



Informatica MDM – Product 360

Web UI - User manual

Version 10.5 HotFix 3 SP 1 (English)

Informatica MDM - Product 360 - Web
Version 10.5 HotFix 3 SP 1

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1 Informatica MDM - Product 360 - Web

This manual is primarily aimed at employees of companies who use Product 360 Web to process electronic product data. An intuitive, easy-to-use interface controls the editing process. All of the data required can be easily accessed via a web browser. Entries can be made via copy & paste, while classification and reference assignments can be made using the drag & drop function.

1.1 Typographic conventions

the online help is not to describe every single variation of each and every command. As a rule, the description of the procedure and command calls is restricted to recommended variations for ease of reading. In addition, no distinction is made between menu commands, dialog box calls and context selection entries. For example, if you see **Tasks > My responsibilities** in the instructions, this means that you first select the **Tasks** entry in the context selection, and then select the **My responsibilities** sub-entry to display specific content on the screen.

As Product 360 Web is a browser-based application, you will not find the terms "Views" and "Perspectives" that you may be familiar with from Product 360 Desktop. The individual elements of the window are then indicated as the **context selection**, for example.

Step-by-step instructions are numbered.

1. Open a table containing the objects you want to perform a quality check on.
2. Select the data records you want to check.

Text markings at various points indicate special instructions, tips, or warnings, as the following examples show:



Tip: Tables like this contain useful tips.



Note: These tables contain important information:



Caution: This includes warnings about sources of errors and how to avoid them.



Information: Provides additional information about the current topic.

In addition, examples are provided from an imaginary company called "Erstein", which uses Product 360 Web and is involved in typical business transactions. A typical description of such a text is as follows:



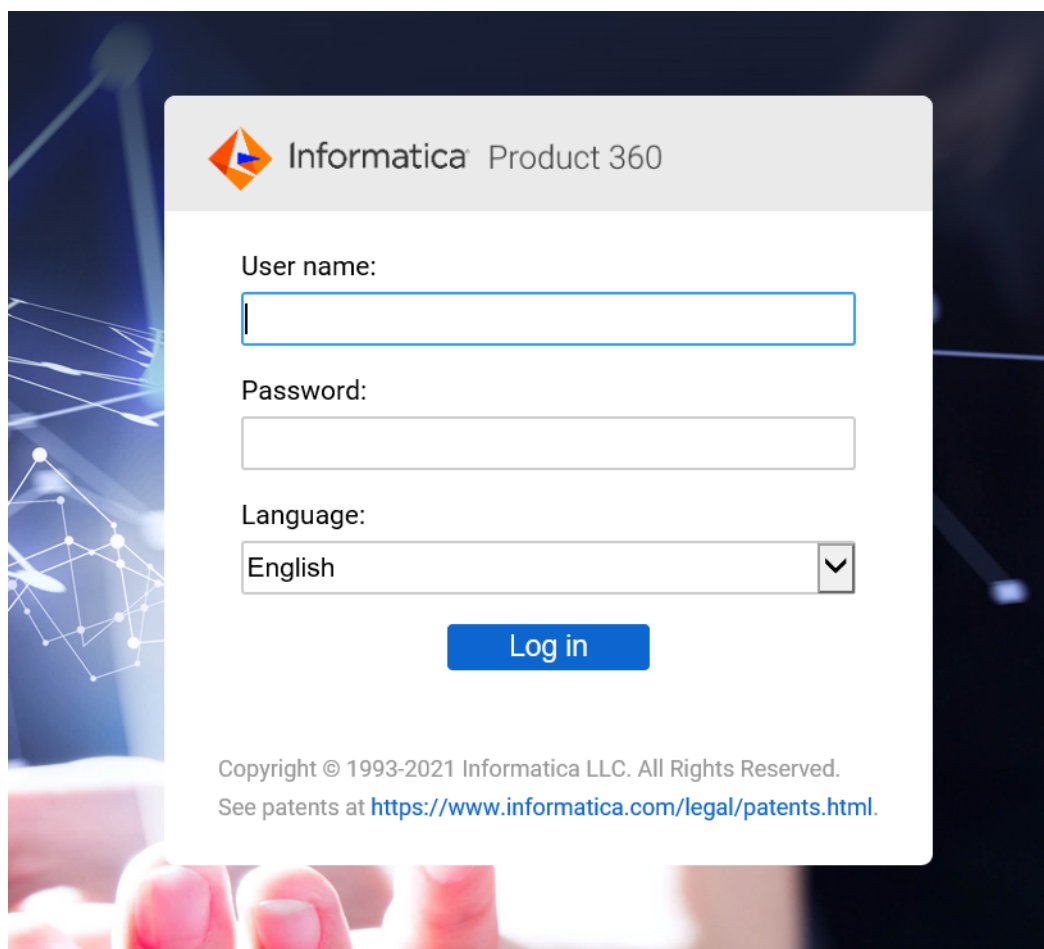
Every year in May, Erstein Handelsgesellschaft AG issues its annual main catalog with all the available items and the prices valid at that time. The item data including the image information must be perfectly maintained at that time. The sophisticated layout...

In conjunction with the description of a fact or object, an actual name is used, e.g. of a catalog, which may not exist in your system. To indicate that this is a system-specific name, <Catalog name> is written in the text instead of the actual name.

2 Starting Informatica MDM - Product 360 - Web

In Product 360 Web you can use a browser to access all available functions. All changes you make to the data using Product 360 Web are not saved on your computer but directly in the database. However, settings that affect your own application, e.g. the arrangement of views, are saved locally on the corresponding workstations.

You use the address defined by your administrator to access the Product 360 Web login dialog box.



Login screen


To log in, follow the steps below:

1. Enter your user name and password.
2. Select the language you want to use for the user interface.
3. Click on **Login**.

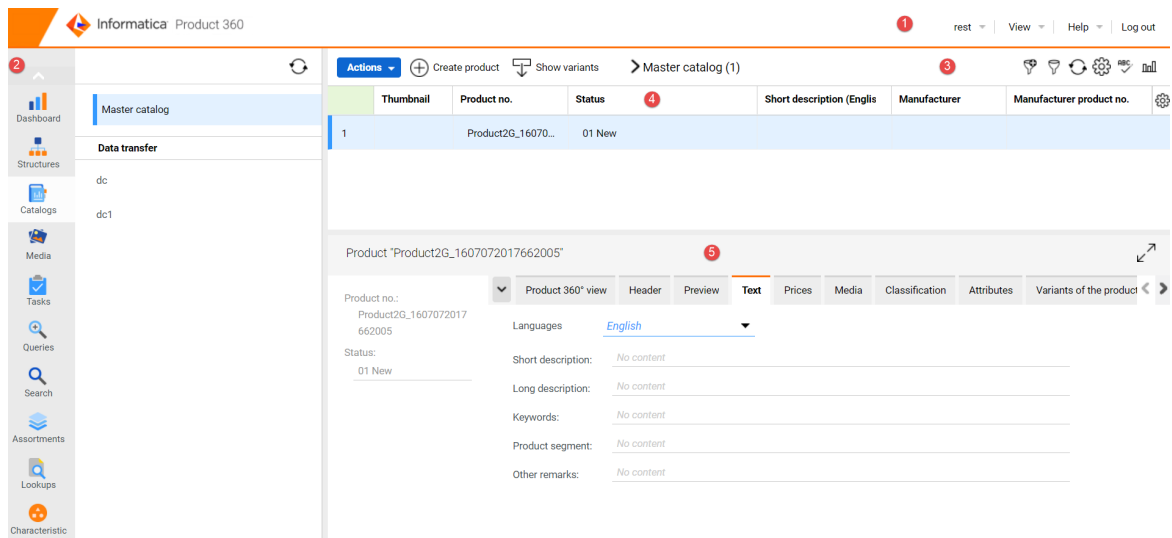
2.1 Program interface

The administrator configures the program interface based on your user profile. Based on the permissions you have, you see the views, tabs, or fields in the program interface. You can also











customize the views, fields, or tabs as per your choice. For example, you can select the fields to appear in the list view.













 **Caution:** The local storage of your browser stores the customizations that you make on the program interface. If you clear the browser local storage, all the customizations that you made will be lost.

The following image displays the standard configuration of the program interface.



The program interface is divided into the following areas:

Area	Description						
1	<p>The header offers additional functions. For example, it shows who is currently logged in. Next to this, you will find buttons that you can use to access the online help or to log off if necessary.</p> <p>You can also rearrange the individual screen areas using the View menu (horizontal/vertical), and show or hide the navigation area. The most recently used screen layout is saved and is applied again the next time you log on.</p>						
2	<p>You define the context selection in the navigation area. The meanings of the individual icons in the menu bar are described in the table below. The currently selected menu option shows the selection corresponding to the content saved in Product 360 Desktop and any modifications made in Product 360 Web. You can click on the Refresh icon  to synchronize the content of Product 360 Web with the current content of Product 360 Desktop.</p> <table><tr><td></td><td>Dashboards provide the user with a personalized view of data and tasks</td></tr><tr><td></td><td>Structures^[57] represent level systems such as classifications, categorization, assortment or material group assignments.</td></tr><tr><td></td><td>Catalogs represent the physical containers for your data. The catalogs defined in Product 360 Desktop are available here.</td></tr></table>		Dashboards provide the user with a personalized view of data and tasks		Structures ^[57] represent level systems such as classifications, categorization, assortment or material group assignments.		Catalogs represent the physical containers for your data. The catalogs defined in Product 360 Desktop are available here.
	Dashboards provide the user with a personalized view of data and tasks						
	Structures ^[57] represent level systems such as classifications, categorization, assortment or material group assignments.						
	Catalogs represent the physical containers for your data. The catalogs defined in Product 360 Desktop are available here.						

	<table> <tr> <td data-bbox="387 208 491 309"> Media</td><td data-bbox="491 208 1434 309">This icon takes you to the context selection for maintaining multimedia documents^[77].</td></tr> <tr> <td data-bbox="387 309 491 409"> Tasks</td><td data-bbox="491 309 1434 409">Tasks^[62] created manually or by a workflow can be encountered in this context selection.</td></tr> <tr> <td data-bbox="387 409 491 521"> Queries</td><td data-bbox="491 409 1434 521">Predefined queries^[28] allow targeted and rapid access to a particular set of data.</td></tr> <tr> <td data-bbox="387 521 491 613"> Search</td><td data-bbox="491 521 1434 613">This icon is used to call up the functions of a full text search^[31].</td></tr> </table>	 Media	This icon takes you to the context selection for maintaining multimedia documents ^[77] .	 Tasks	Tasks ^[62] created manually or by a workflow can be encountered in this context selection.	 Queries	Predefined queries ^[28] allow targeted and rapid access to a particular set of data.	 Search	This icon is used to call up the functions of a full text search ^[31] .
 Media	This icon takes you to the context selection for maintaining multimedia documents ^[77] .								
 Tasks	Tasks ^[62] created manually or by a workflow can be encountered in this context selection.								
 Queries	Predefined queries ^[28] allow targeted and rapid access to a particular set of data.								
 Search	This icon is used to call up the functions of a full text search ^[31] .								
3	<p>In the function bar you will find the Actions menu, the Favorites menu, the breadcrumb trail, and the toolbar. The example shows all products from the master catalog.</p> <p>The Actions menu enables you to execute specific actions. It provides direct access to actions for editing and for navigation, selection, and individual screen configuration. The range of actions available varies depending on the context selected in the navigation area.</p> <p>For more information about actions see: Actions menu^[13]</p> <p>The Favorites menu allows you to quickly access frequently used actions. For more information about configuring the settings, see Favorites menu^[18].</p> <p>The breadcrumb trail shows you the last path selected in the data hierarchy. Click ... to view the hidden path, if the breadcrumb expands.</p> <p>You can use the toolbar to control how the table is displayed, activate the spellchecker, and view the quality rules. For more information about the toolbar, refer to Toolbar^[17]</p>								
4	<p>The table area displays the data in the form of tables. You can view the data here but you cannot edit it. The content of the tables varies depending on the context selected in the navigation area.</p> <p>You can use the toolbar^[17] to filter the table content^[27], add or delete columns, and select predefined views.</p> <p>You can click on a column header to sort the column. Sorting in ascending order is preconfigured by default. Clicking on the header again reverses the sort order. The arrows displayed (▲/▼) indicate the sort order.</p> <p>You can change the order of the columns using drag and drop on the column headers.</p> <p>The area highlighted in color in front of the first column header indicates which data is displayed in the table. The following assignments are defined: Products (●), Variants (●), Items (●) or Structure groups (●). The same color scheme is also used on the tabs in the detail view.</p>								
5	<p>The detail view shows detailed information for the data record selected in the table. It is used to maintain the data. The information is grouped thematically using tabs. You can use the arrows to scroll if not all tabs are visible on the screen. Detailed data maintenance is explained in the next section^[20].</p> <p>The header of the detail view shows the last selected path in the data hierarchy.</p>								

You can essentially increase or decrease the width of each area displayed. To do this, position your mouse pointer on the relevant border between two areas. When the mouse pointer changes (↔ or ⇆), you can move the border in the required direction while holding down the left mouse button. When you release the mouse button, the border slots into place in its new location.

2.1.1 Detail view

The detail view displays detailed information of the record that you select in the list view. The detail view groups the information and displays the information in relevant tabs.

You can customize the detail view tabs as per your choice.

You can navigate to any tab using filtering options, reorder the sequence in which the tabs appear, display only the required tabs, and navigate to fields associated with data quality rules. You can display the detail view in full screen for better visibility.



Caution: The local storage of your browser stores the customizations that you make on the detail view. If you clear the local storage, all the customizations that you made will be lost.

2.1.1.1 Filtering and navigating across tabs

Some records might include several tabs in the detail view. To easily navigate across the available tabs, use the **Navigate to any tab** icon that lists the available tabs in alphabetical order. Select the required tab from the list, or use the search box to find the required tab.

1. In the Detail view, click the **Navigate to any tab**  icon.

A search box and all the available tabs for the selected record appear.

2. Perform one of the following tasks:

- Select the required tab from the list.
- Use the search box to find the tab you require.

The detail view for the tab that you select appears.

2.1.1.2 Selecting tabs for the detail view

When the detail view displays many tabs, you might want to view only those tabs that you require. You can configure the detail view to display only the required tabs.

1. In the Detail view, click the **Navigate to any tab**  icon.

2. Click **Configure tabs**.

The **Configure tabs** dialog box appears.

3. Select the tabs to display, and click **OK**.

2.1.1.3 Navigating to fields associated with data quality rules

Entities can have multiple data quality rules configured. You can directly navigate to the tab or the Flex UI associated with data quality rules.

For example, if the quality status for a specific record fails, you can use the **Navigate to the tab** or **Navigate to Flex UI** icon to open the associated tab and make the changes.

1. In the Detail view, click the **Quality status** tab.

The list of data quality rules configured for the selected record appear.

2. To navigate to the tab that is associated with the configured data quality rule, click the **Navigate to the tab** icon.

The corresponding tab opens.

3. To navigate to the Flex UI that is associated with the configured data quality rule, click the **Navigate to Flex UI** icon.

The corresponding Flex UI opens.

2.1.1.4 Re-ordering and viewing tabs in full screen

The detail view displays all the associated tabs in a specific sequence. For ease of use, you can reorder the sequence in which the tabs appear.

- In the **Detail** view, drag the tab to the required position.

The tab moves to the new position.

By default, the detail view appears in the lower pane of the screen. For better visibility, you can display the detail view in full screen.

- In the **Detail** view, click the **Enter Focus Mode**  icon.

The detail view appears in full screen.

2.1.2 Actions menu

Use the Actions menu to perform tasks that are relevant to the context you select.

The following table describes the menu options available on the Actions menu:

Context	Menu option	Action
Catalog	Create product	Creates a product.
Catalog	Delete product	Deletes the selected product.
Catalog	Clone product	Clones the selected product.
Catalog	Classify product	Classifies the product into structure groups.
Catalog	Create variant	Creates a variant.
Catalog	Delete variant	Deletes the selected variant.

Catalog	Clone variant	Clones the selected variant.
Catalog	Classify variants	Classifies the variants into structure groups.
Catalog	Create item	Creates an item.
Catalog	Delete item	Deletes the selected item.
Catalog	Clone items	Clones the selected item.
Catalog	Classify item	Classifies the item into structure groups.
Catalog	Create assortment	Creates assortments.
Catalog	Add to existing assortment	Adds objects to existing assortments.
Catalog	Exclude from assortment	Excludes objects from an assortment.
Assortments	Delete assortment	Deletes an assortment.
Assortments	Show assortment content	Shows the objects that the assortment contains.
Assortments	Refresh assortment	Refreshes an assortment.
Catalog	Create tasks	Creates a task.
Catalog	Add to existing task	Adds the current data record to an existing task.
Catalog	Import	Imports data.
Catalog	Export	Exports data directly to a preconfigured template format, a CSV file, or the Supplier Portal.
Catalog	Compare	Compares an object with other objects and with its own versions.
Catalog	Execute data quality rules	Checks the current data record based on the selected data quality rule.
Catalog	Share	Shares the selected objects.
Catalog	To higher-level object	Navigates to the higher-level selection.
Catalog	Show variants	Shows all variants of the selected product.
Catalog	Show items	Shows all items for the selected variant.
Catalog	Search and replace	Searches for an entry and replaces the matching entry with another specified entry.
Catalog	Merge	Merges selected items from the supplier catalog to master catalog.
Task	Assign task	Assigns tasks or workflow tasks to other users or user groups.

Task	Accept	Accepts the current task or workflow task.
Task	Delete a task	Deletes the current task.
Task/Catalog	Open Flex UI	Links tasks using a Flex UI template.
Task	Show task content	Shows the content of the current task.
Task	Mark as completed	Marks a task as completed.
Task	Accept and finish	Accepts and finishes a workflow task.
Task	Cancel work	Cancels a workflow task.
Task	Finish work	Finishes a workflow task.
Task	Approve	Approves a workflow task.
Task	Reject	Rejects a workflow task.
Task	Terminate workflow	Terminates a workflow task.
Task	Comment and ...	Lets you add a comment and assign, accept, accept and finish, cancel, finish, approve, reject, or terminate a workflow task.
Lookups	Create lookup value	Creates a lookup value.
Lookups	Delete lookup value	Deletes a lookup value.
Lookups	Reset sort lookup	Resets the sort order of lookup values.
Characteristics	Create root characteristic	Creates a root characteristic.
Characteristics	Create child characteristic	Creates a child characteristic.
Characteristics	Delete characteristic	Deletes a characteristic.
Characteristics	Activate characteristic	Activates a characteristic.
Characteristics	Deactivate characteristic	Deactivates a characteristic.
All	Configuring menu settings	Shows the favorite action menus and the other action menus that are available and hidden for you.

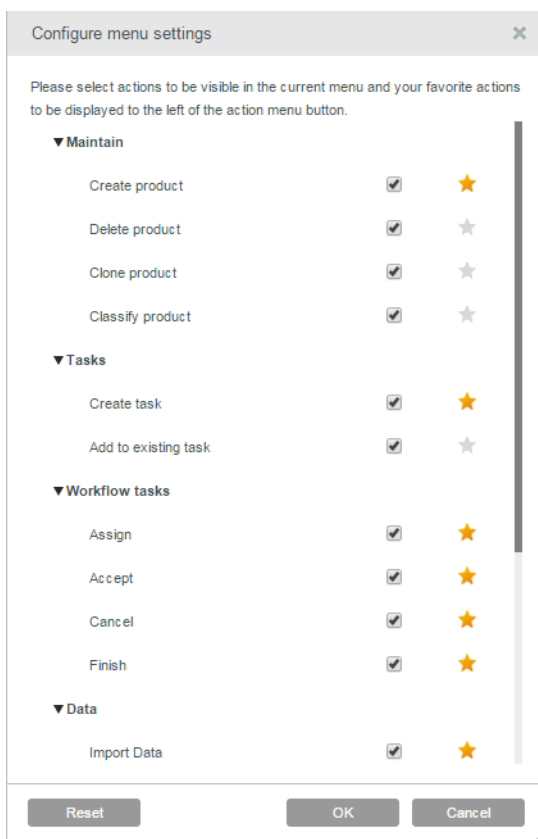


Note: The menu options available on the Actions menu vary based on the context and object that you select.

2.1.3 Configuring menu settings

The Configure menu settings option in the **Actions** menu allows you to specify which menu options will be available and which will be directly selectable as favorites in the function bar:

1. Click on **Actions**
2. Click on **Configure menu settings** in the Actions menu.
 - ⇒ The configuration menu opens.
3. Check the menu options to specify which of them will be visible to you in the Actions menu.
4. Selecting an entry with an asterisk specifies that this option will be visible directly in the Favorites menu.








Category	Action	Visible	Favorites
▼ Maintain	Create product	<input checked="" type="checkbox"/>	★
	Delete product	<input checked="" type="checkbox"/>	★
	Clone product	<input checked="" type="checkbox"/>	★
	Classify product	<input checked="" type="checkbox"/>	★
▼ Tasks	Create task	<input checked="" type="checkbox"/>	★
	Add to existing task	<input checked="" type="checkbox"/>	★
▼ Workflow tasks	Assign	<input checked="" type="checkbox"/>	★
	Accept	<input checked="" type="checkbox"/>	★
	Cancel	<input checked="" type="checkbox"/>	★
	Finish	<input checked="" type="checkbox"/>	★
▼ Data	Import Data	<input checked="" type="checkbox"/>	★

Configuring menu settings


- ⇒ The selected menu settings are now visible in the menu bar.

2.1.4 Toolbar

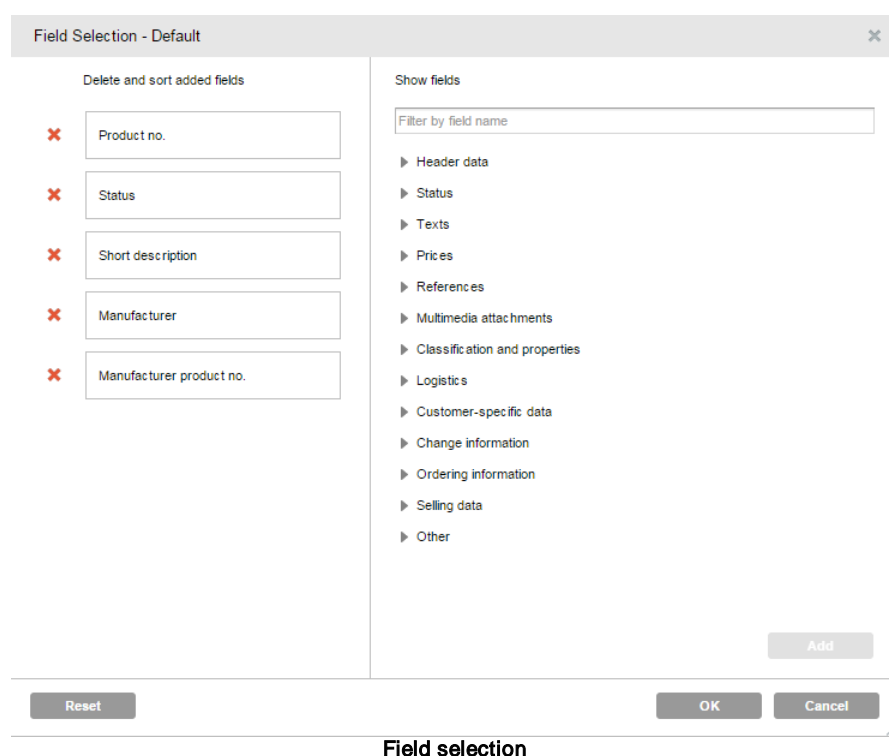
You can use the **toolbar** to execute the following actions:

- [Filter table data](#) . Use the icon to do this.
- Refresh table data. Use the icon .
- Change the view of the table. Use the icon .
- Activate or deactivate the spellchecker. Use the icon .
- Display the quality dashboard. Use the icon .

2.1.4.1 Field selection dialog box

You can use the  icon in the toolbar to call up the dialog box for selecting table fields.

⇒ A separate window opens, in which you can add, delete, or sort the available fields.



Adding fields

1. The fields are divided into different categories, which you can expand and collapse. Select the relevant field and highlight it.
2. Click on **Add**. (The button is inactive if no entry is selected.)
 - ⇒ The entry now appears in the list of available fields. This list shows, from top to bottom, the columns in the table, in the order they are displayed from left to right.

Duplicating qualified fields

1. Select the relevant entry in the list of available fields on the left. You now have the option of changing the field qualification on the right.
2. Click on **Duplicate**. (The button is inactive if no entry is selected, or the field cannot be duplicated.)
 - ⇒ The entry now appears in the list on the left.

Deleting fields

Click on **X**.

Resetting fields

You can restore the default configuration at any time by clicking on **Reset**.

3 Data maintenance

Data maintenance involves creating, editing, deleting, and importing data.

Typical data can include:

- Identifying information for the item, e.g. item number
- Attributes
- Ordering information
- Prices
- Image information
- Product features and product descriptions
- References to other data

Data maintenance is of critical importance in Product 360 Web. There are several ways to accomplish most of the tasks that have to be completed. Which one you choose depends on the processes in your company. Below, you will find an overview of the available functions.


3.1 Creating data



Note: The creation of data is regulated by the user profile that your administrator has assigned to you. Your user profile takes account of all field rights and object rights associated with your role within your user group.

Essentially, the currently selected data record serves as the basis for creating a new record in the table.

The creation of new data may mean a number of different things, i.e.:

1. You use  to create a new data record in the table.
2. You fill a blank data field with content in the detail view.
 - ⇒ You complete the information that is not covered in the table view.

You will find the functions you need to create this new data in the relevant editing menu.

3.1.1 Cloning data

If you have to create several similar items of data, you can clone data. Cloning data involves copying it and adding it to the table as a new data record.



Note: You require the corresponding action right to clone data.

- 1. Select the data record you want to clone in the table.
- 2. In the Actions menu, select the "Clone" action for the selected data record.
 - ⇒ A new data record with the copied data is added to the table.
- 3. Edit the new data record.

3.2 Editing data



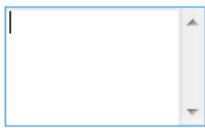
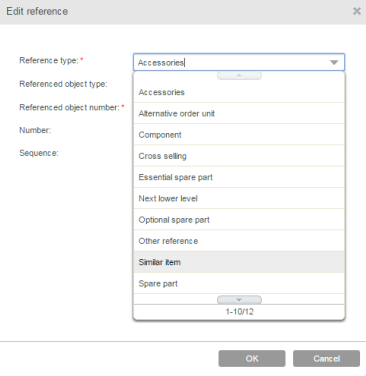
Data selection

You must select a data record before you can access it and edit its field contents. By default, the context selection provides the top level hierarchy. **Clicking once** on a data record in the table view opens the corresponding detail view. **Double-clicking** opens the next level down in the hierarchy.

The Actions or Favorites menu are alternatives to navigation.

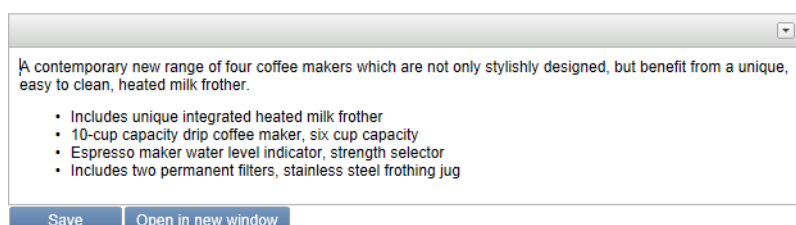
Field types in the detail view

If fields can be edited or if the administrator has given your user group permission to edit specific fields, an icon (✎) is displayed after the field.



		
Selection field with preset values	Single-line input field	Multi-line input field
<p>Selection fields always have an arrow, which you can use to display the list of preset values for the field. Alternatively, you can make a direct entry to filter by preset values.</p>  <p>Drop-down list</p>	<p>Changes are always saved automatically after you exit the field. You can achieve the same effect by pressing the Enter key.</p>	

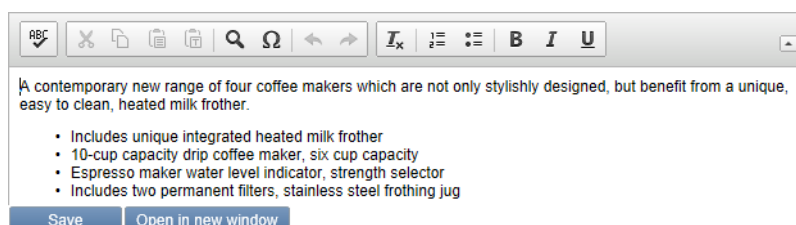
<p>If the list contains more than 10 entries, you can use the arrows provided to scroll up and down through the list.</p>	
---	--

If a longer entry is required for a field, as in the case of the item long description, a text editor is provided.



Text editor without editing menu

The editing menu is hidden by default, which provides sufficient support for simple text entry. You can use / to show and hide the menu.



Text editor with editing menu

If your entry is more complex, you can use the editor in a separate window by selecting **Open in new window**.

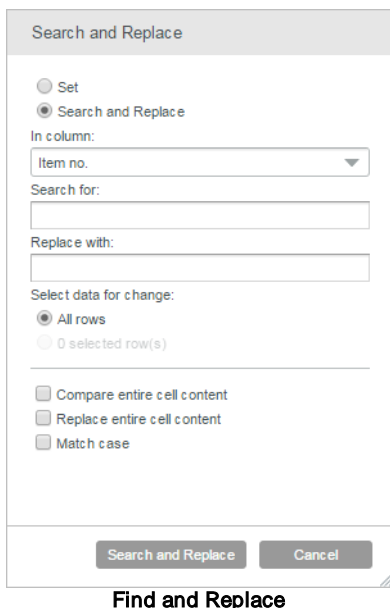
3.2.1 Find and Replace

Find and Replace is an efficient way of editing data, particularly if you want to change a large number of data records at the same time. You can edit all data records or selected data in a single operation.

The "Find and Replace" dialog box is opened by selecting **Additional actions > Find/Replace in the Actions menu**.

Setting new values regardless of the previous values

In addition to the **"Find and Replace"** option, you can also select **"Set"**. Here, you can overwrite all set columns with a new value. If you select "Find and Replace", you can also specify whether you want to compare the entire cell content, take capitalization into account, or replace the entire cell content.



The dialog box is titled "Search and Replace". It contains the following elements:

- Two radio buttons: "Set" (unselected) and "Search and Replace" (selected).
- A label "In column:" followed by a dropdown menu showing "Item no." with a downward arrow.
- A text input field labeled "Search for:".
- A text input field labeled "Replace with:".
- A label "Select data for change:" followed by two radio buttons: "All rows" (selected) and "0 selected row(s)" (unselected).
- Three checkboxes: "Compare entire cell content" (unchecked), "Replace entire cell content" (unchecked), and "Match case" (unchecked).
- At the bottom, two buttons: "Search and Replace" and "Cancel".

Below the dialog box, the text "Find and Replace" is displayed.

3.2.2 Referencing data

Refer data to inform customers about the available related products and enhance cross-selling.

Creating reference

1. In the context selection menu bar, click **Catalogs**, and navigate to the required catalog.

A list of data available within the catalog appears.

2. In the **List** view, click the data to refer.
3. In the **Detail** view, click the **References** tab.

4. Click the **Create reference**  icon.

The **Create reference** dialog box appears. The **Reference type** and **Reference object type** fields show values based on the selected object type.

5. Perform one of the following tasks:

- To select the data to be referenced, perform the following tasks.

- i. Click the **here** link.

The context selection menu bar appears.

- ii. Navigate and select the data to be referenced.

- iii. Click **OK and close browser window**.

The **Create reference** dialog box is populated with the referenced object number.




- If you know the object number of the data to be referenced, specify the referenced object number.

6. Specify the number of objects to be referenced.


7. Specify the sequence of the referenced object.
8. To create another reference, click the **Create another reference** check box.
9. Click **OK**.

Managing references

After you create a reference, you can edit, delete, or view the referenced objects.


1. In the **Detail** view, on the **References** tab, perform the following tasks:
 - To edit the reference, perform the following tasks:
 - a. Select the referenced object to edit, and click the **Edit reference**  icon.
The **Edit reference** dialog box appears.
 - b. Edit the referenced object as required and click **OK**.
 - To delete the reference, perform the following tasks:
 - a. Select the required reference, and click the **Delete reference**  icon.
 - b. Click **Yes**.
 - To view the referenced object in the **List** view, select the required reference and click the **Show reference**  icon.

The selected referenced object opens in its **List** view.

-  **Note:** If you select multiple referenced objects from different catalogs or of different object types, you cannot view them in the list view.

The following image shows a referenced object:

Item "HPM-16431-10 - Lorem ipsum dolor sit amet."


Thumbnail	Reference type	Referenced object type	Referenced object number	Number	Sequence	GTIN	Short description
	Accessories	Item	HPM-16431-1	1			Lorem ipsum dolor sit amet.

Product Reference

3.2.2.1 Referenced multimedia documents



On the **Media** tab, in the detail view, you can see whether the selected data record has any referenced multimedia documents.

Item "0000/3709 - Comfort remote control, black"









Item no.:
0000/3709
Status:
Rework Needed

Food and beverage Diet / Allergen information Ingredient / Preparation information



Standard image
D1200010728970

Name:	No content
Type:	Standard image
Description (English):	No content
Alternative text (English):	No content
Multimedia documents:	
Jpg 70x70	  
originalimage	  

Multimedia documents




The following details are provided:


- Each multimedia document is available in one language. By default, this is the operating system language, but any other licensed language can be selected.
- Standard thumbnails are displayed for all data types.
- Any derivatives that exist are also shown.
- The information that has been stored and the current resolutions are provided for each thumbnail.
- You can download or delete existing multimedia documents if your administrator has assigned you the permissions required to do so.

3.2.2.2 Kits and components

A kit is a group of items that are displayed collectively as a unit.

Creating kits and components manually

1. In the navigation area, select the Catalog context.
2. [Select](#)  the relevant item in the table.
3. Click the **"Kits and components"** tab in the detail view.
4. Use  to add a component.
5. Select the type.
6. Enter the item number.
7. Click **OK** to save the new data record.
8. To view the referenced component in the **List** view, select the required component, and click the **Show component**  icon.

 **Note:** Use  to edit the selected component and  to remove the selected component.

3.2.3 Spellchecking

Managing spellchecking


Spellchecking is only carried out on language-specific fields. This spellchecking function is only available to you if it has been configured by your administrator.

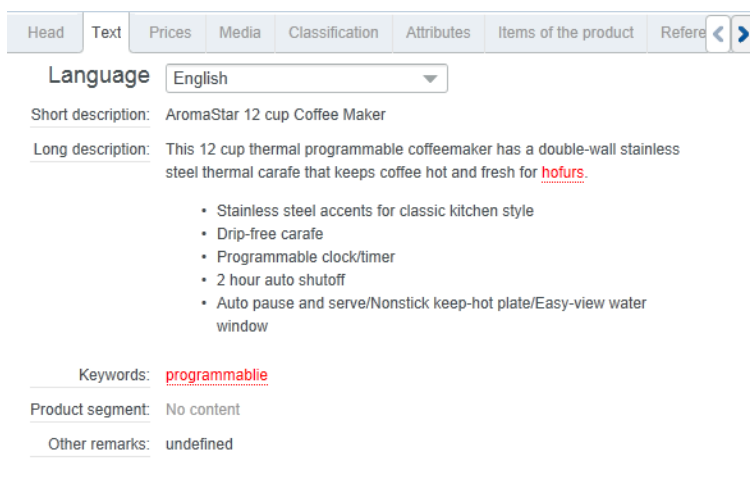
Using the spellchecker

Spellchecking can be used in two different modes.

- The screen content that is currently displayed is checked in full. Errors or words not recognized by the dictionary are highlighted in color.
- Multi-line entries can be checked by clicking on an icon in the text editor. Errors or words not recognized by the dictionary are also highlighted in color in this case. However, read access only is available for the entire content of the field while the spellcheck is active. The field content can only be edited again after you click on the icon a second time to deactivate the spellcheck.

General spellcheck

Selecting the  icon in the toolbar initiates a checking mechanism for the screen content currently displayed. An example of how the spell check appears is shown below:



General spellcheck activated

When you move the mouse pointer over a marked character string, the entire field is highlighted in color, and you can make the necessary corrections in editing mode (✎).


Sharpson 12 cup, programmable, Black ✎

Clicking on a character string that is highlighted in red opens the corresponding pop-up menu. Using the menu you can add terms to the dictionary or select an alternative spelling from the suggestions available.

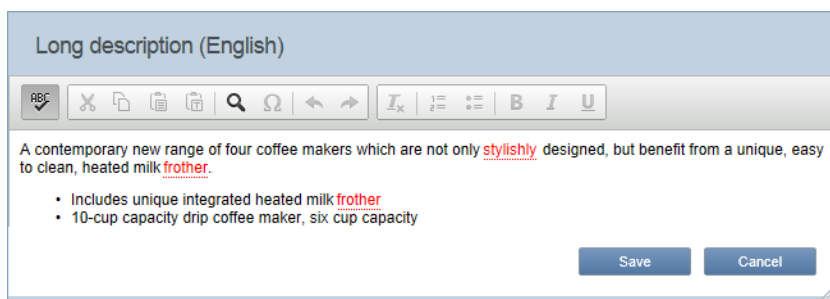
(No suggestions)
Add to dictionary

Pop-up menu
for the
spellcheck

Spellchecking in the text editor


To edit multi-line entries, you can click on ✎ to call up the text editor. This makes [editing](#)^[20] much more convenient. To avoid disrupting the processing flow, the spellcheck is implemented via a switch function. This means that you can click on  to turn the spell checker on or off. **It is important to note that only read access is permitted when the spell checker is activated and that no other character string editing is possible.** Write access is only possible once the spellcheck has been explicitly exited.

When the spellcheck is activated, the editor appears as shown in the following example:



Activated spellchecker in the text editor

All character strings displayed in red are not recognized by the dictionary or are misspelled. By clicking on a highlighted character string, you call up the pop-up menu. In the pop-up menu, you can add terms to the dictionary or select an alternative spelling from the suggestions available, provided that you have the relevant permissions.



You do not have to work your way through all highlighted character strings. You can return to editing mode at any time by clicking on .

3.3 Searching for data

Various options are available in Product 360 Web for finding items, products, variants, or structure groups:

- You can use the filter in the toolbar to [filter data in a table](#)^[27]
- You can use queries in the navigation bar to access pre-defined queries and saved search queries to perform a simple search.
- Selecting Search in the navigation bar gives you access to a [full text search](#)^[37].

3.3.1 Filtering tables

The filter line is located below the title of the window that contains the table display. You can use icons to hide () or show this line (). The filter line is used for field-specific filtering. ***The table content varies depending on which context selection is configured, but is easily identified by the window title. The filter operation, on the other hand, is always the same.*** The general process is explained here using the example of filtering the master catalog.

To filter by product or item, follow the steps below:

1. Select the field you want to use as a filter criterion in the selection field next to the filter line.

Product no.
Status
Short description (English)
Manufacturer
Manufacturer product no.
All Columns

Example field selection for filtering

2. Enter the required value in the filter line.

Note that the filter word must be at least three character long, and that placeholders are not accepted. This means that the sequence of characters in the character string must be correct.

3. To start the filter operation, click on 

⇒ The table lists all entries that contain the specified sequence of characters.

3.3.2 Queries

Use queries to perform basic search operations and find records, such as items, variants, and products.

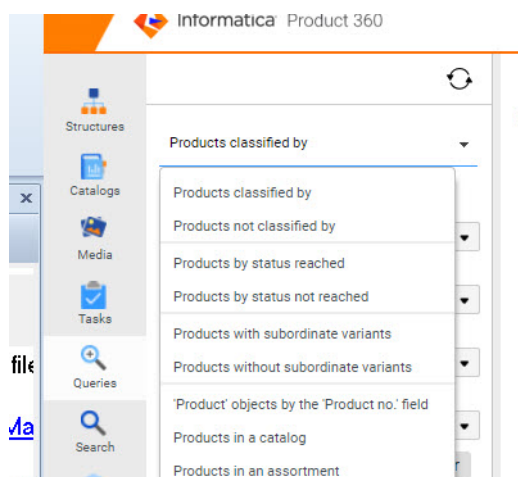
You can use the following types of queries:

- **Predefined queries.** Out-of-the-box queries that are shipped with the product.
- **Saved search queries.** Queries that are created by the user.

3.3.2.1 Predefined queries

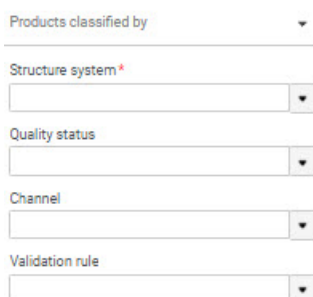
Predefined queries include frequently used filters to find the required items, products, and variants.

The following image shows few samples of predefined queries:



When you use predefined queries, the search fields that appear depend on the predefined query that you select.

The following image shows the search fields that appear when you select the **Product classified by** predefined query:

A screenshot of the search interface for the 'Product classified by' query. It features a dropdown menu at the top labeled 'Products classified by'. Below it are four input fields, each with a dropdown arrow: 'Structure system *', 'Quality status', 'Channel', and 'Validation rule'.

3.3.2.2 Using predefined queries

You can use a predefined query to search for entities.

1. In the context selection menu bar, click **Queries**.

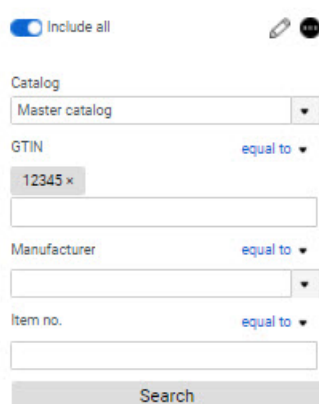
The queries for each entity appear as a list in the navigation area.

2. Expand the entity and select the required predefined query.
3. Specify the relevant details in the search fields, and click **Search**.

3.3.2.3 Saved search queries

Use Product 360 Desktop to create saved search queries. Use Product 360 Web to edit, save, and delete saved search queries.

The following image is an example of the fields of a saved search query.



Include all

Catalog
Master catalog

GTIN equal to
12345 x

Manufacturer equal to

Item no. equal to

Search

3.3.2.4 Editing saved search queries

You can add or delete search fields from a saved search query.

1. In the context selection menu bar, click **Queries**.

The queries for each entity appear as a list in the navigation area.


2. Expand the entity, and select the required saved search query.

The saved search query opens.

3. Click the **Edit**  icon

The **Field Selection** dialog box appears.



4. To add or delete fields, perform the following tasks:

- i. To delete fields, in the **Delete and sort added fields** section, click the delete icon  next to the field to delete.
- ii. To add fields, in the **Show fields** section, expand and select the required fields.

5. Click **OK**.

3.3.2.5 Saving saved search queries

After you edit the queries, you can save the changes to the existing query or save the changes as a new query for future use.


- To save the changes to the existing query, open the saved search query, click the **Actions**  icon, and then click **Save**.
- To save the changes as another query, perform the following tasks:
 - i. Open the saved search query to save, click the **Actions**  icon, and then click **Save as**.

The **Save Search Query** dialog box appears.

- ii. Specify a name, description, and category, and click **Save**.

3.3.2.6 Deleting saved search queries

You can delete a user-defined query if you do not require it.

1. Open the user-defined query to delete, and click the **Actions**  icon, and then click **Delete**.

3.3.2.7 Using saved search queries

After you edit the saved search query, you can find records based on the configured fields.


1. In the context selection menu bar, click **Queries**.

The queries for each entity appear as a list in the navigation area.

2. Expand the entity and select the required saved search query.

The search fields appear.

3. To filter the search fields, perform one of the following steps:

- i. To search using all the search fields, enable the **Include all**  **Include all** option.
- ii. To change the search fields, disable the **Include all** option.

All the search fields are disabled.



- iii. Enable the search fields that you want to use.

4. Specify the relevant details in the search fields, and click **Search**.

3.3.3 Full text search

The full text search accesses language-specific indices that include the product stock with different graduations or predefined sections. Use the **Search** box in the search perspective to specify the search string to find records. You can use wildcard characters and query strings with the search string.

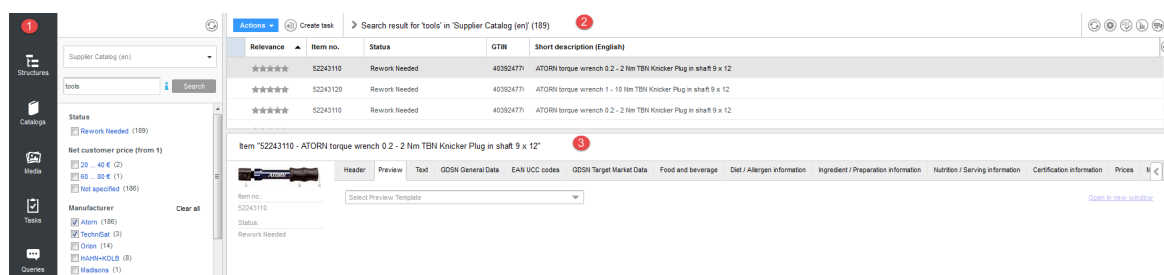
You can use facets to filter and refine the search results.



Note: The administrator in Product 360 Desktop configures and schedules the available indices.
















3.3.3.1 Search perspective




Use the Search perspective to specify the required search parameters. The search results are displayed in a table in the list view. The details of a selected search result are displayed in the detail view.



Search perspective

The following table describes the different sections of the user interface:

Area	Description										
1	<p>Define the search parameters in this section.</p> <table border="1"> <tr> <td></td><td>Synchronizes the contents of Product 360 Web with the current contents of Product 360 Desktop.</td></tr> <tr> <td></td><td>Opens a list of all the created indices. Select the required index from the list.</td></tr> <tr> <td></td><td>Enter a complete or partial search string in the Search box. A search string can include keywords, numbers, and wildcard characters.</td></tr> <tr> <td></td><td>Displays the last modified date of the created index in a tool tip window.</td></tr> <tr> <td></td><td>Initiates the search operation.</td></tr> </table>		Synchronizes the contents of Product 360 Web with the current contents of Product 360 Desktop.		Opens a list of all the created indices. Select the required index from the list.		Enter a complete or partial search string in the Search box. A search string can include keywords, numbers, and wildcard characters.		Displays the last modified date of the created index in a tool tip window.		Initiates the search operation.
	Synchronizes the contents of Product 360 Web with the current contents of Product 360 Desktop.										
	Opens a list of all the created indices. Select the required index from the list.										
	Enter a complete or partial search string in the Search box. A search string can include keywords, numbers, and wildcard characters.										
	Displays the last modified date of the created index in a tool tip window.										
	Initiates the search operation.										
2	<p>Displays the relevant search results in a table. The order is based on the percentage match with the search term. The search results at the top have the highest level of congruence.</p> <p>You can use the icons displayed in the upper left corner of the screen to perform the following activities:</p>										

Area	Description
	 Creates a task from the search result.
	 Performs pre-defined actions on the record. The menu options that you see on the Actions menu depend on the indices and the search result you select.
	Provides a detailed view of the selected result. The data is grouped thematically on the respective tabs and relate to the underlying object type, such as item, variant, and product. You can also edit the data displayed.

3.3.3.2 Search string formats

You can enter a complete or partial search string in the **Search** box. A search string can include keywords, numbers, wildcard characters, and query strings. To refine your search, you can use query strings with the search string.

The following table lists the wildcard characters that you can use with the search string:

Wildcard Character	Description
Asterisk (*)	Returns results that match the pattern of the search string. For example, if you specify Apple iP*, you get Apple iPhone and Apple iPad as the search results.
Question mark (?)	Returns results that contain any character in the position of the question mark. For example, if you specify Apple iPhone?, you get Apple iPhoneX as the search result.

The following table lists the supported query strings:

Query String	Example	Query Behavior
AND	Lenovo AND Laptop	Searches for records that contain Lenovo and laptop.
+	Lenovo+Laptop	Searches for records that contain Lenovo and laptop.
OR	Lenovo OR Laptop	Searches for records that contain Lenovo or laptop.
space	Lenovo Laptop	Searches for records that contain Lenovo or laptop.
NOT	Laptop NOT Lenovo	Searches for records that contain only laptop but not Lenovo.
-	Laptop -Lenovo	Searches for records that contain only laptop but not Lenovo.

3.3.3.3 Finding records

Use the Search box to find records.

1. In the context selection menu bar, click **Search**.

The index list appears in the navigation pane.

2. Select the required index.
3. In the **Search** box, enter the search string.
4. Click **Search**.

The facets appear in the navigation pane, and the search results appear in the **List** view.

3.3.3.4 Filtering records

After you perform a search, you can use the facets to filter and refine the search results.

Facets group the search results based on the fields and their values. Each facet includes facet values that are relevant to the search results. Each facet displays a maximum of five facet values that have the highest number of occurrences in the search results.

Use the **More selection** link to view the other available values. The facet values that you select are added to the facet. The added values replace the older values, and the facet continues to display five facet values.

To filter records using facets, perform the following tasks:

1. In the navigation pane, under a facet, select a facet value.

The **List** view displays the filtered search results.

2. To add the additional facet values that are not listed, perform the following tasks:

- i. Click the **More selection** link.

The **Keywords** dialog box appears.

- ii. Select the required facet values and click **OK**.

The selected values appear in the navigation pane and the filtered search results appear in the **List** view.

3.4 Data import



Note: Importing data is only possible if your administrator has created corresponding mappings and you have permission to import data.

Importing data with existing mappings

You can use the **Actions** menu to import data with existing mappings:

1. Click on **Actions**
2. In the Actions menu, click on **Import**.

⇒ The Import data window opens, in which you can select the available mappings.

Import files

Please choose the file(s) to import. Ensure that the selected files match the file type and format specified in the mapping. To upload file(s) please click on the "Choose file" button. Then click on the "Start upload" button.

Required files / formats	Files to upload to your catalog
File 1 Expected file format(s):*,*	Choose file

Please select an appropriate mapping for the data format. The mapping defines, which field from the input fields are going to be imported

Filter

Name	Description	Match	Format
▶ XML			
▶ CSV			
▶ Hot Folder			
▶ Product with Items -			
Multiple CSV, rich			
information			
-			


Catalog *


Start Import Cancel

Import data

- Click on **Select file** and then select the file to be uploaded.
- Next, select an import mapping corresponding to the file from the list below.
- Finally, select the catalog in which the data import is to be carried out.
- Then click on **Start import**.


3.5 Exporting data

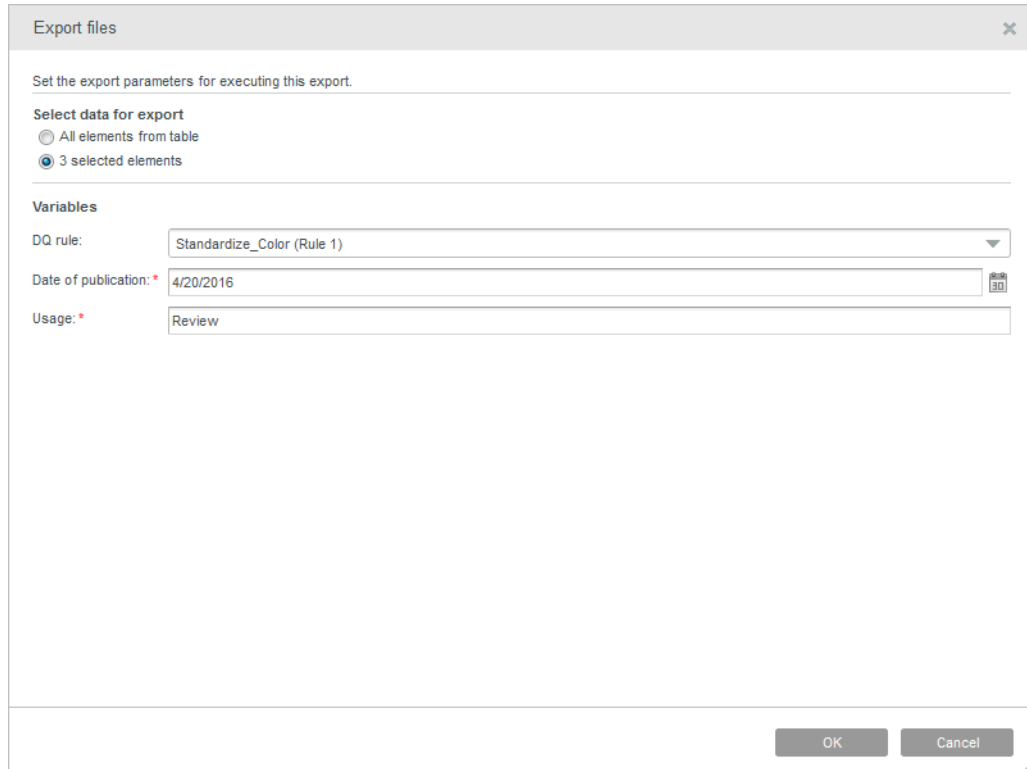
 **Note:** Exporting of data is regulated by the user profile that your administrator has assigned to you. Your user profile takes account of all field rights and object rights associated with your role within your user group.

 **Note:** To schedule exports or execute them repeatedly, use Informatica Product 360 Desktop.


Sometimes there are situations in which you might want to transfer data immediately for more detailed review or revision / correction. This is done using the immediate export function, which accesses [export format templates](#) that are available for all table objects. These can be created for specific objects in Product 360 Desktop and must be assigned the purpose "Available for immediate export".

To perform an immediate export:

1. Select the table entries you want to export.
2. Click on 
 - ⇒ A tooltip shows the assigned export format template.
3. If the export format template meets your requirements, click on the tooltip.
4. The following dialog box appears:



The dialog box is titled "Export files" and contains the following sections:

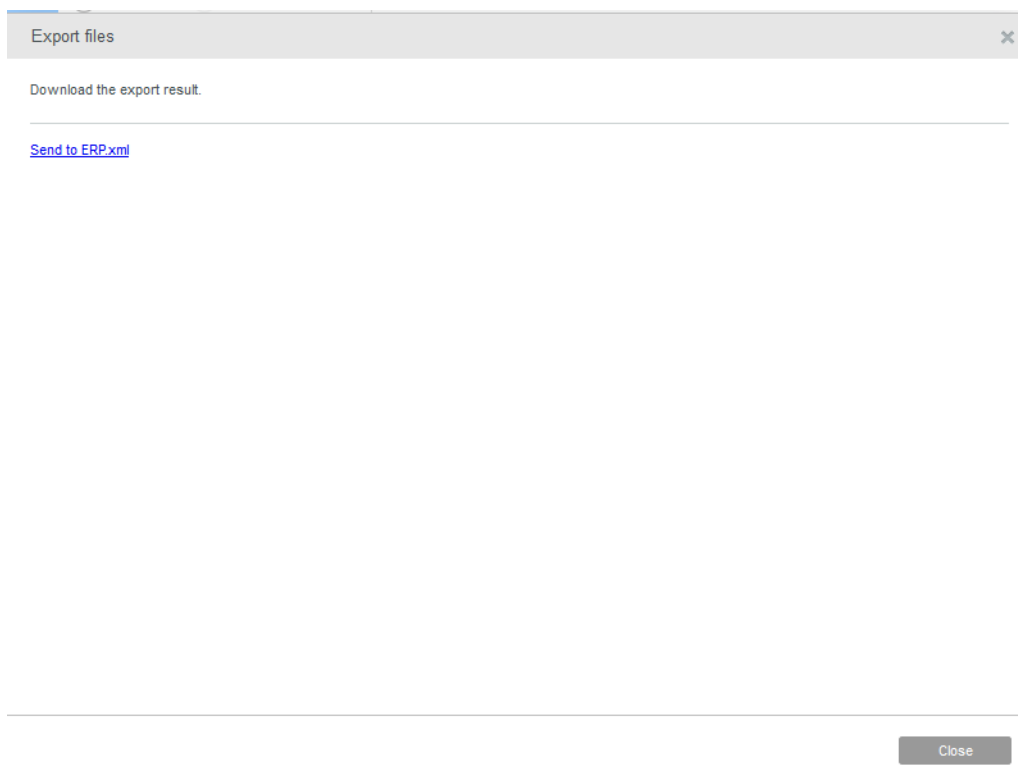
- Set the export parameters for executing this export.**
- Select data for export**
 - ☐ All elements from table
 - ☒ 3 selected elements
- Variables**
 - DQ rule:
 - Date of publication: * 
 - Usage: *

At the bottom right, there are "OK" and "Cancel" buttons.

Immediate export dialog box

- ⇒ Here, you have an opportunity to change the quantity of data records to be exported and to enter the variables.
5. Click on **Start export** to initiate the immediate export.

⇒ A link to the generated export file appears in the dialog box.



Link to export

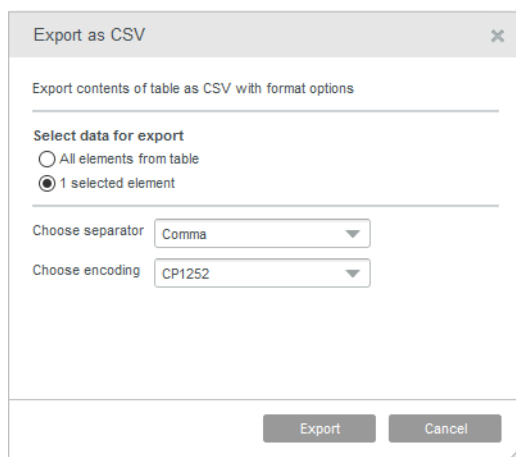
Use this link to open the file manager window and specify the storage location for the file. If any multimedia documents are assigned, they are provided in a separate zip file, which you can use as described above.

Export data from the table space as CSV

Selecting **Actions** in the program menu allows you to export the currently selected content of a table as a simple text file (CSV).

To perform an CSV export:

1. Select the table entries you want to export.
2. Click on **Actions**
3. Click on **Export as CSV** in the Actions menu.
 - ⇒ The Export as CSV menu opens
4. If the export format template meets your requirements, click on **Export**.



CSV export

Specify how the table to be exported should look like:

- Which character set is used - this is particularly relevant for special characters
- Which separator is used.
- Additional options, e.g. saving the table columns as headers.

You can process the CSV files further with other programs. You can also specify that the CSV file is to be opened after saving.

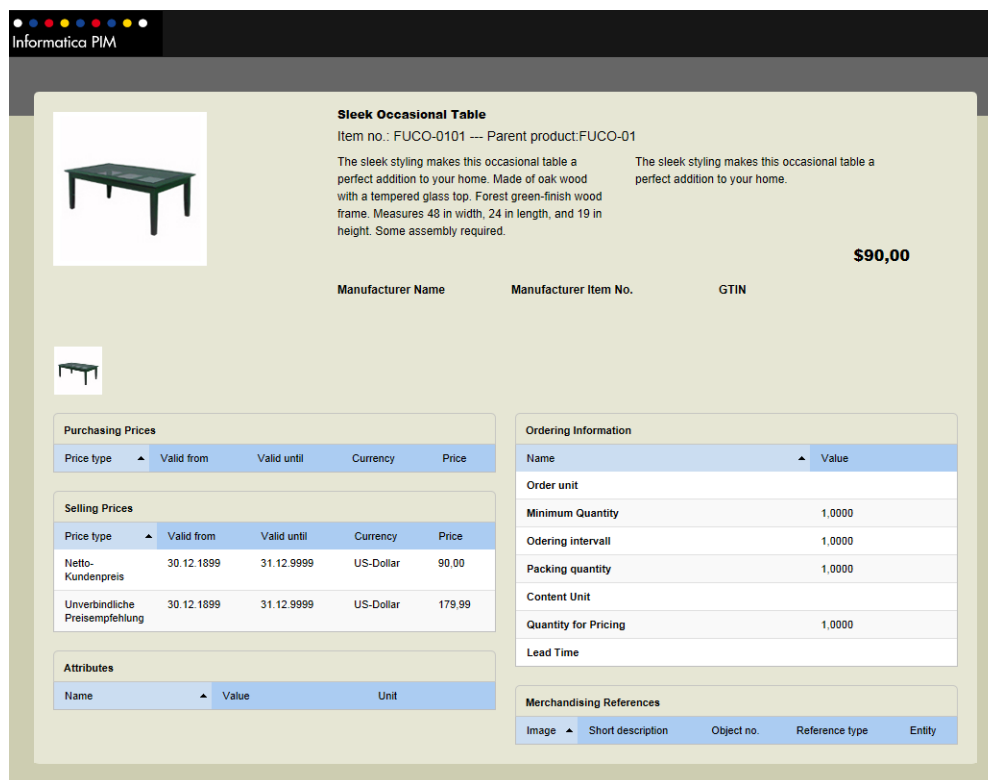
3.6 Preview function

To make it easier for you to assess the completeness or quality of your data, Product 360 Web includes a function that provides a visual representation other than tables or forms. Product 360 Desktop enables you to display **products**, their **variants**, **items**, and **structure groups** in a browser-based preview at a click of the mouse.

The previews are defined as export format templates in Product 360 Desktop and are identified by the purpose **Preview**. Depending on the setting, they can either apply to individual selected objects or to a multiple selection. Based on their data type and the current selection, they are displayed on the **Preview** tab. They can be executed directly, either in the same window or in a separate window.

As a preview always involves using a different amount of RAM, the system puts in place certain limitations. For example, the default **maximum number** of data records is defined as **100**. If more data records are selected, the preview is grayed out and is thus inactive. If it takes too much time to create the preview (currently a maximum of 20 seconds), the action is also canceled. An error message tells you the reason.

Preview examples



Sleek Occasional Table
Item no.: FUCO-0101 --- Parent product:FUCO-01

The sleek styling makes this occasional table a perfect addition to your home. Made of oak wood with a tempered glass top. Forest green-finish wood frame. Measures 48 in width, 24 in length, and 19 in height. Some assembly required.

The sleek styling makes this occasional table a perfect addition to your home.

\$90,00

Manufacturer Name Manufacturer Item No. GTIN

Purchasing Prices

Price type	Valid from	Valid until	Currency	Price
Netto-Kundenpreis	30.12.1899	31.12.9999	US-Dollar	90,00
Unverbindliche Preisempfehlung	30.12.1899	31.12.9999	US-Dollar	179,99

Selling Prices

Price type	Valid from	Valid until	Currency	Price
Netto-Kundenpreis	30.12.1899	31.12.9999	US-Dollar	90,00
Unverbindliche Preisempfehlung	30.12.1899	31.12.9999	US-Dollar	179,99

Attributes

Name	Value	Unit

Ordering Information

Name	Value
Order unit	
Minimum Quantity	1,0000
Ordering interval	1,0000
Packing quantity	1,0000
Content Unit	
Quantity for Pricing	1,0000
Lead Time	

Merchandising References

Image	Short description	Object no.	Reference type	Entity

Preview in list view

3.7 Editing the preview

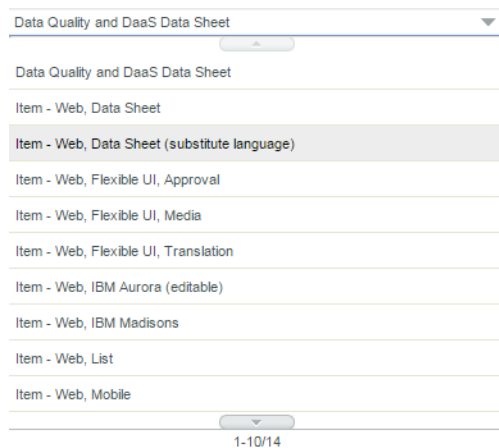
What is considered to be an advantage in PIM systems can become a disadvantage with layout-oriented publications because, often, it is not easy for the user to implement the editorial portion if the corresponding visual context is missing. Nevertheless, a quality assurance process should be possible.

Product 360 Web has now found a way to provide an **editable** preview function, which is similar to the front-end editing approach that was pursued in the area of Content Management systems some time ago. In other words, web pages can be edited directly.

To display an editable preview for particular data:

1. Select the relevant entries in the table.
2. Click on the **Preview** tab in the detail view.

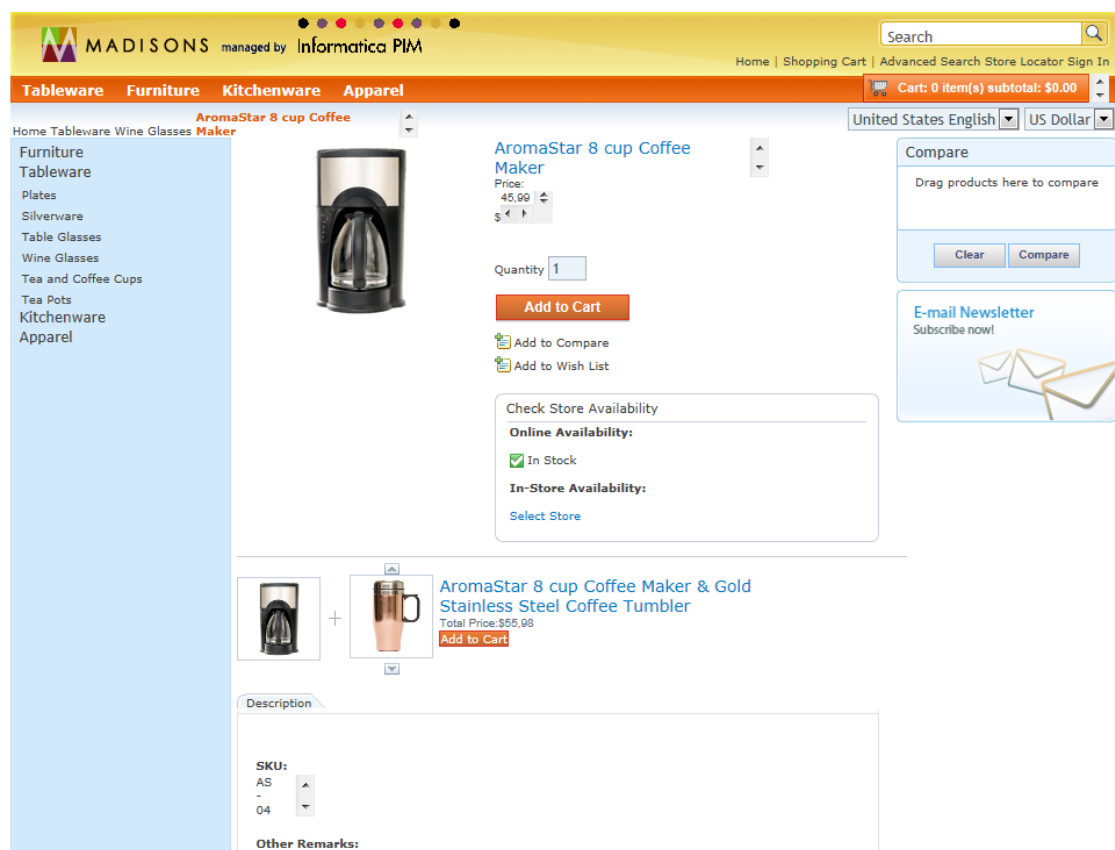
3. Select the relevant entry in the selection dialog box.



Selection field for previews

4. For a better overall impression, you should then select the "Open in new window" option.

⇒ The following preview is displayed:



Editable preview

5. Editable fields have an adjacent scroll bar.

⇒ If you move the mouse pointer over one of these fields, it changes as follows:



Editable field


6. To edit a field, click on the relevant field.



Entry in an editable field

7. Now make the relevant adjustments.

- ⇒ Any changes you make are automatically stored in the data record of the relevant data type when you exit the preview and are therefore available for all future previews.

 **Note:** Similar to "normal" previews, editable previews are also created as export format templates in Product 360 Desktop. They are identified by specific program components, marked accordingly, and made available in Product 360 Web.

3.8 Assortments

Use assortments to group objects, such as items, variants, or products to achieve a specific goal. For example, you can use assortments to group all items that belong to a seasonal update for your online store. All the objects that you add to any assortment appear in the **Assortments** context selection menu.

You can use the following methods to identify objects for an assortment:

- **Explicit.** Use internal identifiers for a static selection of objects and add them to an assortment.
- **Dynamic.** Use a query to identify the objects and add them to an assortment.

The list of objects in the assortment might vary based on the output of the query.

For example, if a query identifies all the available items in a catalog, any new item added to the catalog is automatically a part of the assortment. For more information on queries, see [predefined queries](#)^[28].

3.8.1 Assortment categories

To manage assortments with ease, categorize assortments. The categorized assortments appear under their respective categories. Assortments that do not belong to any category appear under the **Not categorized** node.

3.8.2 Assortment rules

An assortment rule indicates whether an object is added to an assortment or excluded from an assortment.

Based on the type of task that you perform, the system creates the following assortment rules:

- **Including rule.** When you add an object to an assortment, the system creates an including rule for the object.
- **Excluding rule.** When you exclude an object from an assortment, the system creates an excluding rule for the object.

For example, you might want to add an entire catalog to an assortment excluding specific objects. In this case, all the objects that you added to the assortment have including rules and the objects that you excluded from the assortment have excluding rules added to them.

3.8.3 Navigating to objects for assortments

You can select objects for an assortment from catalogs, structure groups, tasks, or queries.

- To access objects from catalogs or structure groups, perform the following tasks:

- i. In the context selection menu bar, click **Catalogs** or **Structures**.
- ii. Select the required catalog or structure group.

A list of objects appears in the **List** view.

- To access objects from tasks, perform the following tasks:

- i. In the context selection menu bar, click **Tasks**.
- ii. In the left navigation pane, click the required task category.

A list of associated tasks appears in the **List** view.

- iii. Double-click the required task.

A list of objects appears in the **List** view.

- To run a query and identify objects, perform the following steps:

- i. In the context selection menu bar, click **Queries**.

The left navigation pane displays a set of predefined conditions.

- ii. Specify the required conditions.

The search fields appear.

- iii. Select the options based on which you want to run the search.

- iv. Click **Search**.

A list of objects appears in the **List** view.

3.8.4 Creating assortments

You can create assortments with selected objects or use query results to identify the objects.

3.8.4.1 Creating an assortment from selected objects

Use catalogs, structures, tasks, or queries to select objects for assortments.

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].

2. In the **List** view, select the objects for which you want to create the assortment.
3. On the menu bar, click **Actions**, and then click **Create assortment**.

The **Create assortment** dialog box appears.

By default, the **Create new assortment from selection** option is selected.

4. Specify a name and description for the assortment.
5. Specify a category under which you want to create the assortment.
6. Click **OK**.

The selected objects are added to the assortment by an including rule attached to the existing assortment.

3.8.4.2 Creating an assortment from query results

Use query results or structures to identify the objects for assortments.

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].
2. On the menu bar, click **Actions**, and then click **Create assortment**.

The **Create assortment** dialog box appears.

By default, the **Create new assortment from query option** is selected.

3. Specify the name and description of the assortment.
4. Specify a category under which you want to create the assortment.
5. Click **OK**.

The selected objects are added to the assortment by an including rule attached to the existing assortment.

3.8.5 Adding objects to existing assortments

You can add objects to an existing assortment.

3.8.5.1 Adding selected objects to an existing assortment

Use catalogs, structures, tasks, or queries to select the objects that you want to add an existing assortment.

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].
2. In the **List** view, select the objects to add.
3. On the **Actions** menu, click **Add to existing assortment**.

The **Add to existing assortment** dialog box appears.

By default, the **Add selection to existing assortment** option is selected.

4. To select the assortment, perform one of the following tasks:

- Type the assortment name, expand the category to which the assortment belongs, and select the assortment.
- Expand the category to which the assortment belongs, and select the assortment.

5. Click **OK**.

The selected objects are added to the assortment by an including rule attached to the existing assortment.

3.8.5.2 Adding objects from query results to an existing assortment

Use query results or structures to identify the objects to add to an existing assortment. For information on navigating to objects, see [Navigating to objects for assortments](#)^[4].

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].
2. On the menu bar, click **Actions**, and click the **Add to existing assortment** option.

The **Add to existing assortment** dialog box appears.

By default, the **Add query to existing assortment** option is selected.

3. To select the assortment, perform one of the following tasks:

- Type the assortment name, expand the category to which the assortment belongs, and select the assortment.
- Expand the category to which the assortment belongs, and select the assortment.

4. Click **OK**.

The selected objects are added to the assortment by an including rule attached to the existing assortment.

3.8.6 Excluding objects from assortments

You can also exclude specific objects from an assortment.

3.8.6.1 Excluding selected objects from an assortment

Use catalogs, structures, tasks, or queries to select the objects that you want to exclude from an assortment.

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].

2. In the **List** view, select the objects to exclude from an assortment.

3. On the **Actions** menu, click **Exclude from assortment**.

The **Exclude from assortment** dialog box appears.

By default, the **Exclude selection explicitly from assortment** option is selected.

4. To select the assortment, perform one of the following tasks:

- Type the assortment name, expand the category to which the assortment belongs, and select the assortment.
- Expand the category to which the assortment belongs, and select the assortment.

5. Click **OK**.

The selected objects are removed from the assortment by an excluding rule attached to the existing assortment.

3.8.6.2 Excluding objects from an assortment using query results

Use queries or structures to identify the objects to exclude from an assortment.

1. Navigate to the objects. For more information about navigating to objects, see [Navigating to objects for assortments](#)^[4].

2. On the menu bar, click **Actions**, and then click **Exclude from assortment**.

The **Exclude from assortment** dialog box appears.

By default, the **Exclude query explicitly from assortment** option is selected.

3. To select the assortment, perform one of the following tasks:

- Type the assortment name, expand the category to which the assortment belongs, and select the assortment.
- Expand the category to which the assortment belongs, and select the assortment.

4. Click **OK**.

The selected objects are removed from the assortment by an excluding rule attached to the existing assortment.

3.8.7 Viewing and managing assortments

After you create assortments, you can view the objects in the assortment, manage assortment rules, delete assortments, and refresh assortments.

3.8.7.1 Viewing assortment content

You can view the list of objects that an assortment contains.

1. In the context selection menu bar, click **Assortments**.

In the left pane, a list of categories appears.

2. To view the objects in an assortment, perform one of the following tasks:

- To select the available assortments in **List** view, perform the following tasks:
 - i. In the left pane, select the category to which the assortment belongs.
 - ii. In the **List** view, select the required assortment.
 - iii. Click the **Actions** menu, and then click **Show assortment content**.
- To select the available assortments in the left pane, expand the category to which the assortment belongs, and then select the assortment.

The assortment content appears in the **List** view.

3.8.7.2 Managing assortment rules

You can view the assortment rules based on which the system created the assortment.

1. In the context selection menu bar, click **Assortments**.

In the left pane, a list of categories appears.

2. Select the category to which the assortment belongs.

The assortments available in the category appear in the **List** view.



3. Select the assortment.

A list of rules appears in the detail view.

Product assortment "Special Sale"			
Name:	Special Sale		
Description:	Special Sale		
Category:	Sale		
Source catalog:	Master catalog		
Number of products:	1		

Rule type	Object count	Rule name	Rule description
Excluding	1	Pre-determined objects	1 pre-determined object(s)
Including	1	Pre-determined objects	1 pre-determined object(s)

You can view the assortment rule content and delete the assortment rule type.

- To view the assortment rule content in the **List** view, select the rule type, and click the  icon.
- To delete the assortment rule, select the rule, and click the  icon. The including or excluding rule associated with the object is deleted. For example, if you delete an excluding rule, the object with the excluding rule is added to the assortment again if it is associated with another including rule of the assortment.

3.8.7.3 Deleting and refreshing assortments

You can delete and refresh assortments. You need to refresh any dynamic and query-based assortment manually to update the content. The content of an assortment does not get updated automatically in real time.

1. In the left navigation pane, select the category to which the assortment belongs.

2. In the **List** view, select the assortment.

3. To delete the assortment, perform the following tasks:

- i. On the **Actions** menu, click **Delete**.

The **Confirmation** dialog box appears.

- ii. Click **Yes**.

4. To refresh the assortment, perform the following task:

- i. On the **Actions** menu, click **Refresh Assortment**.

The **Refresh assortment** dialog box appears.

- ii. Click **OK**.

3.9 Comparing Objects

You can compare objects with their merge previews, with their other versions, and with other objects from master catalog, supplier catalog, or same catalog. For example, if you have multiple versions of an object, you can compare them to highlight the similarities and differences in their data values. The comparison results appear in a comparison view with the differences highlighted.

1. Navigate to the required catalog.

2. In the **List** view, select the one or more objects to compare.

3. From the **Actions** menu, click **Compare**, and perform one of the following steps:

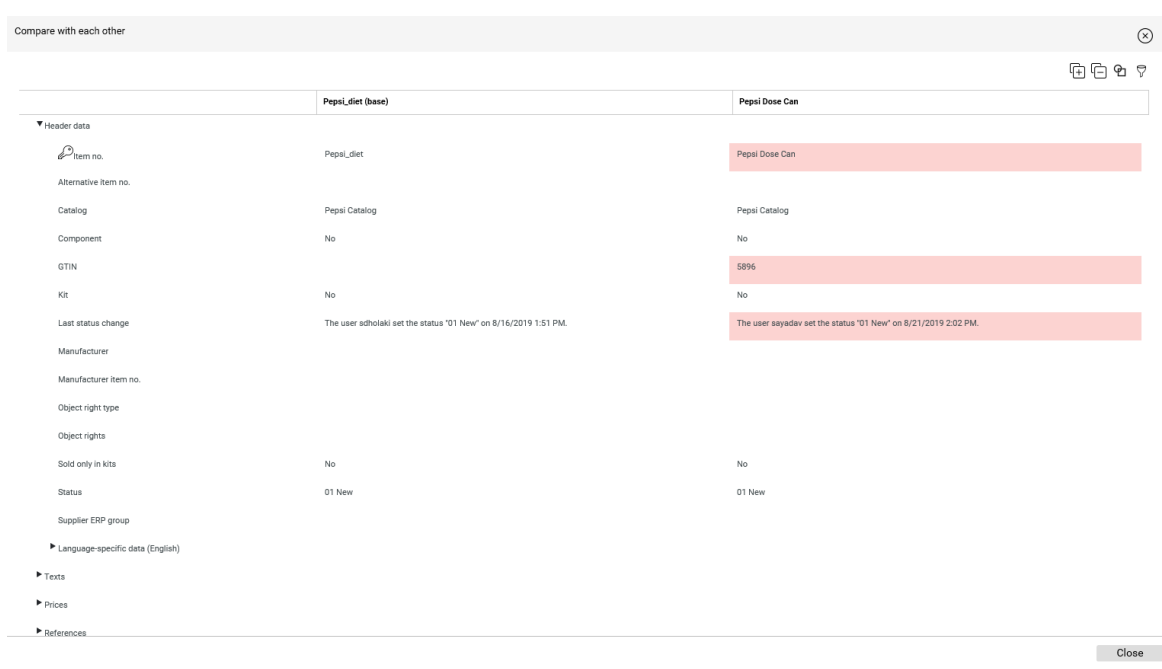
- To compare the selected object in a supplier catalog with its representation in the master catalog, click **Compare with master item**.
- To compare the selected object in a master catalog with its representation in the supplier catalog, click **Compare with supplier item**.
- To compare the selected object with the merge preview, click **Compare with merge preview**. To compare objects with the merge preview, you must first generate a merge preview. For example, use the Product 360 Desktop to initiate a merge operation for a selected catalog.

- To compare multiple versions of an object that you have versioned previously, click **Compare with version**.
- To compare an object with other objects, click **Compare with each other**. You must select at least two objects to compare.

The comparison results based on your selection appear.

Viewing and adjusting comparison results

After you compare objects, you see the comparison of all the selected objects with their differences highlighted. You can compare the objects side by side.







	Pepsi_diet (base)	Pepsi Dose Can
▼ Header data		
Item no.	Pepsi_diet	Pepsi Dose Can
Alternative item no.		
Catalog	Pepsi Catalog	Pepsi Catalog
Component	No	No
GTIN		5896
Kit	No	No
Last status change	The user edholaki set the status '01 New' on 8/16/2019 1:51 PM.	The user sayadav set the status '01 New' on 8/21/2019 2:02 PM.
Manufacturer		
Manufacturer item no.		
Object right type		
Object rights		
Sold only in kits	No	No
Status	01 New	01 New
Supplier ERP group		
► Language-specific data (English)		
► Texts		
► Prices		
► References		

Comparison View

You can adjust the view of the comparison results. You can expand or collapse the fields, you can choose to view the differences only, and you can also apply filters to select the specific fields to display.

The following table lists the options that you can use to adjust the comparison results:

Icon	Description
	Expands all the fields of the compared objects.
	Collapses all the fields of the compared objects.
	Shows the fields with different values only.
	Allows to filter the fields to display.

3.10 Accessing the Product 360 view

The Product 360 view displays a relationship graph that shows the relationships of a selected object within a catalog. For example, a product can have its variants and references. You can use the relationship graph to see these relationships, explore the relationships, and edit the details of the related objects in the detail view.




The relationship graph displays the selected object at the center. The related objects of the selected object appear around it as nodes. The relationship nodes connect to each other through straight lines and arrows.

In the Product 360 view, you can view both the incoming and outgoing references of selected objects. An outgoing reference node shows the objects that the selected object has referred to. An incoming reference node shows the objects that refer to the selected object.

3.10.1 Relationship nodes

The relationship nodes that you see in the Product 360 view depend on the type of object you select in the list view.

The following table lists the relationship nodes that you can see for an object type:

Object	Icon	Relationship Node
Item		Incoming References, Outgoing References, Structure Assignments, Parent Variant, Parent Kit, and Components.
Product		Incoming References, Outgoing References, Structure Assignments, Parent Variant, Parent Kit, and Components.
Variant		Incoming References, Outgoing References, Structure Assignments, Items of the Variants, and Parent Product.

3.10.2 Opening the Product 360 view

You can view the relationship graph of a product, item, or variant in a catalog.

1. In the context selection menu bar, click **Catalogs**, and select a catalog.

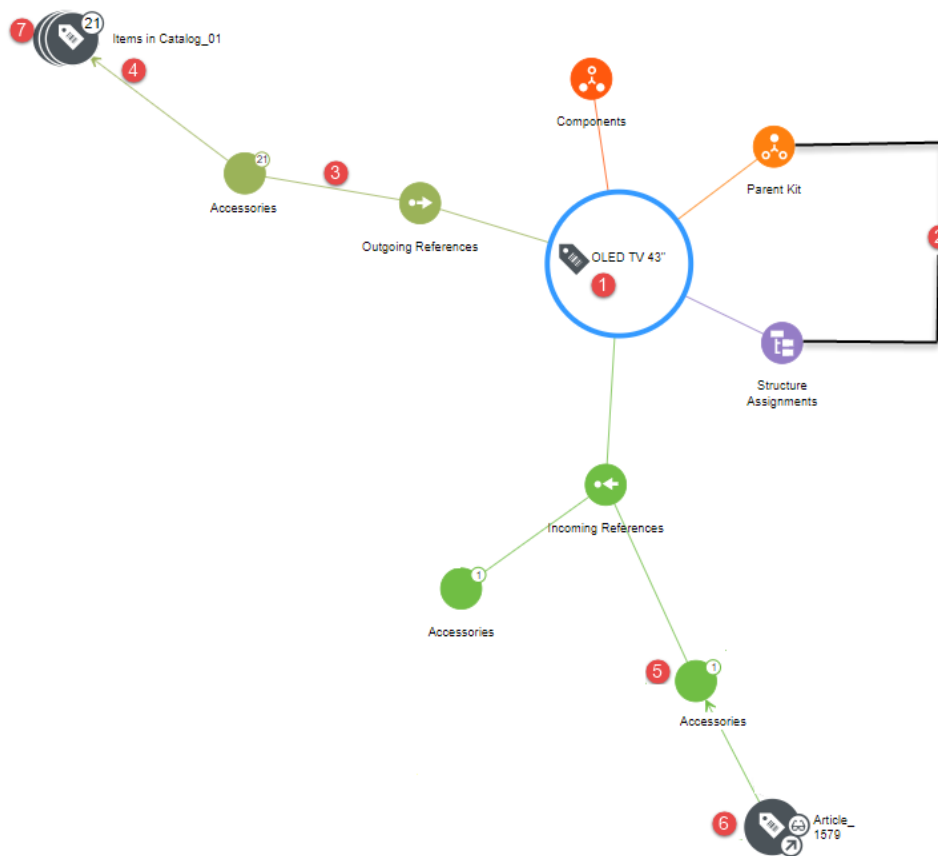
A list of objects appears.

2. In the **List** view, select the required object.
3. In the **Detail** view, click the **P360° view** tab.

The relationship graph for the selected object appears.

3.10.2.1 Product 360 view user interface

The following image is a sample relationship graph for a television:



The following table describes the user interface elements of the Product 360 view.

Legend	Name	Description
1	Selected Object	The object for which you want to view the Product 360 view.
2	Relationship Node	The nodes representing the relationships.
3	Straight Line	A connection indicating that the nodes are related.
4	Connecting Arrow	A connection indicating whether the reference is an incoming reference or an outgoing reference. Outgoing references connect to a related object with an outgoing arrow. Incoming references connect to a related object with an incoming arrow.
5	Related Object Type	The type of related object. In the sample relationship graph, the type of the related object is Accessories . The number on it specifies the number of available related objects.

6	Related Object	The related object. The sample relationship graph, shows Article 1579 as a related object.
7	Group Data Node	The group data node. If the number of related objects for a selected object exceeds 20, the group data node appears. To view all the related objects, click the group data node. All the related objects within the group data node appear in the list view.

3.10.3 Managing related objects

After you open the Product 360 view for a selected object, you can expand the relationship nodes, navigate to the related objects, edit the related objects, view the related objects in list view, and adjust the relationship graph.

3.10.3.1 Viewing the related objects

After you open the Product 360 view, expand the relationship nodes to view the related objects. The related objects appear with their descriptions.

You can also click, expand, and view the relationship graph of the related object.

3.10.3.2 Editing the details of related objects

After you view the related objects, you can edit the details of the related objects.

1. To edit the details of a related object, click the  icon.

A dialog box with the object details appears.

2. Edit the object details, and click **Close**.



3.10.3.3 Viewing the related object in list view


To view a related object in the list view, click the  icon. The selected object opens in the list view.

3.10.3.4 Adjusting the relationship graph

You can adjust the relationships graph to zoom in, zoom out, and recenter the graph.

The following table lists the controls that you can use to adjust the relationship graph:

Icon	Description
	Zooms in to magnify the graph.
	Zooms out to shrink the graph.

	Resets the graph back to its original size.
---	---

4 Data quality checks

To optimize your product data management, it is not just essential that you always know the latest processing status of all products and items and their relationships. The quality of the data is also extremely important. Since a product information management system brings together information from a variety of employees and from different suppliers from multiple sources, it is essential for commercial success to optimize the quality of the data at regular intervals.

The current version of Product 360 Web now contains a link to the quality check module in Product 360 Desktop. This means:

- ✓ You can now also apply rules defined there.
- ✓ You can initiate quality checks on your data in different situations.
- ✓ A [status](#)^[54] shows the resulting "condition" of your data and can be used as a criterion for the creation of assortments and tasks.
- ✓ It is also possible to optimize data for output in particular channels if the rule permits this.


4.1 Quality rule overview

 Caution: All quality checks are created and managed in Product 360 Desktop.

Quality rules are saved as fixed, configured checking specifications and therefore can be used repeatedly. They are tailored to characteristic situations that can be used to maintain data quality. The following situations are possible:

- Incorrect values
- Invalid values
- Missing values
- Duplicates
- Incorrect assignment

The quality rules maintained in Product 360 Desktop can relate to all data objects. As a source and a target are always necessary for data cleansing, there is an input port and an output port. Both of these must refer to the same data type. However, rules for data output can relate to subordinate units of the same data type. For security, these are automatically referenced and provided for selection.

Essentially, you can use  to immediately perform quality checks for selected data. Furthermore, you can define and configure particular dates or events that trigger a quality check. Since these are triggered in Product 360 Desktop, it is enough to recall here that you can also view their results in both the dashboard and the [detail view](#)^[54] of the relevant object type.

4.2 Performing quality checks

Quality checks can be initiated in different ways:

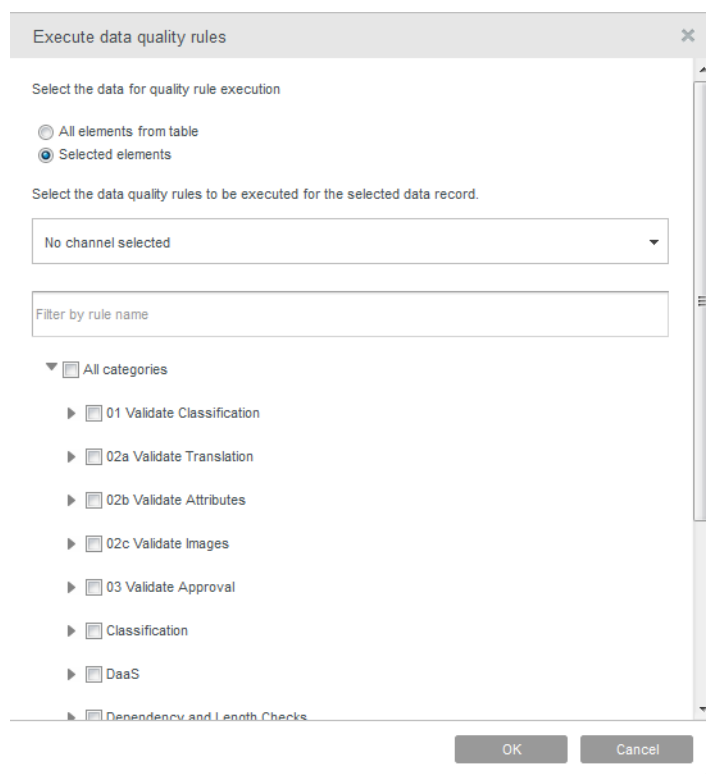
1. by an event defined in Product 360 Desktop or a fixed date, or
2. by a direct request

We cannot influence the first scenario because the rules are defined and managed in Product 360 Desktop. Here, we will explain how you can perform a direct quality check.

Performing direct quality checks – using the example of an assigned task

1. In the "My responsibilities" table overview, select the task you want to edit.
2. Select the data records for the task you want to check.
3. Select **Execute data quality rules** in the Actions menu.


⇒ The following dialog box appears:



Configuring the parameters for a quality check

4. You have the following options:

- A. Change your mind in relation to the volume of data you want to check (entire table/ selected data)
- B. Select one or more channels (
 - ⇒ means that all assigned rule groups and rules are already activated.)
- C. Use the filter to search for a specific rule and then activate/deactivate it
- D. Carry out the activation/deactivation directly in the relevant categories or rule groups

 Note: The visibility of the rules is influenced by the channel's object rights. Specifically:

1. A user only sees all rules that are used in their channels.
2. A user sees all rules that are not assigned to any channels.

5. Choose **OK** to confirm your entries or **Cancel**

➔ to discard them. The dialog box closes.

6. In the next dialog box that opens, you can click on **Run in background** if the volume of data is such that the check is considered to be extremely time-consuming.

7. A message provides information about the success of the quality checks.


➔ You can view the results for each data record individually in the [detail view](#)⁽⁵⁴⁾ or you can call up the dashboard for the selected volume of data.




4.3 Viewing the quality rule result


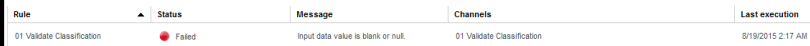
Essentially, there are two ways in which to access the relevant status information:

1. On the one hand, a "Quality status" tab is available in the detail view for each object.
2. On the other hand, you can view the status in the Quality dashboard.


"Quality status" tab

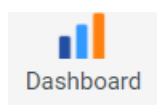
Information about completed quality checks is displayed in table format. Click on  to open a dialog box in which you can change how individual fields are displayed. Meaning of all fields in detail:

Field	Meaning	
Channel selection	Selection of a particular channel: All available quality check results for this channel are displayed for the object selected. In addition, an icon indicates that checks are still expected for particular rules. Since some validation rules are not assigned to a particular channel, you must select All channels so that you can also display these validation rules.	
Status	Icon for the status of the executed rule	
	Icon	Meaning
		The check has been performed with no errors.
		The check has detected errors.
		Object not fully checked, or object has been modified since last check.
Rule	Specifies the name of the rule assigned in the definition.	
Message	Text output for the status and any error messages.	

Field	Meaning
Ignore	<p>Under certain conditions, you can ignore the check results. Select the required data record in the table and click on .</p>  <p>Ignoring the status of the quality check</p> <p>The adjacent fields log information concerning who initiated this exclusion and when.</p> <p>Ignoring a rule has an effect on the quality overview. An ignored rule is assessed as a rule with the result "OK".</p>
Score	For language identification rules, a match factor is specified here, which should be viewed as equivalent to a percentage correspondence.
Channels	All channels for which the relevant rule is to be applied are shown here.
Last execution	The date of the last execution enables you to assess whether and when a repeat check is necessary.
Description	The description of the rule entered in the definition is displayed here.

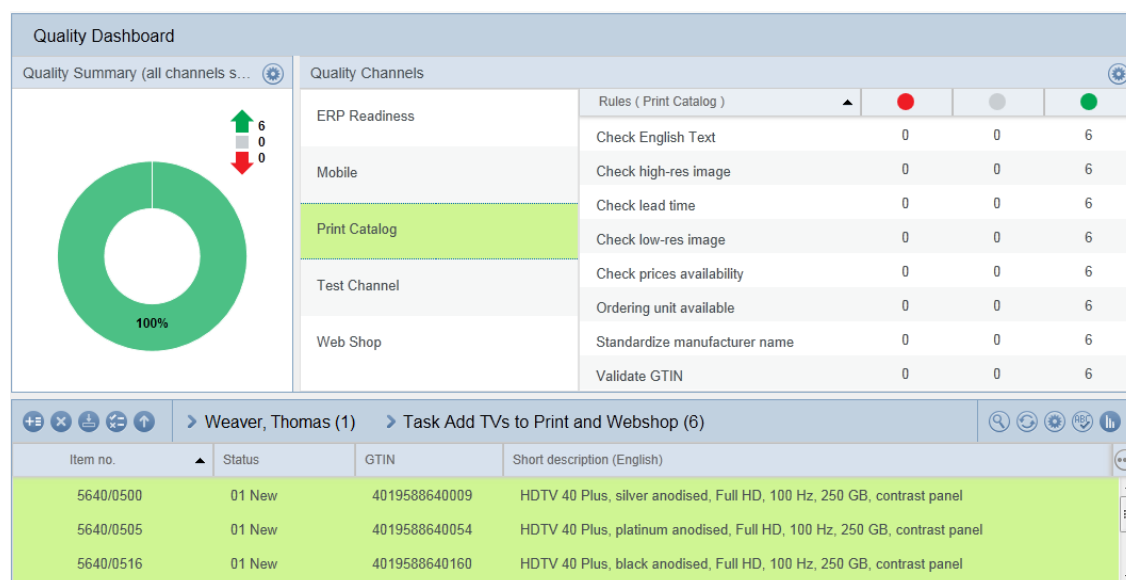
Quality dashboard

To open the dashboard, click on the  icon in the toolbar.





The icon's appearance changes to

➡ The following dashboard is displayed:



Dashboard containing quality check results

1. You have the following options:

- A. You can filter the results by clicking on  to call up the settings dialog box and adjust the settings accordingly.
- B. In the "Channels" widget, you can select a channel directly and then take a detailed look at the status of the assigned validation rules.
- C. If the status with  is identified as "Not fully checked", you can trigger a new, targeted check for this data.

2. To close the dashboard view again, click on the  icon.

5 Structure systems

Structure systems include data defined in a specific structure. A structure system includes a node structure group that can have multiple child structure groups. You can assign data to the most relevant structure group to classify data. Structure systems help you work with data efficiently.

To create and edit structure systems, use Product 360 Desktop. To classify data and maintain text and multimedia documents for structure groups, use Product 360 Web.

5.1 Filtering structure groups

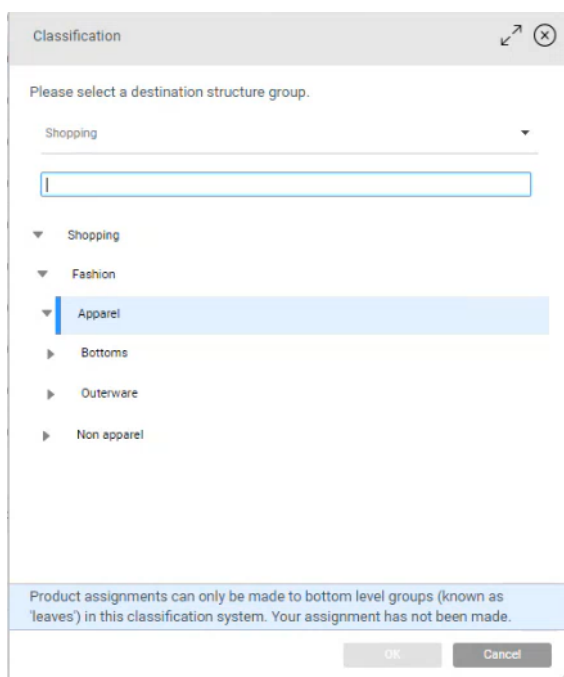
You can filter structure groups by name in the structures context view and classification dialog box.

Previously, you could see just the parent groups that directly matched with the displayed search criteria. However to improve the navigation and user experience, you can click on the search results to reveal the child subgroups.

The comprehensive visualization and interaction with subgroups might not directly match with the initial search terms but are relevant due to their association with the parent group.

When you select a subgroup in the search results, the hierarchical structure of the subgroups remain intact after you clear the search string.

The following image displays the Classification dialog box with search results intact with the filter structure group and its hierarchical breakdown after you expand the child subgroups and clear the search string:



5.2 Classifying data

Classify data appropriately to find the most relevant data easily and quickly. To classify data, you need to assign them to relevant structure groups.

1. In the context selection menu bar, click **Catalogs**, and navigate to the required catalog.

A list of data available within the catalog appears.

2. Perform one of the following tasks:

- In the context selection menu bar, perform the following tasks:

- a. Click **Structures**.

All the available structure systems appear in a hierarchy format.

- b. From the list view, drag the data to the required structure group, and click **OK**.

- In the **List** view, click the data to classify and perform one of the following tasks:

- o On the menu bar, perform the following tasks:

- a. Click **Actions**.

- b. Based on the type of data, click **Classify Item** or **Classify Product**.

The **Classification** dialog box appears.

- c. From the structure group list, select the destination structure group, and click **OK**.

- o In the **Detail** view, perform the following tasks:

- a. On the **Classification** tab, click the **Classify**  icon.

The **Classification** dialog box appears.

- b. From the structure group list, select the destination structure group, and click

OK.

6. If the data belongs to another structure group, select one of the following classification types:

- **Move**. Assigns the data to the new structure group and removes the current assignment.
- **Copy**. Assigns the data to the new structure group and retains the existing assignment.


Classification ✕

Please select a classification type.
☒ Move
☐ Copy

Item no. ▲	Status	GTIN	Short description
51188580	Rework Needed	4039247263868	ATORN engineering hammers 1.500 kg with Hickory handle With a nylon prote
51490140	Rework Needed	4039247270576	ORION flat blunt-ended files D 7261A 400 mm length of cut Cut 1
53417120	Rework Needed	4039247413645	ATORN water-pump pliers 250 mm head chrome plated

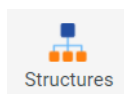
OK Cancel

Classification dialog box

 **Note:** If the data is assigned to a structure group, you can move or copy the assignment to another structure group with appropriate permissions. Contact your system administrator for the appropriate permissions.


5.3 Displaying assigned data

To display data that is assigned to a structure group:



1. Select in the navigation view
2. Select the catalog, the structure system, and the data type in turn.
3. Navigate to the corresponding structure group and select it.

⇒ The assigned data is displayed in the table.

 **Note:** If you select “Structure group” as the data type, the table shows the subordinate structure groups belonging to the selected structure group.

5.4 Maintaining structure groups



Note: The display format used depends on the defaults that your administrator has assigned to you via your user profile. Here, we describe the full range of editing options.



To maintain structure groups, select them in the navigation area

1. Select the catalog, the structure system, and the data type in turn.
2. Select Structure group as the data type.
3. Navigate to the corresponding higher-level structure group.
4. Select it.

⇒ The subordinate structure groups are displayed in the table.

5. Select a structure group in the table.

You can maintain the structure group in the detail view.

In Product 360 Web, you can only edit the descriptive texts and multimedia documents for structure groups.




Note: The Actions menu can be used to create tasks that include the structure groups.

Header	Preview	Text	Media	Features	Products of structure group	Items of structure group	Quality status	Change information
Structure group identifier:	1321973413299							
Hierarchical number:	No content							
Last changed by:	Smith, John							
Last changed on:	3/23/2012 6:03 PM							


Detail view of structures

An overview of these tabs and a summary of their contents is provided below:

Tab	Content
Header	This tab lists the most important information, such as the structure group identifier, which can be used for identification purposes, as well as information about the most recent change.
Text	This tab is primarily used to maintain the descriptions ^[20] . The fields are available in all languages for which a language pack is licensed. The German and English language packs are delivered as standard. The description can be displayed for one language in each case.
Media	If any multimedia document is assigned to the structure, they are displayed here, including any media derivatives that may exist. Use  to add new media attachments.

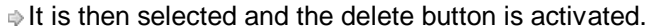
Tab	Content
Features	Specific features, such as the size or forms of a structure, are listed here. These are provided for information purposes only and cannot be changed.
Products	All products assigned to this structure are listed here. These are provided for information purposes only and cannot be edited.
History	The history is comparable to an editing log. It records the date on which the structure was created and the user who created it, and logs the date and user for the most recent change to the structure.

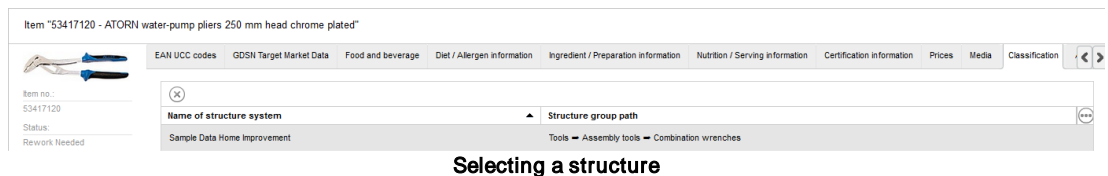
5.5 Deleting structure assignments



 **Note:** The display format used depends on the defaults that your administrator has assigned to you via your user profile. Here, we describe the full range of editing options.

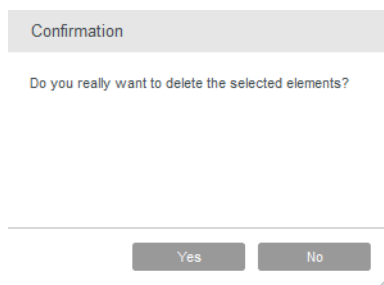
Structure assignments can only be deleted in the detail view of a data record using the "Classification" tab

To do this:


1. Click on the relevant entry in the table displayed.




2. Click on .




Confirmation dialog box

3. Confirm by clicking on **Yes**.


6 Tasks

The **Tasks** navigation area displays tasks created manually or by a workflow in a tree structure. The tree is divided into three main directories.

These are:

- My tasks
Lists all the tasks you have accepted.
- Tasks not accepted
Tasks that have been assigned to you or your user group but have not yet been accepted
- Responsibility
Tasks that you are responsible for but are being processed by other users.
- Tasks assigned to other users
Tasks that have been assigned to or accepted by other users from other user groups.
- Users in my user groups
Tasks that have been assigned to or accepted by other users in your user groups.

There are two different task types:

1. [Standard tasks](#)
2. Workflow tasks

Tasks and workflow tasks are indicated by different symbols.

 stands for a standard task.

 stands for a workflow task generated by the system.

6.1 Task overview

If you have selected a directory or a user in the navigation area, the associated tasks appear in the table view.



Type	Name	Priority	Description	Escalation on	Time expires on	Anticipated completion on	Responsible	
	Review customer feedback	High	04 Maintain missing e		5/27/2016 9:15 AM		Smith, John	
	Take customers out for dr	High	The higher-level proc		5/27/2016 9:14 AM		Smith, John	

Table display of accepted tasks


The tasks may be displayed with different formatting. The meaning of this formatting is explained below:

Formatting	Meaning
Black font	The task is not yet completed and has not exceeded any deadlines, or no deadlines were specified.
Yellow font	The escalation date has been exceeded or was not specified.



Formatting	Meaning
Red font	The deadline for processing the task has been exceeded.
Green strikethrough font	The task has been completed.

When you select a table entry, the details of the relevant task are displayed in the detail view.






6.1.1 Task details



When you select a table entry, the details of the relevant task are displayed in the detail view. If you have the relevant permission, you can edit the field entries () . To specify progress on a task, you can select percentage values in increments of 25%.

Actions

 Accept
  Open Flex UI

My tasks (2)

Type	Name	Priority	Description	Escalation on	Time expires on	Anticipated completion on	Responsible	
	Review customer feedb	High	04 Maintain missing ε		5/27/2016 9:15 AM		Smith, John	
	Take customers out for	High	The higher-level proc		5/27/2016 9:14 AM		Smith, John	

Tasks "Review customer feedback on demo"

Name:

Review customer feedback on demo

Description:

04 Maintain missing attributes


Created by:

Eight, Amy


Created on:

4/1/2015 8:08 AM

Assigned user:

 Seven, Kitty

User group:

 No content

Delegate:

No content

Responsible:

Smith, John

Escalation on:

No content

Time expires on:

5/27/2016 9:15 AM

Anticipated completion on:

No content

Progress:

0%

Priority:

High

Template:

No content

Work flow:

No content

Task details

6.2 Standard tasks

Standard tasks can be:

- [Create](#) ^[64]
- [accepted](#) ^[65]
- [Assign](#) ^[66]
- [Delete](#) ^[68]

6.2.1 Creating tasks

Tasks can be created in different ways in Product 360 Web. The essential difference between tasks is the form in which they are available to users:

- Static tasks. The task contains a fixed number of elements.
- Dynamic tasks. The query displayed at the moment when the task is created is saved; e.g. a query for items with the status "01 New" was previously performed. The query is executed again each time the task is displayed. Thus, the number of elements/objects contained in the task can differ from one time to another.

Static tasks

You create static tasks as follows:

1. Select the required catalog or structure group in the navigation area.
2. Select the relevant elements in the table.
3. Select **Create task** in the Actions or Favorites menu.

⇒ The following dialog box opens:



Create task

Here you can set the properties of the task based on your selection (note selection in static task).

☐ Create query as a new task

☒ Create selection as a new task

Name: * Items in catalog "Tools 2013"

Description:

Created by: Seven, Kitty

Created on: 8/19/2015 4:41 AM

Assigned user: * ☒ Seven, Kitty

User group: ☐

Delegate: ☐

Responsible: Seven, Kitty

Escalation on:

Time expires on:

Anticipated completion on:

Progress: * 0%

Priority: * Normal

Template:

OK Cancel

Dialog box for creating a new task

4. Complete all fields, or at least the mandatory fields (*).

5. Choose **OK** to confirm your entries or **Cancel**

⇒ to discard them. The dialog box closes.

Dynamic tasks

You create dynamic tasks as follows:

1. Select the **Queries** context in the navigation area.

2. Execute an appropriate [query](#)^[28].

3. Select **Create task** in the Actions or Favorites menu.

⇒ The dialog box shown above opens. Here, you can save the search query as the basis for a new task:

4. Make sure that the "Create query as a new task" option is selected.

- ☐ Note query in a new task
- ☒ Note selection in a new task

Selecting a task type

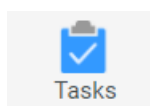
5. Complete all fields, or at least the mandatory fields (*).

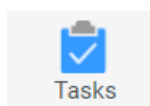
6. Select **OK** to confirm your entries or discard them with **Cancel**

⇒ The "Create task" dialog box is closed.

6.2.2 Accepting tasks

In Product 360 Web tasks are [created in various ways](#)^[64] and are [assigned to a specific employee](#)^[65]. All tasks that have been assigned to you are listed in the **Tasks** view.



You can access them using  in the navigation bar.


Essentially, all tasks assigned to you arrive in the **Tasks not accepted** directory.

You must accept a task before you can execute it.

To do this, follow the steps below:

1. Go to the **Tasks not accepted** directory.

2. Select the task in the table.

3. Click on .

⇒ The task is displayed in the **My tasks** directory.

Type	Name	Priority	Description	Escalation on	Time expires on	Anticipated completion on	Responsible	
✓	Review customer feedback	High	04 Maintain missing c		5/27/2016 9:15 AM		Smith, John	
✓	Take customers out for dr	High	The higher-level proc		5/27/2016 9:14 AM		Smith, John	

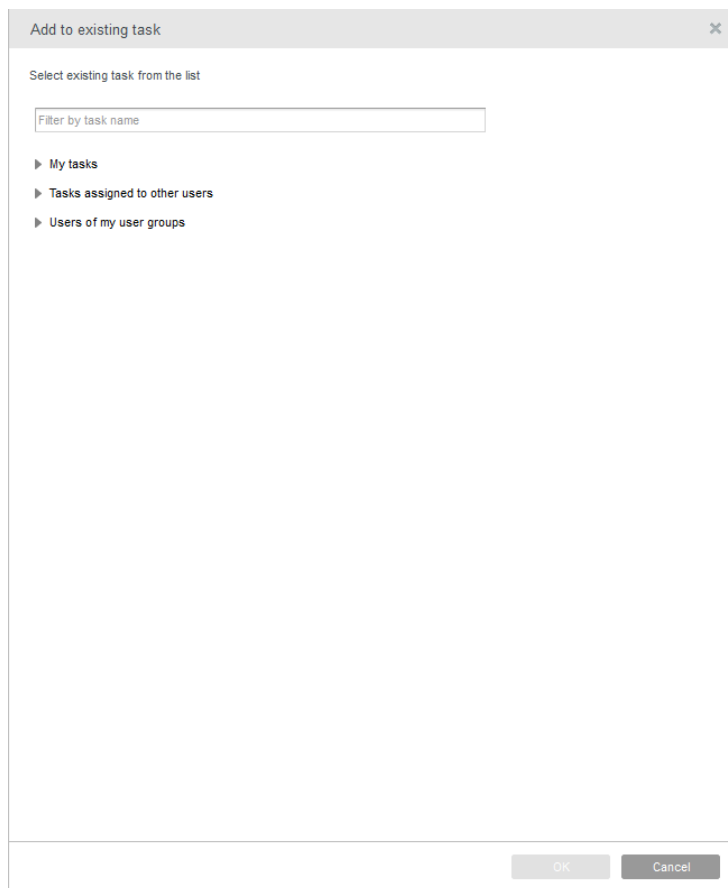
My tasks

6.2.3 Adding data records to existing tasks

You can also add data records to existing tasks:

1. Select the required catalog or structure group in the navigation area.
2. Select the data records in the table.
3. Select **Add to existing task** using the Actions or Favorites menu.

⇒ The following dialog box opens:

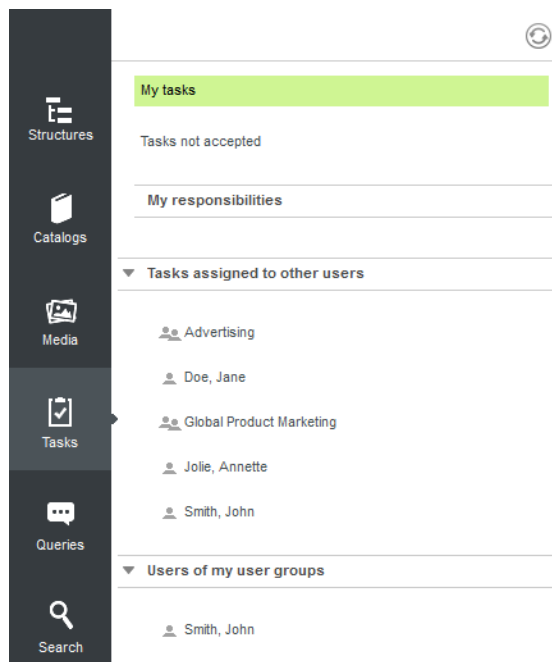
The dialog box is titled "Add to existing task" with a close button (X) in the top right corner. Below the title bar, it says "Select existing task from the list". There is a text input field labeled "Filter by task name". Below the input field, there are three expandable sections: "My tasks", "Tasks assigned to other users", and "Users of my user groups". At the bottom of the dialog box, there are "OK" and "Cancel" buttons.

Add to existing task dialog box

4. Activate **Add selection to existing task**. You then have the following options:
 - A. Use the filter to filter out a specific task.
 - B. Search for the task in the directories displayed.
5. Confirm your selection with **OK** or discard it with **Cancel**

6.2.4 Assigning tasks

If you have the rights required to do so, you can assign tasks to other users or user groups. You will know that this is the case if other users within your task group or other task groups are displayed in the navigation area. To make things simpler, a line for filtering is included.



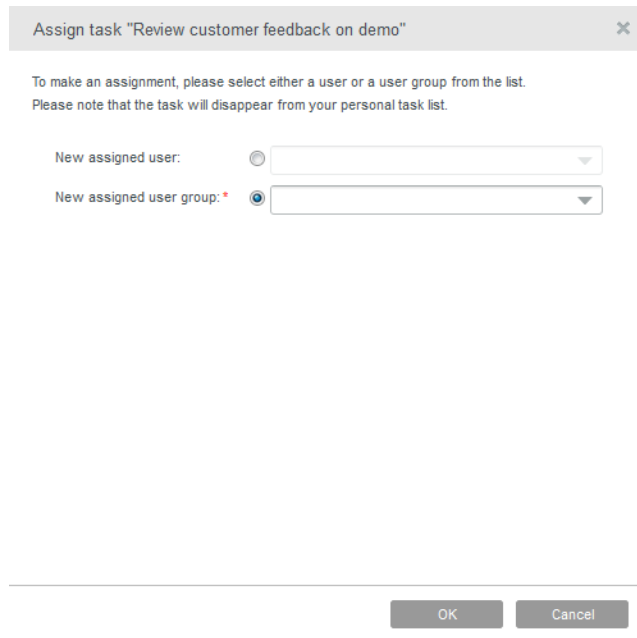
Assigning tasks

You can re-assign tasks from each directory available.

To do this, follow the steps below:

1. Select the task in the table.
2. Select **Assign task** in the Actions or Favorites menu.

⇒ The following dialog box opens:

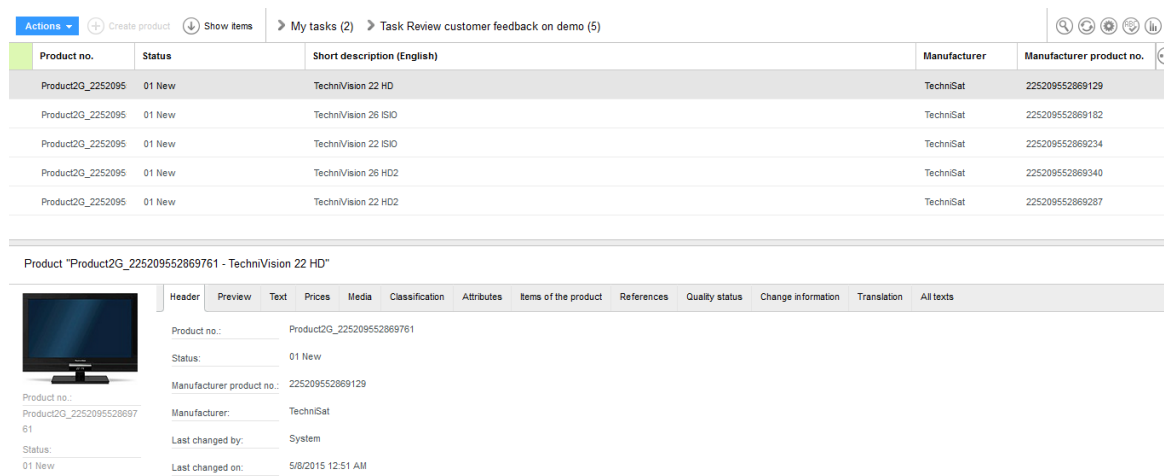


Task assignment

3. Select the relevant new assigned user or user group from the selection field and confirm with **OK**.

6.2.5 Processing tasks

Double-clicking on a task in the table view gives you access to the data to be edited.



The screenshot shows the Informatica MDM interface. At the top, there's a navigation bar with 'Actions' and 'Create product'. Below it, a table lists tasks. The table has columns: Product no., Status, Short description (English), Manufacturer, and Manufacturer product no. The table contains five rows of data. Below the table, there's a section titled 'Product "Product2G_225209552869761 - TechniVision 22 HD"'. This section contains a detailed view of the selected task, including a product image, a header, and various tabs like Preview, Text, Prices, Media, Classification, Attributes, Items of the product, References, Quality status, Change information, Translation, and All texts. The detailed view shows fields for Product no., Status, Manufacturer product no., Manufacturer, Last changed by, and Last changed on.

Product no.	Status	Short description (English)	Manufacturer	Manufacturer product no.
Product2G_2252095	01 New	TechniVision 22 HD	TechniSat	225209552869129
Product2G_2252095	01 New	TechniVision 26 ISIO	TechniSat	225209552869182
Product2G_2252095	01 New	TechniVision 22 ISIO	TechniSat	225209552869234
Product2G_2252095	01 New	TechniVision 26 HD2	TechniSat	225209552869340
Product2G_2252095	01 New	TechniVision 22 HD2	TechniSat	225209552869287

Product "Product2G_225209552869761 - TechniVision 22 HD"

Header Preview Text Prices Media Classification Attributes Items of the product References Quality status Change information Translation All texts

Product no.: Product2G_225209552869761
 Status: 01 New
 Manufacturer product no.: 225209552869129
 Manufacturer: TechniSat
 Last changed by: System
 Last changed on: 5/6/2015 12:51 AM

Product details for the task

Once you have completed a task, mark it as completed.

To do this, follow the steps below:

1. Select the task in the table.
 1. Select **Mark as completed** using the Actions or Favorites menu.
- ⇒ The task is displayed in green strikethrough formatting.

6.2.6 Deleting tasks

To delete tasks, follow the steps below:

1. Select the task in the table.
 2. Select **Delete task** in the Actions or Favorites menu.
- ⇒ A confirmation prompt is displayed to prevent you from deleting tasks by mistake.
3. Confirm with **OK**.
- ⇒ The dialog box closes and the relevant entry is removed from the table.

6.2.7 Tasks - Templates (Flex UI)

You can link tasks to special templates for the flexible user interfaces – known as Flex UI templates.

 **Note:** The prerequisite is that a Flex UI template has been assigned to the relevant task.

To do this:

1. In the table, select the tasks you want to open with a template
 2. In the Actions or Favorites menu, select **Open Flex UI**.
- ⇒ The task opens in a separate browser window with the assigned Flex UI template.

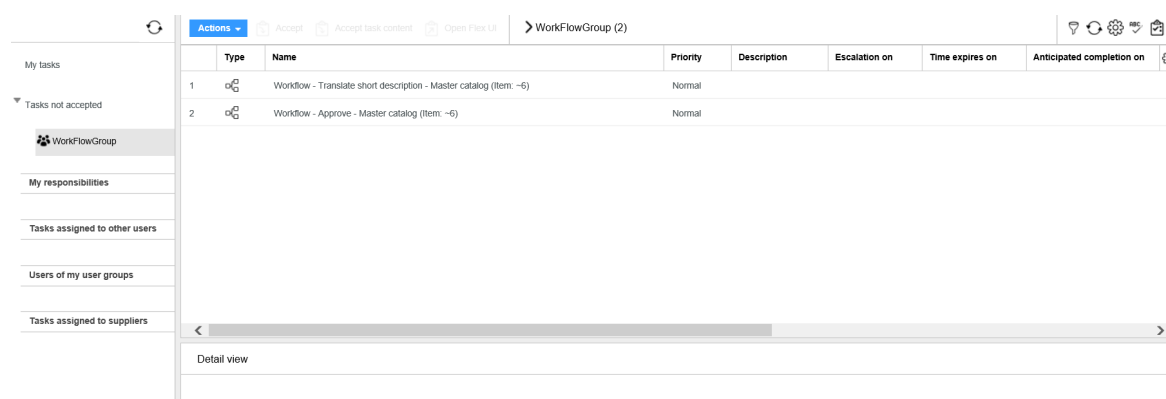
6.3 Workflow tasks

Workflow tasks contain one or more objects, such as items, products, or variants that you can individually update and process. The Business Process Management system creates workflow tasks for specific users or user groups. You can view the workflow tasks assigned to you. To work on workflow tasks, you can use the list view or a Flex UI template if a template is assigned to the workflow task.

When the workflow process assigns a new workflow task to you, it first appears in the **Tasks not accepted** directory. You can either assign the workflow task to other users or user groups, or you can accept the objects of the workflow task.

If you accept the objects of the workflow task, they move to the **My tasks** directory. You can then perform the workflow tasks, such as finish, cancel, approve, or reject to complete the workflow step. The workflow tasks that you can perform depend on the type of the workflow.

The following image shows examples of workflow tasks displayed in the list view:



Type	Name	Priority	Description	Escalation on	Time expires on	Anticipated completion on
1	Workflow - Translate short description - Master catalog (Item: -6)	Normal				
2	Workflow - Approve - Master catalog (Item: -6)	Normal				

Workflow tasks

6.3.1 Assigning workflow task content

You can assign the entire workflow task content to other users or user groups. Or, you can assign selected objects of a workflow task to other users or user groups. When you assign selected objects to other users or user groups, the remaining objects stay in their current assignments.

6.3.1.1 Assigning complete task content

Assign workflow task content to assign all objects in a workflow to another user.

1. In the **List** view, select the workflow task.
2. From the **Actions** menu, click **Assign task content**.

The **Assign content of task** dialog box appears.

3. Select the relevant user or user group.
4. Click **OK**.

6.3.1.2 Assigning task objects

Assign selected objects to another user.

1. In the **List** view, double-click workflow task.

The task objects appear.

2. Select the task objects to assign.
3. From the **Actions** menu, click **Assign**.

The **Assign objects from task** dialog box appears.


4. Select the relevant user or user group, and click **OK**.

6.3.2 Accepting workflow task content

You can accept the workflow task content, which includes all the objects of a workflow. You can also accept selected objects of a workflow task. The objects you accept move to the **My Tasks** directory and you can perform the relevant workflow actions on them.

6.3.2.1 Accepting complete task content

To accept all the objects of a workflow task, accept the task content.

1. In the **List** view, select the workflow task.
2. On the tool bar, click **Accept task content**  .

6.3.2.2 Accepting tasks objects

You can select specific objects from a workflow task to accept.

1. In the **List** view, double-click the workflow task.
2. Select the objects to accept.
3. From the **Actions** menu, and click **Accept**.

6.3.3 Finishing workflow task objects

After you accept the objects of a workflow task, you can work on them and finish each objects for the task individually. When you finish the objects, they disappear from the workflow task.

You can also finish workflow task objects in a Flex UI. For more information about finishing workflow task objects in a Flex UI, see [Finishing workflow task objects in a Flex UI](#)^[73].

1. In the **List** view, double-click the workflow task.

The task objects appear in the **List** view.

2. Select the required objects.

3. From the **Actions** menu, perform one of the following steps:

- If you have already accepted the object, click **Finish work**.
- If you have not accepted that object before, click **Accept and finish**.

6.3.4 Canceling workflow task objects

After you accept the objects of a workflow task, you can choose to cancel the objects from the task. When you cancel the objects from the task, the objects disappear from the workflow task.

You can also cancel objects of a workflow task in a Flex UI. For more information about canceling objects in a Flex UI, see [Canceling workflow task objects in a Flex UI](#)^[73].

1. In the **List** view, double-click the workflow task.

The task objects appear in the **List** view.

2. Select the objects of the workflow task to cancel.

3. From the **Actions** menu, click **Cancel work**.

6.3.5 Approving and Rejecting workflow task objects

For an approve-reject workflow, you can either approve the accepted objects or choose to reject the objects. When you approve or reject the objects, they disappear from the workflow task.

For more information about approving and rejecting workflow tasks in a Flex UI, see [Approving and Rejecting workflow task in a Flex UI](#)^[73].

Approving workflow task objects

1. In the **List** view, double-click the workflow task.

The task objects appear in the **List** view.

2. Select the objects to approve.

3. From the **Actions** menu, perform one of the following steps:

- If you have already accepted the object, click **Approve**.
- If you have not accepted that object before, click **Accept and approve**.

Rejecting workflow tasks objects

1. In the **List** view, double-click the workflow task.

The task objects appear in the **List** view.

2. Select the objects of the workflow task to reject.

3. From the **Actions** menu, perform one of the following steps:

- Reject the objects.

i. Click **Reject**.

The **Reject objects from task** dialog box appears.

ii. Select the workflow steps to reject the objects to, and click **OK**.

- Accept and reject the objects.

i. Click **Accept and reject**.

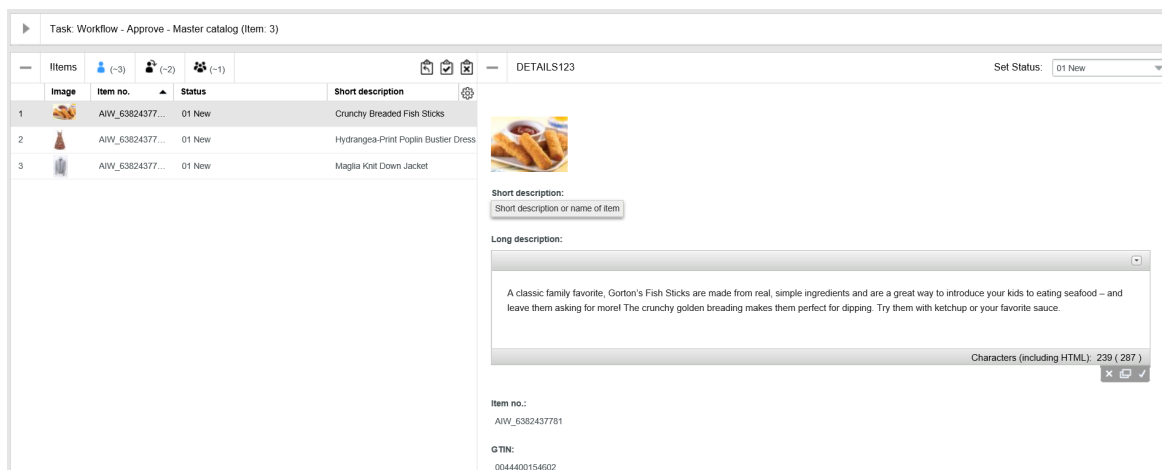
The **Reject objects from task** dialog box appears.

iii. Select the workflow steps to reject the objects to, and click **OK**.

6.3.6 Accessing tasks in a Flex UI




You can assign Flex UI templates to workflow tasks. Open workflow tasks with the Flex UI template to navigate across the objects seamlessly. The objects assigned to you and your user groups are categorized into tabs. You can switch between the tabs and navigate across the objects with ease. You can use the Flex UI template to accept, finish, approve, reject, and cancel the objects.

The following screenshot is an example of workflow task objects in a Flex UI template:



Workflow tasks in Flex UI

The following table describes the task tabs:

Tab	Name	Description
 (~2)	My objects	Displays the objects you have accepted.
 (~2)	Objects not accepted	Displays the objects still assigned to your user group that you have not accepted.
 (~1)	Objects of my user group	Displays the objects of your user group.

6.3.6.1 Opening a workflow task in a Flex UI


Open workflow tasks in a Flex UI.

- In the **List** view, select a workflow, and click **Open Flex UI**.

The Flex UI template for the selected workflow opens. The objects of the workflow appear on the left pane.



6.3.6.2 Accepting workflow task objects in a FlexUI

Accept the objects of the workflow task to perform the assigned task. The accepted objects move to the **My objects** tab.

- In the **Flex UI**, select the objects to accept, and click **Accept** .


6.3.6.3 Finishing workflow task objects in a Flex UI

After you accept the objects of a workflow task, you can work on them and finish each objects for the task individually. When you finish the objects, they disappear from the workflow task.

- In the **Flex UI**, select the objects, and click **Finish work** .
- If you have not accepted the objects earlier, click **Accept and finish** .

6.3.6.4 Canceling workflow task objects in a Flex UI



After you accept the objects of a workflow task, you can choose to cancel the objects of the workflow task. When you cancel the task, the objects disappear from the workflow task.

- In the **Flex UI**, select the objects, and click **Cancel** .


6.3.6.5 Approving and Rejecting workflow task in a Flex UI

For an approve-reject workflow, you can either approve or reject the accepted objects. When you approve or reject the objects, they disappear from the workflow task.

Approving workflow task in a Flex UI

- In the **Flex UI**, select the objects to approve, and click **Approve** .
- If you have not accepted the objects, click **Accept and approve** .

Rejecting workflow task in a Flex UI

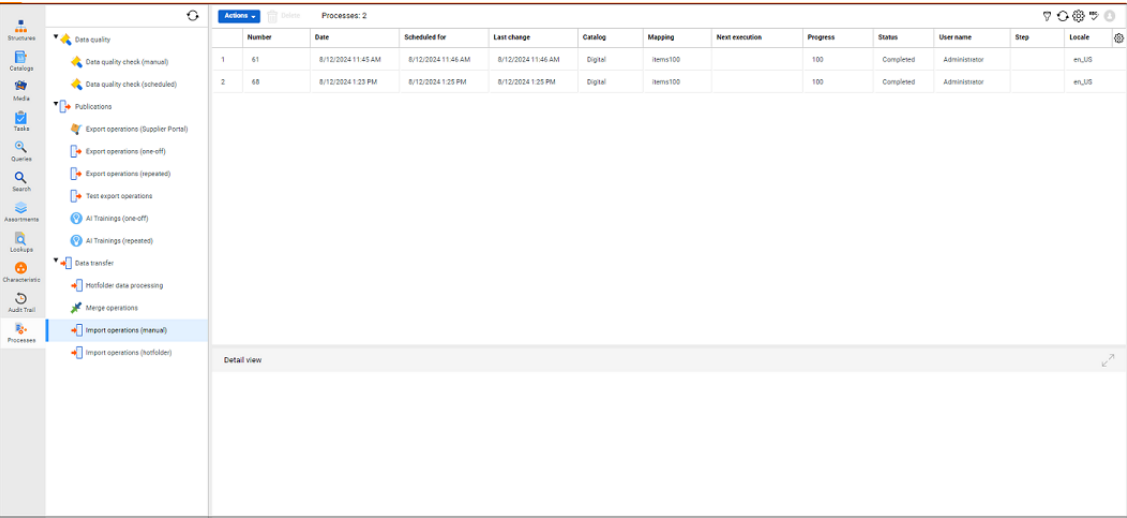
1. In the **Flex UI**, select the objects to reject, and click **Reject** .
- The **Comment and reject** dialog box appears.
2. Select the workflow steps to reject the objects to, and click **OK**.

7 Process Overview

The **Processes** view shows all current and completed Project 360 jobs. The **Processes** view is organized into the following major categories:

- Data transfer: Hotfolder data processing, import operation, and merge operations.
- Data quality: Data quality check (one-off) and data quality check (repeated).
- Publications: Export operations (one-off), export operations (repeated), test export operations, and AI trainings.

The following image displays the categories available in the Processes view:



The screenshot shows the Informatica Processes view. On the left is a sidebar with a tree view of categories: Data quality, Publications, Data transfer, and others. The main area displays a table of processes. The table has columns: Number, Date, Scheduled for, Last change, Catalog, Mapping, Next execution, Progress, Status, User name, Step, and Locale. Two rows are visible, both with a progress of 100 and status of Completed.

Number	Date	Scheduled for	Last change	Catalog	Mapping	Next execution	Progress	Status	User name	Step	Locale
1	61	8/12/2024 11:45 AM	8/12/2024 11:46 AM	Digital	Items100		100	Completed	Administrator		en_US
2	68	8/12/2024 1:23 PM	8/12/2024 1:23 PM	Digital	Items100		100	Completed	Administrator		en_US

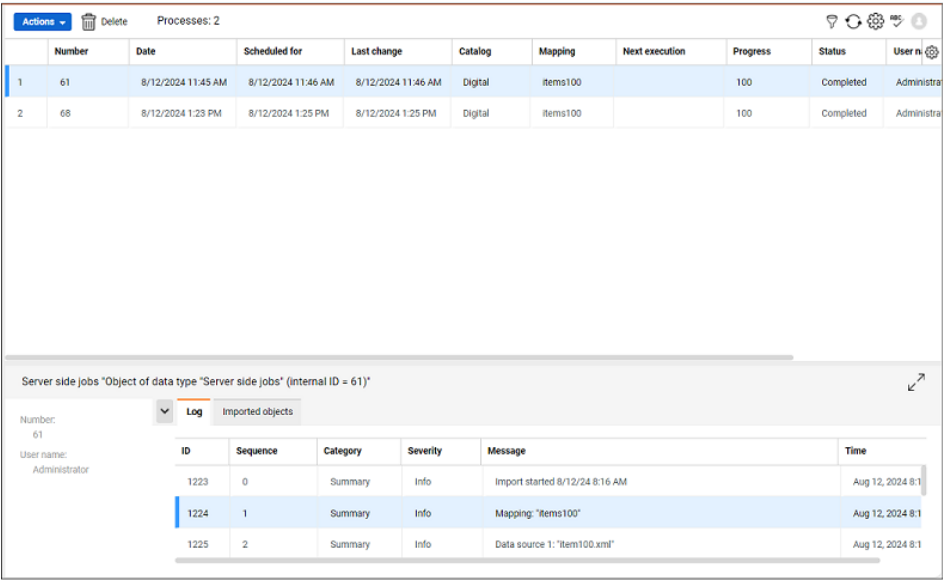
7.1 Viewing a process


The table view offers high-level details of the process, while the Detail view gives you in-depth, record-level information.

To view a process:

1. Select the category to view the process.
The **table** view displays information about the progress of the active and completed processes.
2. Click on a row in the table to view the details in a **Detail** view.
In the Detail view, the **Log** section provides the log for a selected process and the **Imported Objects** section displays information about imported objects.

The following image shows an import process:




3. Click the  button to view the processes that you scheduled.
- Depending on the sub-categories of the process selected in the **Table** view, the options available in the Actions menu varies.


Sub-categories	Options	Description
Import operations, Merge operations, Hotfolder data processing, AI training, Data quality check	Delete selection	Deletes the selected process.
	Cancel process	Cancels the selected process.
	Select all	Selects all the processes in the list.
Export operations	Delete selection	Deletes the selected process.
	Cancel process	Cancels the selected process.
	Select all	Selects all the processes in the list.
	Download export file	Downloads the exported compressed files or multimedia files to a local directory.
	Repeat job	Repeats the export job.


8 Multimedia documents

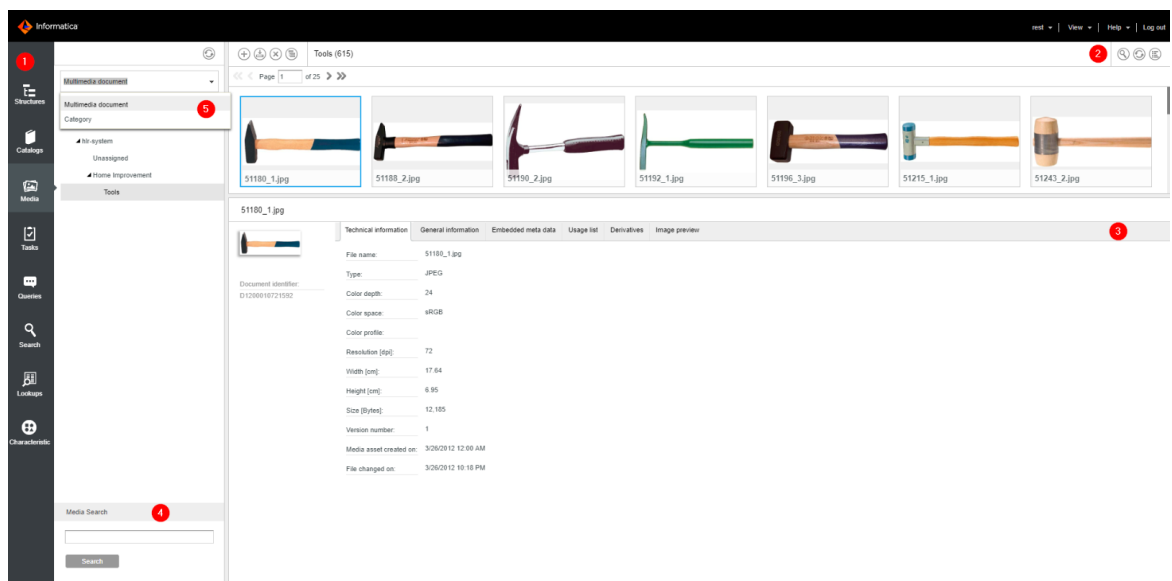
As part of the Informatica MDM - Product 360 solution, Product 360 Media Manager enables you to consistently manage and edit all multimedia files that are required in a product information management system. The maintenance options available to you in Product 360 Web are described below. There is a separate online help and user manual for the individual functions.

 **Caution:** It is also possible to connect a different media asset management system to your Informatica MDM - Product 360 software. In this case, the following description is not applicable. Contact your administrator for further information.

8.1 Maintaining multimedia documents



 **Note:** The Product 360 Desktop user manual includes information related to multimedia data maintenance. This section describes the specific display format in Product 360 Web.



































Use the **Media** icon  in the context selection menu bar to access multimedia documents. All the multimedia documents available in the system are listed in a hierarchical tree structure. You can also search for the required multimedia document.




Maintaining multimedia documents

The following table describes the different sections of the user interface:

Area	Description
	Define the context selection in the navigation area. The selected menu expands and displays the corresponding multimedia documents. Click the Refresh icon () to reload the data. This helps when multiple users use the category tree simultaneously.

<div>2</div>	<p>The light table view displays the existing multimedia documents. You can select a single multimedia document or multiple multimedia documents.</p> <p>If you have appropriate permissions, you can use the available icons to perform the following tasks:</p> <table border="1"> <tr> <td></td><td>Opens a dialog box that you can use to upload^[87] multimedia documents to Product 360 Web.</td></tr> <tr> <td></td><td>Opens a dialog box that you can use to remove^[84] multimedia documents from Product 360 Web.</td></tr> <tr> <td></td><td>Opens a dialog box that you can use to move or copy multimedia documents from Product 360 Web.</td></tr> <tr> <td></td><td>Opens a dialog box that you can use to download^[84] multimedia documents from Product 360 Web.</td></tr> </table> <p> Note: The Move option is available if the Media Manager is active.</p> <p>Depending on the number of documents, you can use the arrows provided to navigate in the required direction:</p> <table border="1"> <tr> <td></td><td>Navigates to the first page.</td></tr> <tr> <td></td><td>Navigates to the previous page.</td></tr> <tr> <td></td><td>Navigates to the next page.</td></tr> <tr> <td></td><td>Navigates to the last page.</td></tr> </table> <p>In addition, you can use the icons displayed in the right hand corner of the screen to perform the following activities:</p> <table border="1"> <tr> <td></td><td>Displays the Filter by field.</td></tr> <tr> <td></td><td>Refreshes the screen content.</td></tr> <tr> <td></td><td> Displays the available views. <div data-bbox="512 1290 767 1458"> <input checked="" type="checkbox"/> Medium thumbnail <input type="checkbox"/> Large thumbnail <input type="checkbox"/> List </div> <p>You can display the images within a folder as thumbnails or as a list. By default, the thumbnail view is selected.</p> <p>A list view displays the media attachments within the selected folder in a table with additional information about the images.</p> </td></tr> </table>		Opens a dialog box that you can use to upload ^[87] multimedia documents to Product 360 Web.		Opens a dialog box that you can use to remove ^[84] multimedia documents from Product 360 Web.		Opens a dialog box that you can use to move or copy multimedia documents from Product 360 Web.		Opens a dialog box that you can use to download ^[84] multimedia documents from Product 360 Web.		Navigates to the first page.		Navigates to the previous page.		Navigates to the next page.		Navigates to the last page.		Displays the Filter by field.		Refreshes the screen content.		Displays the available views. <div data-bbox="512 1290 767 1458"> <input checked="" type="checkbox"/> Medium thumbnail <input type="checkbox"/> Large thumbnail <input type="checkbox"/> List </div> <p>You can display the images within a folder as thumbnails or as a list. By default, the thumbnail view is selected.</p> <p>A list view displays the media attachments within the selected folder in a table with additional information about the images.</p>
	Opens a dialog box that you can use to upload ^[87] multimedia documents to Product 360 Web.																						
	Opens a dialog box that you can use to remove ^[84] multimedia documents from Product 360 Web.																						
	Opens a dialog box that you can use to move or copy multimedia documents from Product 360 Web.																						
	Opens a dialog box that you can use to download ^[84] multimedia documents from Product 360 Web.																						
	Navigates to the first page.																						
	Navigates to the previous page.																						
	Navigates to the next page.																						
	Navigates to the last page.																						
	Displays the Filter by field.																						
	Refreshes the screen content.																						
	Displays the available views. <div data-bbox="512 1290 767 1458"> <input checked="" type="checkbox"/> Medium thumbnail <input type="checkbox"/> Large thumbnail <input type="checkbox"/> List </div> <p>You can display the images within a folder as thumbnails or as a list. By default, the thumbnail view is selected.</p> <p>A list view displays the media attachments within the selected folder in a table with additional information about the images.</p>																						
<div>3</div>	<p>The detail view provides information divided in subject-specific tabs:</p> <table border="1"> <thead> <tr> <th>Tab</th><th>Content</th></tr> </thead> <tbody> <tr> <td>Header</td><td>Lists information, such as file name, format, time when the attachment was created, and the last time when the attachment was changed.</td></tr> </tbody> </table>	Tab	Content	Header	Lists information, such as file name, format, time when the attachment was created, and the last time when the attachment was changed.																		
Tab	Content																						
Header	Lists information, such as file name, format, time when the attachment was created, and the last time when the attachment was changed.																						

	Tab	Content
	Technical information (Media Manager)	Lists all of the technical information, such as color depth, resolution, size, height, width, graphical formats, and the number of levels.
	General information (Media Manager)	Lists the editable, country-specific attributes of the file. Click ▼ to select a specific language from the available list of languages.
	Embedded meta data	Lists the meta data, such as EXIF, XMP, and JFIF.
	Usage list	Displays all the links for the current multimedia document arranged by product, variant, item, and structure group. You can selectively filter them using the selection field. Select ⊕ to assign references. To view the referenced object in the list view, click the Usage list ↗ icon.
	Derivatives (Media Manager)	Lists the derivatives of the multimedia documents used. Click ⓘ for additional information. Click ⬇ to download the file.
	Image preview	Image previews have two different sizes and a list view, which you can define in the detail menu. Depending on the size you select, you can scale the preview, as per your requirements, to create a detailed impression. To do this, move the symbol in the scaling line until the display appears as required. Use ⬇ to download the image.
4	<p>The media search section lets you search the detailed information for the file.</p> <p>You can specify AND and OR operators.</p> <hr/> <p> Note: The search is only available if Media Manager is active.</p>	
5	<p>The managing document categories section helps you manage document categories in the Media area. Select “Categories” in the drop-down menu. The sub-categories in the selected area are displayed in the detail view. To edit or remove categories, select the corresponding category in the list and change the values in the detail view. To remove a sub-category, click the ⊗ icon in the toolbar. To add a new category, click ⊕.</p>	


8.1.1 Referencing multimedia documents

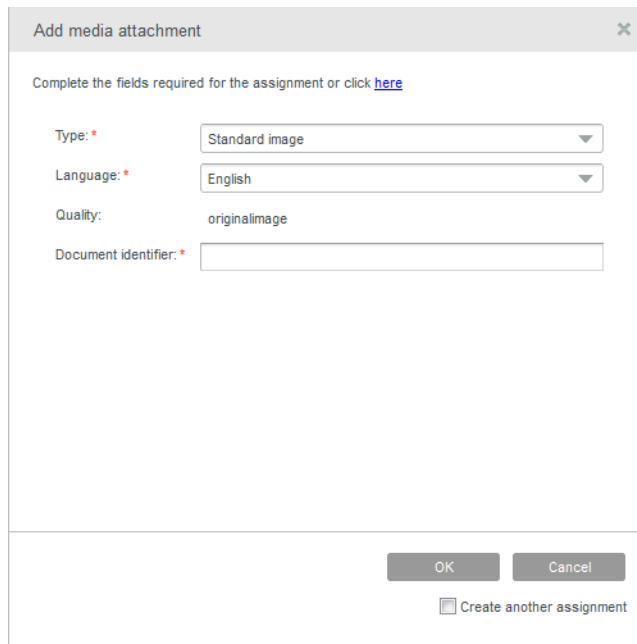
Multimedia documents can be referenced in the same way as products, variants or items:

- using the option of using a type of batch editing function
- using direct selection of the multimedia document to be referenced from the relevant light table display

A step-by-step guide to creating image variants is provided below.

Selecting the multimedia document to be referenced

1. Select the relevant catalog in the pop-up menu.
2. [Select](#) the relevant entry in the table.
3. Click on the "Media" tab in the detail view.
4. Click on .



The dialog box titled "Add media attachment" contains the following fields and controls:

- Type:** A dropdown menu with "Standard image" selected.
- Language:** A dropdown menu with "English" selected.
- Quality:** A text field with "originalimage" entered.
- Document identifier:** An empty text field.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.
- Checkbox:** A checkbox labeled "Create another assignment" located below the "OK" and "Cancel" buttons.

Create variant dialog box

5. Enter the relevant values in the fields or select the relevant entries from the pre-defined values in the drop-down lists.
6. You can enter the document identifier manually if you know its storage location. However, direct selection is easier.

Direct selection

For direct selection, click on **Choose element**.

⇒ A new window opens, where you must select the required multimedia document. An information message is displayed at the bottom of the window, which you must confirm before closing the window.

1. The document identifier you have just selected has been copied into the relevant field.
2. Choose **OK** to confirm your entries or **Cancel**
 - ⇒ to discard them. The dialog box closes.

Batch editing

In certain situations, you will need to create multiple references. For example, you may have been assigned a task that requires you to do so. In this case, you can click on the "Create another assignment" checkbox in the dialog box.


1. Once you have created the first reference and confirmed with **OK**, the dialog box remains open for further editing.
2. Follow the same steps for all subsequent references you want to create.
3. Once all references are created, click on the "Create another reference" checkbox again to deactivate it. To finish editing, click on **X** in the top right corner of the dialog box to close the current window, or click on **OK**.
⇒ The dialog box is closed.

8.1.2 Uploading multimedia documents

Multimedia documents can be transferred to Product 360 Web in various ways:

1. using Product 360 Desktop and then updating the view
2. or directly using the Product 360 Web "Upload document" window.

This section describes how this can be done in Product 360 Web:

1. Go to the directory to which you want to upload the multimedia documents.
2. Click on  .
⇒ The following window opens:



Uploading multimedia documents

You now have two options for adding multimedia documents:

3. Open a file manager window with the directory containing the relevant attachments.

4. Select the entries and move your selection to the above window using Drag & Drop.

⇒ The window changes as follows:



Multimedia documents added using drag & drop

5. Here, you have the option of excluding individual files from the upload by clicking on the associated ✕.

6. Click on **Start upload**:

⇒ The window changes as follows:



Multimedia documents uploaded

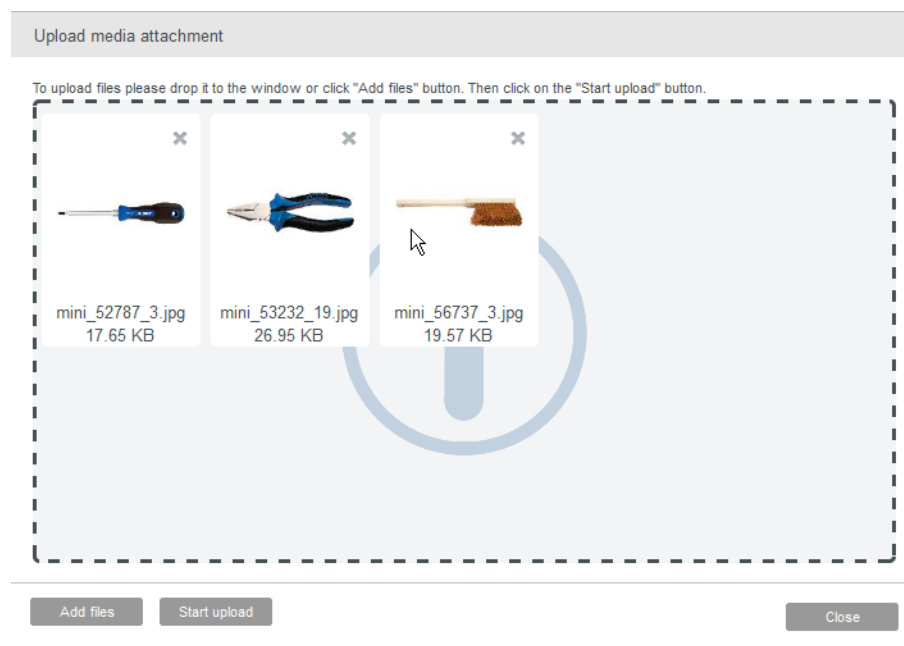
7. Close the window by clicking on ✕ or **Close**.

The option for adding multimedia documents involves individual files and is done as follows:

3. Click on **Add files**.

4. Select the relevant file and confirm your selection. In our case, we have repeated this operation several times.

⇒ The window now looks like this:



Add multimedia documents individually

5. Once again, you have the option of excluding individual files from the upload by clicking on the associated ✕.

6. Now click on **Start upload**:

⇒ The window changes as follows:



Multimedia documents uploaded


7. Close the window by clicking on ✕ or **Close**.

8.1.3 Downloading multimedia documents

You can download a single multimedia document or multiple multimedia documents at the same time.


1. In the Product 360 Web page, on the navigation menu, click **Media**. The corresponding pane displays all the available multimedia documents categorized in a hierarchical folder structure. To view the multimedia documents, ensure to select the Media Document option from the list.
2. Click the folder that includes the multimedia documents you want to download.
3. In the right pane, perform one of the following tasks:
 - To download all the multimedia documents within a selected folder, click **Download documents**. By default, all the multimedia documents within the folder is selected for download.
 - To download specific multimedia documents select the required multimedia documents, and then click **Download documents**.
 - To select multiple multimedia documents, press CTRL or SHIFT and select the multimedia documents you want to download, and then click **Download documents**.
 - ➡ The **Download documents** dialog box appears. It displays the number of documents selected for download.
4. Click **Download**. The selected files are downloaded to your local drive as a zipped file.

8.1.4 Deleting multimedia documents

 **Caution:** Note that it is currently not possible to undo the deletion of multimedia documents and their references. Therefore, only use this function if you are really sure that you want to delete multimedia documents and their references.

The process of deleting multimedia documents differs depending on whether or not references exist.

In both cases, the first step is identical:

1. Go to the directory in which you want to delete multimedia documents.
2. [Select](#) the file(s) that you want to delete.
3. Click on .

4. If **references exist** for the file(s), the following window opens:

Delete document

The operation has following effects:

Reference type	Count
Number of affected file attachments	0
Product, Number of assignments	0
Item, Number of assignments	10
Structure group, Number of assignments	0

You can confirm the changes, which adjusts all affected entities, or cancel the operation.

☐ Apply to all

Yes

No

Skip

Deleting referenced multimedia documents

If you select several files, you can now...

...exclude individual files from the delete operation by clicking on **Skip** for the relevant document.

⇒ The existing references assigned in each case are retained.

...apply the delete operation to all selected files by clicking on **Apply to all** to identify them with a check mark and clicking on **Yes**.

⇒ Existing references are removed.

...cancel the delete operation for all selected files by clicking on **Apply to all** to identify them with a check mark and clicking on **No**.

⇒ All assigned, existing references are retained.

If you select only one file, you can now...

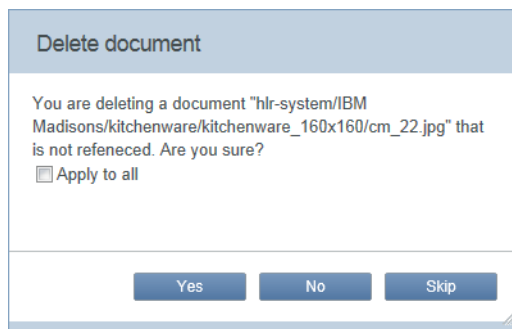
...cancel the delete operation by clicking on **No** or **Skip**.

⇒ The existing references assigned in each case are retained.

...perform the delete operation by clicking on **Yes**.

⇒ Existing references are removed.

4. If **no references** exist for the file(s), the following window opens:



Deleting non-referenced multimedia documents

If you select several files, you can now...

...exclude individual files from the delete operation by clicking on **Skip** for the relevant document.

...apply the delete operation to all selected files by clicking on **Apply to all** to identify them with a check mark and clicking on **Yes**.

...cancel the delete operation for all selected files by clicking on **Apply to all** to identify them with a check mark and clicking on **No**.

If you select only one file, you can now...

...cancel the delete operation by clicking on **No** or **Skip**.

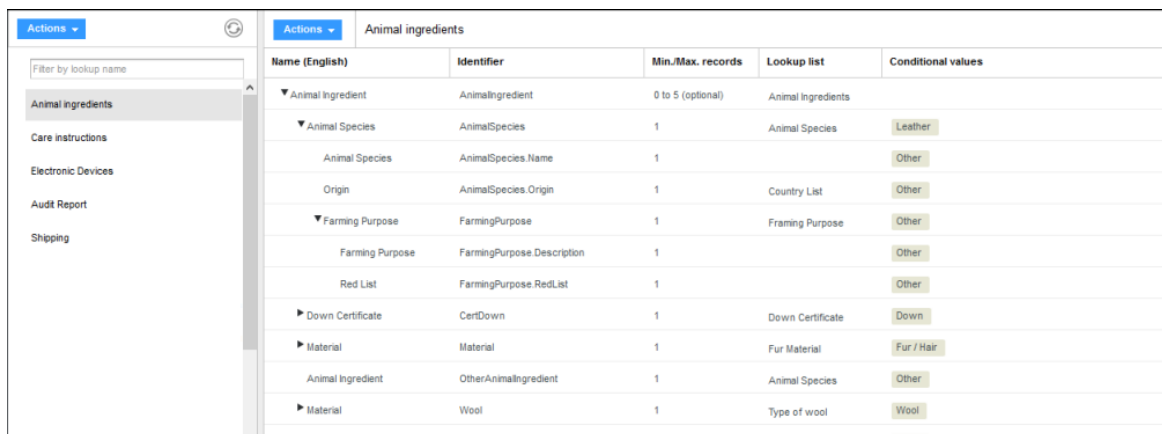
...perform the delete operation by clicking on **Yes**.

9 Characteristics

Create characteristics to define the properties of entities, such as items, products, and variants, and define dependencies between different properties.

For example, define animal ingredients for a clothing product. If the ingredient is leather, define the name of animal species, the country of origin, and the farming purpose. If the ingredient is wool, define the type of wool, the material type, and the country of origin.

The following image shows how you can specify the characteristics of an item:



Name (English)	Identifier	Min./Max. records	Lookup list	Conditional values
▼ Animal Ingredient	AnimalIngredient	0 to 5 (optional)	Animal Ingredients	
▼ Animal Species	AnimalSpecies	1	Animal Species	Leather
Animal Species	AnimalSpecies.Name	1		Other
Origin	AnimalSpecies.Origin	1	Country List	Other
▼ Farming Purpose	FarmingPurpose	1	Farming Purpose	Other
Farming Purpose	FarmingPurpose.Description	1		Other
Red List	FarmingPurpose.RedList	1		Other
▶ Down Certificate	CertDown	1	Down Certificate	Down
▶ Material	Material	1	Fur Material	Fur / Hair
Animal Ingredient	OtherAnimalIngredient	1	Animal Species	Other
▶ Material	Wool	1	Type of wool	Wool

In this example, Animal Ingredients is the root characteristic. It includes other child characteristics, such as Origin.

Use lookup values from the Lookup list to specify the properties. Ensure that the lookup values and references are configured. For more information on lookups, see [Lookups](#)^[98].

9.1 Value providers

Use value providers to define dependencies between lookups. You can specify the list of lookup values to display for a characteristic based on the selected parent or sibling lookup value.

Use the following value providers to define the dependencies between the lookup values:

- **Lookup of parent characteristics.** Filters the lookup value based on the selected parent characteristic. For example, when you specify the characteristics for an item, if you select Germany as a country, you see only the states of Germany in the State field.
- **Lookup of sibling characteristics.** Filters the lookup value based on the selected sibling characteristic.

In the following example, there is a root characteristic called Continent, with two child characteristics called Country of origin and State. Here, the child characteristics Country of origin and State are siblings.

Region				
Name (English)	Identifier	Min./Max. records	Lookup list	Conditional values
Continent (inactive)	Continent list	0 to 1 (optional)	Continent	
Country of origin (inactive)	Country of origin	0 to 1 (optional)	Country of origin	Add condition
States (inactive)	States	0 to 1 (optional)	States	Add condition

For Country of origin, if you select the data type as **Lookup value**, and the Value provider as **Lookup of parent characteristics**, the parent characteristic list appears. Next, specify Continent as the parent characteristics.

Characteristic "Country of origin"

Details Access rights History

Languages: English

Name: Country of origin

Description: No content

Identifier: Country of origin

Minimum records: 0

Maximum records: 1

Data type: Lookup value

Value provider: Lookup of parent characteristics

Parent characteristic: Continent

Default value:

Read-only:

Multiple values: ☐

In this case, while specifying the characteristics for an item, the Country of origin field displays the countries that belong to the selected parent continent only.

Product 360° view Characteristics Header Preview Text Prices Media Classification Attributes KI

Region

Region

Continent: Asia

Country of origin:

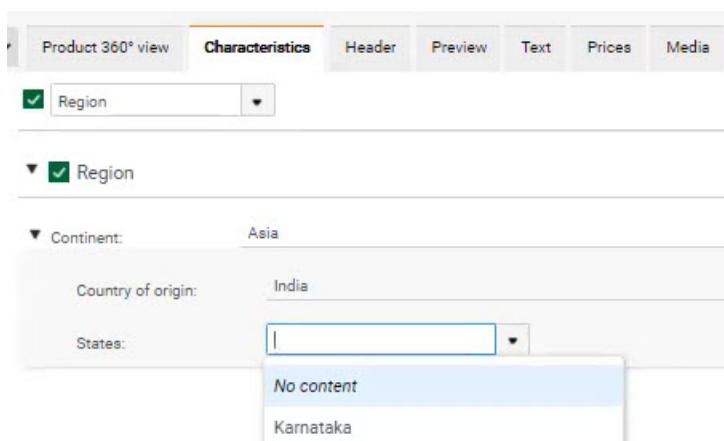
States:

No content

India

Similarly, for States if you specify the data type as **Lookup value**, and the Value provider as **Lookup of sibling characteristics**, the Sibling characteristic list appears. Next, select Country of origin from Sibling characteristic list.

In this case, while specifying the characteristics for an item, the State field displays the states that belong to the selected Country of origin only.



Product 360° view **Characteristics** Header Preview Text Prices Media

Region

Region

Continent: Asia

Country of origin: India

States:

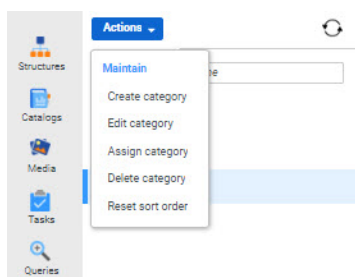
No content

Karnataka

9.2 Categories


Before you create characteristics, you must create categories. You can create characteristics within a category. After creating categories, assign them to relevant structure groups and activate the categories to add characteristic values.

You can also deactivate and delete categories.



9.2.1 Creating a category

You can activate or deactivate a category. Ensure that you activate the category to add the characteristic values.

1. In the context selection menu bar, click .

2. From the **Actions** menu in the navigation area, click **Create category**.

The **Create new category** dialog box appears.

3. Enter the following details:

Field	Description
Code	A unique code to identify the category.
Name	A language-specific name for the category.
Description	A language-specific description for the category.
Active	Indicates whether to activate the category. If you deactivate a category, you cannot add any characteristic values.

3. Click **OK**.

The category is created and added to the list of categories in the navigation area.

9.2.2 Editing and activating a category

After you create a category, you can edit the details of the category. You can also activate or deactivate a category.

1. In the context selection menu bar, click .

A list of categories appears in the navigation area.

2. Select the category to edit, and from the **Actions** menu, click **Edit category**.

The **Edit category** dialog box appears.

3. Edit the details as required.

4. In the **Active** list, select **Yes** to activate the category, or **No** to deactivate the category.

5. Click **OK**.

9.2.3 Assigning categories to structure groups

After you create a category, assign the category to structure groups. The characteristic values are applicable to the specified entities that belong to the structure groups that you have assigned.

1. In the context selection menu bar, click .

2. In the navigation area, select the category to assign.

3. From the **Actions** menu in the navigation area, click **Assign category**.

The **Assign category** dialog box appears.

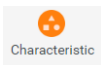
4. Select the structure groups to which you want to assign the category.

5. Click **OK**.

The category is assigned to the structure group.

9.2.4 Deleting a category

You can delete a category if it is not assigned to any structure group.

1. In the context selection menu bar, click .

2. In the navigation area, select the category to delete.

3. From the **Actions** menu, click **Delete category**.

The **Confirmation** dialog box appears.

4. Click **OK**.

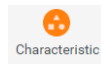
The category is deleted.

9.3 Managing Characteristics

To create and manage characteristics, the user profile that your administrator has assigned to you must have the required rights. You can create root and child characteristics, manage access rights, and edit, activate, deactivate, and delete characteristics. You can also configure value providers to define dependencies between lookup values.

9.3.1 Creating a root characteristic

The first level characteristic is the root characteristic.

1. In the context selection menu bar, click .

2. From the **Actions** menu in the list view, click **Create root characteristic**.

The **Create new characteristic** dialog box appears.

3. Enter the following details:

Field	Description
Identifier	A unique identifier to identify the characteristic.
Name	A language-specific name for the characteristic.
Data type	A data type for the characteristic.

4. Click **OK**.

The root characteristic is created.

5. In the **List** view, add the following values:

Detail	Description
Name	Language-specific name with 250 characters.
Description	Language-specific description with 2000 characters.
Identifier	A unique identifier for the characteristic.
Entities	The applicable entity, such as item, variant, or product.
Minimum records	Maximum records permitted for the characteristic.
Maximum records	Minimum records permitted for the characteristic.
Purpose	Purpose of the characteristic.
Target markets	List of target markets represented.
Standardization system	The standardization system, such as GDSN.
Alternative identifier	An alternative identifier for the characteristic.
Data type	The data type of the characteristic.
Value provider	The value to configure dependencies between lookup values. You can determine whether to display a child lookup value based on the selected parent lookup value.
Default value	Default value of a new record.
Read-only	Indicates whether you can change the values.
Multiple value	Indicates whether you can save multiple values.
Unit	Optional definition of a unit for a value.
Validation expression	Expression that validates the values.
Test input	A test value that you can validate against the defined format.

9.3.2 Creating child characteristics

You can add multiple child characteristics to a root characteristic.

1. Select the root characteristic to which you want to add the child characteristic.
2. From the **Actions** menu in the list view, click **Create child characteristic**.

The **Create new characteristic** dialog box appears.

3. Enter the following details:

Field	Description
Identifier	A unique identifier to identify the characteristic.
Name	A language-specific name for the child characteristic.
Data type	The data type for the child characteristic.

4. Click **OK**.

The child characteristic appears in the detail view below the root characteristic.

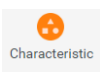
5. Add the details in the **List** view as required.

Actions ▼		Animal ingredients	
Name (English)	Identifier	Min./Max. records	Lookup list
▼ Animal Ingredient	AnimalIngredient	0 to 5 (optional)	Animal Ingredients
▼ Animal Species	AnimalSpecies	1	Animal Species
Animal Spec	AnimalSpecies.Name	1	

9.3.3 Creating child characteristics with conditional values

Use conditional values to define dependencies between properties. To create conditional values, create a characteristic with the Lookup data type. You can add conditional values for a child characteristic only.

For example, for the Animal Ingredients in the lookup list, if you select the conditional values as Leather, the characteristic is applicable only when the Animal Ingredient is leather for an item.

1. In the context selection menu bar, click  ..

2. In the navigation area, select the category.

The characteristics appear in the **Detail** view.

3. Select a value from the lookup list for the root characteristics.

4. Select a value from the **Add condition** list for the child characteristics.

9.3.4 Managing access rights

Use the Access rights tab to manage access rights for characteristics.

Use one of the following options:

Option	Description
Open	All user groups can read and write the data records for the characteristic.
Restricted	All user groups are restricted from accessing the records for the characteristic.

Use the following options to specify exceptions:

Option	Description
No access	The specified user groups have no access to the records for the characteristic.
Read only access	The specified user groups have read-only access to the records for the characteristic.

9.3.5 Activating characteristics

After you specify the details for the characteristics, activate the characteristics.

1. Select the root characteristic that you want activate.
2. From the **Actions** menu in the list view, click **Activate characteristic**.

The **Confirmation** dialog box appears.

3. Click **OK**.

9.3.6 Configuring a value provider

Configure value providers to define the dependencies between the parent and child lookup values.

1. In the context selection menu bar, click **Characteristics**.

A list of characteristics appears in the navigation area.

2. Select a characteristic
3. In the list view, select a characteristic value.
4. In the **Detail** view, on the **Details** tab, select the data type as **Lookup value**.
5. Select one of the following value providers and perform the corresponding task:

- Lookup of parent characteristic.
 - a. Specify the parent characteristic value.
- Lookup of sibling characteristic.
 - b. Specify the sibling characteristic value.

9.3.7 Deactivating characteristics

Deactivate the characteristics when required. When you deactivate characteristics, the characteristic values for the entities are not visible any more.

1. Select the characteristic that you want deactivate.
2. From the **Actions** menu in the list view, click **Deactivate characteristic**.
The **Confirmation** dialog box appears.
3. Click **OK**.

9.3.8 Deleting characteristics

Delete the characteristics that you do not require. You can delete only deactivated characteristics.

1. Select the characteristic that you want to delete.
2. From the **Actions** menu in the list view, click **Delete characteristic**.
The **Confirmation** dialog box appears.
3. Select **Please confirm to proceed**, and click **OK**.

The characteristic and all associated data records are deleted.

9.4 Values for characteristics

Once the characteristics have been modeled and activated, specific values can be maintained for the entities.

In general, all available characteristics are visible. Values of characteristics that were once available are also visible. However, these are write-protected and appear as “not available” in the interface.



If a characteristic is missing, check that the following conditions are met:

- Check whether the characteristic is activated.
- Define the category for the characteristic
- Make sure that the category is activated.
- Check which structure groups the category is assigned to.
- Is the entity assigned to one of these structure groups?
- Does the user have access rights for the characteristic values?

To start data maintenance:


Select in the navigation area to access the structure systems. All structure systems that have been created and are available are displayed here in a hierarchical tree structure.



1. In the navigation area, select Structures.
2. Select a catalog of your choice.
3. Select a structure of your choice.
4. Select a type: for example: Item.
5. Click on the corresponding structure group to display the items.
6. Click on items in the table area.
7. Select the Characteristics tab in the detail area.


 **Note:** You can use  to navigate in the hierarchy.

9.4.1 Maintaining values

Adding values


1. In the detail view, click on  next to the characteristic for which a new value is to be added.
 - Depending on the configured data type, a field appears for entering the value.
2. Enter the required value.
 - The value is saved automatically.


 **Note:** Depending on the set number of possible data records for the characteristic, it is possible to create several instances by clicking on  again.

 **Note:** The user must have permission to edit characteristic values. The rights are defined for the characteristic.

Copying values


You can copy the values for an entire category. However, it is not possible to limit the selection further.


 **Caution:** Pasting the data records for characteristics from the clipboard to the selected objects overwrites all existing data records for the selected categories

1. Click on  in the detail view.

- ⇒ The dialog box for copying data records for characteristics to the clipboard opens.
- 2. Select the categories.
 - ⇒ All data records belonging to a characteristic located in the selected categories are copied.
- 3. Click on **OK**.
- 4. In the table view, select the item to which you want to assign the copied values.
- 5. Click on the Paste icon
 - ⇒ The dialog box for pasting data records for characteristics from the clipboard opens and asks you whether you want to continue.
- 6. Confirm by clicking on **OK**

Deleting values

- 2. In the detail view, click on  next to the characteristic whose value you want to delete.
 - ⇒ The value is deleted.

 **Note:** All characteristics whose categories correspond to the item's structure group and that are active are displayed.

10 Lookups

Lookups include a set of predefined values for a specific field. You can configure lookups by using Product 360 Desktop. After you configure lookups, you can add or delete lookup values by using Product 360 Desktop or Product 360 Web.

For example, you can create a lookup called Country, and then you can add a list of countries as lookup values to the Country lookup. After you add the lookup values, while specifying the characteristics for an item, the Country field displays the list of countries that you have added.

10.1 Reference values for Lookups

You can add reference values to each lookup value. For example, for the lookup value Germany, you can add the states of Germany as reference values.

After you add the reference values, configure value providers to define the dependencies between the parent and child lookup values. For more information on value providers, see [Characteristics](#) [87].

10.2 Managing lookups

You can create and delete lookup values and add reference values to each lookup value. You can also filter the reference values, see the referenced values, and delete the referenced values.

10.2.1 Creating lookup values

Use the Lookups context selection menu to create lookup values.

1. In the context selection menu bar, click **Lookups**.

A list of lookups appears in the navigation area.

2. Select a lookup, and from the **Actions** menu, click **Create lookup value**.

3. In the **Detail** view, click the **Lookup value details** tab, and enter the following details:

Field	Description
Code	Specify a unique value for the lookup.
Active	Activate the lookup.
MIME Attachment	Upload a multimedia media file for the lookup.
Standardization system	Specify the standardization system, such as GDSN.
External code	Specify additional codes for the lookup values.
Languages	Set the required language.
Name	Provide a name for the for the lookup.
Description	Provide a description for the for the lookup.
MIME Attachment	Upload a language specific multimedia media file for the lookup value.

10.2.2 Creating reference values

Ensure that you add all the lookup values to the parent and reference lookups.

1. In the context selection menu bar, click **Lookups**.

A list of lookups appears in the navigation area.

2. Select the required lookup.

The lookup values appear in the list view.

3. Select the lookup value to which you want to add reference values.

4. In the **Detail** view, click the **Referenced values** tab.

5. Under **Include values**, click the **Create lookup value reference**  icon.

The **Create lookup value reference** dialog box appears.

6. Click **here**.

The Lookup context selection menu opens.

7. In the navigation area, select the lookup that contains the reference values.




8. In the list view, select the lookup values, click **OK and close browser window**, and click **OK**.

The selected values are added to the lookup value as reference values.

10.2.3 Managing reference values

After you create a reference value, you can delete, filter, or view the referenced objects.

In the **Detail** view, on the **References values** tab, perform the following tasks:

- To delete the reference value, perform the following tasks:
 - a. Select the referenced value to delete, and click the **Remove referenced lookup value**  icon.
 - b. Click **Yes**.
- To filter referenced values, perform the following tasks:
 - a. Select the required value, and click the **Filter referenced lookup value**  icon.
 - b. In the **Filter by** list, select your filter criteria, and click **Filter**.
- To view the referenced value in the **List** view, select the lookup value, and click the **Show referenced lookup value**  icon.

The selected referenced object opens in its **List** view.

10.2.4 Deleting lookup values

You can delete the lookup values if required.

1. In the context selection menu bar, click **Lookups**.

A list of lookups appear in the navigation area.
2. Select a lookup, and from the **Actions** menu, click **Delete lookup value**.
3. The **Confirmation** dialog box appears.
4. Click **Yes**.

11 Audit trail

An audit trail records the history of all the modifications that an object undergoes. For example, a user might modify an item by updating the price. Also, an item might undergo modifications because of system operations, such as merge. The audit trail records the details of modifications that the users make, and the modifications that occur because of system operations.

You can use audit trail to view the modification history of objects and track all the modifications. You can find any modified object, and view the history of its modifications.

To find modified objects, use the **Audit Trail** context selection menu. Use the search pane to specify search conditions and view the modified records based on the conditions you apply.

Use the **History** tab to view the history of all the modifications of the selected objects. The **History** tab displays the date and time of the modification, the user who made the modification, and the initiator of the modification for every modified field. You can view the history in Flex UI. To configure the Flex UI settings, contact your administrator.


You can see if a section of data was created, deleted or changed. You can also see the old and new values for each field, compare these values, and revert new values to old values, if required.

11.1 Audit trail search pane

Use the **Audit Trail** context selection menu to find modified objects. Use the available filters in the search pane to specify your search conditions.

You can specify search conditions, such as identifier, the type of change, the time period of the modification, the initiator of the modification, and the user who made the modification. For example, if you specify a specific user, such as administrator, all the modifications that the administrator made appear in the **List** view.

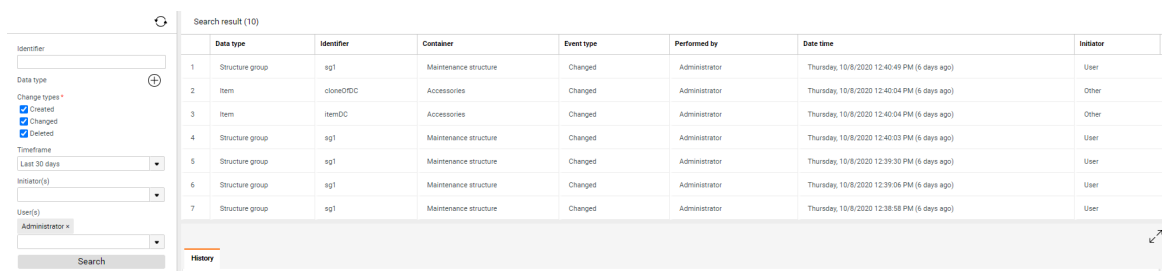
Product 360 Web retains the search conditions that you specify across sessions. Use the **Refresh**

 icon to reset the search conditions.

To search across all the modified objects, you can leave the filters blank. However, the **Change types** filter is mandatory.

The **List** view displays details, such as the data type, identifier, container, event type, user who made the modification, and initiator of the modification.

The following image displays a list of objects that the administrator modified.



Audit Trail Search Results


11.1.1 Finding modified objects

Use the search pane in the **Audit Trail** context selection menu to find modified records. You can search for modified objects from products, variants, items, structure groups, lookup values, and characteristics.

1. In the context selection menu bar, click **Audit Trail**.

The search pane appears.

2. Use the following search fields to specify your search conditions:

Field	Description
Identifier	Searches for the modified objects based on the specified identifier. For example, the item number is an identifier of an item.
Data type	Searches for the modified objects that belong to the specified data type, such as structure group or supplier catalog. To add a data type, click  .
Field Selection	Searches for specific fields modified for the objects that belong to the respective data type.
Change types	Searches for objects based on the type of modification, such as created, changed, or deleted.
Timeframe	Searches for objects modified during the specified time duration.
Initiator(s)	Searches for objects modified by the specified initiator. For example, if you select import, the objects modified by the import appear.
Users(s)	Searches for objects modified by the specified user.

3. Click **Search**.

The modified objects appear in the **List** view based on the conditions you specify.

11.2 Modification history

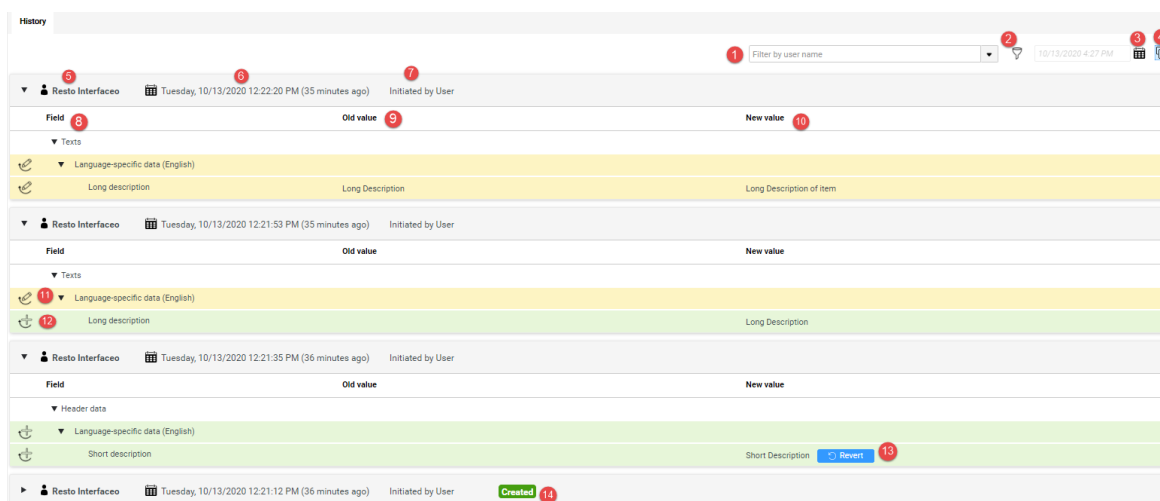
Use the **History** tab to view the details of the modifications, such as the date and time of the modification, the user who made the modification, the initiator of the modification, the modified fields, and the modified values. You can view the modification history of multiple objects at once. When you select multiple objects, the **History** tab displays the object identifier for each change history.

Each change history appears as a node, and each node includes multiple child nodes. To view the details of the modifications, you must expand the child nodes.

For example, when you view the modifications made to the short and long descriptions of an object, you might see Texts as the primary node and Language-specific data as the child node.

When you expand the child node, you can see the modified values. You can see if a value was added, deleted, or changed. Both old and new values appear, and you can compare and revert the new values or old values.





The following image shows the modifications of an object on the **History** tab:



History Tab


The following table describes the user interface elements of the **History** tab:

Legend	Description
1	Filters the records according to the specified user who made the change.
2	Filters the modification history based on the selected fields.
3	Filters the modifications made until a specific date.
4	Expands or collapses all the nodes.
5	User who made the modification. To view the user who made the modification, you must have the appropriate rights.
6	Date and time of the modification.
7	Initiator of the modification.
8	Field that the user modified.
9	Old value of the modified field.
10	New value of the modified field.

	Icon to indicate that the field value was changed.
	Icon to indicate that a new value was added.
	Reverts the selected value to another historic value.
	Status that indicates that the object was created.

11.2.1 Viewing modification history



You can view the modification history of objects from products, variants, items, structure groups, lookup values, and characteristics.

1. Navigate to the required object, and then in the **List** view, select the object.
2. In the **Detail** view, click the **History** tab. For audit trail search results, the **History** tab appears by default.
The modification history of the selected object appears as nodes.
3. To view the modification details, expand the nodes. To expand all the nodes at once, click the **Expand all**  icon.

11.2.2 Filtering modified records

After the modification history appears, you can choose to display modifications made to specific fields, modifications made by specific users, and modifications made until a specific date.

On the **History** tab, perform one or more of the following tasks:

- To display modifications made by specific users, in the **Filter by user name** list, select the users.
- To display modifications made to specific fields, click the **Field selection**  icon, and select the required fields. You can add fields without adding any qualifications.
- To display the modifications made until the specified date, click the **Calendar**  icon, and select a date.

11.2.3 Reverting new values to old values

When you expand the field nodes, you see the old and new values of the modified fields. You can revert a current field value to another historic value.

1. On the **History** tab, navigate to the field value by expanding the nodes.
The old value and the new value appear.
2. Hover over the new value or old value, and click **Revert**.

The **Revert the field value** dialog box appears.

3. Click **Apply**. By default, the **Apply** button is disabled if the currently active value of the object is identical to the selected historic value.

12 Dashboard

Dashboards support day-to-day work by providing the user with a personalized view of data and tasks.


Actions can be initiated directly from the dashboards.

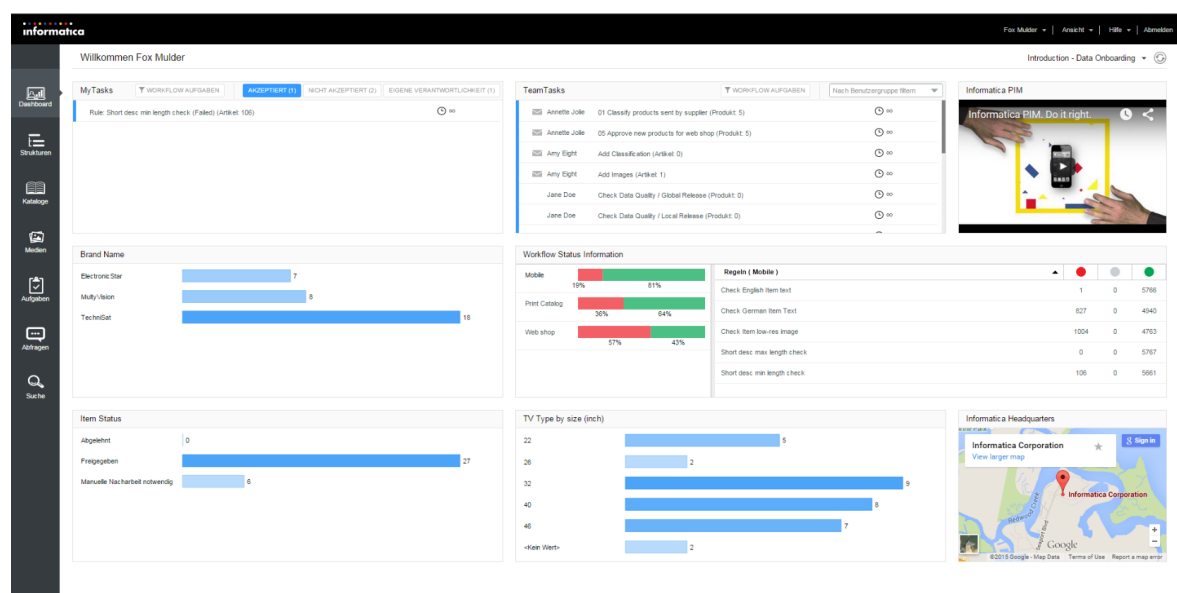
Possible actions include:

1. From a task list, you can directly access the **Flex UI** flexible user interfaces for the tasks shown.
2. From an overview of data quality statuses, you can create tasks for data.
3. The overview diagrams are used to access tables containing filtered data.

12.1 Calling up dashboards


When you initially call up Product 360 Web the **Dashboard** context opens automatically. If a different context is already active, you can use the navigation menu to reach the **dashboard**.

 **Note:** For this context to be displayed, interface visibility rights are required and at least one dashboard must be assigned to one of the user groups.



Dashboard

If several dashboards are available to you, you can select them in the drop-down list. You can

use  to update the data in the dashboard.

13 Performance statistics

To ensure optimum operation of Product 360 Web, information of a technical nature is necessary. You can view a summary of the most important performance data by selecting **View >**

Performance statistics.

Performance Statistics	
User name:	Seven, Kitty
This page was loaded in	322 ms
The bandwidth to the server is:	179678 kbps ($\pm 10\%$)
The latency to the server is:	3 \pm 0.37ms
Browser:	Firefox v 39.0
Date:	Wed Aug 19 2015 10:34:37 GMT-0700 (Pacific Standard Time)

Performance statistics

A separate window containing the following information is opened:

- The time (in milliseconds) required to load the relevant page. This specifies the difference, which arises as a delay between two operations (sending and receiving data).
- The bandwidth is a measure of the capacity or transfer rate in digital data transmission. It is specified in the unit bits per second and represents the available ***data volume per unit of time*** ratio for digital data transmission.
- The latency is the time (in milliseconds) between an action (or an event) and the occurrence of a delayed reaction. If there is a latency time, the action is hidden and is only clear when the reaction occurs. Colloquially, reactions with a very short latency are said to occur *in real time*.
- Information about the users currently logged on, the browser used, and the current date rounds off the statistics.

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