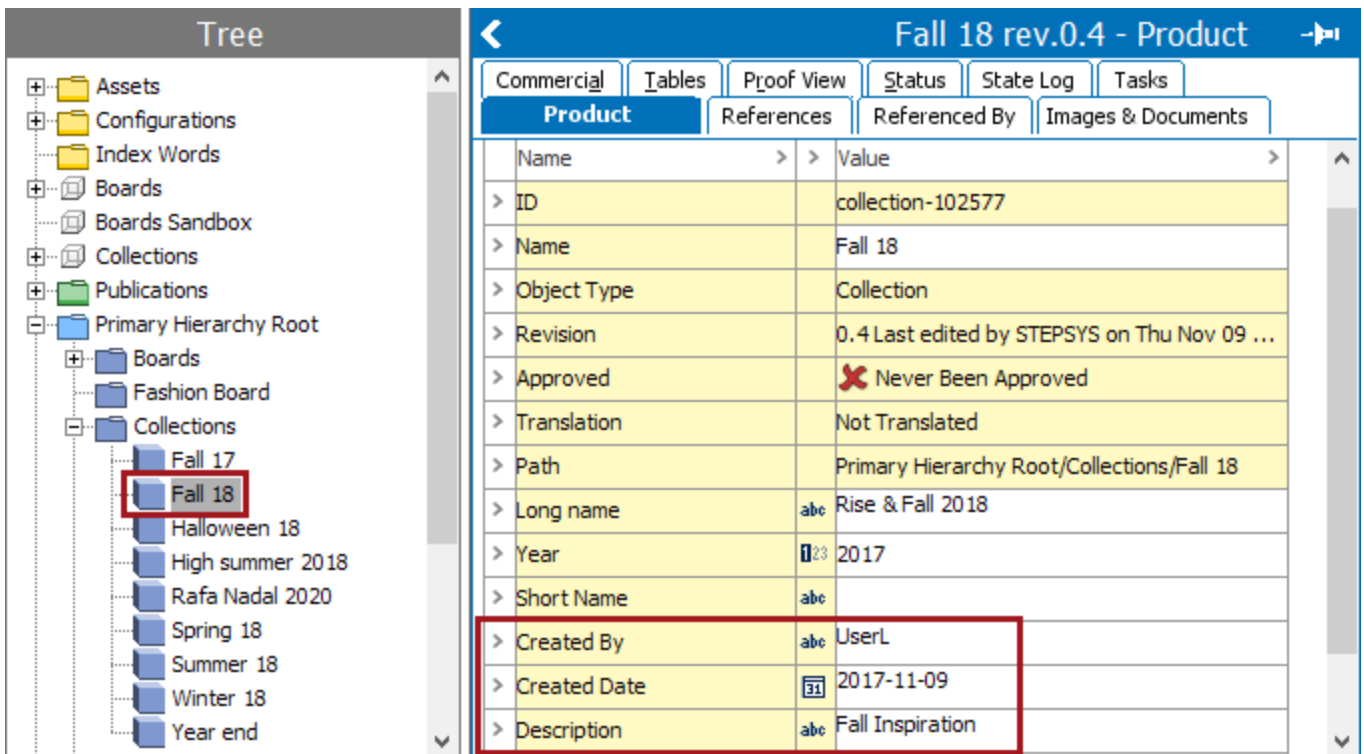
1. Go to System Setup > Attribute Groups > and create two folders. One with the ID **PLMBoardInformation** with the name of **Board Information**, and a child folder with the ID **PLMBoardCollectionAttributes** with the name of **Board Collection Attributes**.



2. In the child folder, **PLMBoardCollectionAttributes**, create any needed collection attributes. These need to be created as description attributes, and they need to be made valid for **Board Collections** and **Board Collection** object types. See the **Attributes** topic in the **System Setup / Super User Guide** documentation for more information on how to create attributes and make them valid for certain object types.



3. After the attributes are applied to the collection object type, fill in any data needed in the value fields.



4. The values for the attributes in the PLMCollection List Attributes folder are then concatenated in the PLM configuration file.


Note: Talk to your implementation team for the order that you need the attribute concatenation to take place.

5. Once concatenated in the PLM configuration file, when a user goes to apply a collection to a storyboard, they only see the full concatenated value when creating or editing a storyboard. When selected, only the collection name appears on the storyboard in the board gallery.

Edit Board

INFO

COLLECTIONS

Summer 18 - Summer 2018 - SU18 - 2018 

High summer 2018 - High summer - HS18 - 2018

Spring 18 - Spring 2018 - SP18 - 2018



OK

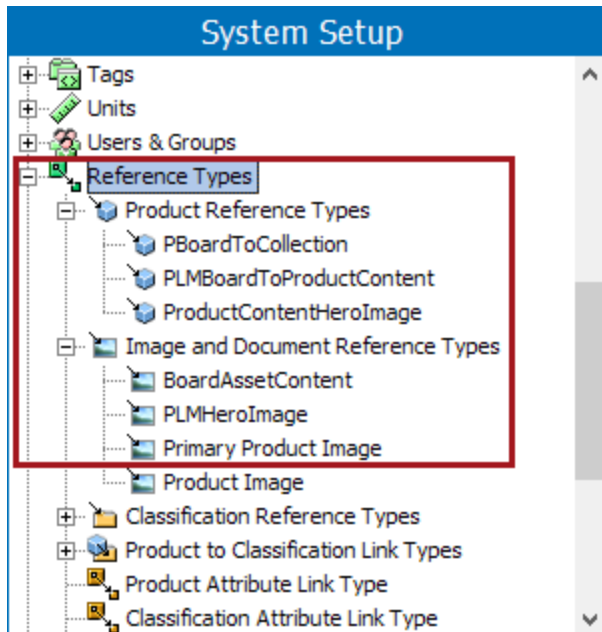
Pre Fall 2018

Summer 18



PLM Reference Types

Reference types allow content to appear on storyboards. As part of the setup for PLM, certain **Product Reference Types** and **Image and Document Reference Types** need to be setup to allow PLM to operate correctly for end users.



Below, the necessary reference types are listed:

Product Reference Types

The following product reference types are needed for PLM to function properly. All product reference types listed in this section should have the Board object type as the valid source type. The valid target types are listed within each bullet.

Valid Source Types	
ID	Name
Board	Board

Valid Target Types	
ID	Name
PCollection	Collection

- **PBoardToCollection**: PLMCollection should be a valid target type.
- **PLMBoardToProductContent**: PLMMaterial, PLMProduct, and PLMTrim should be valid target types.
- **ProductContentHerolImage**: PLMMaterial, PLMProduct, and PLMTrim should be valid target types.

Image and Document Reference Types

The following Image and Document Reference Types are needed for PLM to function properly. Any valid source or valid target types needed are listed below within each bullet.

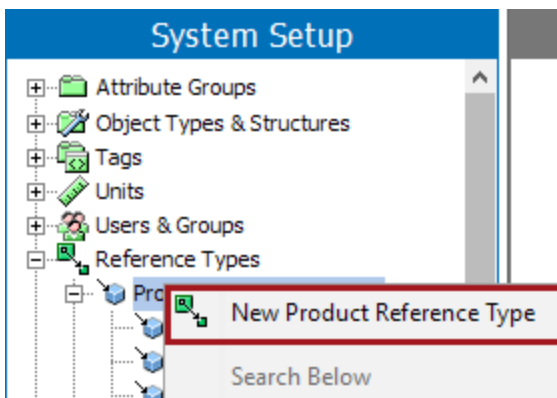
- **BoardAssetContent**: Board object type should be a valid source type; PLMImage object type should be a valid target type.
- **PLMHerolImage**: Board object type should be a valid source type; PLMImage object type should be a valid target type.
- **Primary Product Image**: PLMMaterial, PLMProduct, and PLMTrim object types should be valid source types; ProductImage should be a valid target type.

Note: The names of all mentioned reference types can be changed as long as they are also updated in the configuration documents. Notify your implementation team of any changes.

Creating a Reference Type

To create these needed reference types, follow the steps outlined below. Note that in this example, a Product Reference Type is used, though the steps are the same for creating all new reference types. To learn more about different reference types, see the **Reference and Link Types** topic in the **System Setup / Super User Guide** documentation.

1. Go to System Setup > Reference Types > Product Reference Types > right click and select **New Product Reference Type**.



2. Continue to work through the 'Create Product Reference Type' wizard, entering in the necessary ID, Name, valid source types, and valid target types. Select **Finish** when complete.

Create Product Reference Type [Close]

Steps

- 1. Enter ID and Name**
- 2. Select valid source types
- 3. Select valid target types
- 4. Apply Dimension Dependencies
- 5. Advanced

Enter ID and Name

ID:

Name:

[Back] [Next] [Finish] [Cancel]

Multi Reference Editor in PLM

The Multi Reference Editor in Web UI has two actions unique to PLM:

- PLM Create References Action
- PLM Edit Reference Action

This topic will focus on configuring these actions within a pre-configured multi reference editor.

Prerequisites

This topic assumes that the user has the necessary permissions to access the designer as well as familiarity with the Web UI designer. For more information on the designer, see the **Design Access** topic in the **Web User Interfaces / Web UI Getting Started** documentation. As mentioned, this topic will add actions to an existing multi reference editor. For more information, see the **Multi Reference Editor** topic in the **Web User Interfaces / Web UI Getting Started** documentation. Finally, this topic also assumes that the user has configured a Reference Metadata Flex Value Header component. See the **Reference Metadata Flex Value Header Component** topic in this documentation.

Configurations

1. In Web UI Designer, from a screen containing a multi reference editor, navigate to a node list screen > child components > Actions. Click **Add**.

Properties

Configuration Web UI style

PLM Food Recipe Sa ▾ Save Close New... Delete Rename Save as...

Node List Properties [go to parent](#)

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

Hide Standard Buttons

*ID

Include Labels

Lookup Screen Type For Navigation

Page Size

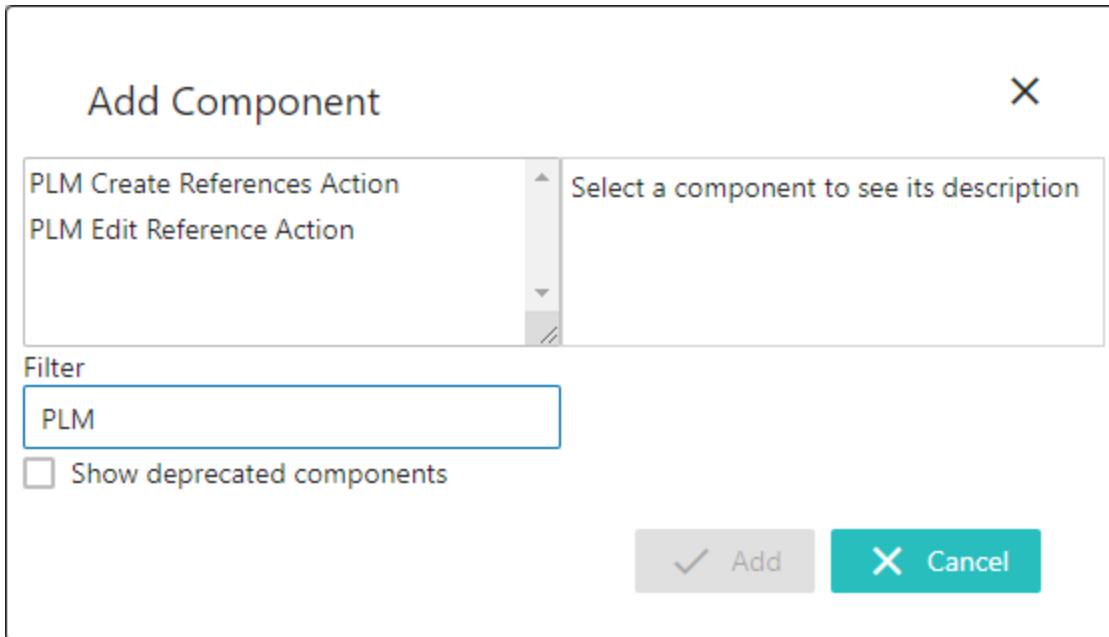
Use Details Overlay

Child Components

Display Modes ▾

Actions

- From the 'Add Component' dialog, type 'PLM' into the Filter field below the Action box. Either select **PLM Create References Action** or **PLM Edit Reference Action**, and click Add to configure further. See below for details.



The screenshot shows the 'Add Component' dialog box. The title bar reads 'Add Component' with a close button (X) on the right. Below the title bar is a list box containing two items: 'PLM Create References Action' and 'PLM Edit Reference Action'. To the right of the list box is a text area with the placeholder text 'Select a component to see its description'. Below the list box is a 'Filter' field containing the text 'PLM'. Below the filter field is a checkbox labeled 'Show deprecated components'. At the bottom right are two buttons: 'Add' (with a checkmark icon) and 'Cancel' (with an X icon).

PLM Create References Action

The 'PLM Create References Action' allows users to configure a button that adds references to an object when used with the Multi Reference Editor. This action can be configured to specify business rules for consistent creation, object nodes to restrict applicable references, and validation methods to ensure that the created reference is allowed.

Edit component

✕

PLM Create References Action Properties

Component Description This action can be added to a Node List and allows the user to create references with metadata attributes

Button Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Context Help	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Custom Icon	<input type="text" value=""/> ... <input type="button" value="Reset"/>
Dialog Header	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Target Node Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Action Add Another Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Action Cancel Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
Action Save Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReference:"/>
*Root Node URLs	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div> <div style="display: flex; gap: 5px; margin-top: 5px;"> <input type="button" value="Add..."/> <input type="button" value="Remove"/> <input type="button" value="Up"/> <input type="button" value="Down"/> </div>
*Get Reference Type - Business Function	<input type="text" value=""/> ...
*Copy From Template - Business Action	<input type="text" value=""/> ...
Validation - Business Function	<input type="text" value=""/> ... <input type="button" value="Clear"/>
Copy From Template (Context) - Business Action	<input type="text" value=""/> ... <input type="button" value="Clear"/>

⌵

Note: While most fields are optional, the 'Root Node URLs' field, the 'Get Reference Type - Business Function' field, and the 'Copy from Template - Business Action' field are required.

1. Fill out the necessary fields:

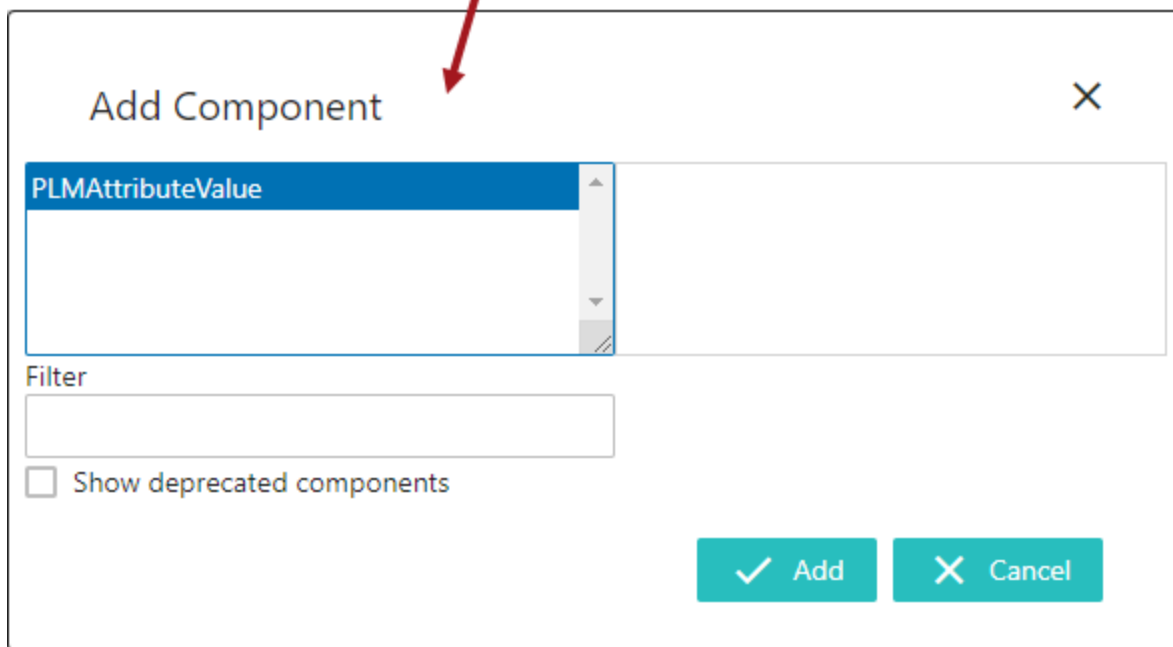
- **Button Label:** This field sets the displaying name for the action button. This field only works if the 'Include Label' parameter on the parent Node List is selected.
- **Context Help:** This field provides a description when the user hovers over the action button to assist users in the their tasks.
- **Custom Icon:** This allows users to select an icon to represent the action.
- **Dialog Header:** When the action is selected, this field will be populated as the title of the dialog that displays.
- **Target Node Label:** This field will is the one displayed as the title for the target node.
- **Action Add Another Label:** This field changes the label of the 'create another' button on the dialog that appears for this action. The default label is 'Add Another.'
- **Action Cancel Label:** This field changes the label of the cancel button on the dialog that appears for this action. The default label is 'Cancel.'
- **Action Save Label:** This field changes the label of the save button on the dialog that appears for this action. The default label is 'Save.'
- **Root Node URLs:** This field will establish from where the user may select the targets of the created references. This field is required.
- **Get Reference Type - Business Function:** This field sets which business function is used when getting the reference type ID. This is a required field.
- **Copy From Template - Business Action:** This field sets the business action that is used for copying the defaults to be displayed in the dialog box. This is a required field.
- **Validation - Business Function:** This field sets the business function that validates the data for the reference.
- **Copy From Template (Context) - Business Action:** This field sets the business action that is executed for copying default values from other contexts.

In this example, the action was titled as 'Add Parameter.' The completed configured Create Reference action looks like the following:

Button Label	<input type="text" value="Add Parameter"/>
Context Help	<input type="text" value="Add Parameter"/>
Custom Icon	<input type="text" value="..."/> <input type="button" value="Reset"/>
Dialog Header	<input type="text" value="Add Parameter"/>
Target Node Label	<input type="text" value="Parameter"/>
Action Add Another Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReferences^"/>
Action Cancel Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReferences^"/>
Action Save Label	<input type="text" value="i18n.stibo.spireplm.webui.server.action.reference.CreateReferences^"/>
*Root Node URLs	<input type="text" value="step://product?id=PLMParametersRoot"/> <input type="button" value="Add..."/> <input type="button" value="Remove"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="text" value="PLMGetRequirementParameterReferenceType"/> <input type="button" value="..."/>
*Get Reference Type - Business Function	<p>Caller parameters: Function input parameters:</p> <p>Target <input type="text" value="target"/></p> <p>Source <input type="text" value="source"/></p>
*Copy From Template - Business Action	<input type="text" value="PLMFoodCopyRequirementParameterTemplate"/> <input type="button" value="..."/> <input type="text" value="PLMFoodValidation"/> <input type="button" value="..."/> <input type="button" value="Clear"/>
Validation - Business Function	<p>Caller parameters: Function input parameters:</p> <p>Target <input type="text" value="target"/></p> <p>Source <input type="text" value="source"/></p>
Copy From Template (Context) - Business Action	<input type="text" value="PLMFoodCopyRequirementParameterTemplate"/> <input type="button" value="..."/> <input type="button" value="Clear"/>

2. Once created, under Child Components, double-click the PLM Create References Action. In the Row field, select 'Add.' The only option is 'PLMAttributeValue.'

Child Components



3. Select 'Add,' and the PLMAttributeValue Properties dialog will display.

Add component - configure required properties ✕

Required properties (*) must be set before the component can be added to the configuration.

PLMAttributeValue Properties

*Attribute	<input type="text"/>
Label	<input type="text"/>
Mandatory	<input type="checkbox"/>
Read Only	<input type="checkbox"/>

Once configured as needed, the button will be ready for adding new references. For more on how to use the PLM Create References Action, see the **Multi Reference Editor Actions in Web UI** topic in this documentation.

PLM Edit Reference Action

The 'PLM Edit Reference Action' allows users to configure metadata to append to the dialog menu, limiting what values on an object's references may be modified.

Properties

Configuration Web UI style

PLM Food Supplier Save Close New... Delete Rename Save as...

PLM Edit Reference Action Properties [go to parent](#) ^

Component Description This action can be added to a Node List and allows the user to edit references with metadata attributes

Button Label	Answer Requirements	
Context Help	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Custom Icon	<input type="text"/>	... Reset
Dialog Header	Answer Requirement	
Target Node Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Action Save Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Action Next Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Action Previous Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Action Cancel Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Action Close Label	i18n.stibo.spireplm.webui.server.action.reference.EditR	
Help Text For Target Object	<input type="text"/>	... Clear
Show Help Texts For Attributes	<input type="checkbox"/>	
Conditional Rules - Business Function	<input type="text"/>	... Clear
	PLMMandatoryResponse	... Clear
Validation - Business Function	Caller parameters: Function input parameters: Source <input type="text" value="source"/> ▾ Target <input type="text" value="target"/> ▾	

Child Components

Metadata Attributes

Add.. Remove Up Down

- **Button Label:** This field sets the displaying name of the action button. This field only works if the 'Include Label' parameter on the parent Node List is selected.
- **Context Help:** This field will provide a description when the user hovers over the action button to assist users in the their tasks.
- **Custom Icon:** This allows users to select an icon to represent the action.
- **Dialog Header:** When the action is selected, this field will be populated as the title of the dialog that displays.
- **Target Node Label:** This field is the one displayed as the title for the target node.
- **Action Save Label:** This field changes the label of the save button on the dialog that appears for this action. The default label is 'Save.'
- **Action Next Label:** This field changes the label of the next button on the dialog that appears for this action. The default label is 'Next.'
- **Action Previous Label:** This field changes the label of the previous button on the dialog that appears for this action. The default label is 'Previous.'
- **Action Cancel Label:** This field changes the label of the cancel button on the dialog that appears for this action. The default label is 'Cancel.'
- **Metadata Flex Value - Label:** This field sets the label of the Metadata Flex Value.
- **Metadata Flex Value - Defining Attribute:** A defining metadata attributes that is valid for the reference type, is used to specify which attribute is used to capture the data. The defining attribute must be an LOV with ID. The ID must contain the ID of the attributes that are configured to capture the data on. The LOV value is the display name of the attribute. For more information, see the **Reference Metadata Flex Value Header Component** topic in this documentation.
- **Help Text for Source Object:** This field selects the attribute that holds the help text value of the target object.
- **Show Help Texts for Attributes:** If this option is selected, then the help text metadata of the selected attributes will be included.
- **Validation - Business Function:** This field sets the business function that validates the data for the reference.
- **Metadata Attributes:** This child component allows for multiple metadata attributes to be added to the edit reference dialog.

For more on how to use the PLM Create References Action or PLM Edit Reference Action buttons, see the **Multi Reference Editor Actions in Web UI** topic in this documentation.

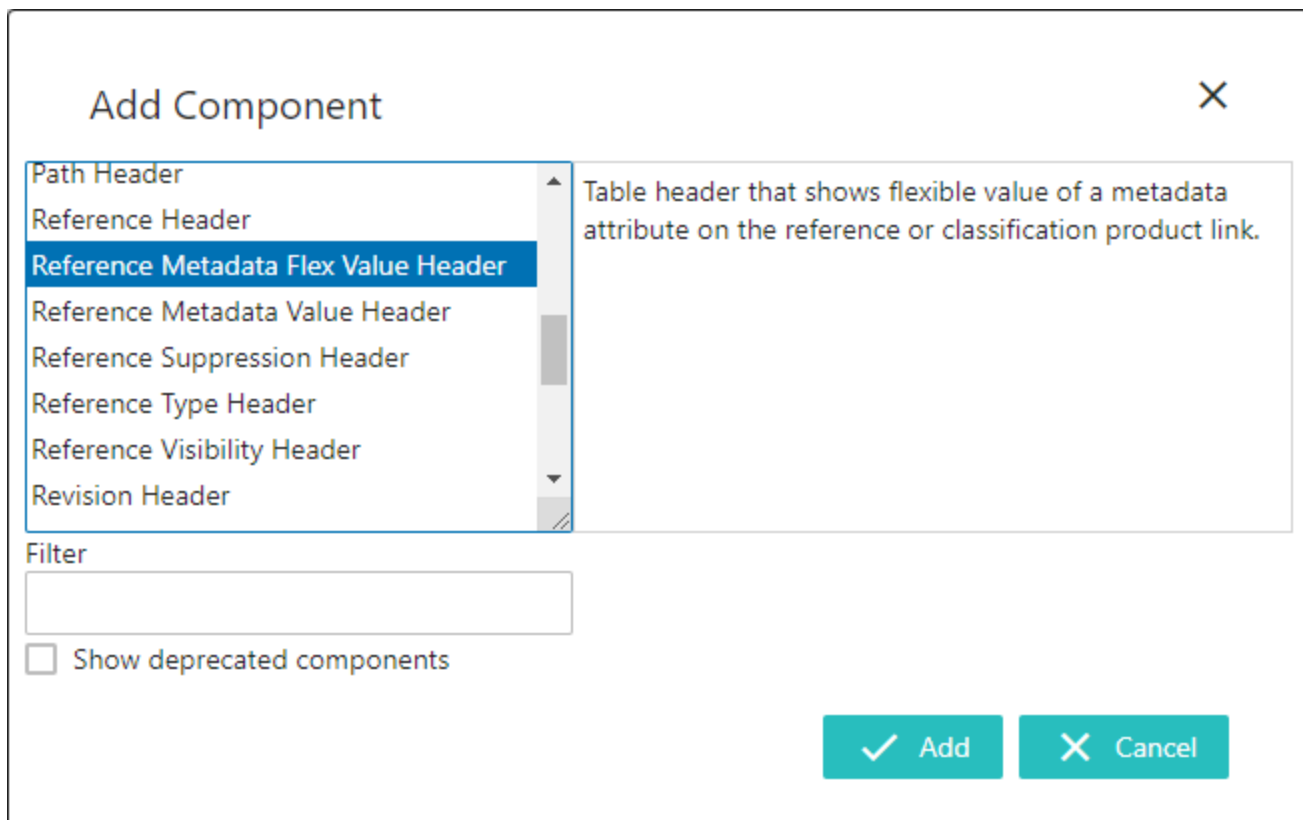
Reference Metadata Flex Value Header Component

Prerequisites

All the steps provided in this topic assume the Web UI designer is in design mode and on a Multi Reference Editor screen prior to starting the configuration process. It is also assumed that all users (designers and end users) have the proper privilege to work with the Multi Reference Editor and its features. For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / Super User Guide** documentation.

Configuration

The Reference Metadata Flex Value Header is a component to be added on a Multi Reference Editor as a header component.



Once added, the Reference Metadata Flex Value Header Properties dialog will display.

Add component - configure required properties

✕

Required properties (*) must be set before the component can be added to the configuration.

Reference Metadata Flex Value Header Properties

Component Description Table header that shows flexible value of a metadata attribute on the reference or classification product link.

***Defining attribute**

Dimensions Edit...

Help Text

Label

Mandatory ▾

Readonly

▼ **Advanced**

Enable Locale Formatting

Show Invalid Inherited Values

Show LOV IDs


No Wrap

Context Help

Display Context Help

✓ Add
✕ Cancel

While these fields are the same as other Header properties, the 'Defining attribute' field is a unique and required field. To understand how this attribute works, consider the following use case.

	Parameter	Parameter Description	Responses Required For	Supplier Response Detail
<input type="checkbox"/>	Haemolytic Streptococci	Not detectable in 25g	Method Meets Requirement? Response Detail	August 8, 2020
<input type="checkbox"/>	Mercury	Not detectable in 25g		0 µg
<input type="checkbox"/>	Coliforme Germs	Not detectable in 25g	Meets Requirement?	0 µg

The defining attribute must be a LOV, and it is used to define what the 'Supplier Response Detail' attribute base type is for each parameter. For example, with the parameter 'heamolytic streptococci,' the 'Supplier Response Detail' attribute is defined as 'PLMDate' with a base type of 'ISO Date.' Any value entered for the 'Supplier Response Detail' are stored in the 'PLMDate' attribute. However, for the parameter 'Mercury,' the 'Supplier Response Detail' is defined as 'PLMNumberAndUnit,' which is a number with a unit. Values entered are stored in the 'PLMNumberAndUnit' attribute.