



# Informatica MDM – Product 360

Web UI - User manual

Version 8.1.1 (English)

Informatica MDM - Product 360 - Web  
Version 8.1.1  
July 2018

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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.

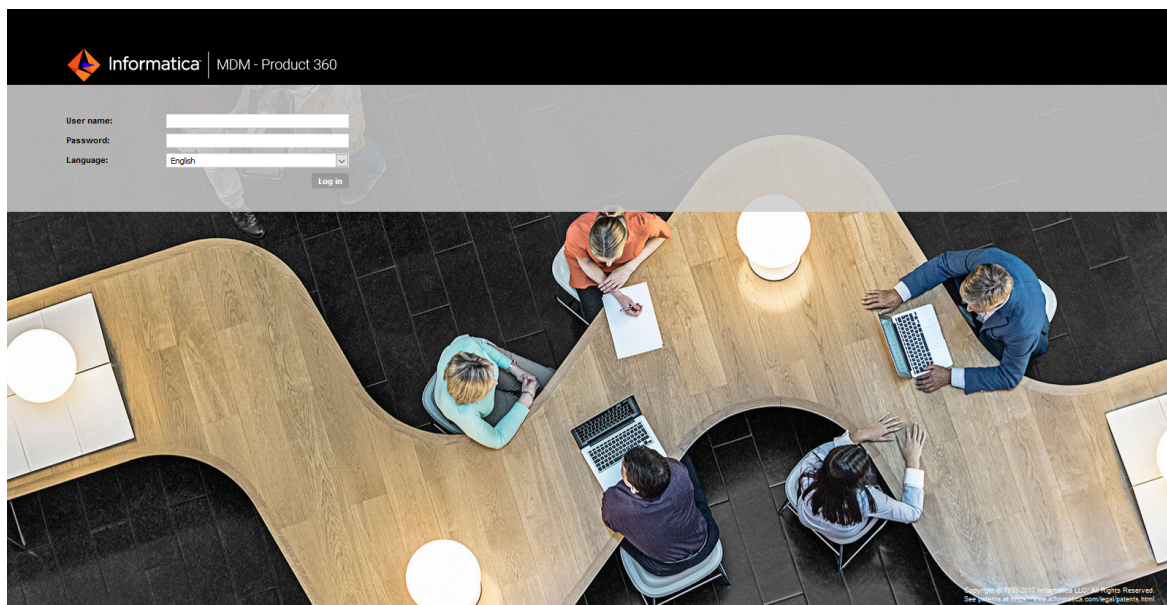
## 2 Starting Informatica MDM - Product 360 - Web

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

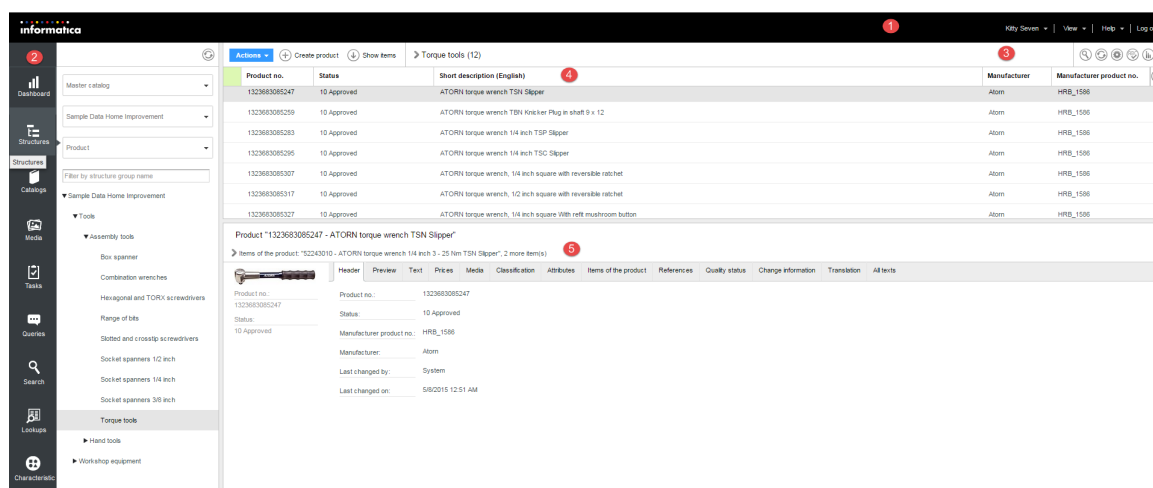
To log in, follow the steps below:

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

















Essentially, you see the program interface that your administrator has assigned to you in accordance with your user profile. This means that certain views, tabs, or fields are shown or hidden, depending on your permissions. The standard configuration is described here.







HPMW\_GUI

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 border="1"> <tr> <td></td><td>Dashboards provide the user with a personalized view of data and tasks</td></tr> <tr> <td></td><td><a href="#">Structures</a> <sup>44</sup> 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> <tr> <td></td><td>This icon takes you to the context selection for maintaining <a href="#">media attachments</a> <sup>62</sup>.</td></tr> <tr> <td></td><td><a href="#">Tasks</a> <sup>50</sup> created manually or by a workflow can be encountered in this context selection.</td></tr> </table>		Dashboards provide the user with a personalized view of data and tasks		<a href="#">Structures</a> <sup>44</sup> 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.		This icon takes you to the context selection for maintaining <a href="#">media attachments</a> <sup>62</sup> .		<a href="#">Tasks</a> <sup>50</sup> created manually or by a workflow can be encountered in this context selection.
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	Catalogs represent the physical containers for your data. The catalogs defined in Product 360 Desktop are available here.										
	This icon takes you to the context selection for maintaining <a href="#">media attachments</a> <sup>62</sup> .										
	<a href="#">Tasks</a> <sup>50</sup> created manually or by a workflow can be encountered in this context selection.										

	<div data-bbox="400 219 491 315">   Queries </div> <p><a href="#">Predefined queries</a><sup>[27]</sup> allow targeted and rapid access to a particular set of data.</p>
	<div data-bbox="400 333 491 427">   Search </div> <p>This icon is used to call up the functions of a <a href="#">full text search</a><sup>[29]</sup>.</p>
<div data-bbox="300 454 352 517"> <span>3</span> </div>	<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 <b>Actions</b> 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 refer to: <a href="#">Actions menu</a><sup>[11]</sup></p> <p>The Favorites menu allows you to quickly access frequently used actions. For details of how to configure the settings, refer to the <a href="#">Favorites menu</a><sup>[12]</sup>.</p> <p>The breadcrumb trail shows you the last path selected in the data hierarchy.</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 <a href="#">Toolbar</a><sup>[13]</sup></p>
<div data-bbox="300 963 352 1025"> <span>4</span> </div>	<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 <a href="#">toolbar</a><sup>[13]</sup> to <a href="#">filter the table content</a><sup>[26]</sup>, add or delete columns, and select predefined views.</p> <p>You can click on a column header to <b>sort</b> 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 <b>order of the columns</b> 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>
<div data-bbox="300 1534 352 1597"> <span>5</span> </div>	<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 <a href="#">section</a><sup>[17]</sup>.</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 Actions menu

Depending on the context, you can use the Actions menu to call up the following actions:

Menu option	Action	Context
Create product	Creates a new product.	Catalog
Delete product	Deletes the selected product.	Catalog
Clone product	Enables you to clone the selected product.	Catalog
Product classification	Opens the dialog box in which you can specify a structure group assignment for the selected products.	Catalog
Create variant	Creates a new variant.	Catalog
Delete variant	Deletes the selected variant.	Catalog
Clone variant	Enables you to clone the selected variant.	Catalog
Classify variants	Opens the dialog box in which you can specify a structure group assignment for the selected variants.	Catalog
Creating items	Creates a new item.	Catalog
Deleting items	Deletes the selected item.	Catalog
Clone items	Enables you to clone the selected item.	Catalog
Classify items	Opens the dialog box in which you can specify a structure group assignment for the selected items.	Catalog
Creating tasks	Creates a new task.	Catalog
Add to existing task	Opens the dialog box in which you can select the task to which you can add the current data record. Alternatively, you can create a new data record.	Catalog
Import data	Allows you to perform a direct import.	Catalog
Export selected rows	Allows you to perform a direct export.	Catalog
Execute data quality rules	Opens the dialog box in which you can select the quality rule according to which the current data record is to be checked.	Catalog
To higher-level selection	Navigates to the higher-level selection.	Catalog
Show variants	Shows all variants of the selected product.	Catalog

<b>Show items</b>	Shows all items for the selected variant.	Catalog
<b>Show subordinate structure groups</b>	Shows all subordinate structure groups for the selected structure group.	Structures
<b>Find and Replace</b>	Enables you to use the Find and Replace function.	Catalog
<b>Accept</b>	Accepts the current task.	Task
<b>Deleting a task</b>	Deletes the current task.	Task
<b>Open Flex UI</b>	Enables you to link tasks using a Flex UI template.	Task
<b>Show task content</b>	Shows the content of the current task.	Task
<b>Assign task</b>	Enables you to assign tasks to other users or user groups.	Task
<b>Mark as completed</b>	Enables you to mark tasks as completed.	Task
<b>Configuring menu settings</b>	Enables you to configure the Actions menu and the Favorites menu.	All

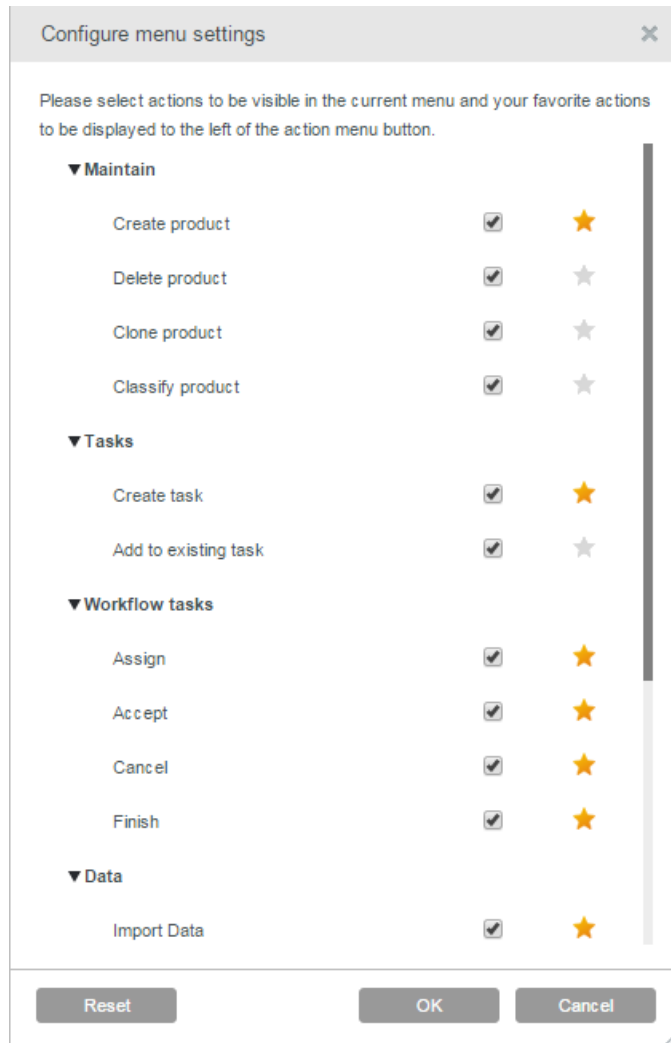


**Note:** The selection of menu options changes depending on the context you are in and the rights groups you are assigned to in the system.

## 2.1.2 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.








Configuring menu settings


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

## 2.1.3 Toolbar

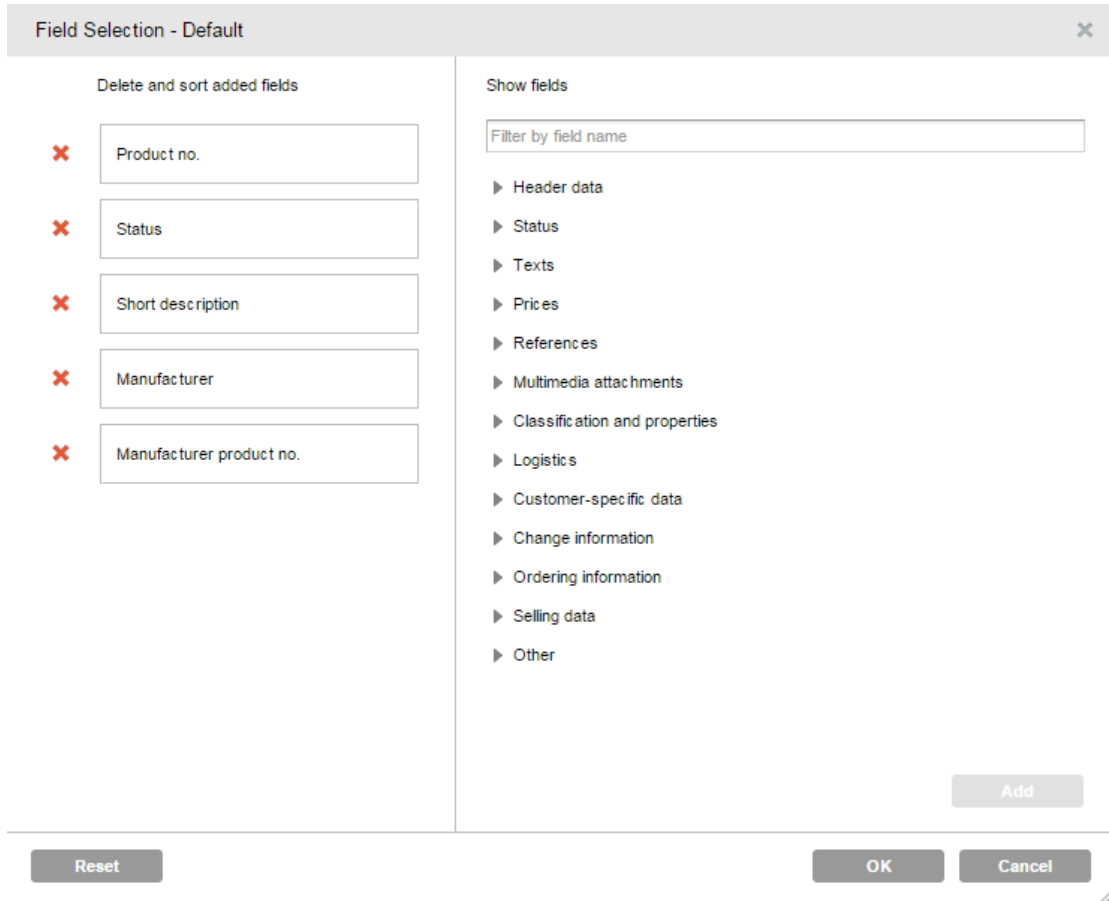
You can use the **toolbar** to execute the following actions:

- [Filter table data](#)<sup>[26]</sup>. 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 .

### 2.1.3.1 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.



The dialog box is titled "Field Selection - Default" and has a close button (X) in the top right corner. It is divided into two main sections:

- Delete and sort added fields:** This section on the left contains a list of five fields, each with a red 'X' icon to its left: "Product no.", "Status", "Short description", "Manufacturer", and "Manufacturer product no.". Each field is enclosed in a rectangular box.
- Show fields:** This section on the right contains a search bar labeled "Filter by field name". Below it is a list of categories, each preceded by a right-pointing triangle icon: "Header data", "Status", "Texts", "Prices", "References", "Multimedia attachments", "Classification and properties", "Logistics", "Customer-specific data", "Change information", "Ordering information", "Selling data", and "Other".

At the bottom of the dialog box, there are three buttons: "Reset" on the left, and "OK" and "Cancel" on the right. An "Add" button is located at the bottom right of the "Show fields" section.

#### Field selection

##### 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](#) <sup>8)</sup>.



### 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


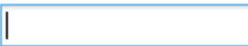
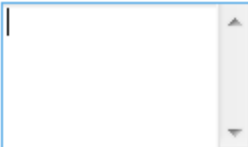
### Data selection

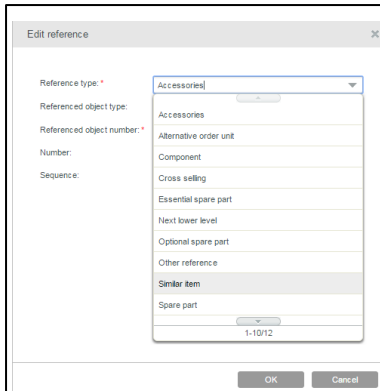
You must select a data record before you can access it and edit its field contents. By default, the context selection provides the top level hierarchy. **Clicking once** on a data record in the table view opens the corresponding detail view. **Double-clicking** opens the next level down in the hierarchy.

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.

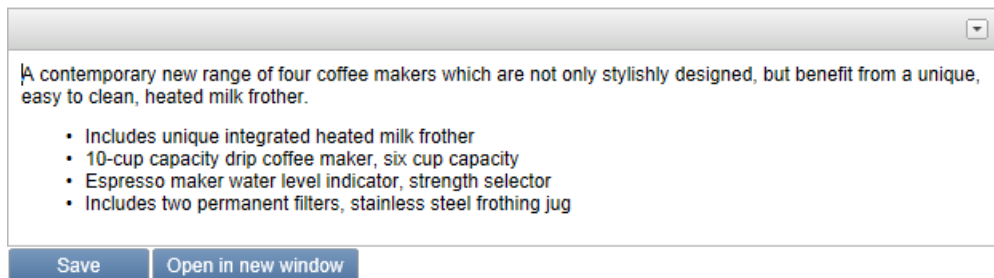
		
Selection field with preset values	Single-line input field	Multi-line input field
<p>Selection fields always have an arrow, which you can use to display the list of preset values for the field. Alternatively, you can make a direct entry to filter by preset values.</p>	<p>Changes are always saved automatically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





### Drop-down list

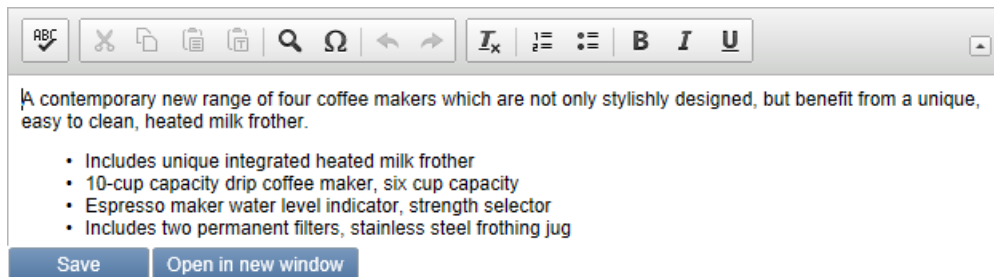
If the list contains more than 10 entries, you can use the arrows provided to scroll up and down through the list.

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**.

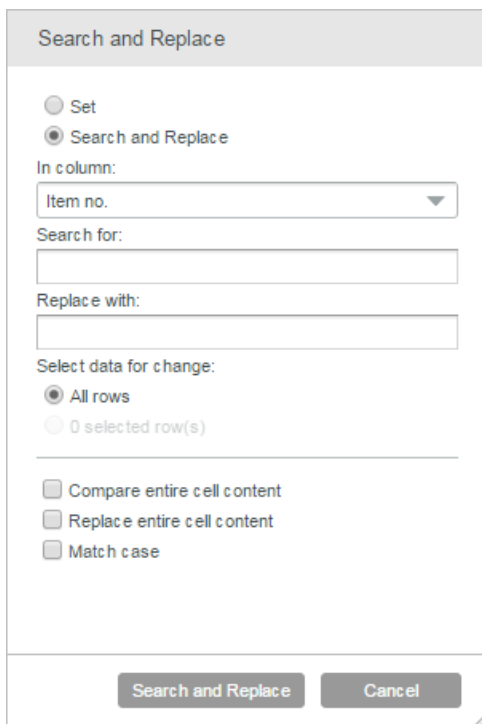
### 3.2.1 Find and Replace

**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.



Search and Replace

☐ Set  
☒ Search and Replace

In column:  
Item no.

Search for:

Replace with:

Select data for change:  
☒ All rows  
☐ 0 selected row(s)

☐ Compare entire cell content  
☐ Replace entire cell content  
☐ Match case

Search and Replace Cancel

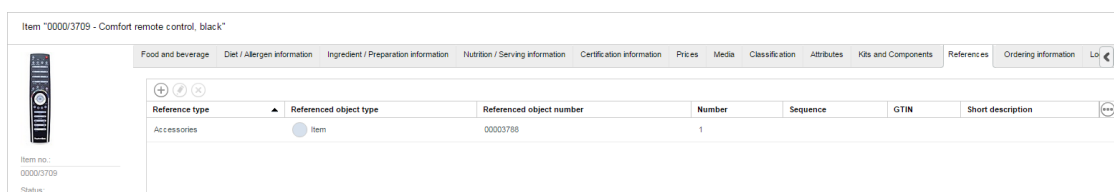
**Find and Replace**

### 3.2.2 Referencing data

A step-by-step guide to using references is provided below.

#### Selecting the object to be referenced




1. Select the relevant catalog in the pop-up menu.
2. [Select](#) <sup>17</sup> the relevant entry in the table.
3. Click on the "References" tab in the detail view.



#### Product references

#### Editing options

The icons for calling up the dialog box in different modes or for color highlighting are displayed, depending on whether you have selected a table entry.

Icon	Meaning
	Opens the dialog box for creating a new reference.
	Opens the dialog box for editing the reference that is currently selected.
	Deletes the selected reference.

## Creating new references

1. Click on the icon for creating a new reference.

Create reference

×

Complete the fields required for reference creation or click [here](#)

Reference type: *	<div>Successor item</div>
Referenced object type: *	<div>Item</div>
Referenced object number: *	<div></div>
Number:	<div>1</div>
Sequence:	<div></div>

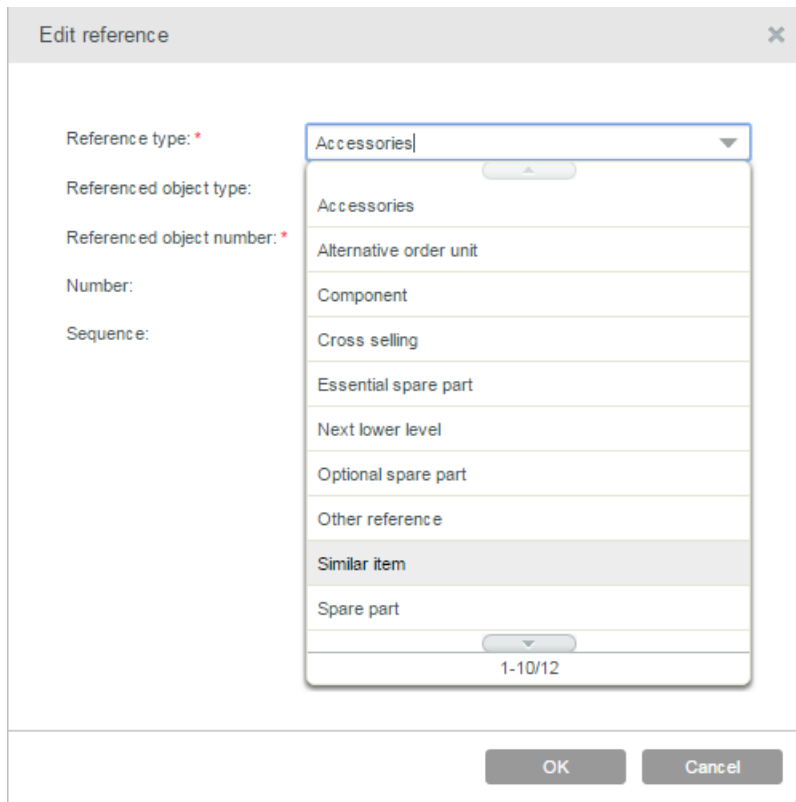
OK

Cancel

☐ Create another reference

Create reference dialog box

2. Select the reference type from the drop-down list.



#### Reference type

3. Enter the object type (product, variant, item) for which you want to create a link.
4. You can enter the object number directly, use CTRL+V to paste it (if it has already been copied) or select it directly from the table.

### Direct selection

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

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

5. The object number you have just selected has been copied into the relevant field.

6. The number is required for parts lists in particular.

7. The sequence is relevant for the "Up-Selling" reference type.

8. If you want to set another reference, check "Create another reference".


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

⇒ to discard them. The dialog box closes.

#### 3.2.2.1 Referenced media attachments

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


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
<b>Multimedia documents:</b>	
Jpg 70x70	  
originalimage	  

**Media attachments**


The following details are provided:


- Each media attachment 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 media attachments 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 on the **"Kits and components"** tab in the detail view.

4. You can use  to add a component.
5. Select the type from the drop-down list.
6. Enter the item number.
7. Click on **OK** to save the new data record.



**Note:** You can edit components by clicking on the component. You can use  to edit components and  to delete them.

### 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:



Head	Text	Prices	Media	Classification	Attributes	Items of the product	Refer
<p><b>Language</b> <span>English</span></p> <p><b>Short description:</b> AromaStar 12 cup Coffee Maker</p> <p><b>Long description:</b> This 12 cup thermal programmable coffeemaker has a double-wall stainless steel thermal carafe that keeps coffee hot and fresh for <u>hofurs</u>.</p> <ul style="list-style-type: none"> <li>• Stainless steel accents for classic kitchen style</li> <li>• Drip-free carafe</li> <li>• Programmable clock/timer</li> <li>• 2 hour auto shutoff</li> <li>• Auto pause and serve/Nonstick keep-hot plate/Easy-view water window</li> </ul> <p><b>Keywords:</b> <u>programmable</u></p> <p><b>Product segment:</b> No content</p> <p><b>Other remarks:</b> undefined</p>							

#### 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.

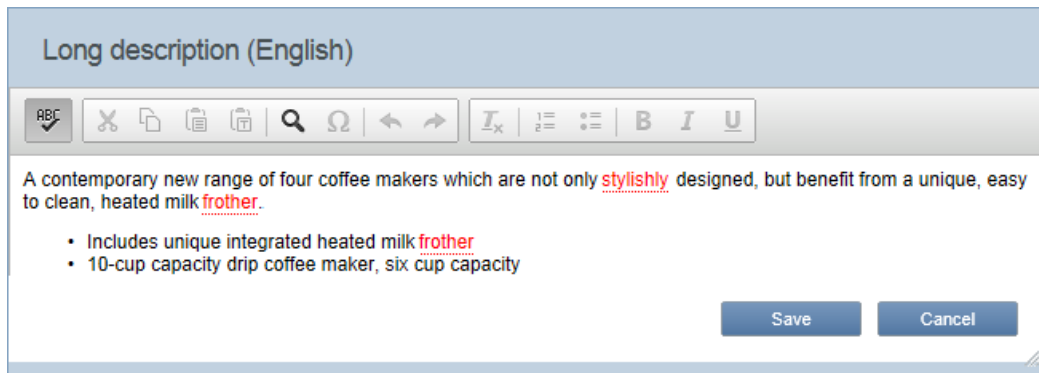
(No suggestions)  
Add to dictionary

**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](#)<sup>17)</sup> 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](#)<sup>[26]</sup>
- You can use queries in the navigation bar to access [predefined queries](#)<sup>[27]</sup> and use configured entries to perform a simple search.
- Selecting Search in the navigation bar gives you access to a [full text search](#)<sup>[29]</sup>.

#### 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 Saved queries

---

 **Note:** The queries available to you correspond to the underlying user profile assigned to you by your administrator. Your user profile takes account of all field rights and object rights associated with your role within your user group.

---

For a simple search, select  in the navigation area. You can access search queries here that can be selected for specific items or specific products. These queries can be divided into two categories:

1. Standard queries

⇒ These queries comprise the data filters that are most commonly used to access items or products.

Products classified by
Products not classified by
Products by status reached
Products by status not reached
Products with subordinate items
Products without subordinate items
Objects of data type 'Product' by their unique identifier
Products in a catalog
Products in an assortment
<b>Saved search queries</b>

### Product-specific standard queries.

For each query, you are required to complete a dialog box with details for the search. Mandatory fields are indicated by a red asterisk.

Products not classified by

▼

Structure system \*

▼

Quality status

▼

Channel

▼

Validation rule

▼

Search

Item

▼

### Adding details to a standard query

Select the required settings and choose **Search** to start the search operation.

## 2. Saved search query

- ⇒ These queries have been individually compiled in Product 360 Desktop using the **Item search**, **Product search** or **Structure group search** views and saved under a unique name. As a result, they can be displayed in a structured format in categories or as a "flat" list.

Item no. begins with
Item no. contains
Item no. equal to
Item no. not equal to
Search by GTIN
Search by status

### Saved item-specific queries

### 3.3.3 Full text search

The full text search accesses language-specific indices that either include the entire product stock (possible with different graduations) or predefined sections. Various search paradigms are provided in a structured view, and you can combine these as required until the result is the data you are expecting:

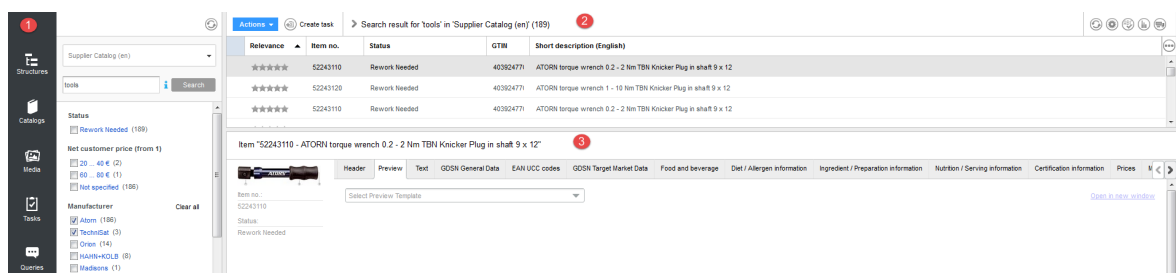
- Single field search
- Faceting
- Additional filter option using attribute and feature search



**Note:** The available indices are configured and scheduled by the administrator in Product 360 Desktop.









You can use **Search** in the menu bar for the context selection to access the **Search** function. All indices that have been created and are available in Product 360 Desktop are listed here in a selection window.



**Search perspective**

The user interface is provided in the following configuration:

Area	Description								
<div>1</div>	Define the search parameters in the first line of the navigation area. You can click on the refresh icon (🔄) to synchronize the contents of Product 360 Web with the current contents of Product 360 Desktop.								
	<table><tr><td>▼</td><td>Opens a selection field listing all created indices.</td></tr><tr><td></td><td>The next field is intended for explicit entry of the search term. All standard placeholders (commonly used operators: ?, *, %) are possible.</td></tr><tr><td></td><td>Indicates the date on which the current index was created in a tooltip window.</td></tr><tr><td><div>Search</div></td><td>Used to initiate the search operation.</td></tr></table>	▼	Opens a selection field listing all created indices.		The next field is intended for explicit entry of the search term. All standard placeholders (commonly used operators: ?, *, %) are possible.		Indicates the date on which the current index was created in a tooltip window.	<div>Search</div>	Used to initiate the search operation.
	▼	Opens a selection field listing all created indices.							
		The next field is intended for explicit entry of the search term. All standard placeholders (commonly used operators: ?, *, %) are possible.							
		Indicates the date on which the current index was created in a tooltip window.							
<div>Search</div>	Used to initiate the search operation.								

Area	Description				
	<p>Once a search operation has been initiated, all preset facets for this index are displayed in the area below. Facets are groupings that include realistic ranges of values relating to the relevant feature. You can activate these to further restrict the number of objects found.</p> <p>A maximum of 5 ranges of values per feature are displayed. If there are more, you will see a link to a dialog box where you can activate others. When this dialog box is closed, the ranges of values selected are integrated into the facet selection, so that 5 ranges of values are still displayed.</p> <p>The search result shows the hit rate in brackets.</p>				
2	<p>The relevant search result is displayed in a table here. The order is based on the percentage match with the search term. The hits right at the top have the highest level of congruence.</p> <p>In addition, you can use the icons displayed on the right-hand border of the screen to perform the following activities:</p> <table border="1"> <tr> <td></td><td>Create task from search result</td></tr> <tr> <td>Actions ▾</td><td>Export search result immediately</td></tr> </table>		Create task from search result	Actions ▾	Export search result immediately
	Create task from search result				
Actions ▾	Export search result immediately				
3	<p>The detail view provides the information grouped thematically on tabs. These relate to the underlying object type (item, variant, product) and provide targeted editing options.</p>				

## 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

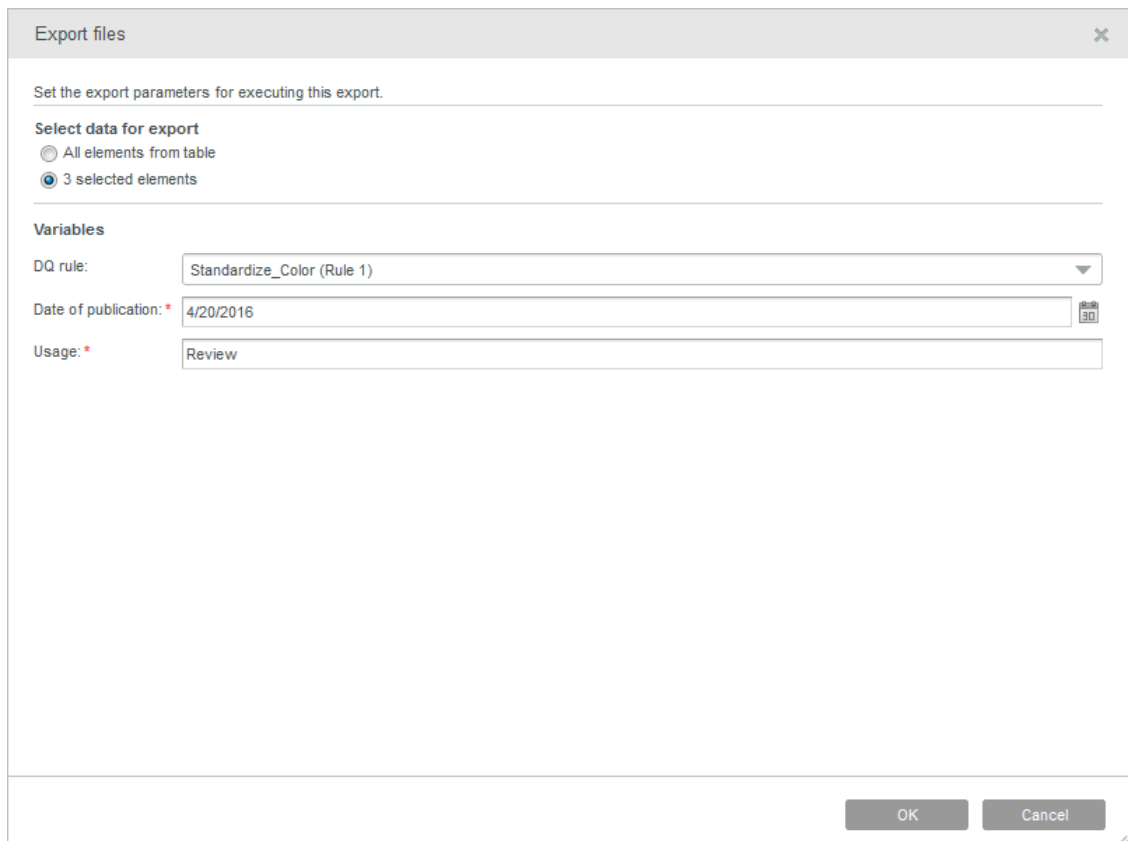
 **Note:** Exporting of data is regulated by the user profile that your administrator has assigned to you. Your user profile takes account of all field rights and object rights associated with your role within your user group.

 **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:



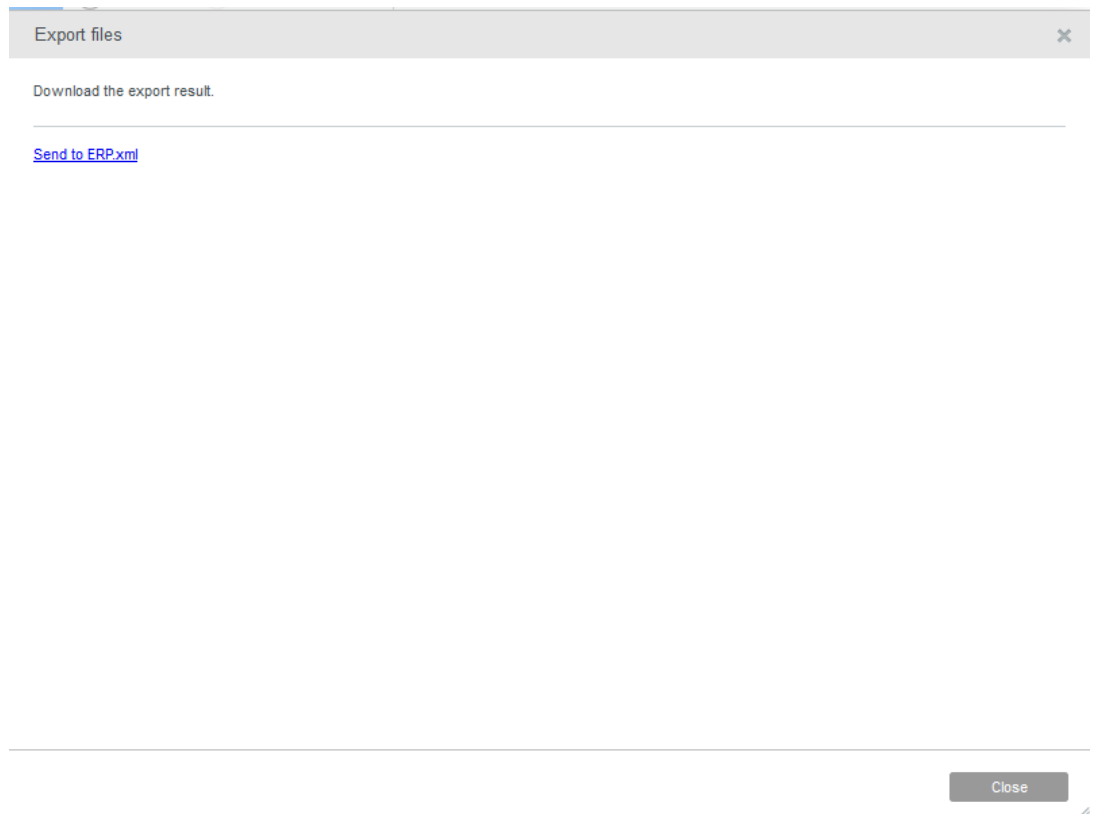
**Immediate export dialog box**

- ⇒ 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

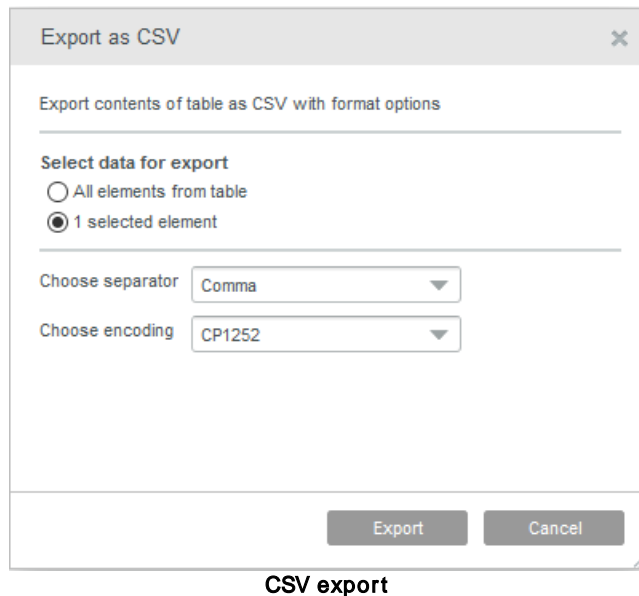
You can use this link to open the file manager window, where you can specify the storage location for the file. If any media attachments are assigned, they are provided in a separate zip file, which you can use as described above.

### 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**.



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.

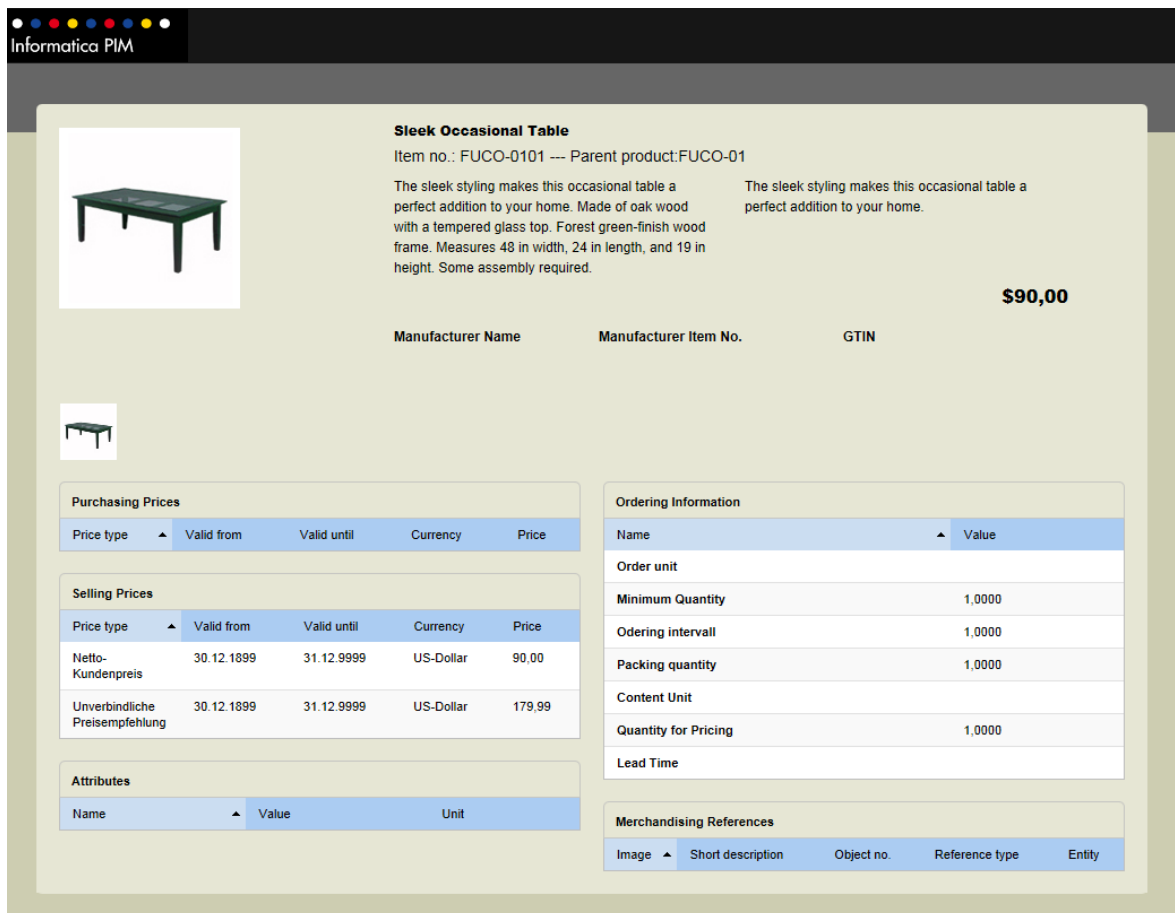
## 3.6 Preview function

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

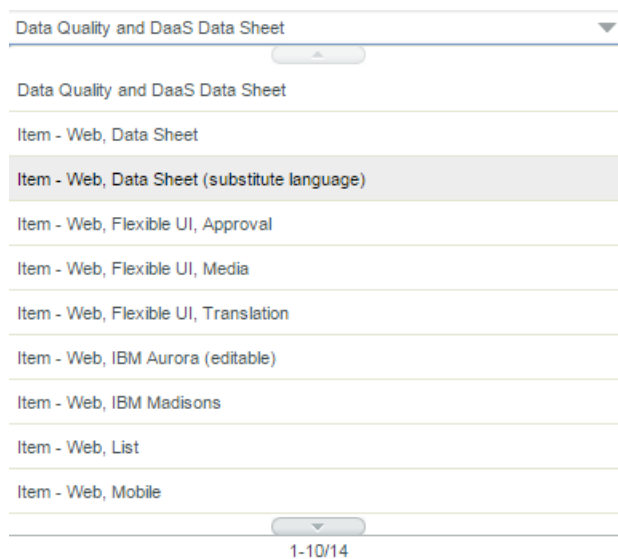
What is considered to be an advantage in PIM systems can become a disadvantage with layout-oriented publications because, often, it is not easy for the user to implement the editorial portion if the corresponding visual context is missing. Nevertheless, a quality assurance process should be possible.

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.

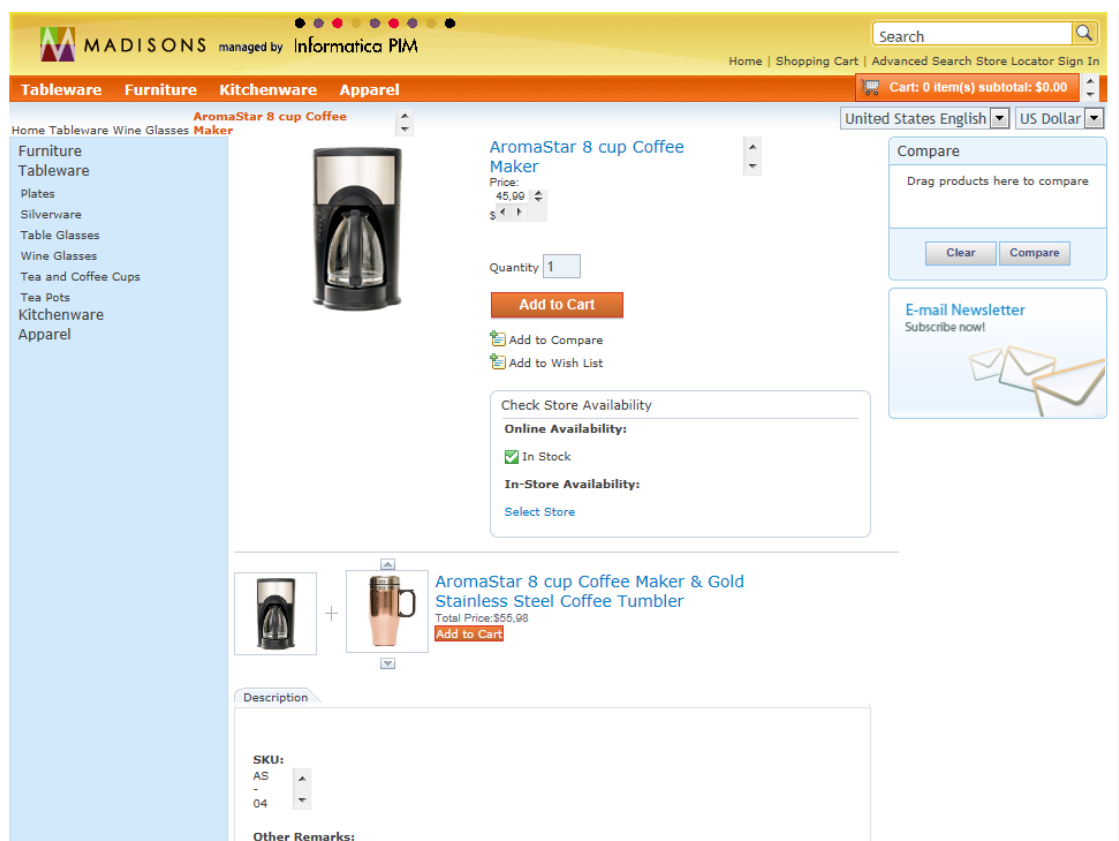
3. Select the relevant entry in the selection dialog box.



#### 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

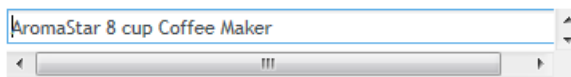
5. Editable fields have an adjacent scroll bar.

⇒ 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.

## 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](#)  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](#)  of the relevant object type.

## 4.2 Performing quality checks

Quality checks can be initiated in different ways:

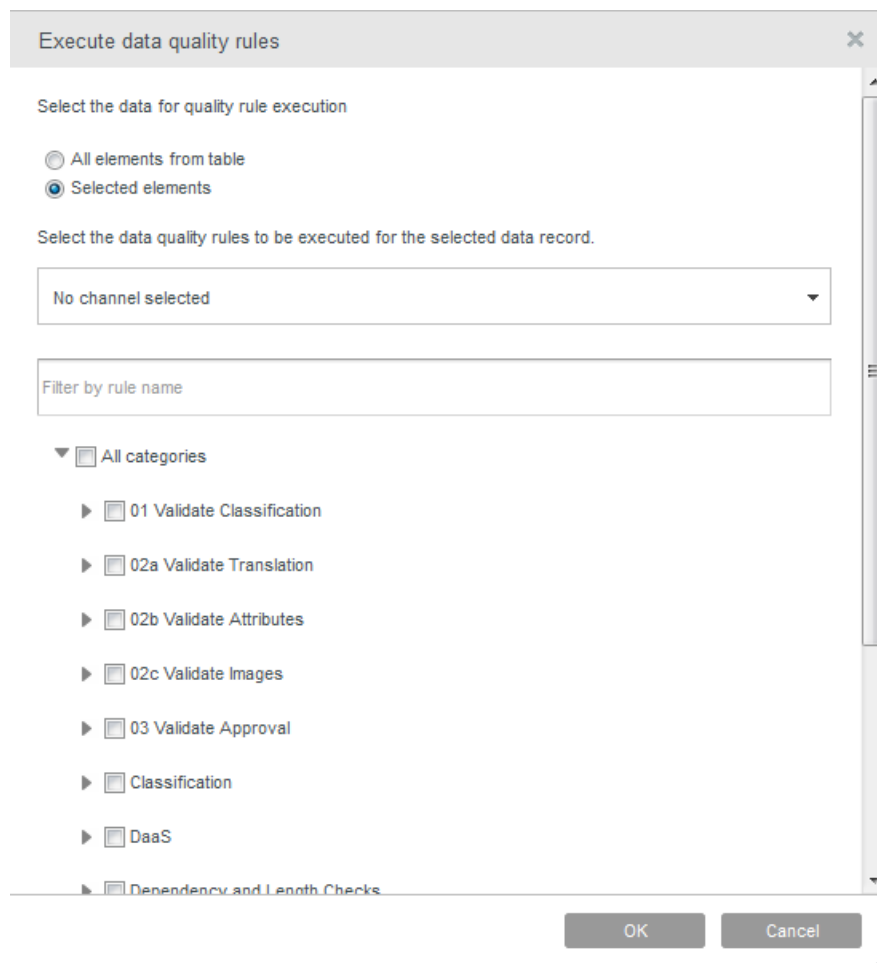
1. by an event defined in Product 360 Desktop or a fixed date, or
2. by a direct request

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](#)  or you can call up the dashboard for the selected volume of data.











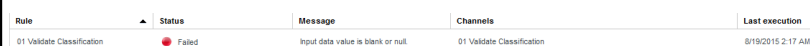
## 4.3 Viewing the quality rule result

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	<p>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.</p> <p>Since some validation rules are not assigned to a particular channel, you must select <b>All channels</b> so that you can also display these validation rules.</p>								
Status	<p>Icon for the status of the executed rule</p> <table> <tr> <th>Icon</th><th>Meaning</th></tr> <tr> <td></td><td>The check has been performed with no errors.</td></tr> <tr> <td></td><td>The check has detected errors.</td></tr> <tr> <td></td><td>Object not fully checked, or object has been modified since last check.</td></tr> </table>	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.
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.								
Ignore	<p>Under certain conditions, you can ignore the check results. Select the required data record in the table and click on .</p> <div>  <p>Ignoring the status of the quality check</p> </div>								

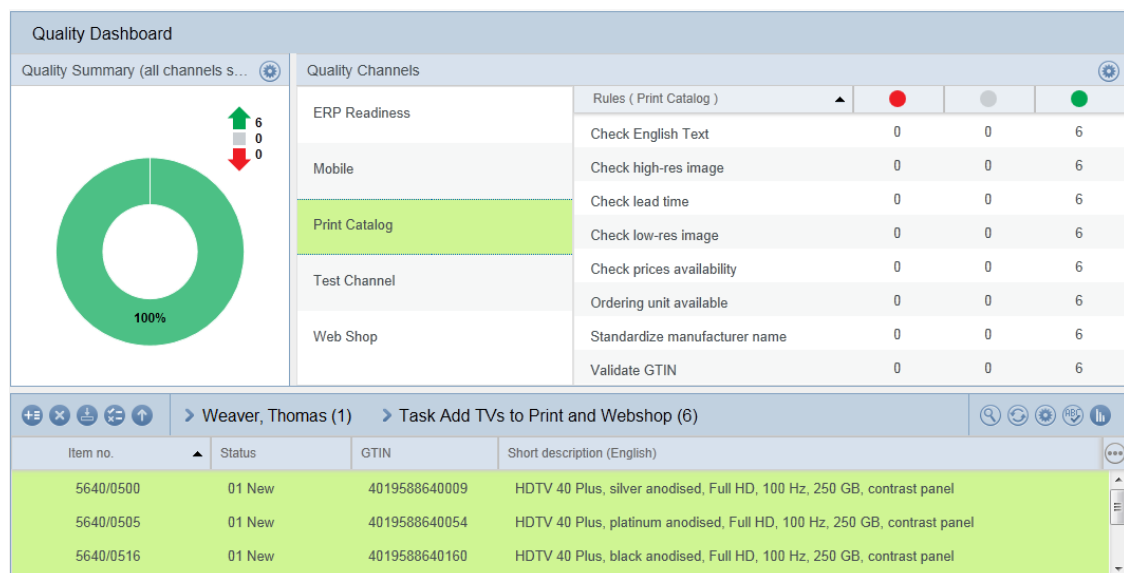
Field	Meaning
	<p>The adjacent fields log information concerning who initiated this exclusion and when.</p> <p>Ignoring a rule has an effect on the quality overview. An ignored rule is assessed as a rule with the result "OK".</p>
Score	For language identification rules, a match factor is specified here, 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:

- You can filter the results by clicking on  to call up the settings dialog box and adjust the settings accordingly.
- 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

Large data volumes require a structure in order to ensure that users can work efficiently with them.

In PIM, we refer to structure systems. The common feature of all structure systems is that they consist of a hierarchy of structure groups.

Structure systems cannot be edited in Product 360 Web. In Product 360 Web you can classify data by assigning it to structure groups, and you can maintain texts and media attachments for the structure groups.

### 5.1 Assigning 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.

---

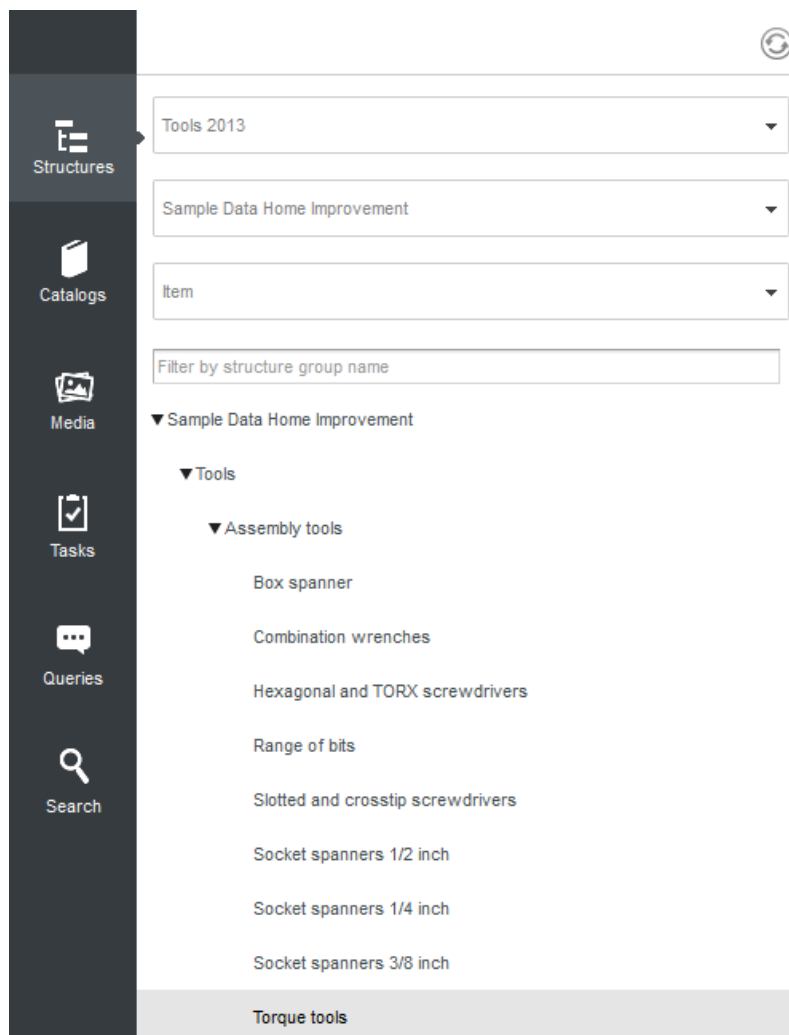


Select  in the navigation area to access the structure systems. All structure systems that have been created and are available in Product 360 Desktop are provided here in a hierarchical tree structure.



**Note:** You can expand and collapse the structures using ▼.

---



**Structures in context selection**

If you want to assign data to a structure group, we recommend the following procedure:

For the assignment itself, the following steps are recommended:

1. Select the data to be classified.
2. In the navigation area, select the structure group to be assigned.
3. Select the data records in the table.
4. Use drag & drop to drag them to the structure group.

⇒ As some structure systems allow you to classify items or products more than once, the following dialog box is displayed:

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

5. Select the required classification type, and click on **OK**.

⇒ All of the resulting information is displayed in a result overview:

If the items or products are already classified, the operation is canceled.

⇒ Note: To view all products in a higher-level structure group, click on **Show all.**

## 5.2 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.

## 5.3 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 media attachments 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 <a href="#">maintain the descriptions</a> <sup>17</sup> . 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 <b>one language</b> in each case.

Tab	Content
	If media attachments have been assigned to the structure, they are displayed here, including any media derivatives that may exist. You can use  to add new media attachments.
	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.

## 5.4 Deleting structure assignments



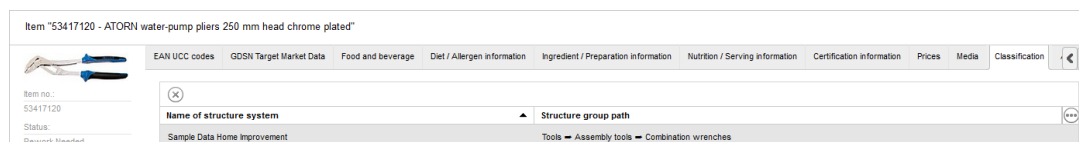
**Note:** The display format used depends on the defaults that your administrator has assigned to you via your user profile. Here, we describe the full range of editing options.

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.

⇒ It is then selected and the delete button is activated.

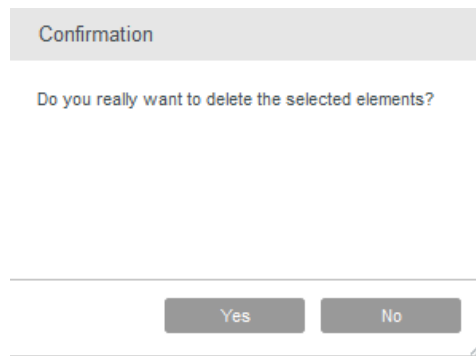


Selecting a structure

2. Click on .



- ⇒ A confirmation prompt is displayed to prevent you from deleting tasks by mistake.



**Confirmation dialog box**

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

- ⇒ The dialog box closes and the relevant entry is removed from the table.



## 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 z		5/27/2016 9:15 AM		Smith, John	
	Take customers out for dir	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.
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 z		5/27/2016 9:15 AM		Smith, John	
✓	<del>Take customers out for</del>	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

Workflow:

No content

### Task details

## 6.2 Standard tasks

Standard tasks can be:

- [Create](#) <sup>52</sup>
- [accepted](#) <sup>54</sup>
- [Assign](#) <sup>56</sup>
- [Delete](#) <sup>58</sup>

### 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:



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:

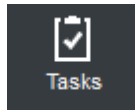
1. Select the **Queries** context in the navigation area.

2. Execute an appropriate [query](#) <sup>[27]</sup>.
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](#) <sup>[52]</sup> and are [assigned to a specific employee](#) <sup>[56]</sup>. 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	
✓E	Review customer feedback	High	04 Maintain missing t		5/27/2016 9:15 AM		Smith, John	
✓E	Take customers out for dir	High	The higher-level proc		5/27/2016 9:14 AM		Smith, John	

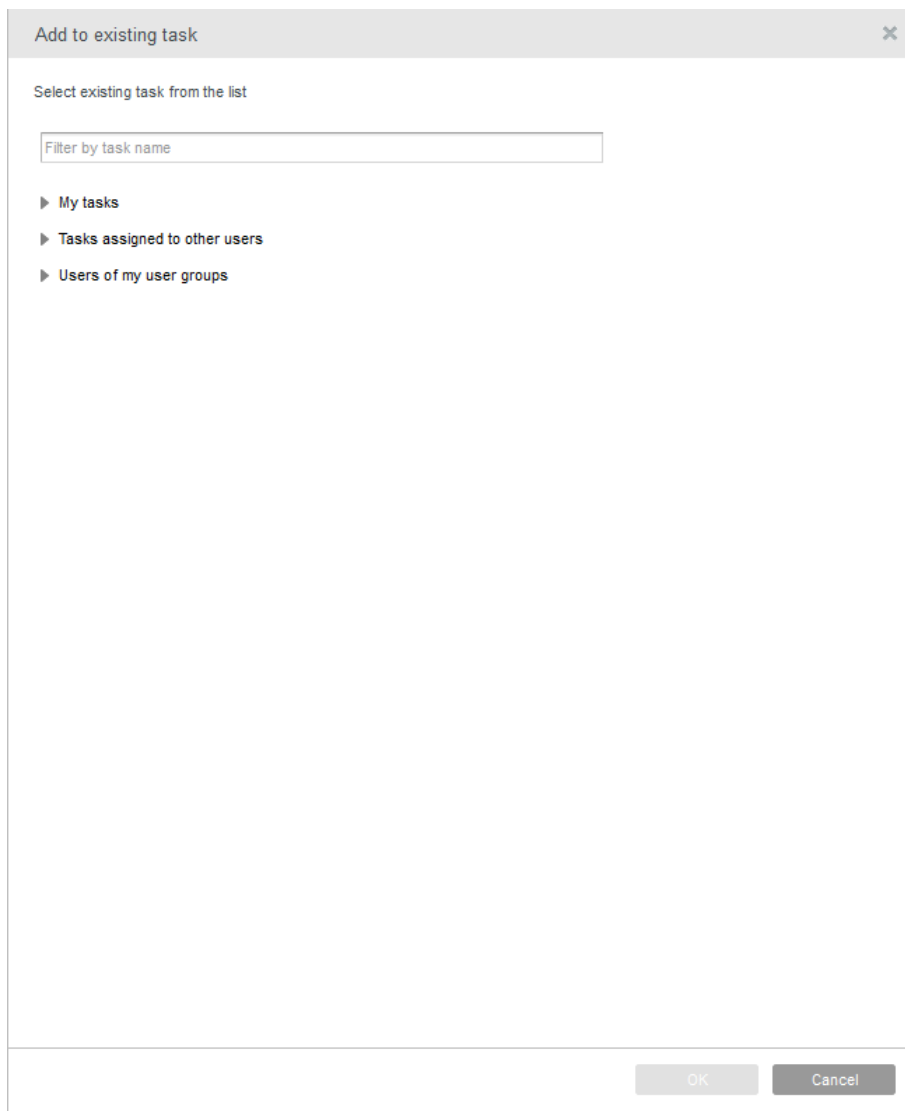
### My tasks

### 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:

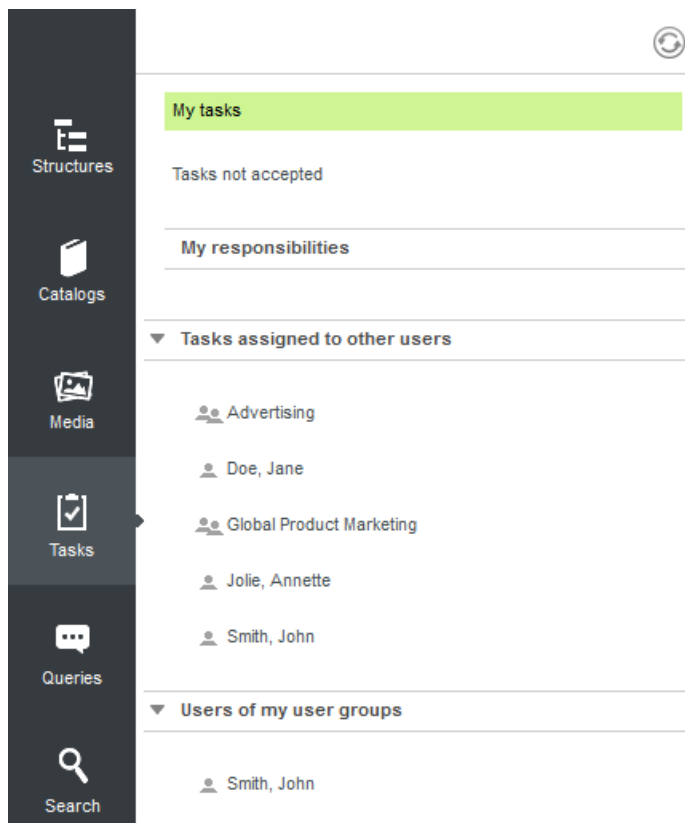
A screenshot of a dialog box titled "Add to existing task" with a close button (X) in the top right corner. Below the title bar, the text "Select existing task from the list" is displayed. Underneath is a text input field with the placeholder text "Filter by task name". Below the filter field, there are three expandable menu items, each preceded by a right-pointing triangle: "My tasks", "Tasks assigned to other users", and "Users of my user groups". At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

**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:

Assign task "Review customer feedback on demo"

To make an assignment, please select either a user or a user group from the list.  
Please note that the task will disappear from your personal task list.

New assigned user: ☐

New assigned user group: \* ☒

OK
Cancel

#### 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.

Actions
Create product
Show items
My tasks (2)
Task Review customer feedback on demo (5)

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 ISiD	TechniSat	225209552869182
Product2G_2252095	01 New	TechniVision 22 ISiD	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"



Product no.:  
Product2G\_225209552869761  
61  
Status:  
01 New

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:  
5/8/2015 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 are tasks that are generated automatically by the system, not created manually by a user. They can be differentiated from standard tasks by the preceding symbol. The  symbol indicates workflow tasks.

Workflow tasks are created by the relevant process for the relevant user or user group in the "**Tasks not accepted**" directory.

They contain one or more elements to be processed (items, products, or variants) , which have a particular process status (e.g. "Translation of short description into French") and are to be processed by the relevant user. The user must first accept the elements to be processed.

A further workflow task is then created in the user's "**My tasks**" directory, containing the accepted data. The user processes the elements in line with the relevant task (e.g. "Translation into French") and then completes processing.

### 6.3.1 Accepting elements to be processed

To accept an element:

1. Double-click on the task to open it
2. Select the elements you want to accept.
3. In the Actions menu, select **Accept** or **Comment and ... > Accept**.

### 6.3.2 Completing/releasing/rejecting processing of elements

Depending on the type of workflow task, you can either complete or release/reject elements.

To complete processing of elements:

1. Double-click on the task to open it.
2. Select the relevant elements in the table.
3. In the Actions menu, select **Complete processing** or **Comment and ... > Complete processing**.

To release or reject processing of elements:

1. Double-click on the task to open it
2. Select the elements you want to accept.

Select **Release** or **Reject**, or alternatively select **Comment and ... > Release** or **Comment and ... > Reject**.

⇒ If rejecting, depending on the workflow structure the **Reject** dialog box opens, in which you can specify which workflow tasks have to be revised.

⇒ The elements are marked as released or rejected.



Note: Processing of elements in workflow tasks can also be canceled by selecting **Cancel processing**.

### 6.3.3 Assigning processing of elements to different users/user groups

To assign an element to a different user/user group:

1. Double-click on the task to open it.
2. Select the elements you want to assign in the table.
3. In the Actions menu, select **Assign** or **Comment and ... > Assign**.
  - ⇒ The **Assignment** dialog box opens
4. Select the user or user group to which you want to assign the elements.
3. Confirm with **OK**.
  - ⇒ The elements of the workflow tasks are assigned to the user or user group.


### 6.3.4 Canceling a workflow for an element

To cancel the workflow for an element:

1. Double-click on the task to open it.
2. Select the elements for which you want to cancel the workflow.
3. Select **Cancel workflow** in the Actions menu.
4. Confirm with **OK**.
  - ⇒ The workflow for the element is canceled.

### 6.3.5 Showing information for an element in a workflow task

As described in the previous sections, you can enter additional comments for the individual actions on elements of workflow tasks. These comments can then be displayed as information for the relevant subsequent workflow tasks:

1. Double-click on the relevant workflow task to open it.
2. Click on the  icon in the toolbar and select the **Field selection** dialog box
  - ⇒ The "Field selection" dialog box opens.
3. Select Information in the list on the left under Workflows.
4. Click on Add.
  - ⇒ The Information entry now appears in the list on the left.
5. In the lower right section of the dialog box, enter the name of the opened workflow task as the Status value.
6. Select the workflow from which the workflow task was generated.



Tip: The name of the workflow and the name of the workflow task can be taken from the identifier of the workflow task. You can find this above the item table. By default, the designations of workflow tasks have the following structure: <Workflow\_Name> - <Name\_Workflow\_Task> - <Catalog\_Name>.

7. Click on **OK**.

⇒ The Information column is added to the Item #1, Products #1, or Variants #1 view.

## 7 Media attachments

As part of the Informatica MDM - Product 360 PIM 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. Here, we are going to take a look at the interface functions in Product 360 Desktop.




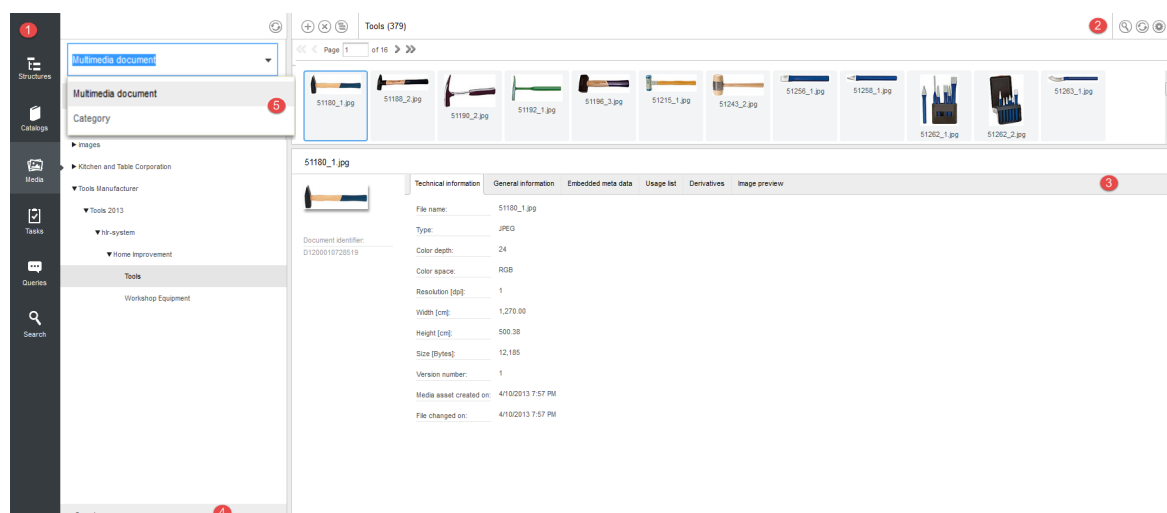
**Caution:** It is also possible to connect a different media asset management system to your PIM software. In this case, the following description is not applicable. Contact your administrator for further information.

### 7.1 Maintaining media attachments








































**Note:** The basic information relating to multimedia data maintenance is contained in the Product 360 Desktop user manual. Here, we describe the differences and the specific display format in Product 360 Web.








You can use  in the context selection menu bar to access **media attachments**. All media attachments that have been created and are available in Product 360 Desktop are listed here in a hierarchical tree structure. There is a 1:1 transfer of all attachments to Product 360 Web.






#### Maintaining media attachments

The user interface is provided in the following configuration:

Area	Description																				
1	<p>You define the context selection in the navigation area. The selected menu is expanded and displays the selection corresponding to the content saved in Product 360 Desktop. You can click on the refresh icon (🔄) to synchronize the contents of Product 360 Web with the current contents of Product 360 Desktop.</p>																				
2	<p>The light table view shows the existing media attachments with a thumbnail image. The icons in front of the window title can only be used for editing if you have been assigned the corresponding permissions.</p> <p>Media attachments are selected using the mouse pointer, with multiple selections possible by holding down the CTRL key.</p> <table border="1"> <tr> <td></td><td>Opens a dialog box that you can use to <a href="#">load</a>  media attachments to Product 360 Web.</td></tr> <tr> <td></td><td>Opens a dialog box that you can use to <a href="#">remove</a>  media attachments from Product 360 Web.</td></tr> <tr> <td></td><td>Opens a dialog box that you can use to move or copy media attachments from Product 360 Web</td></tr> </table> <p> <b>Note:</b> The <b>Move</b> category is only available if Media Manager is active.</p> <p>Depending on the number of attachments, 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 on the right-hand border of the screen to perform the following activities:</p> <table border="1"> <tr> <td></td><td>Showing the filter line</td></tr> <tr> <td></td><td>Refresh the screen contents</td></tr> <tr> <td></td><td>Option for specifying the size of the thumbnail</td></tr> </table> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>▼ Small thumbnails</p> <p>Medium thumbnails</p> <p>Large thumbnails</p> </div>		Opens a dialog box that you can use to <a href="#">load</a>  media attachments to Product 360 Web.		Opens a dialog box that you can use to <a href="#">remove</a>  media attachments from Product 360 Web.		Opens a dialog box that you can use to move or copy media attachments from Product 360 Web		Navigates to the first page		Navigates to the previous page		Navigates to the next page		Navigates to the last page		Showing the filter line		Refresh the screen contents		Option for specifying the size of the thumbnail
	Opens a dialog box that you can use to <a href="#">load</a>  media attachments to Product 360 Web.																				
	Opens a dialog box that you can use to <a href="#">remove</a>  media attachments from Product 360 Web.																				
	Opens a dialog box that you can use to move or copy media attachments from Product 360 Web																				
	Navigates to the first page																				
	Navigates to the previous page																				
	Navigates to the next page																				
	Navigates to the last page																				
	Showing the filter line																				
	Refresh the screen contents																				
	Option for specifying the size of the thumbnail																				
3	<p>The detail view provides information divided among a number of subject-specific tabs:</p>																				

Area	Description	
	Tab	Content
	Header	This lists the most important information, such as file name and format, as well as information about when the attachment was created and the last time it was changed.
	General information (Media Manager)	The editable, country-specific attributes of the file are listed here. Click on ▼ to select from the available languages.
	Technical information (Media Manager)	This tab lists all of the technical information, such as color depth, resolution, size, height, width and, for certain graphical formats, the number of levels.
	Embedded meta data	The meta data, such as EXIF, XMP, and JFIF, is listed here.
	Usage list	All links for the current media attachment are displayed here. They are arranged by product, variant, item, and structure group and can be selectively filtered using the selection field. You can also select  here to assign references.
	Derivatives (Media Manager)	The multimedia documents used are listed here. Clicking on  provides you with additional information. Clicking on  enables you to download the file.
	Image preview	Image previews can have three different sizes, which you can define in the detail menu. Depending on the size you select, you can scale the preview in accordance with your requirements in order to create a detailed impression. To do this, move the symbol in the scaling line until the display appears as required. Once again, you can use  to download the image.  
	Advanced search	<p>The advanced search enables you to search in the detailed information for the file.</p> <p>You can also specify AND and OR operators.</p> <hr/> <p> <b>Note:</b> The advanced search is only available if Media Manager is active.</p> <hr/>



Area	Description
	<p>Managing document categories</p> <p>To 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 on the  icon in the toolbar. To add a new category, click on .</p>


### 7.1.1 Referencing media attachments


Media attachments can be referenced in the same way as products, variants or items:

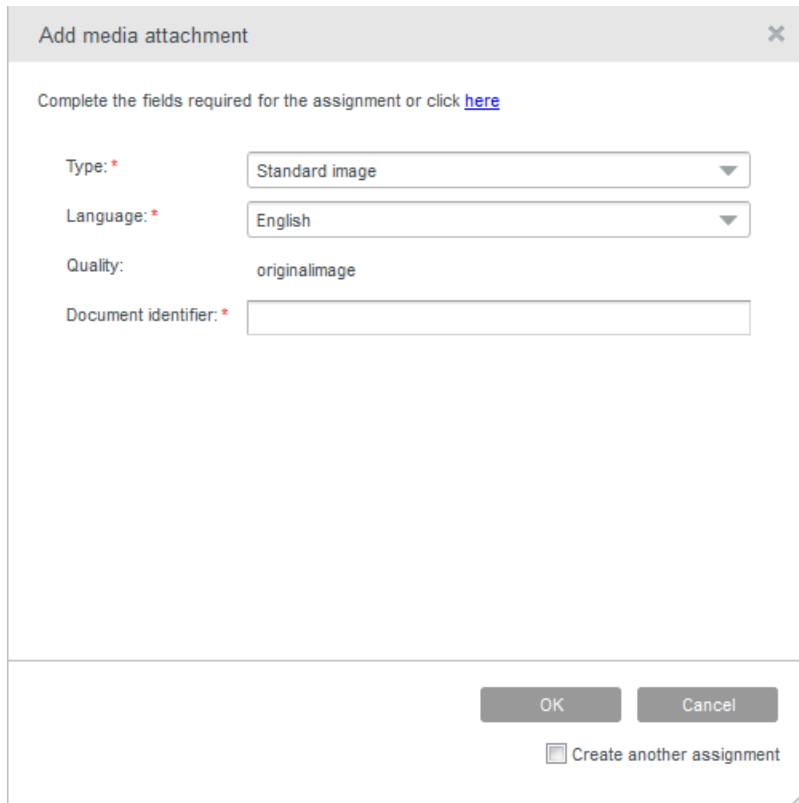
- using the option of using a type of batch editing function
- using direct selection of the media attachment to be referenced from the relevant light table display

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

#### Selecting the media attachment 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 attachments" tab in the detail view.

4. Click on  .



The dialog box is titled "Add media attachment" and 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" 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 media attachment. 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 reference" 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.

## 7.1.2 Uploading media attachments

Media attachments 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 media attachment" 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 media attachments.
2. Click on .

⇒ The following window opens:

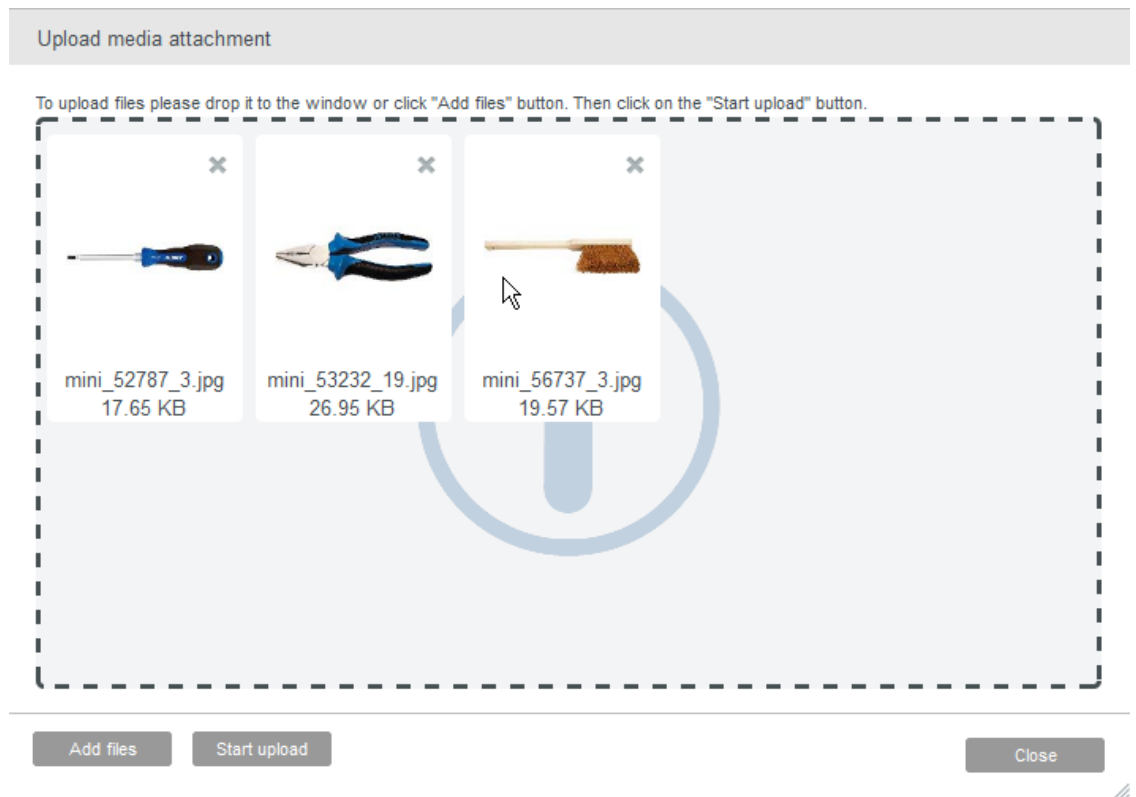


Uploading media attachments


You now have two options for adding media attachments:

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:



#### Media attachments 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:



**Media attachments uploaded**

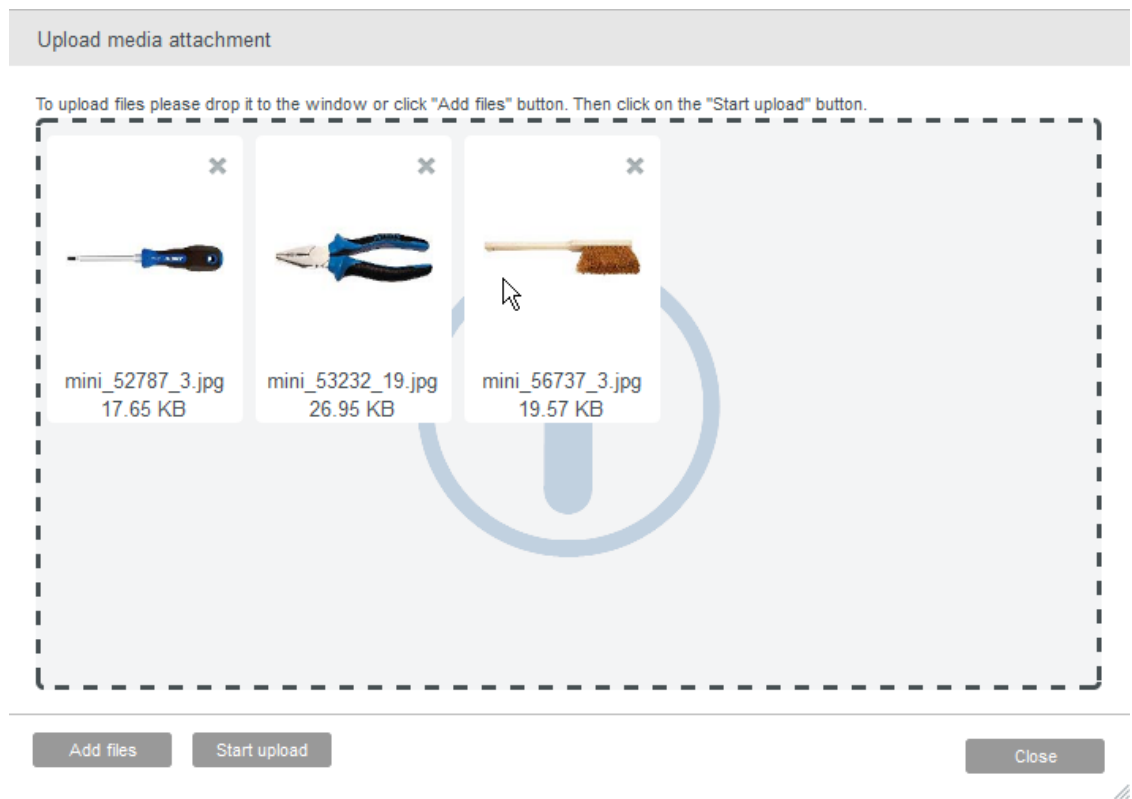
7. Close the window by clicking on **×** or **Close**.

The option for adding media attachments 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 media attachments individually


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

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

⇒ The window changes as follows:



Media attachments uploaded

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



### 7.1.3 Deleting media attachments



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

The process of deleting media attachments 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 media attachments.
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 media attachments

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**.

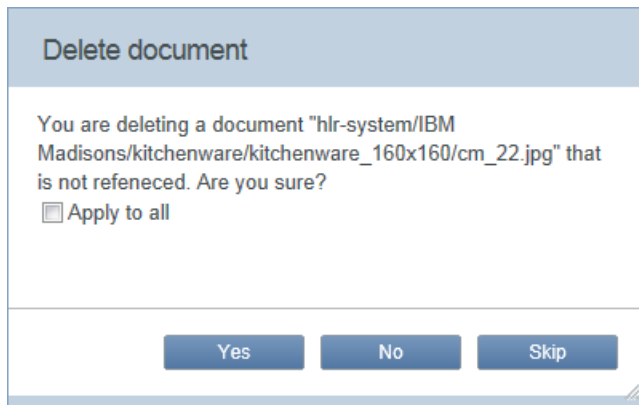
⇒ The existing references assigned in each case are retained.

...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 media attachments**

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**.

## 8 Characteristics



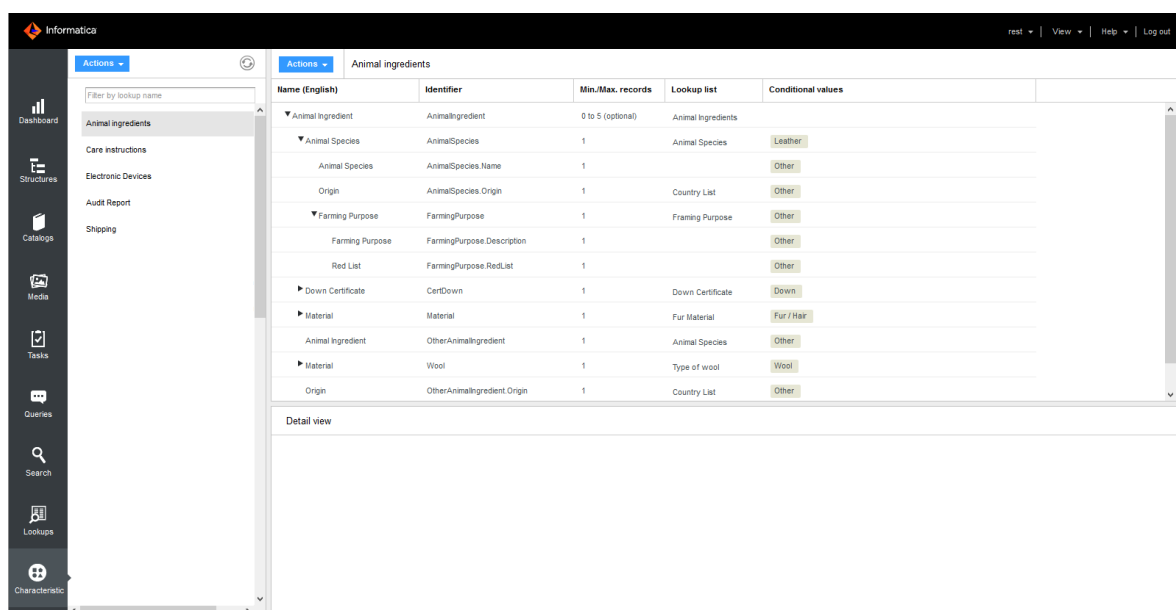
**Note:** The display format used depends on the defaults that your administrator has assigned to you via your user profile. Here, we describe the full range of editing options.

Alongside item attributes, characteristics provide you with another way of representing the properties of items. Unlike item attributes, with characteristics it is possible to represent dependencies between different properties.

For example, if you want to enter the data for clothing that contains animal products such as down, leather, wool, etc., you can model this using characteristics. Depending on the animal product, you may want to maintain different data – for example, the down certificate for down, the type of animal for leather, and the type or material for wool. In turn, for the down certificate, in addition to the actual certificate you might want to enter a description and an expiry date for the certificate. For the type of animal for leather, you may also want to enter the country of origin and the breeding purpose. For the wool type, in addition to the animal of origin you might also want to enter the country of origin, etc.

The figure below shows you one possible way to model this example.

The hierarchies represent the dependency between features.



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
Origin	OtherAnimalIngredient.Origin	1	Country List	Other

Detail view

### Characteristics

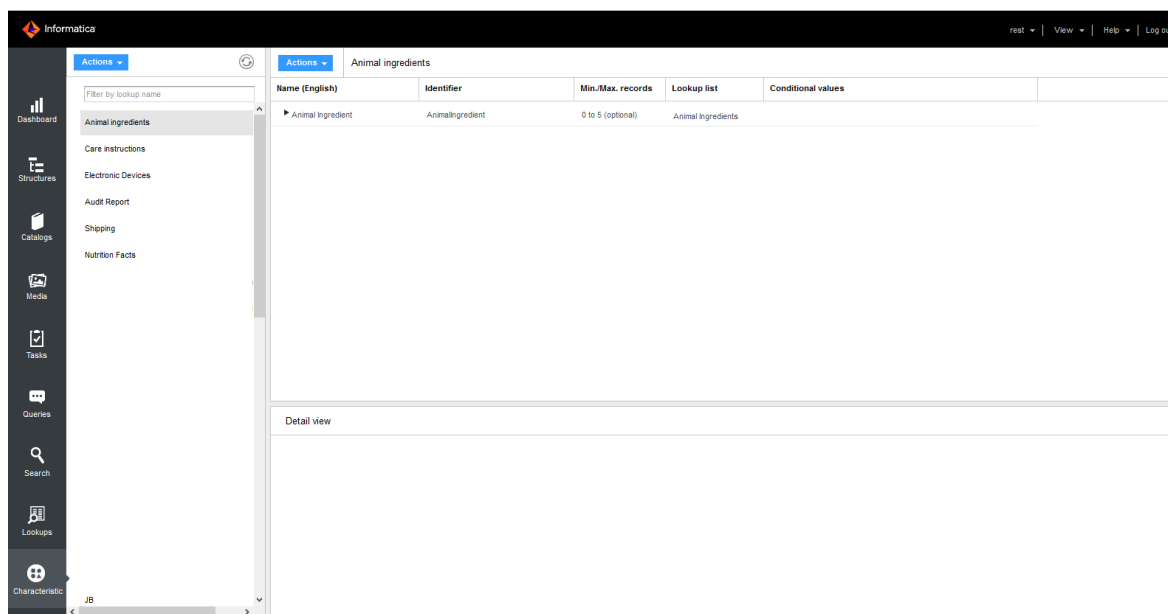
The first level is the so-called basic characteristic, which is “Animal products” and contains the subordinate characteristics “Type of animal”, “Certificate for down”, “Material”, “Breeding purpose”, etc. In turn, the subordinate characteristics contain other characteristics.

**We recommend the following procedure for creating characteristics:**

1. Create category.
2. Create characteristics.
  - Modeling (only inactive characteristics can be maintained in the model).
  - Activate (only activated characteristics are visible to the user in the user interface to maintain values. Activation validates the model.)
3. Assign the category to the relevant structure groups.
4. Activate the category (only activated categories are visible to the user in the user interface to maintain values).
5. Maintain characteristic values (maintain values for items).

## 8.1 Categories

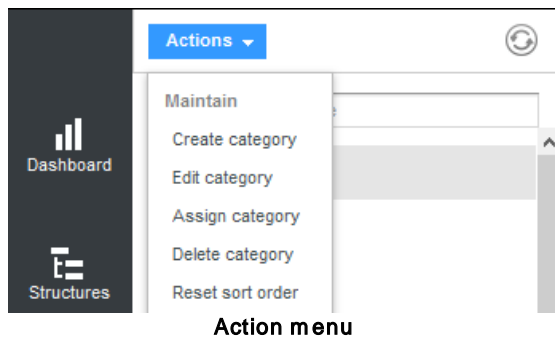
Categories are used for grouping characteristics and to help you navigate the user interface. In addition, activating categories is used as a release mechanism.



**Categories**

### 8.1.1 Creating a category

The Actions menu in the navigation area enables you to create a category.



1. Click on **Actions**

2. Click on **Create categories** in the Actions menu.

⇒ The Create new categories window opens and you can enter the following information.

- The unique code of the new category
- The language-specific name
- The language-specific description
- Initial activity status on creation (Active? Yes / No; controls the visibility of the values for the item.)

3. Click on **OK**

⇒ A new category is created and is inserted into the overall list of categories in the system.



**Note:** Categories can be put into a sequence in the interface.

### 8.1.2 Assigning categories to structure groups



**Note:** To enable values for an item to be maintained, the item must be assigned to a structure group that also contains the associated category. The number of characteristics included in these categories are known as available characteristics.

The **Actions** menu in the navigation area enables you to assign categories to the structure groups:

1. Click on **Actions**

2. Click on **Assign categories** in the Actions menu.

⇒ The **Assign categories** window opens.

3. Select the structure group to which you want to assign this category.



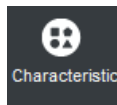
**Note:** A category can be assigned to multiple structure groups.

3. Click on **OK**

⇒ The categories are assigned to the structure groups.

### 8.1.3 Activating categories

There is no way to maintain values for active characteristics in inactive categories, even though they are assigned via the structure group. They are only released for use when the entire category is activated.



You can use **Characteristic** in the context selection menu bar to access **Characteristics**.

1. Select the category you want to activate.
2. Click on **Actions** in the navigation area.
3. Click on Edit categories in the Actions menu.

⇒ The Edit categories window opens and you can enter information.

3. Initial activity status Active? Yes / No.
4. Select Yes to activate the category.
5. Click on **OK**.

The category is activated.

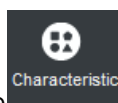
### 8.1.4 Deactivating a category

If you deactivate a category, the values of the characteristics from this category will no longer be visible for the item.

### 8.1.5 Deleting a category



**Note:** It is only possible to delete a category if it no longer contains any characteristics.




You can use **Characteristic** in the context selection menu bar to access **Characteristics**.

1. Select the category you want to delete.

2. Click on **Actions** in the navigation area.
3. Click on Delete categories in the Actions menu.
  - ⇒ The information window opens and asks you to confirm the delete operation.
3. Click on **OK**
  - ⇒ The category is deleted.

## 8.2 Characteristics


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 **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.

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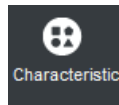
A characteristic is created in the context of the category.

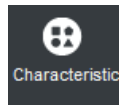
---

 Note: You can expand and collapse the characteristics using ▼.

---

### Creating a basic characteristic



1. You can use  in the context selection menu bar to access **Characteristics**.
2. Click on **Actions**
3. Click on **Create characteristic** in the Actions menu.
  - ⇒ The **Create new characteristic** window opens and you can define the identifier, name, and data type. Further information can be found in the Maintaining characteristics section.
4. Click on **OK**.
  - ⇒ The characteristic has been created.

<div> <div>Actions ▼</div> <div>Animal ingredients</div> </div>				
Name (English)	Identifier	Min./Max. records	Lookup list	Conditional values
▶ Animal Ingredient	AnimalIngredient	0 to 5 (optional)	Animal Ingredients	

### Basis characteristic

#### Creating subordinate characteristics

1. Select the basic characteristic to which you want to add a subordinate characteristic.

2. Click on Actions

3. Click on **Subordinate characteristic** in the Actions menu.

⇒ The **Create new characteristic** window opens and you can enter the required information.

4. Click on **OK**.

⇒ The subordinate characteristic you have created appears in the table view below the higher-level characteristic.

If you want to create a further subordinate characteristic below the characteristic already created, the data type must be **Lookup** or **No value**.

<div> <div>Actions ▼</div> <div>Animal ingredients</div> </div>				
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		

### Subordinate characteristics

#### Creating subordinate characteristics with conditional values

To define dependencies between features, the concept of conditional values is used.

If you want values:

1. Create a characteristic with the data type Lookup.
2. Create a subordinate characteristic.
  - a. Click on Conditional values in the table view.
  - b. Select the conditional value(s) from the lookup for the higher-level characteristic.

When values are maintained for the item later, the subordinate characteristic only appears if one of the conditional values has been selected for the higher-level characteristic.

Actions ▾		Animal ingredients		
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 Spec	AnimalSpecies.Name	1		Other
Origin	AnimalSpecies.Origin	1	Country List	Other

**Subordinate characteristics with conditional values**

## 8.2.1 Maintaining characteristics



**Note:** Editing is only possible if the characteristic has not yet been activated.

This section provides an overview of all the properties of a characteristic.

To maintain characteristics:

1. Select a characteristic previously created.
2. The detailed view (field) tab opens.
3. You fill the blank data fields with content in the detail view.

Each feature comes with a set of meta data fields, which specify its general type and purpose in more detail.

Detail	Description
Identifier	Unique identifier
Entities	List for selecting the availability for an item entity – only used for the basic characteristic.
Name	Language-specific name with 250 characters
Description	Language-specific description with 2000 characters



Identifier	Alternative identifier, which is qualified by a key (identifier for another system, e.g. "GDSN")*																		
Target markets	List of target markets represented*																		
Purpose	Purpose																		
Data type	<p>Data type</p> <p>There are different setting options depending on the data type, for example for the Text data type you can select whether the data type is to be language-specific.</p> <table> <tr> <td>Date</td><td>Date</td></tr> <tr> <td>Date/Time</td><td>Date/Time</td></tr> <tr> <td>Decimal</td><td>Decimal numbers with decimal places</td></tr> <tr> <td>Integer</td><td>Whole numbers</td></tr> <tr> <td>Logical value</td><td>Logical value (yes/no)</td></tr> <tr> <td>Lookup</td><td>List defining the permitted values</td></tr> <tr> <td>MME</td><td>File</td></tr> <tr> <td>No value</td><td>It is not possible to set a value</td></tr> <tr> <td>Text</td><td>String with up to 1900 characters</td></tr> </table>	Date	Date	Date/Time	Date/Time	Decimal	Decimal numbers with decimal places	Integer	Whole numbers	Logical value	Logical value (yes/no)	Lookup	List defining the permitted values	MME	File	No value	It is not possible to set a value	Text	String with up to 1900 characters
Date	Date																		
Date/Time	Date/Time																		
Decimal	Decimal numbers with decimal places																		
Integer	Whole numbers																		
Logical value	Logical value (yes/no)																		
Lookup	List defining the permitted values																		
MME	File																		
No value	It is not possible to set a value																		
Text	String with up to 1900 characters																		
Order	Sequence in the hierarchy level. Only influences the display sequence in the user interface and can be configured in the table using drag & drop.																		
Access rights	Access rights for the values saved for the product																		
Minimum records	Number of instances permitted for the item																		
Format pattern	<p>Format pattern used to define the formatting of the value.</p> <p>For example, numbers and character strings for date values.</p>																		

	Date values	yyyy-MM-dd kk:mm:ss
	Numbers	##.###
	Character strings	UUU ###
	<p>For further information on permitted format patterns, consult the following links:</p> <p><a href="https://docs.oracle.com/javase/8/docs/api/java/text/SimpleDateFormat.html">https://docs.oracle.com/javase/8/docs/api/java/text/SimpleDateFormat.html</a></p> <p><a href="https://docs.oracle.com/javase/8/docs/api/java/text/DecimalFormat.html">https://docs.oracle.com/javase/8/docs/api/java/text/DecimalFormat.html</a></p> <p><a href="https://docs.oracle.com/javase/8/docs/api/javax/swing/text/MaskFormatter.html">https://docs.oracle.com/javase/8/docs/api/javax/swing/text/MaskFormatter.html</a></p>	
Validation expression	Option for configuring a validation for the individual values	
Unit	Optional definition of a unit for a value	
Multi value	Specifies whether it is possible to save multiple values	
Multiline	Allows the entry of multi line input fields in the user interface for text	
Write protected	Specifies whether values can generally be changed by a user	
Default value	Defines a default value	

### Access rights for editing values

The “Detail” tab and the “Access rights” tab allow you to define access rights for values assigned to individual items.

### Access rights tab

The default access right defines the access to data records for this characteristic after assignment to an entity.

The following options are available:

<b>Open</b>	All user groups can read and write the data records for the characteristic
<b>Limited</b>	Access to data records for the characteristic is generally locked for all user groups
<b>Inherited</b>	The setting for the higher-level characteristic is adopted

You can use the **"Open"** and **"Limited"** options to define exceptions from the default behavior.

If the drop-down menu is set to **"Open"**, the following exceptions are displayed on the Details tab:

<b>No access</b>	Multiple selection of user groups that you do not want to have access to values.
<b>Read access</b>	Multiple selection of user groups that are only permitted to read values.

If the drop-down menu is set to **"Limited"**, the following exceptions are displayed on the Details tab:

<b>Read access</b>	Read access for the multiple selection of user groups that can read values
<b>Full access</b>	Full access

If the drop-down field is set to **"Inherited"**, no exceptions are displayed as the rights for the higher-level feature apply (only available for subordinate features).


The default values are **"Open"** for new basic characteristics and **"Inherited"** for new subordinate characteristics.

## 8.2.2 Activating characteristics

You can use the Actions menu to activate characteristics previously created. You should do this if you have completed the definition of the characteristics and want to release them for the maintenance of values.

1. Click on **Actions** in the navigation bar.
2. Click on **Activate characteristics** in the Actions menu.  
⇒ The confirmation window opens.


---

 **Note:** If a characteristic was once active and values were maintained, all properties are no longer editable in order to guarantee the consistency of maintained values.

---

## 8.2.3 Deactivating characteristics

---

 **Note:** If a characteristic is deactivated, the values are no longer visible for the item.

---

To deactivate characteristics:

1. Click on **Actions** in the navigation bar.

2. Click on **Deactivate characteristics** in the Actions menu.

⇒ The confirmation window opens.

## 8.2.4 Deleting characteristics



**Note:** Only inactive characteristics can be deleted from the model.

To delete an existing feature, the administrator is asked for confirmation.

1. Select the characteristic you want to delete.
2. Click on **Actions** in the navigation bar.
3. Click on **Delete characteristic** in the Actions menu.

⇒ The confirmation window opens.

4. Confirm to continue.

5. Click on **OK**.

⇒ The characteristic and all associated data records are deleted.



**Note:** The characteristic and all associated data records are irrevocably deleted for “All maintained” values.

## 8.3 Values for characteristics

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

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 item 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.



---

### 8.3.1 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.

See also [Editing characteristics.](#) 

---

***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.



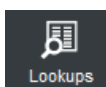
**Note:** All characteristics whose categories correspond to the item's structure group and that are active are displayed.

## 9 Lookup

Lookups define a particular set of permitted values for a specific data field. For example, a lookup “Countries of origin” contains all available countries that a business user can select when specifying a value for a data field to which the lookup is assigned.

Lookups provide you with the following options:

- Create new values.
- Value has a language-specific name.
- Value has a language-specific description.
- Value has an activity status (option of displaying and specifying this value as a new entry for a feature).
- Other codes for different standardization systems can also be maintained.



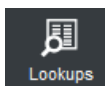
You can use  in the navigation area to access the lookups.

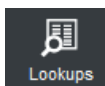
To use all of the maintenance functions for lookups, use the Lookups perspective in Product 360 Desktop .

The Lookups area on the web does not have a facility for creating new lookups.

### 9.1 Adding a value

To extend existing lookups with a value:



1. You can use  in the context selection menu bar to access **lookups**.
2. Select the list previously created.
3. Click on **Actions** .
4. Click on **Create lookup value** in the Actions menu.

⇒ The enumeration value “...” window opens, where you can edit the values in the detail view on the Preset value details tab.

Code	Code must be unique and language neutral.
Active	Only active values are displayed in the rest of the application.
Name/ Description:	Select the name and description in the relevant language
Standardization system	Option for specifying a code for other systems



## 10 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:

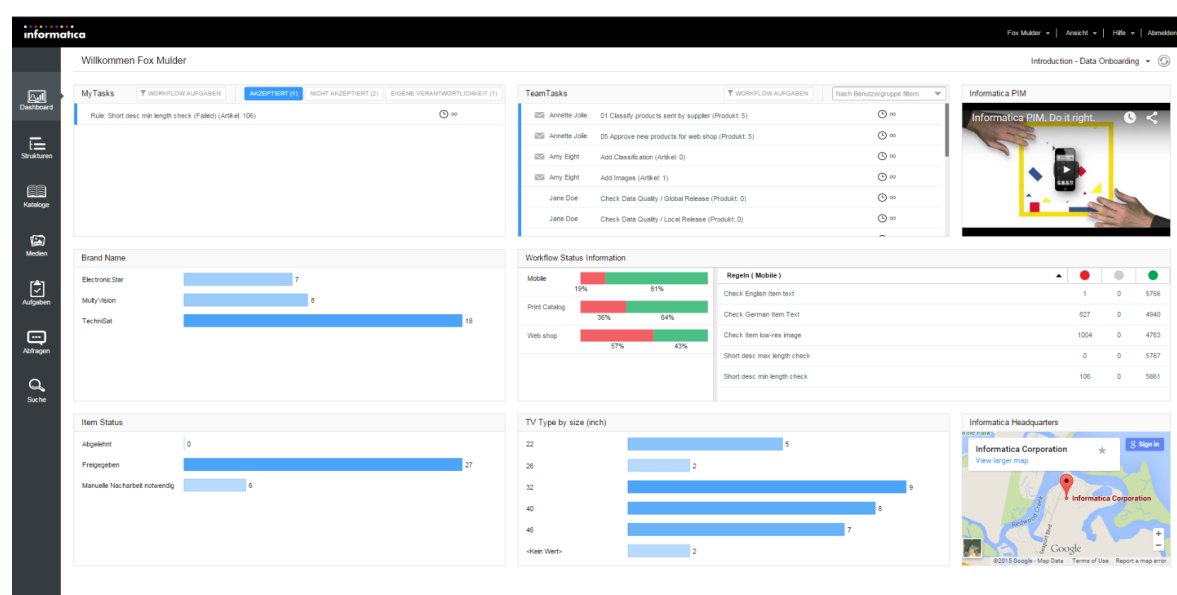
1. From a task list, you can directly access the **Flex UI** flexible user interfaces for the tasks shown.
2. From an overview of data quality statuses, you can create tasks for data.
3. The overview diagrams are used to access tables containing filtered data.

### 10.1 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.

## 11 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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