



**Enable 9
User Manual**

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EnterWorks[®], Inc.
46040 Center Oak Plaza Suite 115
Sterling, VA 20166

©EnterWorks Acquisition, Inc.
Loudoun Tech Center
46040 Center Oak Plaza
Suite 115
Sterling, VA 20166

1.888.242.8356 (Sales and General Information)
1.888.225.2705 (U.S. Support)
<http://www.enterworks.com>

EnterWorks® Enable PIM™ *User Manual*
Version 9

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1 Document Conventions

This EnterWorks document uses the following typographic conventions:

Convention	Usage
pathnames	Pathnames are shown with backslashes, as for Windows systems.
Courier New font	<p>Denotes sample code, for example, Java, IDL, and command line information. May be used to denote filenames and pathnames, calculations, code samples, registry keys, path and file names, URLs, messages displayed on the screen.</p> <p>If <i>italicized</i> and in angle brackets (< >), it denotes a variable.</p>
Calibri Font (bold)	<p>When used in body text, it denotes an object, area, list item, button, or menu option within the graphical user interface; or a database name or database-related object. (Examples: the Save button; the Product tab; the Name field; the SKU repository)</p> <p>Can also be used to denote text that is typed in a text box. (Example: Type “trackingNo” in the Name field)</p>
Blue underlined text	Words, phrases or numbers in blue are active links that can be clicked. Clicking these active links will bring the user to the required information, steps, pages chapters, or URL.

2 Customer Support

EnterWorks provides a full spectrum of customer support. Check the maintenance contract for details about the level of support purchased. The first time you contact customer support, you will be issued a customer identification number. Keep this number for future reference when using the EnterWorks customer support service.

How to reach us	Comments
On the Web: http://support.enterworks.com Via email: support@enterworks.com	For detailed discussions of hardware, software, configuration issues, or Helpdesk credentials, contact your EnterWorks representative.
Phone: U. S. Support 1. 888. 225. 2705	Support hours are from 9:00 a.m. to 8:00 p.m., United States Eastern Time (-0500 UTC), Monday through Friday.
Postal mail: EnterWorks Acquisition Inc. Customer Support Team Loudoun Tech Center 46040 Center Oak Plaza Suite 115 Sterling, VA 20166 USA	Please include your telephone number and customer identification number or project name in your letter.

3 Overview

This document covers end-user procedures for managing an organization's product information within the Enable Product Information Management (PIM) system. The Enable system is configured for each organization's product requirements so not all functionality is applicable for every organization. If a function described in this document is desired but not available, contact the Systems Administrator.

For administrative functionality, see the "Enable 9 Product Information Management (PIM) Administrator's Manual".

For publication functionality, see the "Enable 9 Product Information Management (PIM) Publication Manual".

For installation instructions, see the "Enable 9 Product Information Management (PIM) Installation Manual".

4 Enable Basics

Enable provides organizations the means to define and manage critical data. This is done by creating a single point of reference for data. Through various integration methods, selected data can be imported, validated, enhanced or modified as needed, and exported.

4.1 Records, Repositories, Attributes

Enable can be configured to have multiple repositories. Each repository is designed to hold only one kind of data. For instance, they might hold information about all the company’s products or contact information for all their customers, but not both. The data is stored in records. Each record contains data that pertains to a particular item, such as a product or a customer. Every record in a repository has the same format or structure, which is defined by the repository’s profile. The profile determines what attributes (data fields) the repository will store for its items, their data types, and their order in the record. Each record in the repository has the same list of attributes, but it may leave some of the attribute values blank.

For example, a business that sells movies would have a repository for storing information about the movies they sell. Each record in turn would store data about one movie. It would contain attributes like the title of the movie, availability date, rating, director, cast, etc. Some of a record’s attributes may be empty, for instance, if the availability date of a movie was unknown.

MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOR SALE	SUPER TICKET PRODUCT	RATING
1	Baywatch (Extended Cut)	Review Specifications	09/07/2017	Yes	Upgrade	R
2	Guardians of the Galaxy Vol. 2	Active	09/01/2017	Yes	No	PG 13
3	The Lion King	Active	09/01/2017	Yes	No	G
4	The Lion King (VF)	Active	09/01/2017	Yes	No	G
5	Alien: Covenant	Active	09/01/2017	Yes	No	R
6	King Arthur: Legend of the Sword	Active	09/01/2017	Yes	Redeem	PG 13
7	Everything, Everything	Active	09/01/2017	Yes	No	PG 13
8	Snatched	Active	09/01/2017	Yes	No	R
9	The Boss Baby	Active		Yes	No	PG 13
10	Kong: Skull Island	Active	09/01/2017	Yes	No	PG 13
11	The Circle	Active		Yes	No	PG 13
12	Ghost in the Shell	Active	09/01/2017	Yes	Upgrade to HD	PG 13

4.2 Saved Sets

A Saved Set is a group of one or more records in a repository. Each Saved Set has a unique name and can be stored for later use. Saved Sets can be used to revisit the same group of records without having to search for them again.

Saved Sets contain records from only **one** repository. A repository can have many Saved Sets. For instance, a repository that contains products might have a Saved Set named “Brand A Products” that contains all the records whose brand is “Brand A”. It might have another Saved Set named “Cold Regions” that contains all the products sold in regions that have cold winters.

A snowshoe made by “Brand A” and sold in Antarctica would be listed in both Saved Sets. A jet ski made by “Brand A” and sold in the tropics would only be listed in the “Brand A” Saved Set. A stove made by “Brand B” and sold in the tropics would be listed in neither Saved Set.

Saved Sets can be shared so all other users can also see and use them.

Applying a Saved Set in a Repository View creates a Filter Term. A Filter Box will appear on the Active Filters Bar.

4.3 Taxonomies and Hierarchies

Businesses typically sell many different types of items and they need a way to organize their product records so they can identify, store, and find them. They do that through the use of taxonomies and hierarchies.

If a business sells party goods, they may sell balloons, tableware, and decorations. When they think about their products, they probably think in terms of those categories: all the different types of balloons are in the balloon category; all the silverware, tablecloths and paper plates are in the tableware category; and all the streamers, banners and posters are in the decoration category. Inside those categories, all the items have a similarity. There may be a lot of balloons in different shapes, sizes and colors, but they are all balloons. The business may then divide their products into more subcategories, such as dividing the balloons by the material they are made of: mylar and latex. They can keep dividing their categories until they reach a point that represents how they think of their products.

This type of categorization of data into categories and subcategories is called a tree structure. Think of starting at the root (or trunk) of the tree – that’s the main category: Party Goods. From the root, the data branches into subcategories: Balloons, Tableware, and Decorations. Then Balloons splits into subcategories: Mylar and Latex. The point where a category splits is called a node and so are the final subcategories (the ends of the branches). The actual products themselves (the item records) are assigned to nodes. Every record is assigned to one, and only one, node. Nodes can have multiple records assigned to them.

A taxonomy describes the path from the root to the node a product record is attached to. Every product record has a taxonomy. Taxonomies are typically written as: root.node.node...last_node (though they can be written in other formats, depending on the configuration of Enable). For instance: Party Goods.Balloons.Mylar is the taxonomy for the product record [balloon, #37, 10”, red, birthday]. For example:

Taxonomy	Item	Item Description
Party Goods.Balloons.Mylar	#37	10”, red, mylar, birthday balloon.
Party Goods.Decorations.Banners	#48	3’, paper birthday banner, in Spanish.

Party Goods.Tableware.Forks	#95	Large silver serving fork.
-----------------------------	-----	----------------------------

Each product repository has one classification system. It is called the repository’s taxonomy. Each record appears only once in the taxonomy.

A hierarchy is similar to a taxonomy in that it is also a tree-like structure, but it looks at product records in a slightly different way. It records a path that someone might follow to find a product record.

Some items might logically be thought of as belonging in more than one category, so they can appear in multiple places in a hierarchy. For instance, using the party goods example above, if a customer wanted to buy paper plates for a birthday party, they might look in tableware, but they also might look in decorations. Paper plates with birthday party designs could be thought of both as tableware and as decorations. So a product item might be assigned to two different nodes and have two different hierarchies. A package of 10”, purple paper plates might have the hierarchies: Party Goods.Tableware.Paper Plates and Party Goods.Decorations.Paper Plates.

Hierarchy	Item	Item Description
Party Goods.Tableware.Paper Plates	#37	10”, purple paper plates.
Party Goods.Decorations.Paper Plates	#37	10”, purple paper plates.

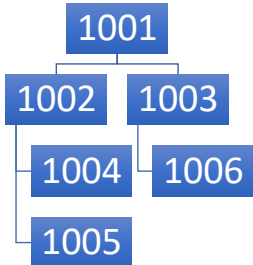
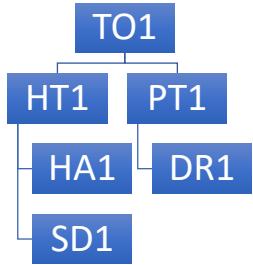
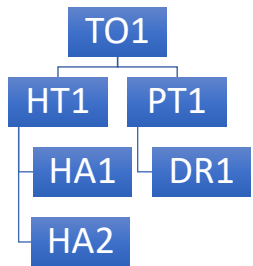
A repository may have more than one hierarchy classification system. For instance, one hierarchy might be used to prepare the Spring 2019 Catalog and another used for the Fall 2019 Catalog. Some items might appear in both hierarchies, while others may only appear in one.

A simple way to remember the difference between a repository’s taxonomy and its hierarchies is: “A taxonomy is what the product is. A hierarchy is where someone might look for the product.”

4.3.1 Implementation of Taxonomy and Hierarchies

A taxonomy path or hierarchy path is the route traversed from the root node to get to the assigned node. It is often called “a node’s taxonomy” or “a node’s hierarchy”. It is stored as a string of characters. Enable offers three different notation methods for taxonomy or hierarchy paths (path codes): no path; relative path; and full path. If a relative or full path method is used, it is further qualified by a choice of delimited or fixed. The node names in a delimited path are separated by periods. The node names in a fixed path are known by their position in the path.

Consider the following table and the relative conceptual diagrams pertaining to Path Codes:

Path Codes	Hierarchy/Taxonomy Node Tree
<p><u>No Path</u> 1001 = Tools 1002 = Hand Tools 1003 = Hammer</p>	 <pre> graph TD 1001 --> 1002 1001 --> 1003 1002 --> 1004 1002 --> 1005 1004 --> 1006 1003 --> 1006 </pre>
<p><u>Relative Path</u> TO1 = Tools TO1.HT1. = Hand Tools TO1.HT1.HA1 = Hammer</p>	 <pre> graph TD TO1 --> HT1 TO1 --> PT1 HT1 --> HA1 HT1 --> SD1 HA1 --> DR1 </pre>
<p><u>Full Path (Example: 3-levels)</u> TO1.0.0 = Tools TO1.HT1.0 = Hand Tools TO1.HT1.HA1 = Hammer</p>	 <pre> graph TD TO1 --> HT1 TO1 --> PT1 HT1 --> HA1 HT1 --> DR1 HA1 --> HA2 </pre>

Enable provides the ability to manage three distinct types of hierarchical relationships. The main difference between them is how a record stores its taxonomy or hierarchy.

- Taxonomy** – used to define what a record “is”. The taxonomy is stored in a designated attribute in the record, for instance, an attribute called “Taxonomy”. (The attribute is designated as a taxonomy by indicating in the profile that it is a Special Function attribute and its code set is designated a taxonomy object.) Since there is only one attribute in a record that stores the taxonomy, each record can be linked to only one node in the

taxonomy. A taxonomy node can also have category attributes associated with them. (See [Category Attributes](#)). For example, a cup requires a field to capture its volume capacity, but plate does not.

Taxonomy Behavior
<ul style="list-style-type: none"> • A repository can have only one Taxonomy. • A repository record can be linked to only one Taxonomy node. • Category attributes can be associated with nodes.

- **Hierarchy** – A hierarchy is used to define a navigational path to one or more records. The node assignments are stored in a separate repository, to allow each record to be assigned to multiple hierarchy nodes. This allows the record to be found in more than one category during a search. An example would be an Abrasive Disk item record that would be assigned to a category node called “Abrasives” and a category node of “Power Tool Accessories”. Records can be assigned to multiple nodes from multiple Hierarchies. Hierarchies cannot have category attributes.

Hierarchy Behavior
<ul style="list-style-type: none"> • A repository can have multiple hierarchies. • A repository record can be linked to multiple hierarchy nodes. • A repository can be assigned to multiple hierarchies. • Cannot have category attributes.

- **Restricted Hierarchy** – A restricted hierarchy is similar to a taxonomy. An attribute in the repository is used to store a record’s hierarchy node assignment, so a record can only be assigned to one node in the hierarchy. However, the record can be assigned to nodes in multiple hierarchies. Each hierarchy’s node assignment is stored in its own repository attribute. Restricted hierarchies **cannot** have category attributes.

Restricted Hierarchy Behavior
<ul style="list-style-type: none">• A repository can have multiple restricted hierarchies; each hierarchy node assignment is stored in its own attribute.• A repository record can be linked to only one node in a restricted hierarchy.• Nodes cannot have category attributes.

All three types above can be used to find records by drilling down into the tree structure and selecting a node to see the records assigned to that node.

4.3.2 Taxonomy Node Properties

A taxonomy node property is metadata that applies to a taxonomy node. It describes a characteristic of records assigned to that node. For instance, a property field might be used to hold the name of the department responsible for records attached to the node, or it might specify if the records attached to the nodes are product records.

Taxonomy node properties can be defined when a taxonomy is being created or edited by the system administrator.

4.4 Category Specific Attributes/Category Attributes

Each record in a repository has the same structure – the same attributes, with the same data types, in the same order. However, each record may not use all the attributes. If a business sells multiple types of items, their product repository profile must include attributes for every type of item. For instance, to store data about pens, the record would need to include

attributes relative to pens, such as the type of ink they use. But if the company also sold paper, the record would also have to include attributes that describe paper, such as paper thickness. Therefore, every record in the product repository must include attributes for both pens and paper: type of ink and paper thickness. Records that contain data about pens would leave the data fields for paper thickness empty. Records that contain data about paper would leave the data field for type of ink empty.

Because a business can sell thousands of products, product records can have thousands of attributes. While this is not a problem for computers, it can be a problem for computer users. Most users don't want to wade through thousands of empty attributes to find the ones they are interested in. They only want to see the attributes that apply to the product record they are accessing.

Enable can be configured to define these relevant attributes as category specific attributes or category attributes. Category attributes are assigned to a taxonomy node, which means that Enable knows that all the records attached to that node use that attribute. Depending on system configuration, descendent nodes (a node's subcategory nodes or children nodes) can inherit category attributes as well. Note that category attribute values are not shared – each record still maintains its own attribute value. The only effect of designating an attribute as a category attribute is to indicate to Enable which attributes are relevant for a particular record.

Once category attributes have been defined and assigned to nodes in the taxonomy, and product records have also been assigned to the taxonomy, viewing or editing a record in that repository will only show the assigned category attributes.

WARNING: Care needs to be taken when changing the assignment of a Category Attribute to a node. Any time a Category Attribute is unassigned from a node, the values of that attribute will be deleted in all the records assigned to that node and in any children nodes that had inherited that attribute. Care also needs to be taken when changing the taxonomy assignment of a record. If the new taxonomy node does not have the same Category Attributes as the old node, when the record is reassigned, the values of the old taxonomy node's Category Attributes will be deleted from the record.

4.4.1 Category Attributes Association Objects

Category Attributes are assigned to a taxonomy through a category attributes association object, which is sometimes called an association object. An association object is associated with a profile and a taxonomy. It is a list of nodes and their assigned category attributes. There is one node/category attribute pair for each category attribute assigned to a node. The association object also specifies if a category attribute for a node can be inherited by its

children nodes, meaning that the category attribute is assigned once to the parent node but also applies to all its children nodes.

If a code set is assigned to a category attribute, the associations for the attribute can also specify a subset of the code set values. An example would be a category attribute named “Color” that is assigned to a code set containing the values: “Blue”, “Black”, “Red”, “Green”, and “Yellow”. An assignment of the Color attribute to the node: “Stationary.Writing Materials.Pens” may limit the values for Color to “Blue”, “Black”, or “Red” while the assignment to the node: “Equipment.Audio/Visual.Laser Pointers” may limit the values for Color to “Red” or “Green”. When a user is editing a record, the dropdown list for Color will only show the designated subset of values.

4.4.2 Dynamic Attributes

Dynamic Attributes are like Category Attributes, but they can be assigned to any other attribute with a code set assignment. For more information about Dynamic Attributes, contact EnterWorks.

4.5 Linked Records

Linked records are records that have a relationship with another record. For example, a product record may contain links to accessory products or related products. The records can be in the same repository or in different repositories. Linked relationships can be “one-to-one” (one record linked to another record), “one-to-many” (one record linked to more than one record), or “many-to-many” (records can both have more than one record link to them and can link to more than one record).

Records can be linked to digital asset metadata records. A digital asset is a file, such as an image, spreadsheet or PDF file. For every digital asset, Enable’s DAM keeps a metadata file in the DamMaster repository. (See [Digital Asset Management \(DAM\)](#) for more information.) If a record is linked to a digital asset metadata record, it is said to be linked to the digital asset.

4.6 Record Attributes

4.6.1 Data Types

Every record attribute has a data type. The data type specifies what type of data will be stored in that field and how the attribute’s value should be interpreted. An attribute’s data type is established when Enable is configured. Some data types have configurable characteristics. For instance, if an attribute is declared as VARCHAR data type, the maximum length of the attribute’s character string must also be specified.

Data Type	Description
INTEGER	A 4-byte integer value.
BIGINT	An 8-byte integer value used to store values that can exceed two billion.
DECIMAL	A decimal value.
CURRENCY	A decimal value typically with two decimal places but may contain more.
BOOLEAN	True or False.
VARCHAR	A variable length string of text that is Unicode and handles international characters and symbols.
DATE	A calendar date. Its format is configurable with standard templates.
TIMESTAMP	A date and time. Its format is configurable.

When the editor displays an attribute value for the user to edit, the format it uses is defined by the attribute’s data type, as is the format of the value the user will enter. For instance, an attribute of the type DATE might display a calendar for the user to select from as well as a place for the user to type the date in directly, whereas an attribute of the type CURRENCY may display a value in the form of “\$xxx.xx”.

When a user edits a record and saves it, the editor will assign validation errors to any attribute values that do not match the attribute’s data type, such as characters entered into decimal fields.

A Code Set is a special data type that constrains the possible values of the attribute to those on a predefined list. When the attribute is displayed, the user will be presented with the list of values to choose from. The Code Set’s list of values is determined by the system administrator.

4.6.2 Primary Keys and Sequence Numbers

Each record in a repository has a unique record ID or key so it can be accessed individually. The record’s unique, identifying key is called its primary key. Primary keys are often auto-generated.

If the primary key is an auto-sequenced attribute field and Enable has been configured to allow the user to set its value, if the user enters a value, it will be saved. If the user has not, Enable

will generate the field value based upon the next number in the sequence and any configured rules. Once the new record is saved, the value of the auto-sequenced field is typically configured so that it cannot be changed. Enable can be configured to generate unique identifiers across a set of repositories, so no duplicate identifiers will be generated or saved.

If the record's primary key is not auto-generated and the user does not enter a primary key, the field will be left empty and an error for the record will be generated. If the user enters a value in a primary key attribute that has been used elsewhere in the repository, a duplicate identifier error for the record will be generated. Enable may also be configured to ensure that within a set of repositories, no duplicate identifiers are generated or saved.

NOTE: A record's primary key may be edited using the Inline Editor in a **Repository View** if the user has sufficient permissions. This should not be considered common practice and great care must be taken when modifying a primary key, as the key can be referenced in numerous database tables and reports. Changing a primary key that is referenced by other repository records will effectively break the link from those records, unless the same change is made to those records as well.

A record's primary key is not to be confused with its sequence number. A sequence number only describes the order in which records are displayed in a **Repository View**, it is not used to identify the record.

4.6.3 Editor Control Settings

Editor controls are settings defined when the system is configured. They add additional specifications on how an attribute value is displayed and the format the user will use to enter that value. These specifications are not determined by the attribute's data type, but by how the attribute value will be used. For instance, although an attribute that holds a phone number might have the data type of VARCHAR and a length of 10, an editor control rule for that attribute may denote that the editor will display the phone number as "(xxx) xxx-xxxx" and that as the user types in digits, they will be fit into that format.

4.6.4 Default Values

A record attribute may be configured to have a default value. When a new record is added, any attribute that has a specified default value will be set to the default value. Depending on the way the attribute was defined, the user or the system may be allowed to change the value.

4.6.5 Calculated Fields

A calculated field is an attribute whose value is determined by the values of other attributes or system variables. For instance, the value of the attribute "Area of Rug" might be calculated by multiplying the value of the attribute "Length of Rug" by the value of the attribute "Width of Rug".

The values of calculated fields are not determined until the record is saved, both in the case of a new record being added and when an existing record is being edited. If a user edits a value in a calculated field, it may be overwritten with the system-derived value when the record is saved, depending upon system configuration.

4.6.6 Auto-sequenced Fields

An auto-sequenced attribute field is similar to a calculated field. Each repository profile may have one attribute that is defined as auto-sequencing. Typically, this would be its primary key or an item number.

When a new record is created, the user may be allowed to enter the value of an auto-sequencing field (depending on the configuration of Enable). When the record is saved for the first time and if the user is allowed to set a value for that field, their value will be saved. If not, Enable will generate the field value based upon the next number in the sequence and configured rules. Once the new record is saved, unless Enable is configured differently, the value of the auto-sequenced field cannot be changed. Enable can coordinate the generation of auto-sequenced fields between repositories, so that within a set of repositories, no duplicate values are generated. This can be useful if, for instance, new products were being entered into separate repositories and each product needed a unique item number.

4.6.7 Attribute Tabs and Groups

Records may have thousands of attributes, which can make them unwieldy to view or edit. For display purposes attributes are typically grouped according to their function. For instance, all the metric measurement attributes might be placed into a group called “Metric Measurements” and the imperial measurements in a group called “Imperial Measurements”.

The attribute groups are then placed into larger groups called attribute tabs. The groups Metric Measurements and Imperial Measurements might be placed into a tab named “Specifications”.

When a record is opened in an editor, the attribute tabs are displayed. The tabs can be expanded to show the attribute groups. The attribute groups can be expanded to show the actual attributes themselves.

Each repository has its own set of attribute tabs and groups. Attribute tabs and groups are defined and maintained by the system administrator.

4.6.8 Summary Attributes

When a record is opened in an editor, attributes selected as summary attributes are displayed in the record header. Any attributes may be selected to be summary attributes, even attributes in records that are linked to the repository.

4.7 Filters

Filters provide a way for the user to quickly find a set of records based on the values of selected attributes.

During configuration, the system administrator selects specific attributes in a repository to be drill down indexes.

When the user opens the **Filter Sidebar**, a list of the drill down index attributes appear. Upon the user expanding an index attribute, a list of all the values that attribute has in the repository is displayed. Each attribute value displays a count of how many times that attribute value appears in the repository.

Selecting an attribute value causes a Filter to be placed on the **Repository View** so that it only lists those records that contain the specified attribute value. It also causes an **Active Filter** box to be displayed in the **Active Filters Bar** that indicates the name of the attribute and what Filter is being applied to its values.

If a Saved Set is in use in the Repository View, the Filter will show attribute values and counts applicable to the Saved Set only.

If additional attribute value Filters are selected (from the same attribute or from different attributes) their effect is such that any record that contains at least one of the indicated attributes' values will be included in the **Repository View** record list.

4.8 Staging and Production

Some repositories have two versions, a Staging version and a Production version. Records are stored in the Staging and Production repositories depending on their readiness for use.

The Staging repository holds records that are in the process of being populated and validated. Staging is thought of as a work area.

The Production repository holds records that are ready for use: they have been validated and are available for internal use or export.

Some organizations also have a temporary Pre-staging repository for records that are not yet ready for Staging. Pre-staging is typically used for imported data that needs processing or validation before it is ready for Staging.

After a record in a Staging repository has been deemed valid (see [Record Validation](#)), it is copied to the Production repository, where it overwrites any previous copy of the record. This act is called promotion. Enable can be configured to automatically promote records when they are valid for the next repository or configured to require promotion to be triggered by a process or user. When records are promoted, they are not deleted from Staging.

4.9 Package Promotions

Records are modified in the Staging environment and then moved to Production using the promotion process. Promotion can be handled automatically or manually, depending on system configuration.

A package is a group of records from linked repositories. If a repository is designated as Package-Dependent, its records will not be promoted to Production if any of the records in the Package have severe validation errors. If a repository is not designated as Package-Dependent, its valid records will be promoted to Production even if the packages containing them are deemed invalid.

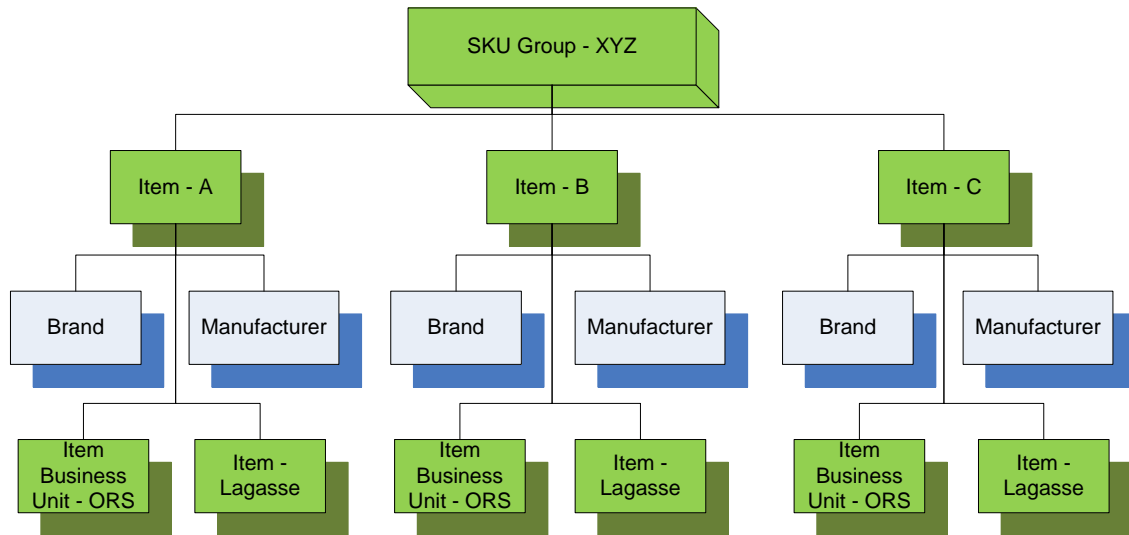
The Package Promotion process has several steps:

1. Creation of temporary Saved Sets for each repository in the package.
2. Validation of the records in the temporary Saved Sets for each repository.
3. Revision of the temporary Saved Sets based on Package Promotion rules (i.e., remove any records belonging to packages that have validation errors).
4. Promotion of the records in the temporary Saved Sets for each repository.
5. Removal of the temporary Saved Sets (to reduce clutter).

The validation and promotion operations are visible in the Job Monitor as individual jobs. The Scheduled Import Jobs shows the overall package promotion progress.

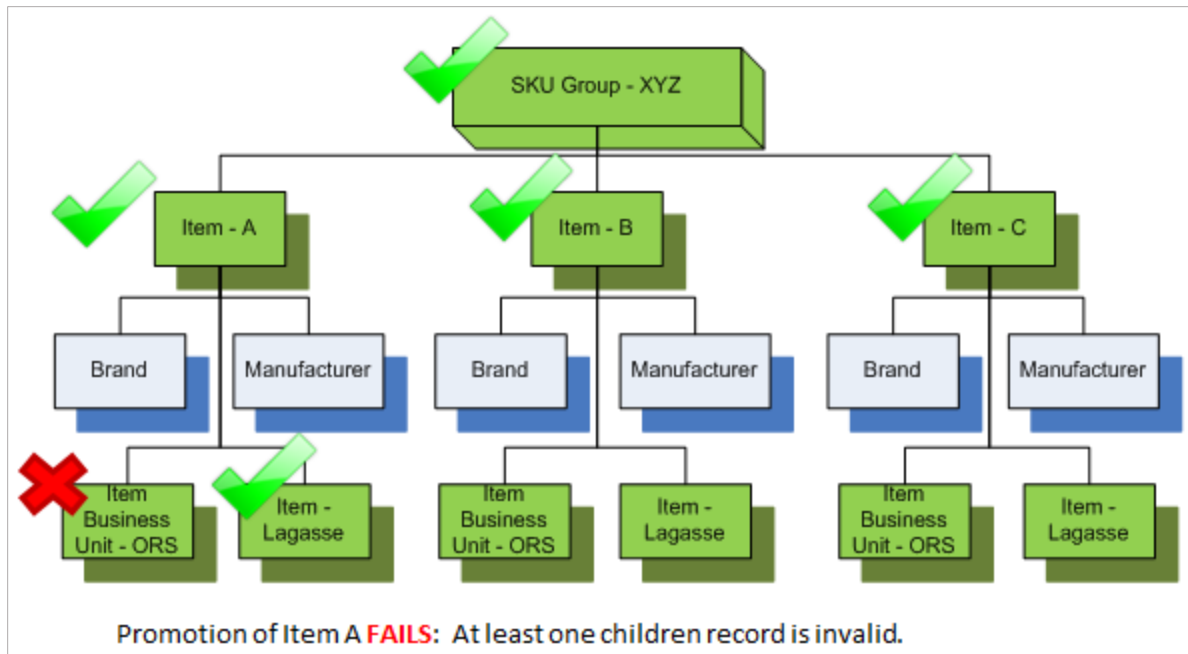
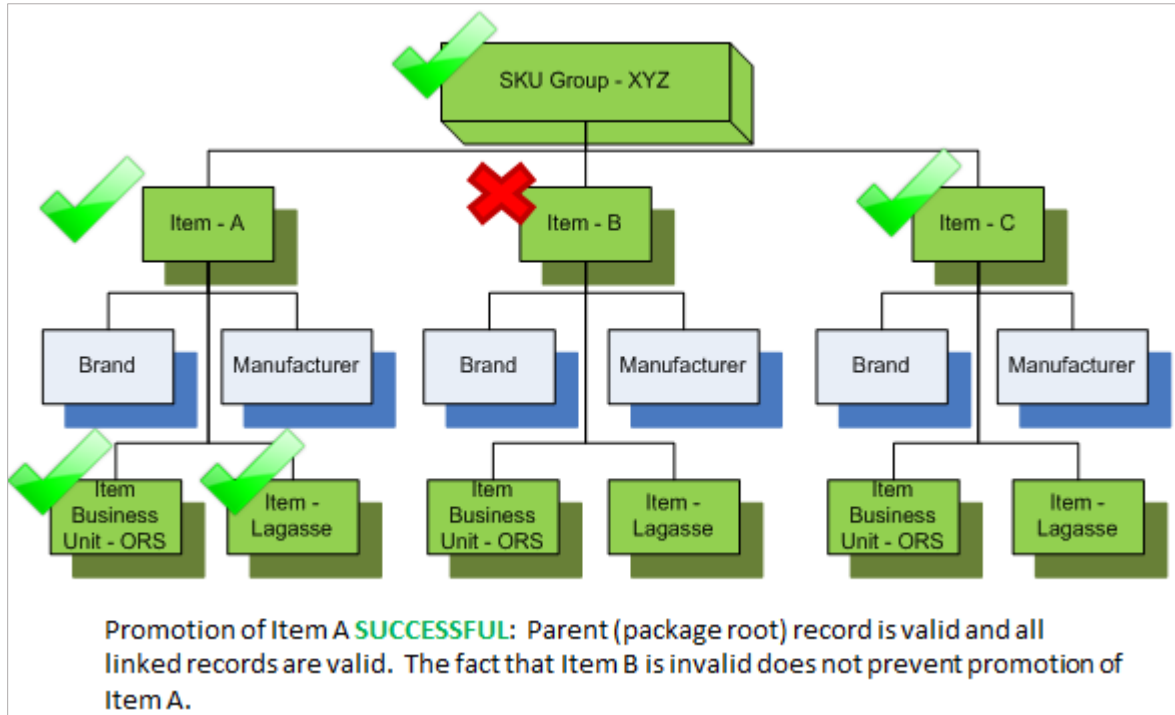
4.9.1 Package Promotion in Detail

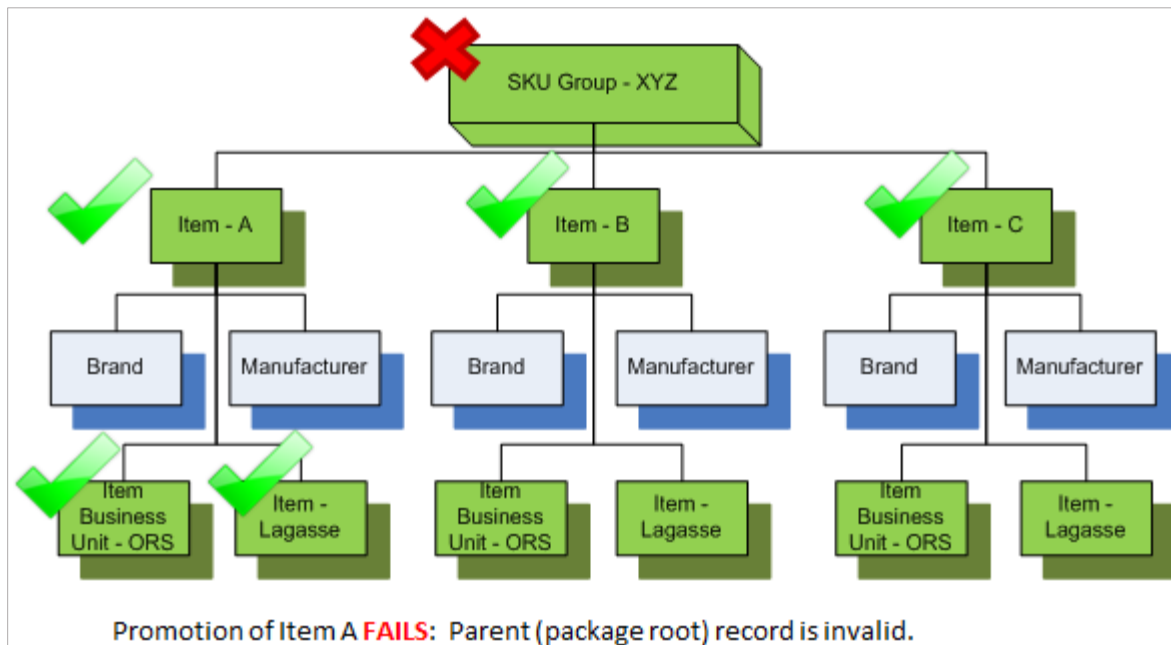
The example below shows the use of a package defined from the root of SKU Group. Item records are linked to the SKU Group record. Brand, Manufacturer and Item Business Unit records are linked to each Item record. The SKU Group, Item, and Item Business Unit records are designated as Package-Dependent. This means that if any records within the package have a severe validation error, the Package-Dependent records will NOT be promoted to Production. The Brand and Manufacturer records are not designated as Package-Dependent, so they will be promoted to Production even if records in the Package are deemed invalid.



The Package Promotion capability supports the ability to promote sibling non-root records independently. In the example above, Item A, Item B, and Item C are sibling records because they belong to the same SKU Group XYZ. If Package Promotion is launched on the Item records instead of on the SKU Group record, the promotion of Item A is possible even if Item B or Item C are invalid. This assumes that SKU Group XYZ is valid and that Package-Dependent children of Item A are also valid.

Below are possible scenarios in which Package Promotion is invoked for Item A. Checkmarks indicate valid records; an 'X' marks invalid records.





If the Enable implementation utilizes validation levels (see [Record Validation](#)) to control the quality of the data made available for Syndication and Publication, the Package Promotion processing uses the validation level settings of the records being promoted to determine which validation rules to apply. Only applicable validation errors are included in the Package Promotion report. If validation errors are found, correction files will be generated that list the records containing the errors. If many validation errors are found, a log update file will also be generated. These files will be included in the same ZIP file as the Package Promotion report.

Validation levels for records can be set manually. The Package Promotion capability also provides a mechanism for automatically setting the validation level of all the records in the package to a designated minimum level (depending on the Package Promotion configuration settings). The automatic setting of the validation level will only raise the validation level on qualifying records – it will not lower the level. For example, if three of the five items in the package promotion are currently set to validation level C and the other two are set to level A, initiating the package promotion with a validation level of B will only raise the three records from C to B. The other two records will remain at level A.

4.9.2 Package Promotion Report

Each time the Package Promotion function is invoked, a report is generated that details the steps taken during the Package Promotion processing.

The first section of the report displays the details of the promotion package being used.

```
Package: SKU Group has 3 levels:

    PIM_Product_Staging
      PIM_Item_Staging
        PIM_Brand_Staging
        PIM_ItemBusinessUnit_Staging
        PIM_Manufacturer_Staging
      PIM_ProductLine_Staging
```

The next section provides details on the saved sets that are generated for each repository comprising the Promotion Package. The repository the Package Promotion process was launched on is listed first.

```
Creating saved set Package PIM_ItemBusinessUnit_Staging_1436463369505 and adding 325 records .
    Successfully created and populated saved set.
Repository PIM_ItemBusinessUnit_Staging not root-level. Identifying packages from selected
items.

Create Saved Sets for Packages:

[Package PIM_Product_Staging_1436463369505]
    Adding 36 records.
[Package PIM_Item_Staging_1436463369505]
    Adding 325 records.
[Package PIM_ProductLine_Staging_1436463369505]
    No records added to saved set.
[Package PIM_ItemBusinessUnit_Staging_1436463369505]
    Adding 325 records.
[Package PIM_Brand_Staging_1436463369505]
    Adding 9 records.
[Package PIM_Manufacturer_Staging_1436463369505]
    Adding 9 records.
```

The next section provides details on the validation of the records in each repository included in the saved sets previously generated. For environments that have multiple validation levels defined, only the validation errors that are applicable for the current level are displayed.

```
Validate Saved Sets for Packages:

    Saved Set: [Package PIM_Manufacturer_Staging_1436463369505]
        Performing validation.
        Validation job completed successfully.
        Validation processed 9 finding 0 errors.

    Saved Set: [Package PIM_Brand_Staging_1436463369505]
        Performing validation.
        Validation job completed successfully.
        Validation processed 9 finding 0 errors.

    Saved Set: [Package PIM_ItemBusinessUnit_Staging_1436463369505]
        Performing validation.
        Validation job completed successfully.
        Validation processed 325 finding 0 errors
    Saved Set: [Package PIM_ProductLine_Staging_1436463369505]
        Performing validation.
        Validation job completed successfully.
```

```

Validation processed 0 finding 0 errors.

Saved Set: [Package PIM_Item_Staging_1436463369505]
Performing validation.
Validation job completed successfully.
Validation processed 325 finding 2 errors:

ERROR: Master Item Id[1002] (Item Validation Level: C) has a critical error
SKU Group Auto-Id: :Failed Level C rule "Required for Level C" :data is empty
Master Item Id: 1002 :Failed Level C rule "Linked Main Image" :Expected one or
more linked records in: DAMLink - found none.
ERROR: Master Item Id[1003] (Item Validation Level: A) has a critical error
UPC: :Failed Level A rule "Required - for Level A" :data is empty
UNSPSC UN Product Class Code: :Failed Level A rule "Required - for Level A" :data
is empty
SKU Group Auto-Id: :Failed Level C rule "Required for Level C" :data is empty
Master Item Id: 1003 :Failed Level C rule "Linked Main Image" :Expected one or
more linked records in: DAMLink - found none.

Saved Set: [Package PIM_Product_Staging_1436463369505]
Performing validation.
Validation job completed successfully.
Validation processed 36 finding 1 errors:

ERROR: SKU Group Auto-ID[1234] (Item Validation Level: A) has a critical error
SKU Group: :Failed Level A rule "Required - for Level A" :data is empty
    
```

The next section provides details on any alterations made to the saved sets based on the results of validation. Records are removed that have a validation error or that belong to a Package-Dependent repository that cannot be promoted because one or more records in the package have a validation error.

```

Update Saved Sets Based on Validation errors

Saved Set: [Package PIM_Product_Staging_1436463369505]

Validation Errors:
SKU Group Auto-ID[1234]
Parent Validation Errors:
No changes
Child Validation Errors:
No Changes

Saved Set: [Package PIM_Manufacturer_Staging_1436463369505]

Validation Errors:
No Changes
Parent Validation Errors
No Changes
Child Validation Errors
No Changes

Saved Set: [Package PIM_Brand_Staging_1436463369505]

Validation Errors:
No Changes
Parent Validation Errors
No Changes
Child Validation Errors
No Changes

Saved Set: [Package PIM_ProductLine_Staging_1436463369505]
Validation Errors:
No Changes
Parent Validation Errors
    
```

```

No Changes
    Child Validation Errors
        No Changes

    Saved Set: [Package PIM_Item_Staging_1436463369505]

        Validation Errors:
            Master Item Id[1002]
Master Item Id[1003]
Parent Validation Errors
Master Item Id[1004]
    Child Validation Errors
        No Changes

    Saved Set: [Package PIM_ItemBusinessUnit_Staging_1436463369505]
        Validation Errors:
            No Changes
Parent Validation Errors
Master Item Id[1002]; Business Unit [ORS]
Master Item Id[1003]; Business Unit [ORS]
Master Item Id[1004]; Business Unit [ORS]
    Child Validation Errors
        No Changes
    
```

The next section of the report details the results of the promotion process for the repositories of the records remaining in the corresponding saved set. It is expected that all remaining records will be promoted successfully.

```

Promote Saved Sets in Packages

    Promote Saved Set: Package PIM_Manufacturer_Staging_1436463369505 in repository:
PIM_Manufacturer_Staging
    Promotion Completed Successfully. Records Processed: 9 Records with errors: null
    Saved set promoted successfully.
    Promote Saved Set: Package PIM_Brand_Staging_1436463369505 in repository:
PIM_Brand_Staging
    Promotion Completed Successfully. Records Processed: 9 Records with errors: null
    Saved set promoted successfully.
    Promote Saved Set: Package PIM_ItemBusinessUnit_Staging_1436463369505 in repository:
PIM_ItemBusinessUnit_Staging
    Promotion Completed Successfully. Records Processed: 322 Records with errors:
null
    Saved set promoted successfully.
    Promote Saved Set: Package PIM_ProductLine_Staging_1436463369505 in repository:
PIM_ProductLine_Staging
    Promotion Completed Successfully. Records Processed: 0 Records with errors: null
    Saved set promoted successfully.
    Promote Saved Set: Package PIM_Item_Staging_1436463369505 in repository: PIM_Item_Staging
    Promotion Completed Successfully. Records Processed: 322 Records with errors:
null
    Saved set promoted successfully.
    Promote Saved Set: Package PIM_Product_Staging_1436463369505 in repository:
PIM_Product_Staging
    Promotion Completed Successfully. Records Processed: 35 Records with errors:
null
    Saved set promoted successfully.
    
```

The final entry in the report provides the elapsed time for the Package Promotion process from start to finish.

```
End of Package Promotion process. Processing time: 0 hours, 9 minutes.
```

If validation errors are found, correction files will be generated containing records with errors. If many validation errors are found, a log update file will also be generated. These files will be included in the same ZIP file as the Package Promotion report.

4.10 Syndication

Syndication is the process of exporting Production data to a particular target, (user of the data). Syndication targets may include targets such as web pages, servers that process product orders, or subsidiary businesses. A syndication channel is a data stream consisting of a set of data being transmitted (or made available to) a particular syndication target.

An organization may have different validation requirements for different syndication targets. For example, the server that processes orders may have minimal requirements, while the website requires a greater amount of data, such as marketing data and images.

The use of validation levels allows an organization to specify that a record is valid for one syndication target but not valid for another. Validation requirements are cumulative as levels are ascended, meaning that records that pass a validation level must have passed lower validation levels as well. See [Record Validation](#) for more information regarding validation levels and the process of record validation.

Records are eligible for promotion to Production once they have reached their assigned validation level. Once promoted, they will only be available for syndication to those targets which they are ready for (have achieved a validation level high enough for). Note that since validation levels are cumulative, records that are available for syndication to one target will also be available for syndication to all targets that have the same or lesser validation level requirements.

For example, an organization might name their lowest validation level (the level with least requirements) “Mainframe”, indicating that records that pass the Mainframe level of validation are ready to be syndicated to the mainframe that processes product orders. The organization may also define a higher validation level named “Web” that requires a record not only to pass Mainframe validation, but also to contain other specified, validated data before it is available for syndication to the web.

Records assigned to the Mainframe level will be eligible for promotion to Production as long as their data quality is sufficient to achieve the Mainframe validation level. The records will not be available for syndication to the web unless they are assigned to Web Level and also pass Web level validation. Note that in order for a record to pass Web level validation, it must also have passed Mainframe validation, thus they would be eligible for syndication to both targets.

4.11 Channel Readiness

A syndication channel is a data stream consisting of a set of data being transmitted (or made available to) a particular syndication target.

Channel readiness is a measure of how ready a channel is to be syndicated to its target, that is to say, how many of the required record attribute values have reached a validation level sufficient to be syndicated to their target.

4.12 Record Validation

The attribute values of a record are validated when the attribute values are entered into the system. This typically occurs when a record is imported into the database, when the user creates a new record, opens an existing record in the Record Editor and when a new or existing record is saved. Attribute values are checked against constraints placed by the data type, editor control settings, and explicit validation rules. The constraints are independent of validation levels (i.e., they are always applied). The explicit validation rules can be assigned to specific validation levels.

Different syndication targets may have different requirements for data content, such as which attribute values are required and whether or not they accept attribute values flagged with warnings.

The use of validation levels gives an organization the ability to determine if particular validation errors and warnings are severe enough to prohibit the syndication of a record to a particular target. They allow a record to be deemed good enough for syndication to one target but not another.

Validation levels are associated with the quality of the record's attribute values. Validation rules are assigned to validation levels; for a record to reach a level of validation, it must pass the validation checks for that level and all the validation levels beneath it. Enable supports up to **five levels of validation** and they are often labeled "A" through "E", such that in order for a record to be deemed valid at level A, it must satisfy all the requirement levels for E, D, C, and B as well.

Records are eligible for promotion to Production once they pass the validation rules for their assigned validation level. Once promoted, they will only be available for syndication to those targets which they are ready for (have achieved a validation level high enough for). Note that since validation levels are cumulative, records that are available for syndication to one target will also be available for syndication to all targets that have the same or lesser validation level requirements.

A record's validation status indicates whether it achieves its assigned validation level. The possible status values are:

Green: Promotable

Yellow: Has warnings – May be promotable according to system configuration and user entry.

Red: Has severe errors – Unpromotable.

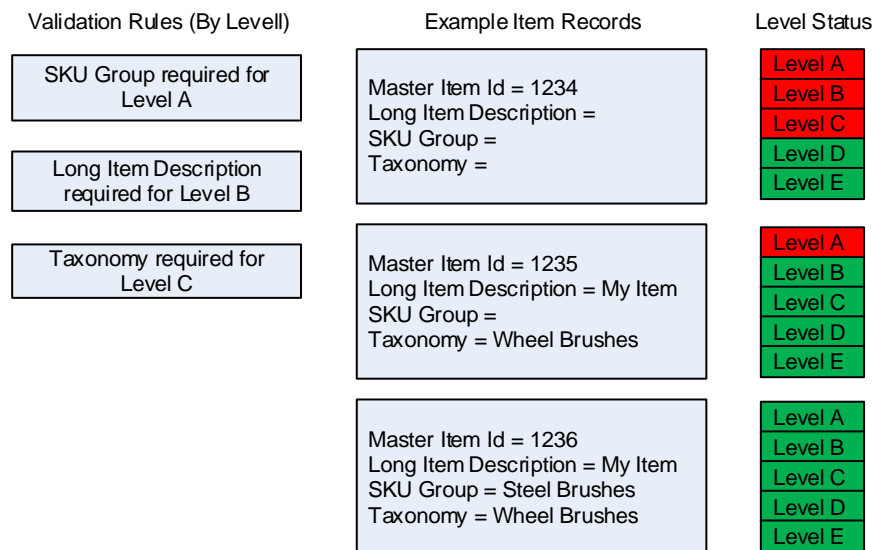
Black: Record not yet validated.

During system configuration, it is determined which validation rules map to which validation levels and whether the promotion of records allows for errors or warnings.

For detailed information about how a record’s validation status is determined, see the “Enable 9 Product Information Management (PIM) Administrator’s Manual”.

4.12.1 Record Validation Example

The following diagram illustrates how validation rules assigned to validation levels affect the validation status of records for those levels:



In the above example, if the first record (with Master Item Id = 1234) has a required validation level of D or E, the record will be deemed valid. But if it must reach level A, B, or C to be promotable, it would be deemed not promotable and flagged with at least one severe error.

The second record is valid if its required validation level is set to any level but A.

The third record is deemed valid regardless of what its required validation level because all validation rules have been satisfied.

4.13 Digital Asset Management (DAM)

The DAM is the set of folders, repositories, and processes used to store digital assets and make them accessible to the rest of Enable.

An organization's digital assets may include digital images, audio files, video files, PDF documents, Microsoft Office documents, and other file types.

The records in the DAMMaster repository hold the metadata for the digital assets. Each digital asset has one record in DAMMaster. The metadata includes values such as the asset's id, file name, and media type.

Digital assets can be associated with any repository records, depending on system configuration. The records in the DAMLink repository hold the associations between the DAMMaster records and records in the repositories that have been configured to allow Digital Assets to be linked.

4.14 Events

The Events function allows the user to specify changes to a set of records that will occur at a later date and time. Optionally, the user may specify an expiration date for the changes, after which the records will revert to their state before the Event was defined.

Note: To use Events successfully, the user must address the need to ensure data integrity in the case that the contents of the selected records change before the Event occurs. Specifically, the difficulties that may arise are that the changes are overwritten when the Event restores the original state of the records, or that the changes combined with the Event's modifications will invalidate the records.

4.15 Workflow

The Workflow capability allows multiple users to manage a particular job through a defined process determined by the requirements of the organization.

A workflow is a business process. It is a set of tasks that must be performed to fulfill a function. A work item is a marker for a specific job that is going through the process. The work item contains information about the job and where the job is in the process.

For example, a business may have the following workflow when bringing a new product to market:

Someone comes up with the idea to start selling a new product. They create a proposal and start distributing it to different departments to get input on the idea. Sales writes up their assessment of the marketability of the product and gathers some data. They attach it to the proposal and send it on. Engineering and Procurement each provide assessments and gather data, attach it to the proposal and send it on. The proposal's owner may decide the Product Safety department needs to be consulted before the proposal is sent to management for approval, or they may decide Product Safety's involvement is not necessary and send the proposal straight to management. Management then makes the decision to accept the proposal, reject it, or to send the proposal back through the process with a request for more information.

The workflow in this example is the process the company follows to make the decision whether or not to sell a new product. The proposal serves as the work item. It identifies the proposed product, acts as a collection point for data gathered about the product, and its signature list indicates where the proposed product is in the workflow.

Work items are implemented in Enable as one or more records (or a Saved Set of records) that are put into a preconfigured workflow.

For a work item to advance in a workflow, tasks need to be performed by one or more users or groups of users (participants). These tasks may involve the use of automated processes, such as retrieving information from an FTP server or other external system, generating and transmitting files, sending e-mails, updating data in Enable, etc.

Depending on a workflow's configuration, when a user acts on a work item, they may have only one action to perform, more than one action to perform, or a choice between actions to perform.

There may be only one route a work item can take through a workflow, with the work item being passed sequentially from one participant to the next. Or the route may split with versions of the work item sent as new work items to multiple participants concurrently. Routes that have split may merge back into one route further along the workflow or they may stay separate for the rest of the workflow.

There are four ways work item records can be sent into a workflow.

1. One record is sent into a workflow as one work item.
2. A Saved Set of records is sent into a workflow as one work item.
3. Multiple records are sent into a workflow as one work item.
4. Multiple records are sent into a workflow as multiple work items.

The method a workflow uses to process submitted records is determined by the way it was configured by the system administrator.

Depending on system configuration, a record can be in more than one workflow at a time.

Additional records cannot be added to a multi-record work item once it has been created.

A work item cannot move forward to the next activity task of a workflow process until all its associated records have been processed at the current activity task.

Workflows may be configured to lock records against editing while they are in a work item. If so, the records cannot be edited until the work item is completed except by the user(s) who are currently assigned to the work item. If the record is part of a multi-record work item, all records in the work item must be completed before the records are unlocked.

5 Reference Guides

The following reference guides identify the components of Enable's most commonly used windows. Each aspect of Enable's functionality will be explored in more depth in later sections of this document.

5.1 Dashboard Reference Guide

The dashboard interface includes several key components:

- Features Sidebar Icon:** A hamburger menu icon on the top left.
- Dashboard Selector:** A dropdown menu showing the current user role, 'System Administrator'.
- Text Search Box:** A search input field with a magnifying glass icon.
- Dashboard Tab:** A home icon representing the current dashboard.
- Tab Bar:** A horizontal bar containing 'SAVE LAYOUT' and 'ADD WIDGET' buttons.
- Activity Bar:** A vertical bar on the right side of the dashboard.
- Widget Pane:** The main area containing various data widgets.
- Profile:** A user profile icon on the top right.

The dashboard contains the following widgets:

- PRODUCT REPORT:** A pie chart showing product status. Legend: Not Valid (black), Severe (red), Valid and in production (green), Valid but not in production (blue), Warning (orange).
- VENDOR SCORECARD:** A table with columns: Channel, Valid Content, Required Attributes, Optional Attributes, No. of Records. Includes a 'STATE' toggle.
- CHANNEL REPORT:** A table with columns: Channel, Valid Content, Required Attributes, Optional Attributes, No. of Records. Includes a 'STATE' toggle.
- WORKLIST:** A section for 'My Active Work Items' with buttons for 'CLEAR ERROR', 'PURGE', and 'PURGE ALL COMPLETED WORK ITEMS'.
- UPLOAD:** A 'Drag & Drop files here' area with a '(or click to browse)' link.
- PM STATUS:** A section showing counts for 'Vendor Product Data Submitted', 'Vendor Enrichment', 'Ready for Use', and 'Ready For Commercializati...'.

5.2 Repository View Reference Guide

Open Features Sidebar Search Box Dashboard Tab Repository View Tab More Actions Dropdown Activity Bar Quick Editor Toggle Preference View Dropdown Scroll Slider

Select All Records in Repository 2017 Media Library EDITOR NO PREFERENC...

Active Filters Bar Text: 2017 x

	ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOR SALE	SUPER TICKET PRODUCT	RATING	RUNTIME (MINS)	
<input type="checkbox"/>	▲		1	Baywatch (Extended Cut)	Review Specifications	09/07/2017	Yes	Upgrade	R	120	Comed
<input type="checkbox"/>	▲		2	Guardians of the Galaxy Vol. 2	Active	09/01/2017	Yes	No	PG 13	137	Action
<input type="checkbox"/>	▲		3	The Lion King	Active	09/01/2017	Yes	No	G	87	Action
<input checked="" type="checkbox"/>	▲		4	The Lion King (VF)	Active	09/01/2017	Yes	No	G	87	Action
<input checked="" type="checkbox"/>	▲		5	Star Wars: Spoofs	Active	09/01/2017	Yes	No	R	123	Drama
<input type="checkbox"/>	▲		6	King Arthur: Legend of the Sword	Active	09/01/2017	Yes	Redeem	PG 13	126	Action
<input type="checkbox"/>	▲		7	Everything, Everything	Active	09/01/2017	Yes	No	PG 13	96	Drama
<input type="checkbox"/>	▲		8	Snatched	Active	09/01/2017	Yes	No	R	91	Comed
<input type="checkbox"/>	▲		10	Kong: Skull Island	Active	09/01/2017	Yes	No	PG 13	118	Action

1 To 22 Of 22 (2) Page Number 1 Of 1 Number of Records per Page 50 List View Icons

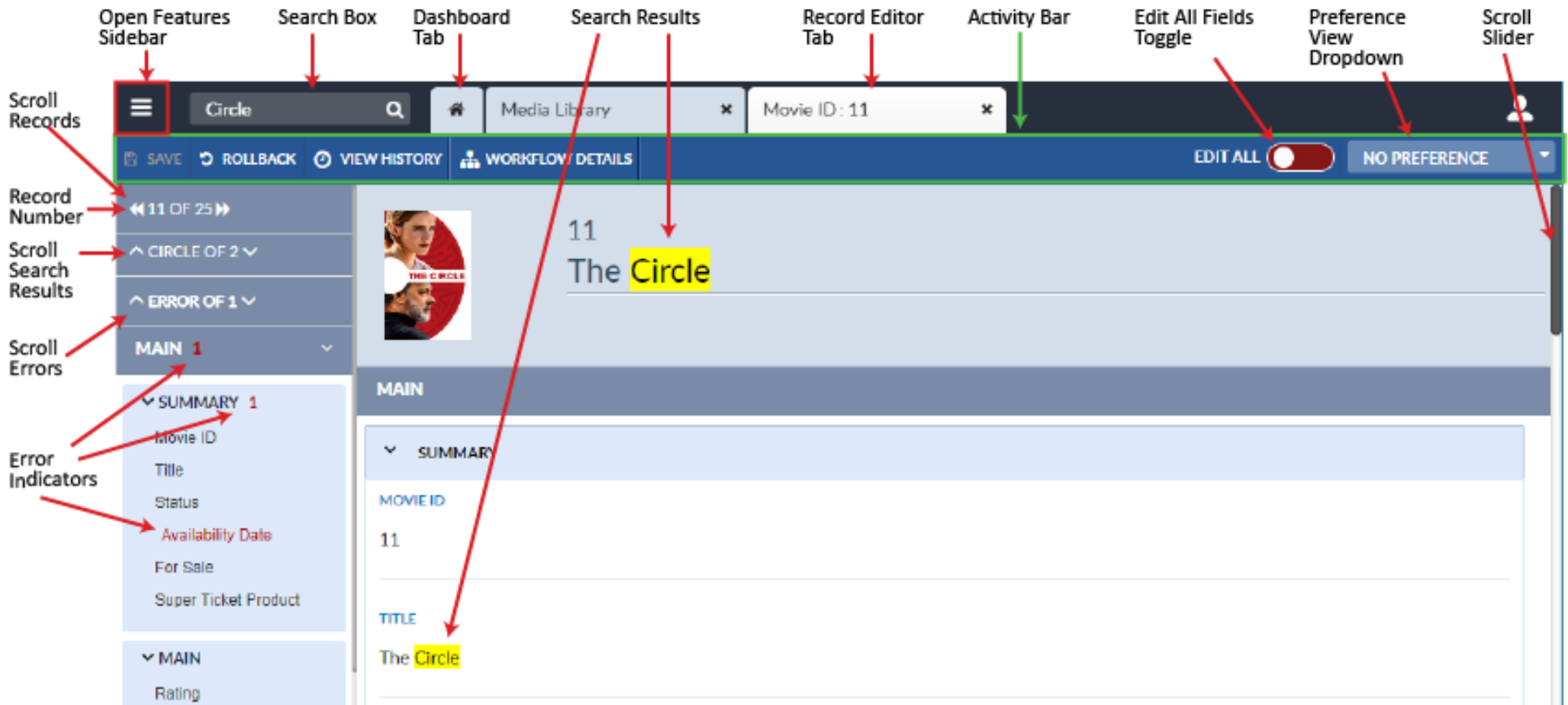
▲ = Record is Valid and Promotable.

▲ = Record has Warnings.

▲ = Record has Severe Errors.

▲ = Record has not been validated.

5.3 Record Editor Reference Guide



5.4 Hierarchy/Taxonomy Sidebar

Labels at the top of the screenshot:

- Features Sidebar Icon
- Hierarchy/Taxonomy Sidebar
- Close Hierarchy/Taxonomy Sidebar
- Hierarchy Button
- Active Filter

Labels on the left side of the screenshot:

- Delete Hierarchy
- Manage Hierarchy/Taxonomy
- Add Hierarchy
- Select Hierarchy/Taxonomy
- Display Option
- Parent Node
- Child Node

	ERROR	PRODUCT ID	BRAND	PRODUCT NAME	TAXONOMY	CLOTH
<input type="checkbox"/>		220	Triot	Powerfly	BICYCLE.RECUMBENT	
<input type="checkbox"/>		310	Linear	Roadster	BICYCLE.RECUMBENT	
<input type="checkbox"/>		320	Linear	Limo	BICYCLE.RECUMBENT	
<input type="checkbox"/>		410	Bike Friday	Bantam	BICYCLE.RECUMBENT	
<input type="checkbox"/>		420	Bike Friday	Llama	BICYCLE.RECUMBENT	
<input type="checkbox"/>		430	Bike Friday	Super Pro	BICYCLE.RECUMBENT	
<input type="checkbox"/>			Catrike	Pocket	BICYCLE.RECUMBENT	

Bottom of the screenshot:

1 To 7 Of 7 1 Of 1 50

5.5 Taxonomy Editor Reference Guide

Open Features Sidebar

Search Box

Select Attributes

Assigned Category Attributes

Close Taxonomy Editor

Activity Bar

Scroll Slider

Category Attribute Tree

Taxonomy Selector

Taxonomy Node Tree

TAXONOMY		ATTRIBUTE	CODESET	SUBSET	IS INHERITED
Products - StarbucksCat	<input type="checkbox"/>	Package Format	Package Format	-	False
	<input checked="" type="checkbox"/>	Certifications	Certifications	-	False
	<input type="checkbox"/>	Calories from Fat		-	False
	<input type="checkbox"/>	Dietary Fiber		-	False
	<input type="checkbox"/>	Allergy Information	S_Allergens	-	False
	<input type="checkbox"/>	Total Fat		-	False
	<input type="checkbox"/>	Calories		-	False
	<input type="checkbox"/>	Protein		-	False
	<input type="checkbox"/>	Sugars		-	False
	<input type="checkbox"/>	Iron		-	False
	<input type="checkbox"/>	Serving Size	S_Size	-	False
	<input type="checkbox"/>	Vitamin A		-	False
	<input type="checkbox"/>	...		-	False

ATTRIBUTES

- > SUMMARY
- > PRODUCT DATA
- > NUTRITION | ALLERGEN DATA
- > SYSTEM

5.6 Hierarchy Editor Reference Guide

The screenshot displays the Hierarchy Editor interface with the following components and data:

- Current Hierarchy Node Tree:** Shows a tree structure under 'HIERARCHY CAMERA STAGING'.
 - Category: CAMCORDER
 - Canon undefined
 - Canon undefined
 - Category: DSLR
 - Panasonic undefined
 - Canon undefined
 - Nikon undefined
 - Canon undefined
 - Nikon undefined
 - Nikon undefined
 - Nikon undefined
 - Nikon undefined
 - Canon undefined
 - Nikon undefined
 - LG undefined
 - Panasonic undefined
 - Panasonic undefined
 - LG undefined
 - LG undefined
- Product Toggle:** A green toggle switch labeled 'PRODUCT' is turned on.
- Center Pane:**
 - Attributes dropdown and a 'SAVE' button.
 - Table with columns: PRODUCT NO (Canon), STATUS.
 - Section: SPECIFICATION
 - Test Att
 - Brand: Canon
 - Model Number: 70D
- Source Hierarchy Tab:**
 - Header: SOURCE HIERARCHY, SAVED SET
 - Text: Use this side to copy nodes
 - Dropdown: Hierarchy Camera Staging [...]
 - Items: CAMCORDER, DSLR

5.7 Workflow Task Manager Reference Guide

The screenshot shows the Workflow Task Manager interface. At the top, there is a search bar labeled 'Search' and a 'Workflow' tab. Below the search bar, there are several action buttons: 'VIEW PROPERTIES', 'CLEAR ERROR', 'PURGE', and 'PURGE ALL COMPLETED WORK ITEMS'. The main area contains a table with columns: #, TASK, TASK ITEM, TASK STATUS, TASK ROLE, WORK ITEM, PRIORI..., ACTIVITY, SENDER, SENT DATE, STATUS, and WORK ITEM ID. The table lists three work items. At the bottom, there is a pagination control showing '1 To 1 Of 1' and a page size selector set to '50'.

#	TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM	PRIORI...	ACTIVITY	SENDER	SENT DATE	STATUS	WORK ITEM ID
1	PM Review	Review Products_07_26_2018_10_05	Review	Product Management	Review Products_07_26_2018_10_05	None	Product Management	RepoData...	07/26/2018 10:05	Enroute	3595181
2	PM Review	Review Products_07_25_2018_16_22	Review	Product Management	Review Products_07_25_2018_16_22	None	Product Management	RepoData...	07/25/2018 16:23	Enroute	3576998
3	Scheduled Start - Export		In Error		Export	None	Scheduled Start		05/10/2018 03:44	In Error	2407893

The **Workflow Task Manager** is described in more detail on following pages.

Select Work Item List

Select Work Item View Profile

Activity Bar

Open Record /Repository

Send to Workflow

	#			TASK	TASK ITEM	TASK STATUS	TASK ROLE
<input type="checkbox"/>	1			Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line
<input type="checkbox"/>	2			App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer
<input type="checkbox"/>	3			Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line
<input type="checkbox"/>	4			App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer

1 To 1 Of 1

Workflow Task Manager Detail (Left Side)

Activity Bar

TASK ROLE	WORK ITEM	PRIORITY	ACTIVITY	SENDER	SENT DATE	STATUS	WORK ITEM ID
Product Line	Review Products_06_21_2018_16_03	None	Product Line Review	ProcessPro...	06/21/2018 16:03	Enroute	2671964
App Engineer	Review Products_06_21_2018_16_03	None	App Engineer Review	ProcessPro...	06/21/2018 16:03	Enroute	2671963
Product Line	Review Products_06_12_2018_18_01	None	Product Line Review	ProcessPro...	06/12/2018 18:01	Enroute	2602383
App Engineer	Review Products_06_12_2018_18_01	None	App Engineer Review	ProcessPro...	06/12/2018 18:01	Enroute	2602382

Workflow Task Manager Detail (Right Side)

5.8 Channel Readiness Reference Guide

Annotations:

- Open Features Sidebar
- View Channel Attributes
- Channel History Graph
- Add Channel
- Edit Channel
- Delete Channel
- Activity Bar
- Refresh Display
- State Toggle
- View All Channels
- Inbound/Outbound Indicator

Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Vendor2	100%	100%	100%	1
Test Kimball 1 Inbound	100%	92%	96%	25
Vendor1	100%	100%	100%	8
Test Matt Inbound	100%	99%	89%	32
Maker1	100%	100%	33%	5

5.9 Job Monitor Reference Guide

Add Active Filter Bar & Filters.

Annotations in the screenshot:

- Open Features Sidebar:** Points to the sidebar menu icon.
- Job Log File:** Points to the search bar.
- Job Download File:** Points to the 'END JOB' button.
- Job Error File:** Points to the 'RESTART JOB' button.
- Activity Bar:** Points to the 'Channel Readiness' tab.
- Select All Jobs:** Points to the 'Select All' checkbox in the table header.
- Select A Job:** Points to the 'Select' checkbox in the first row of the table.

				JOB TYPE	STATUS	REPOSITORY	DATE
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:01:34
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:01:22
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:01:10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:01:04
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:00:52
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:00:40
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:00:28
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:00:16
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 05:00:04
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 03:01:34
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Validation	Completed	Products	06-13-2018 03:01:22

1 To 50 Of 2209 1 Of 45 50

5.10 Links Editor Reference Guide

Annotations:

- Edit Linked Item
- Edit Link
- Add New Linked Item
- Add Link
- Remove Link
- Refresh Display
- Action Button Selection Depends on System Configuration
- Upload Files

#	IMAGE	FILEPATH	FILENAME	IMAGE CONTEXT	IMAGE PRIORITY
<input type="checkbox"/>		10006\0991712006_merch_frt_001_...	0991712006_merch_frt_001_nr.tif	Main	1
<input type="checkbox"/>		10006\0991712006_merch_dtl_001_...	0991712006_merch_dtl_001_nr.tif	Main	2

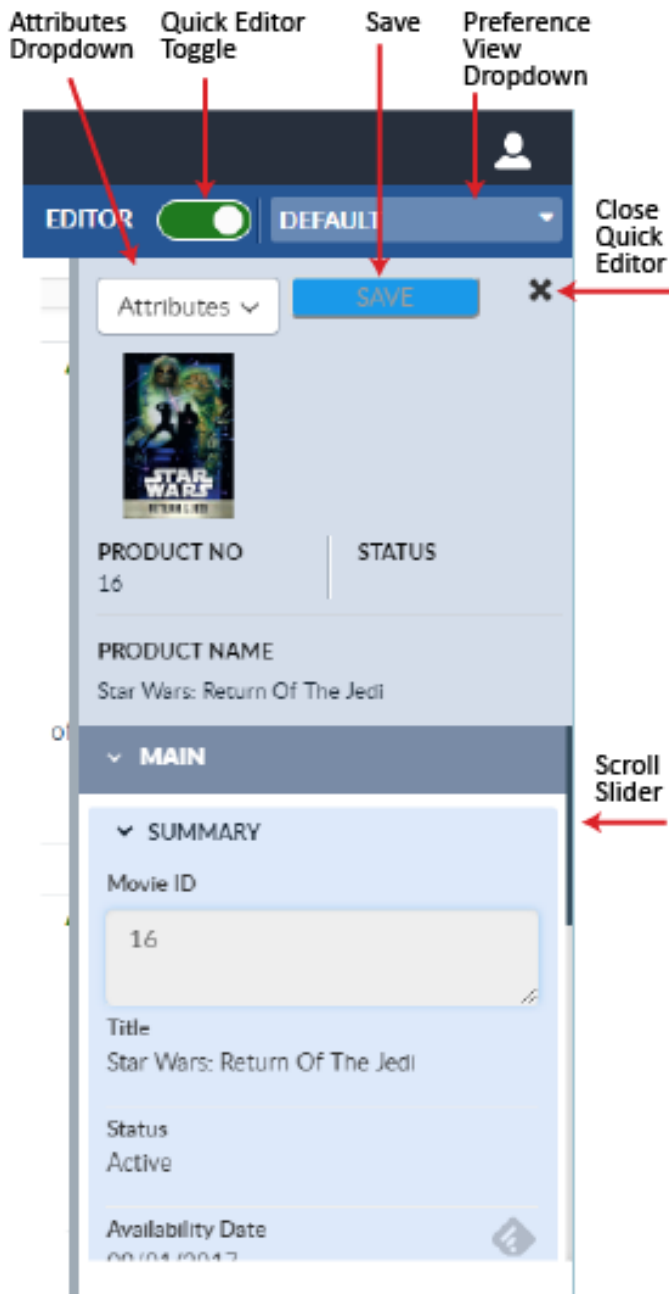
1 To 2 Of 2 Page 1 Of 1 10

5.11 Widgets Reference Guide

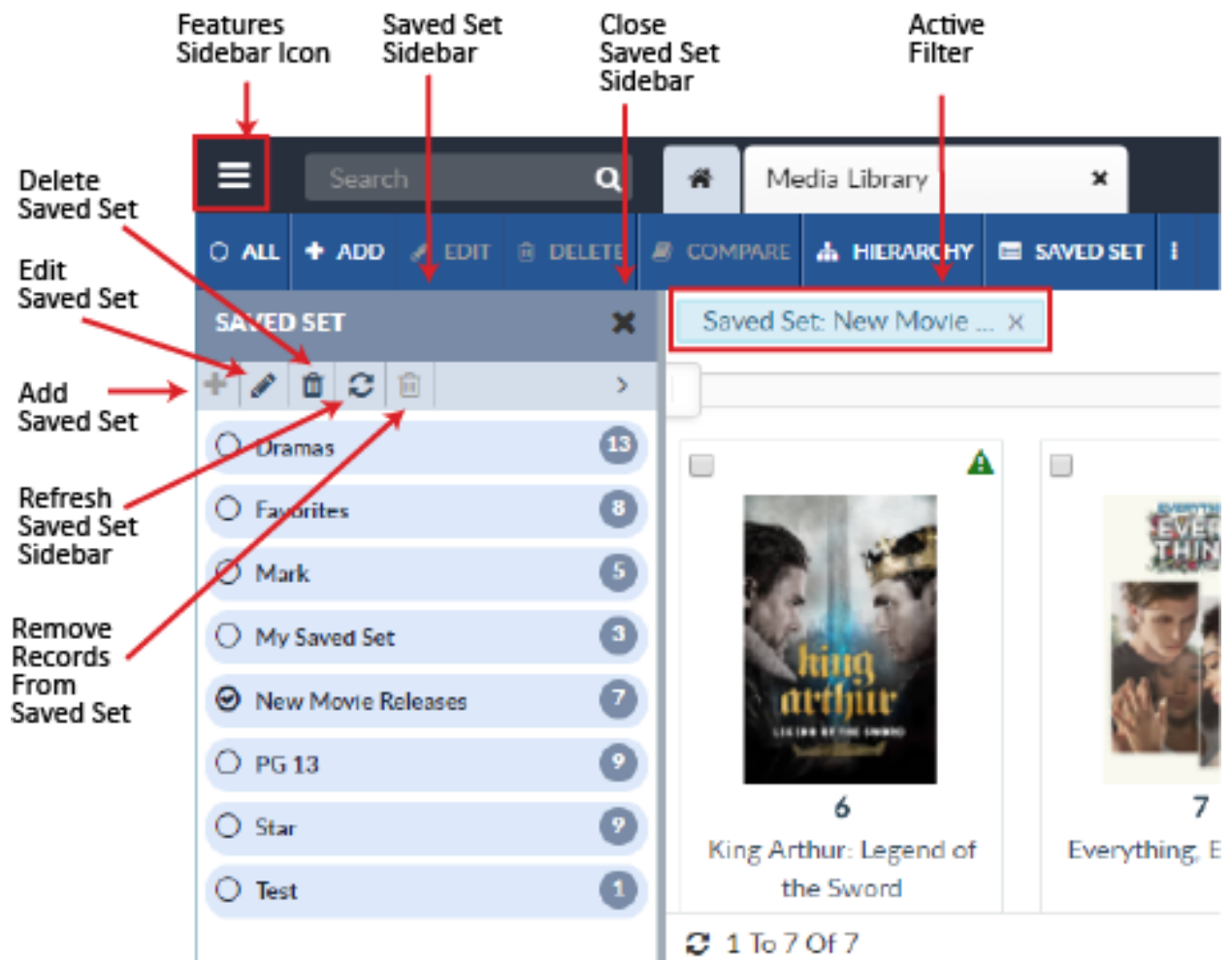
The screenshot shows a widget titled 'CHANNEL REPORT'. At the top left is a gear icon labeled 'Settings'. The title 'CHANNEL REPORT' is centered at the top. On the right side, there are three icons: a square (labeled 'Widget Size Control'), a circular arrow (labeled 'Refresh'), and an 'X' (labeled 'Close Widget'). Below the title is a navigation bar with 'CHANNELS', 'ATTRIBUTES', and 'GRAPH' tabs, and a 'STATE' toggle switch which is currently turned on. The main content is a table with the following data:

Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Macys	100%	100%	63%	8
Web	100%	98%	51%	32
Walm Syndicat	100%	96%	72%	11
Amazon Sundication	100%	98%	34%	25

5.12 Quick Editor Reference Guide



5.13 Saved Set Sidebar Reference Guide



5.14 Events Sidebar Reference Guide

The screenshot displays the EnterWorks interface with the Events Sidebar open. Annotations on the left side identify key components:

- Features Sidebar Icon:** Points to the hamburger menu icon in the top left.
- Events Sidebar:** Points to the sidebar header area.
- Close Events Sidebar:** Points to the 'X' icon in the sidebar header.
- Active Filter:** Points to the 'Pending Request: CZ Event x' filter text.
- Delete Event:** Points to the trash icon in the sidebar toolbar.
- Edit Event:** Points to the pencil icon in the sidebar toolbar.
- Add Event:** Points to the plus icon in the sidebar toolbar.
- Refresh Event Sidebar:** Points to the refresh icon in the sidebar toolbar.
- Remove Records From Event:** Points to the trash icon in the sidebar toolbar.
- Edit Event Record Values:** Points to the pencil icon in the sidebar toolbar.
- Event Filters:** Points to the list of event categories in the sidebar.

The Events Sidebar contains the following event list:

- Temporary Price Reduction Pr...
- Temporary Price Reduction Pr...
- Summer
- Winter Catalog
- Fall
- New Year Changes
- NewPendingRequest_152234...
- CZ Event** (Selected)
- Presidents Day Sale

The main table displays event records with the following columns:

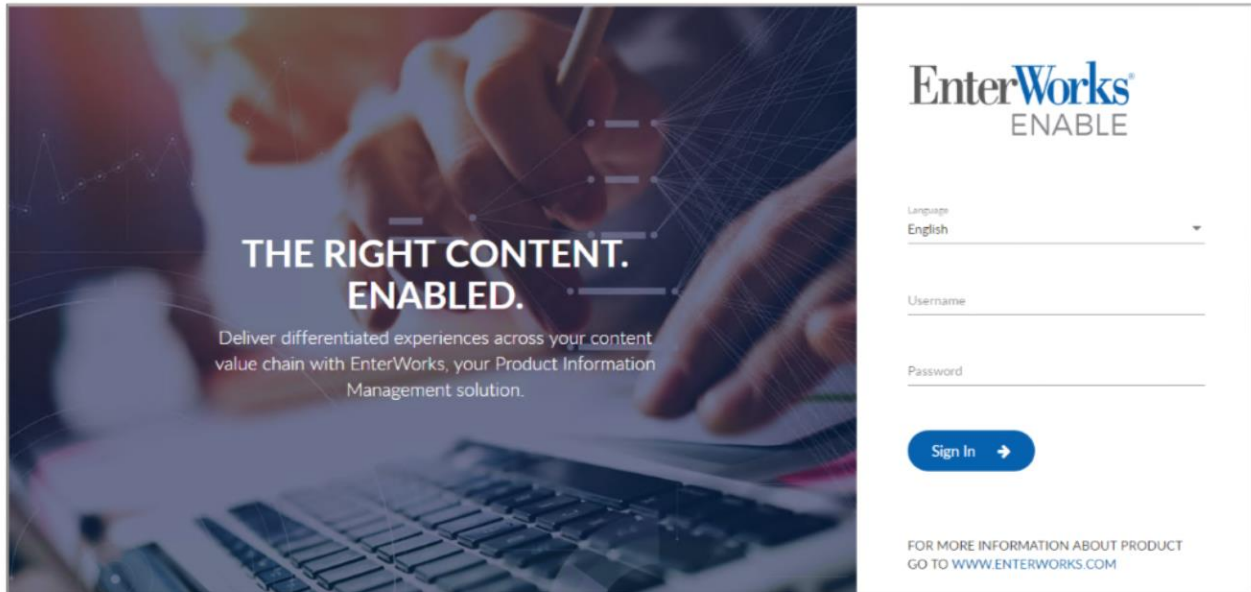
	ERROR	IMA...	MOVIE ID	
<input checked="" type="checkbox"/>			35	Neve
<input type="checkbox"/>			125	Neve
<input type="checkbox"/>			125	Neve
<input type="checkbox"/>			133	Neve
<input type="checkbox"/>				Neve

At the bottom of the table, it shows a pagination indicator: 1 To 5 Of 5 (1).

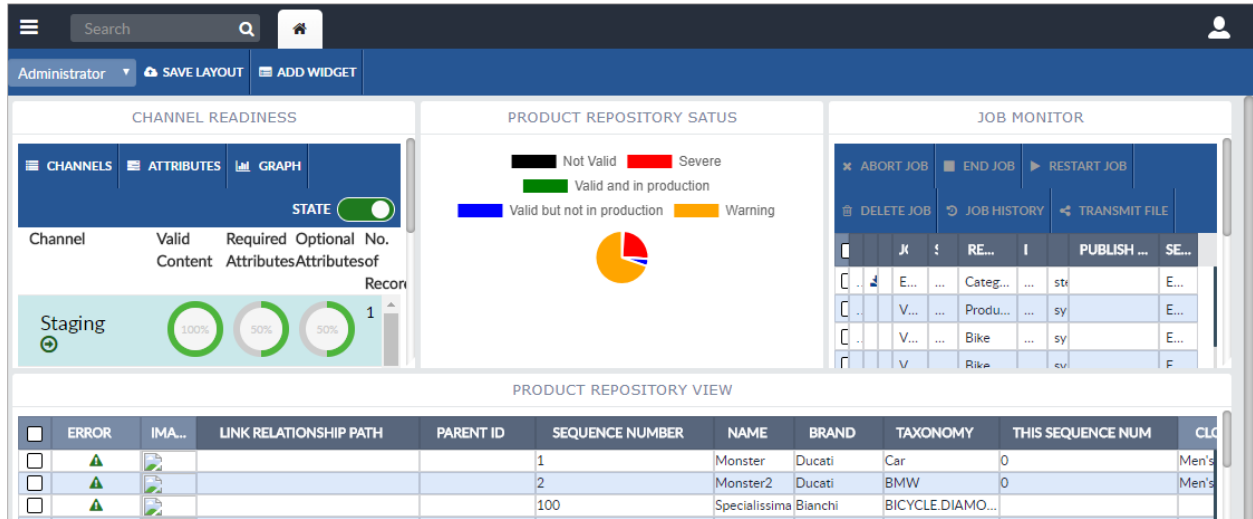
6 Logging into Enable

To log into Enable, perform the following steps:

1. Open the web browser.
2. Enter the Enable 9 URL: `http://<servername>/enable2020/`
3. The Enable login screen appears.



4. Select a **Language**, enter the **Login ID & Password**, and click the **Sign In** button.
5. The user's dashboard will appear.



Enable Dashboard

The **Dashboard** (or **Home** page) appears on system entry. The reports and applications shown are user specific, according to the user’s system privileges. The screen shown is a sample dashboard configuration.

6.1 User Permissions

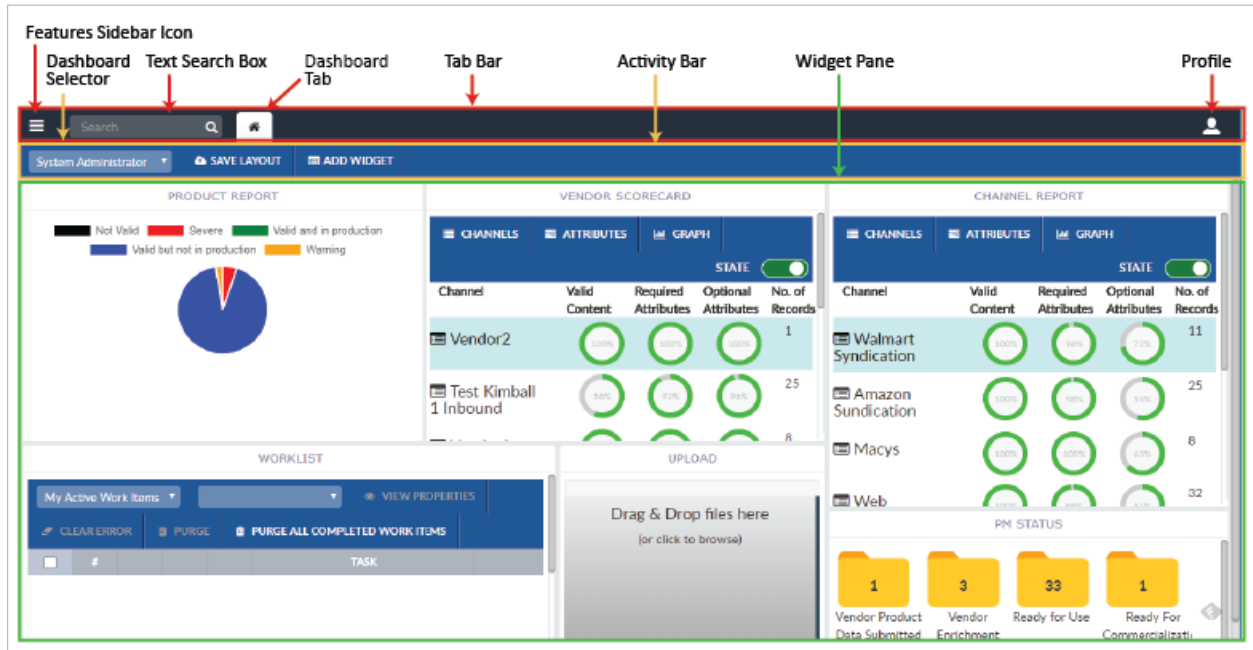
The system administrator sets the data and function access permissions for each role and user group. These permissions determine if users in a particular user group can see data (Read Only) or both see and modify data (Read/Write).

A user can belong to more than one user group. They have all the permissions that all their user groups are assigned. For instance, if the user belongs to the Project Management user group and the Sales user group, they will have all the permissions granted to the Project Management user group **and** the Sales user group.

7 Enable User Interface

The EnterWorks Enable User Interface is streamlined to allow the user to quickly and easily find what they need. The screen has the following main areas:

- **Features Sidebar**
- **Tab Bar**
- **Activity Bar**
- **Main View Area**



Enable Dashboard


More details about the various Enable displays and their functions are described in subsequent sections of this document.

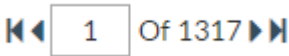






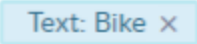
7.1 EnterWorks Logo

Click the EnterWorks logo to go to the EnterWorks website.

7.2 Screen Controls



Enable’s user interface contains common elements across the system. Many of the elements are similar to typical window-based user interfaces.

Function	Appearance	Description
Refresh		Refreshes the contents of a display.
Number of Records	1 To 20 Of 26331 (1)	Indicates the numbers of the records on the page, the number of records in the repository, and the number in parenthesis indicates the number of records selected in the repository.

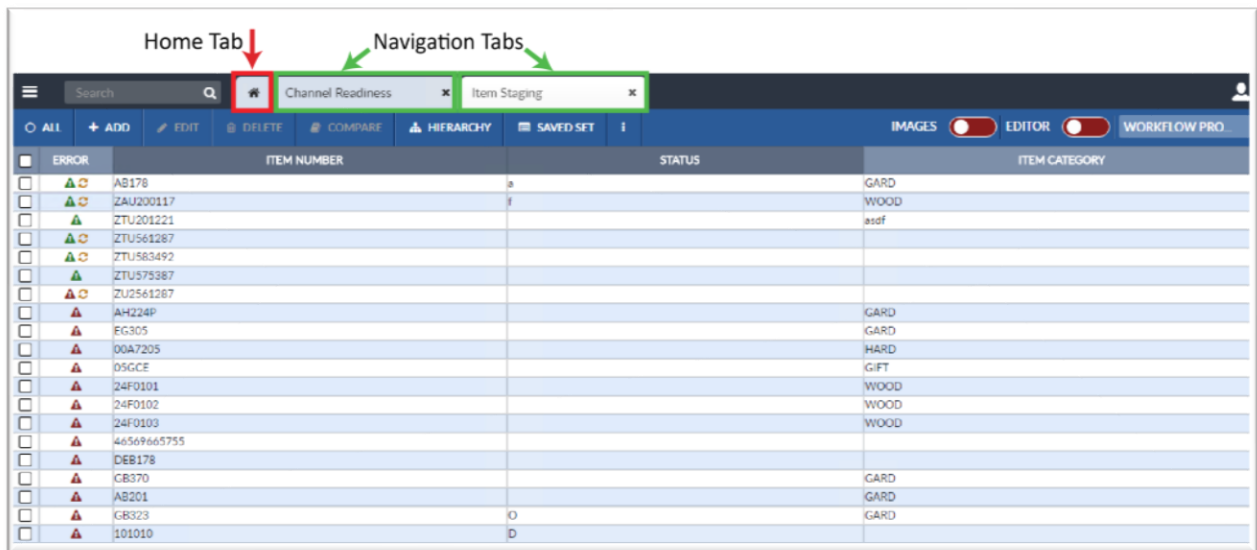
Page Controls		Indicates the number of the page currently being viewed and the total number of pages. The arrow controls allow the user to go forward or back a page, and to the first or last page.
Number of Records Per Page		Allows the user to set the number of records displayed on a page.
List View Icons		Allows the user to choose the layout of records being viewed: Grid View, Card View or Gallery View.
Scroll Slider	Black bar.	Allows the user to scroll the contents of the screen vertically or horizontally.
Maximize Widget		Maximizes the displayed size of the Widget.
Restore Widget		Restores the Widget to its default size.
Settings		Allows the user to modify a Widget.
Close		Allows a user to close a tab or Widget, or to remove the effect of a search filter.
Active Filter box		Displays an active search filter.

7.3 Tab Bar

The **Tab Bar** is the top bar on the Enable screen. It contains:

- **Features Sidebar** icon : Opens the **Features Sidebar**.
- **Text Search** box: Finds the indicated text in active repositories, records, and Widgets. Search is described more thoroughly in the [Search](#) section of this document.
- **Dashboard** tab: Click the **Dashboard** tab to return to the **Dashboard**.
- **Navigation Tabs**: The tabs that appear here allow the user to switch between functional views. The active tab is highlighted.
- **Profile** icon : Allows the user to view their **Profile Name** or to log out.


For a complete reference guide to the Dashboard, see [Dashboard Reference Guide](#).

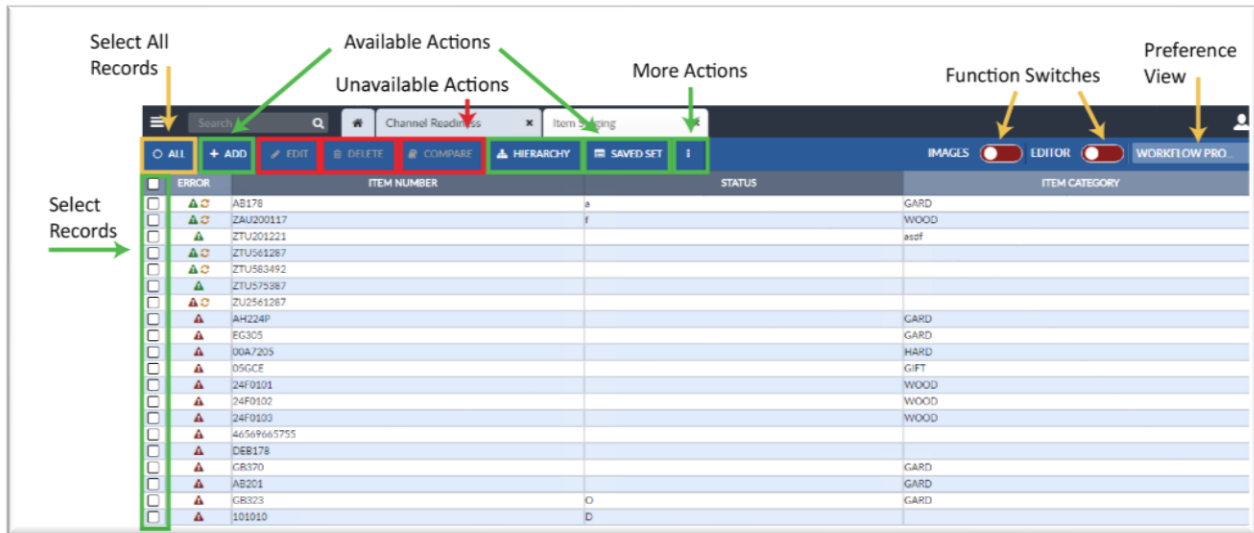


Dashboard Tab Bar

7.4 Activity Bar

The **Activity Bar** lists functions that can be performed on the contents of the opened tab. These activities are described in detail in the sections relating to their functional use. The Activity Bar contains different objects according to the contents of the tab.

- **Dashboard Selector:** Appears on the **Dashboard**. It contains links to the user’s personal dashboards – one for each user group they belong to.
- **Actions:** Actions that can be performed on the contents of the tab. Actions the user is currently able to perform are highlighted. Actions the user cannot currently perform are grayed out.
- **More Actions icon** : A dropdown list of more actions the user may perform contents of the tab.
- **Function switches:** Depending on the contents of the tab, the user may have functions they can turn on/off, such as the **Quick Editor** or Cover View.

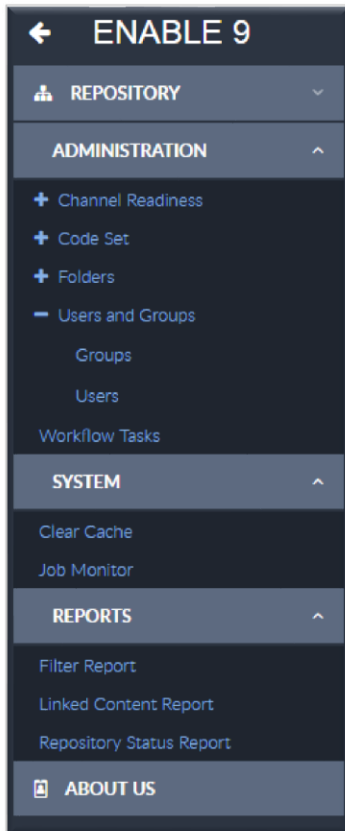


Activity Bar

7.5 Features Sidebar

The **Features Sidebar** displays links to stored content, reports, and available actions. The list of features displayed depend on user permissions and system configuration. It is comprised of the following sections:

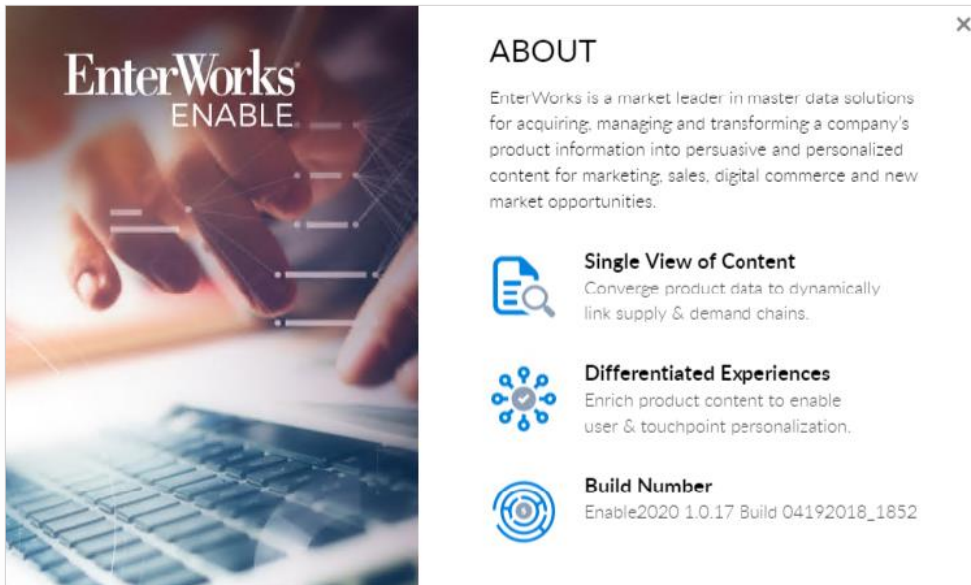
- **Repository:** Lists the repositories the user is permitted to view, edit, or use.
- **Administration:** Allows permitted users to view and manage users, groups, channel readiness, code sets, folders and workflow.
- **System:** Allows permitted users to monitor and manage jobs, and to clear the cache and.
- **Reports:** Allows user to view available reports.
- **About Us:** Displays the version number of the Enable system in use.



Feature Sidebar

7.5.1 Enable Version

To verify the version of Enable installed, open the features bar and click the **About US** function.



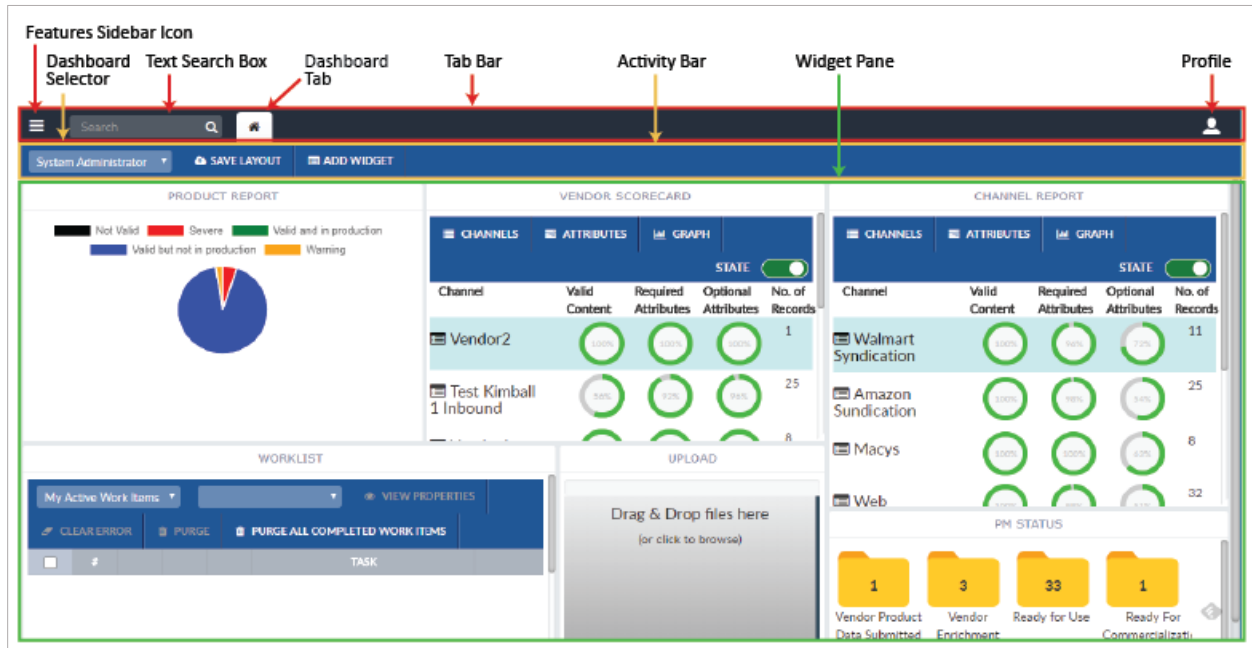
Enable Version Number

NOTE: When entering a support ticket it is very beneficial to note the version of Enable that you are utilizing. Patches often come frequently and any issue that is identified may have been addressed in a recently released version.

8 Dashboard

The user's **Dashboard** consists of a collection of Widgets that allow the user to view and manage data, perform functions, and check system status. The user can modify their **Dashboard** configuration without affecting the **Dashboards** of other users. Widgets can be added, deleted, moved, sized, and modified to suit the user's preference.

The user only sees the Widgets, data and functions they have permission to access. Permissions are set by the system administrator and can be set to allow the user to see data (Read Only) or to see and modify data (Read/Write). The user can belong to more than one user group and has all the permissions assigned to all the user groups they belong to.



Enable Dashboard

The user has a **Dashboard** for each user group they belong to. The **Dashboard Selector** dropdown list, on the far left of the **Dashboard's Activity Bar**, indicates which **Dashboard** the user is currently using. The user can switch to a different **Dashboard** by selecting it on the **Dashboard Selector** dropdown list.

The system administrator configures an initial **Dashboard** for each user group. A user can customize each of their **Dashboards** according to their needs and preferences, without affecting the **Dashboards** of other users. The user can save the configuration of their customized **Dashboards**. When a user selects a **Dashboard** from the **Dashboard Selector** dropdown list, their latest saved configuration of their **Dashboard** for that user group will appear.

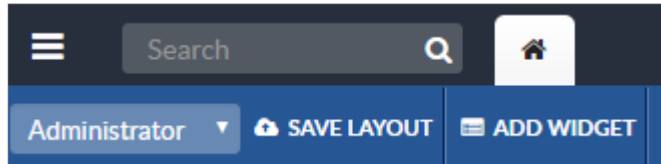
Note: the user retains all the permissions granted to them, from all their user groups, no matter which **Dashboard** they are viewing. For instance, if the user belongs to the Project Management user group and the Sales user group, they will always have all the permissions granted to the Project Management user group and the Sales user group, no matter which **Dashboard** they are viewing.

8.1 Create or Modify a Personalized Dashboard

For full discussions on **Dashboards**, user group **Dashboards**, personal **Dashboards**, and user permissions, see the [Dashboard](#) section in this document.

Users have a **Dashboard** for each user group they belong to. They may personalized their **Dashboards** without affecting the **Dashboards** of other users. They may save a **Dashboard** configuration as their default **Dashboard** configuration for each user group they belong to.

To create or modify a personalized **Dashboard**, switch to the desired **Dashboard** by selecting the appropriate user group in the **Dashboard Selector** dropdown list in the far left of the **Activity Bar**. The existing **Dashboard** for the selected user group will appear.



Dashboard Controls

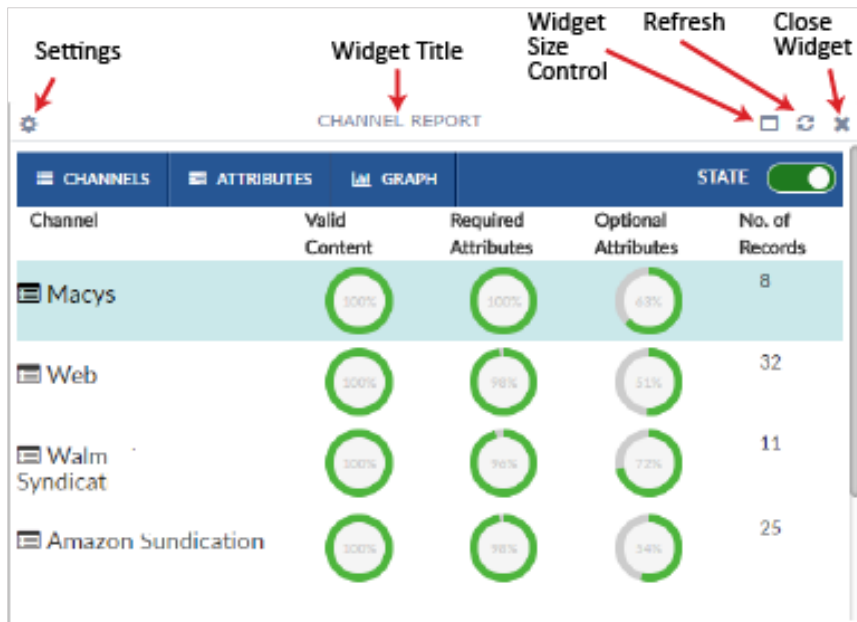
The user may add, delete, modify, move and size Widgets to suit their needs and preferences.

To save a **Dashboard** configuration, click the **Save Layout** button on the **Dashboard's Activity Bar**. If the user logs off or switches user groups before saving their personal **Dashboard**, all changes to that **Dashboard** will be lost.

WARNING: Remember to click the **Save Layout** button to save any changes to the **Dashboard** or all changes (new report Widgets, Widget size changes, Widget positions) will be lost.

9 Widgets

Widgets are windows on the **Dashboard** that allow the user to perform a function, monitor the progress of a function, or to view data. Widgets can be added to the **Dashboard**, removed, configured, modified, refreshed, moved, and sized. The Dashboard can contain more than one Widget at a time.



Widget Controls

Reports are similar to Widgets, in that they provide all the same functionality, but reports appear in their own tab, not on the **Dashboard**. Unlike widgets on the **Dashboard**, the configuration of Reports cannot be changed. Reports may or may not be available to users, depending on the configuration of Enable.

Note that the content of Widgets and reports do not auto-refresh. The user must refresh a Widget to update the data it displays.





To refresh the contents of a Widget, click the **Refresh** icon  on the upper right of a Widget's **Activity Bar**.

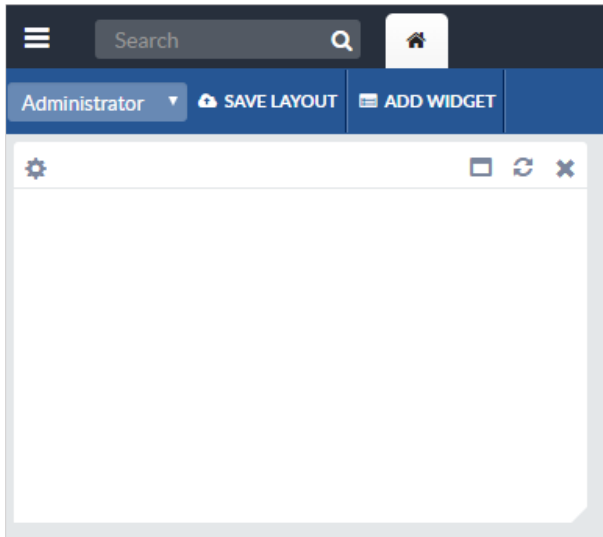
Some Widgets access a lot of data to refresh. Note that having too many data-heavy Widgets open at a time may slow system performance.

9.1 Managing Widgets

9.1.1 Add a Widget

To add a Widget to a **Dashboard**, click the **Add Widget** button on the **Dashboard's Activity Bar**. A blank Widget is added to the **Dashboard**. The blank Widget has not yet been configured.

To see and access the Widget's **Activity Bar**, hover over the top of the blank Widget's window. The Widget's **Activity Bar** consists of (left to right): a **Settings** icon , a **Title**, a **Maximize** icon , a **Refresh** icon , and a **Close Window** icon . See the [Widget Reference Guide](#) section for more details.



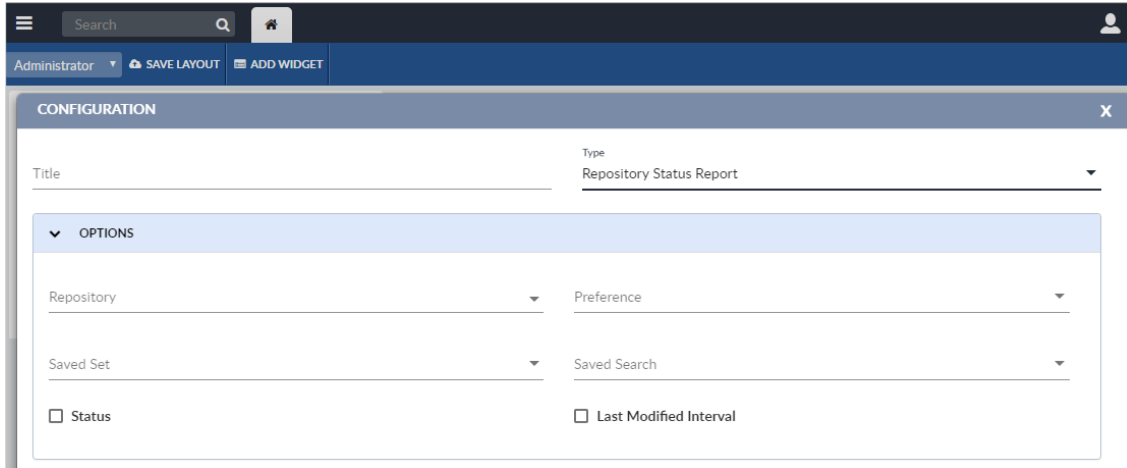
Add a Widget

To configure the Widget for a certain purpose, click the Widget's **Settings** icon .



Widget Activity Bar

A **Configuration** window will appear.



Widget Configuration

Enter a title for the Widget in the **Configuration** window’s **Title** field. This is the title the Widget will display, so it is recommended that the user select a title that names the Widget and indicates what type of Widget it is, for instance, “Product Repository Status Report”.

Select the desired type of Widget in the **Configuration** window’s **Type** dropdown list. Configuration options applicable to the selected Widget type will appear. Configure the Widget as desired. For detailed instructions on configuring different types of Widgets, see the appropriate subsection in the [Configuring Widgets](#) section of this document.

Click the **Apply** button to save any changes to the Widget or click the **Cancel** button to exit without saving changes.

If desired, click the **Save Layout** button on the **Dashboard’s Activity Bar** to save the **Dashboard’s** new configuration as the user’s personalized **Dashboard** for the user group specified in the **Dashboard Selector** dropdown list.

9.1.2 Remove a Widget

To remove a Widget from the **Dashboard**, click the **Close Window** icon **X** on the Widget’s upper right corner.








Widget Activity Bar

The Widget will be removed from the **Dashboard**.

If desired, click the **Save Layout** button on the **Dashboard's Activity Bar** to save the **Dashboard's** new configuration as the user's personalized **Dashboard** for the user group specified in the **Dashboard Selector** dropdown list.

WARNING: Remember to click the **Save Layout** button to save any changes to the **Dashboard** or all changes (new report Widgets, Widget size changes, Widget positions) will be lost.

9.1.3 Modify a Widget

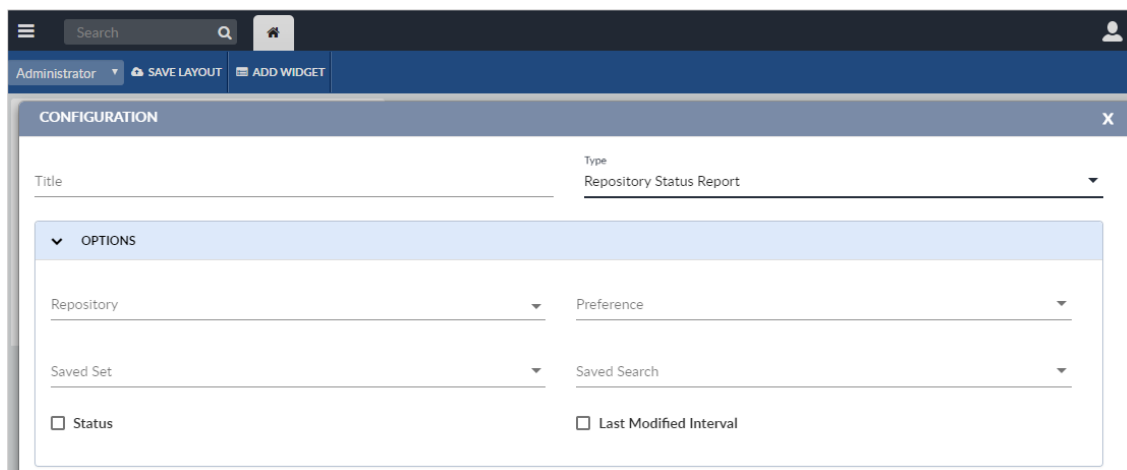
A Widget's **Activity Bar** consists of (left to right): a **Settings** icon , a **Title**, a **Maximize** icon  or **Restore Size** icon , a **Refresh** icon , and a **Close Window** icon . See the [Widget Quick Start](#) section for more details.

To modify a Widget, select the **Settings** icon  on the Widget's **Activity Bar**.



Widget Activity Bar

A **Configuration** window for the Widget will appear.



Widget Configuration

If necessary, enter a new title for the Widget in the **Configuration** window's **Title** field. This is the title the Widget will display, so it is recommended that the user select a title that names the Widget and indicates what type of Widget it is, for instance, "Product Repository Status Report".

If necessary, select the new desired type of Widget in the **Configuration** window's **Type** dropdown list. Configuration options particular to the selected Widget type will appear. Configure the Widget as desired. For detailed instructions on configuring different types of Widgets, see the appropriate subsection in the [Configuring Widgets](#) section of this document.

Click the **Apply** button to save any changes to the Widget or click the **Cancel** button to exit without saving changes.

If desired, click the **Save Layout** button on the **Dashboard's Activity Bar** to save the **Dashboard's** new configuration as the user's personalized **Dashboard** for the user group specified in the **Dashboard Selector** dropdown list.


WARNING: Remember to click the **Save Layout** button to save any changes to the **Dashboard** or all changes (new report Widgets, Widget size changes, Widget positions) will be lost.

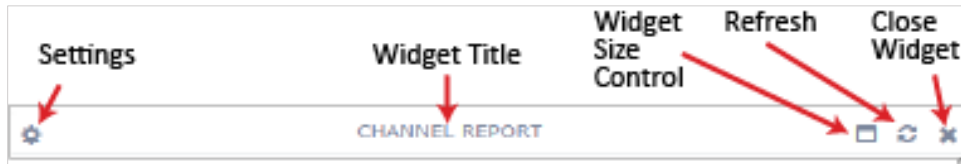
9.1.4 Change Size of a Widget

Widgets are displayed on a grid system – when they are repositioned or sized, their location or size will snap to the next gridline. A shaded background box indicates what their new position or size will be. Note that moving or resizing a Widget may cause the other Widgets to be rearranged to make room for it.

To change the size of a Widget, move the cursor to any edge or corner of the Widget. When the double headed arrow appears, click and drag the Widget window to the desired size, then release the mouse button.

Click the **Maximize** icon  to expand the Widget to fill the screen space.

Click the **Restore** icon  to return the Widget to the size it was before the Widget size was maximized.



Widget Activity Bar

If desired, click the **Save Layout** button on the **Dashboard’s Activity Bar** to save the **Dashboard’s** new configuration as the user’s personalized **Dashboard** for the user group specified in the **Dashboard Selector** dropdown list.

WARNING: Remember to click the **Save Layout** button to save any changes to the **Dashboard** or all changes (new report Widgets, Widget size changes, Widget positions) will be lost.

9.1.5 Move a Widget

Widgets are displayed on a grid system – when they are repositioned or sized, their location or size will snap to the next gridline. A shaded background box indicates what their new position or size will be. Note that moving or resizing a Widget may cause the other Widgets to be rearranged to make room for it.

To move a Widget, position the cursor on the Widget’s **Activity Bar**. The cursor will change into a picture of a hand. Click and drag the Widget to the desired position. Note that other Widgets will change position to accommodate the new position of the Widget.



Widget Activity Bar

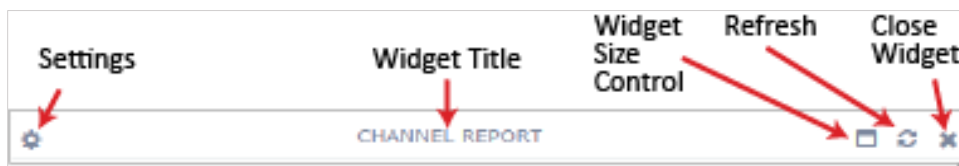
If desired, click the **Save Layout** button on the **Dashboard’s Activity Bar** to save the **Dashboard’s** new configuration as the user’s personalized **Dashboard** for the user group specified in the **Dashboard Selector** dropdown list.

WARNING: Remember to click the **Save Layout** button to save any changes to the **Dashboard** or all changes (new report Widgets, Widget size changes, Widget positions) will be lost.

9.1.6 Refresh a Widget



Note that the content of Widgets do not auto-refresh. The user must refresh a Widget to update the data it displays.

To refresh the contents of a Widget, click the **Refresh** icon  on the upper right of a Widget's **Activity Bar**.

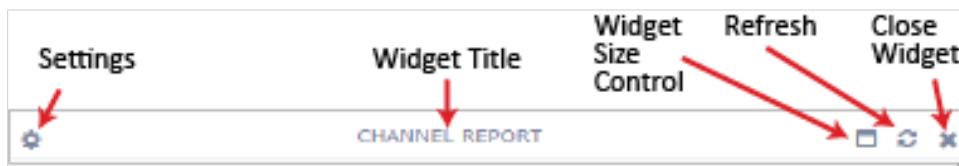


Widget Activity Bar

9.2 Configuring a Widget

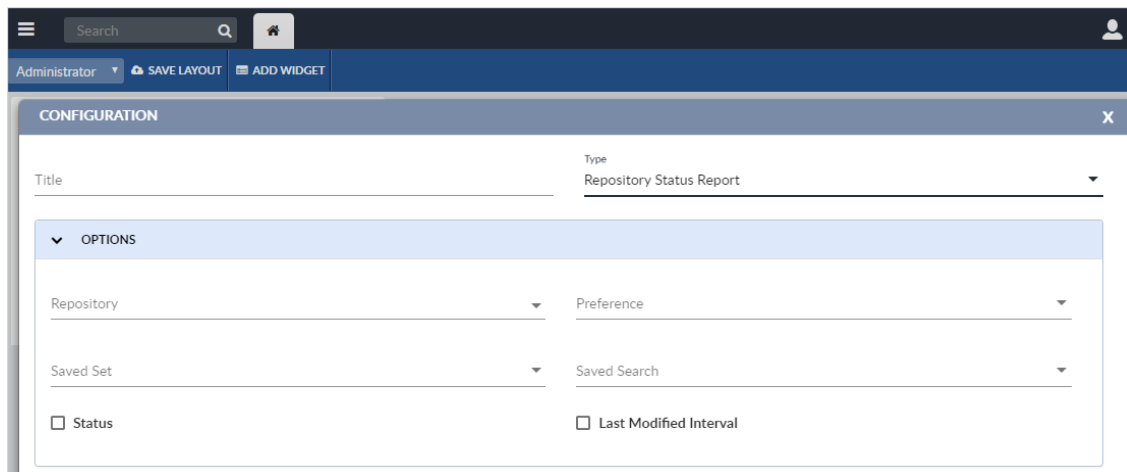
A Widget's **Activity Bar** consists of (left to right): a **Settings** icon, a **Title**, a **Maximize** or **Restore Size** icon, a **Refresh** icon , and a **Close Window** icon . See the [Widget Quick Start](#) section for more details.

To configure a Widget, select the **Settings** icon on the Widget's **Activity Bar**.



Widget Activity Bar

A **Configuration** window for the Widget will appear.



Widget Configuration

Enter a title for the Widget in the **Configuration** window’s **Title** field. This is the title the Widget will display, so it is recommended that the user select a title that names the Widget and indicates what type of Widget it is, for instance, “Product Repository Status Report”.

Select the desired type of Widget in the **Configuration** window’s **Type** dropdown list. Configuration options particular to the selected Widget type will appear.

The following sections detail the configuration options for each type of Widget.

9.3 Widget Reference Guide

9.3.1 Channel Readiness

The **Channel Readiness Widget** displays how ready each specified syndication channel is to be syndicated to its target, that is to say, how many of the required record attribute values have reached a validation level sufficient to be syndicated to their target.

The **Channel Readiness Widget** acts identically to the **Channel Readiness** tab, with the exception that during the Widget’s configuration, if the user has system administration permissions, they may enable the Channel Configuration capability.

For details on the functioning of the **Channel Readiness Widget**, see [Channel Readiness](#).

CHANNEL READINESS				
CHANNELS	ATTRIBUTES	GRAPH	STATE <input checked="" type="checkbox"/>	
Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Staging				1
Vehicles: Bike: Entire Stock				24
Channel: Vehicle: Bike: Recumbents				5
Vehicle: Bike: Diamond Frame				0
Channel B				
Outbound Rep				

Channel Readiness Widget

9.3.1.1 Configuring Channel Readiness Widget

To configure a **Channel Readiness Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon in the upper right of the new Widget’s **Activity Bar**. Note that a Widget’s **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Channel Readiness** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The **Channel Readiness Widget** configuration options will appear.

Channel Readiness Widget Configuration

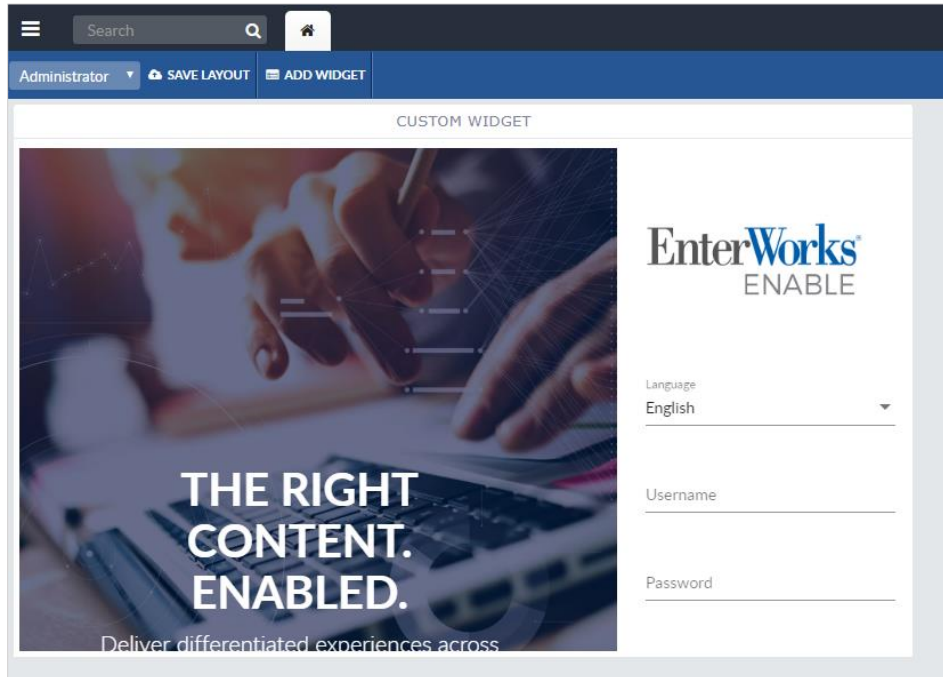
Edit the **Channel Readiness Widget** configuration options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Inbound Channel Readiness”.
- **As Admin:** If checked, the user will have the ability to manage Channel Readiness from the Widget. For more information, see [Channel Readiness](#).
- **All Channels:** If the **All Channels** checkbox is selected, all Inbound and Outbound Channels will be displayed.
- **Inbound:** If the **Inbound** checkbox is selected, all Inbound Channels will be displayed.
- **Outbound:** If the **Outbound** checkbox is selected, all Outbound Channels will be displayed.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.2 Custom Widget


The **Custom Widget** can be used to open an Enable internal URL in a Dashboard Widget.



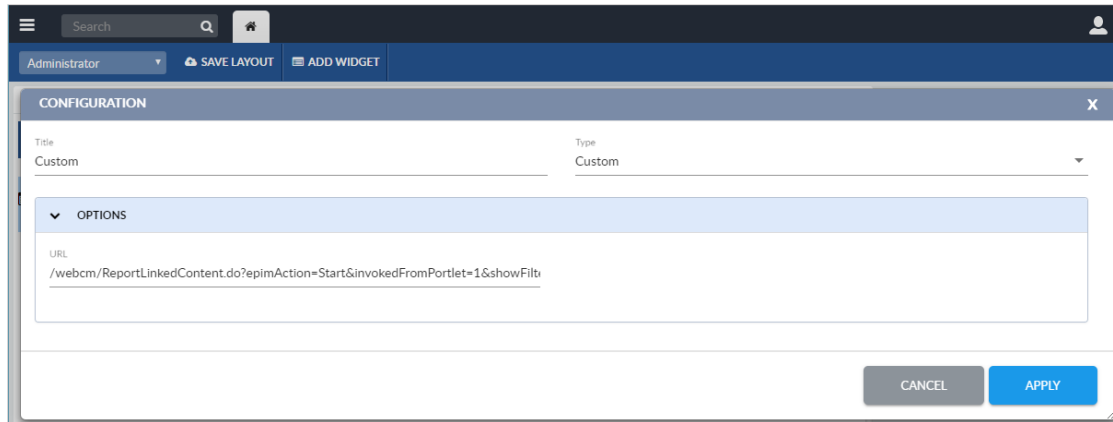
Custom Widget Pointing to Enable Login Page

9.3.2.1 Configuring Custom Widget

To configure a **Custom Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget’s **Activity Bar**. Note that a Widget’s **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Custom** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The **Custom Widget** configuration options will appear.



Custom Widget Configuration

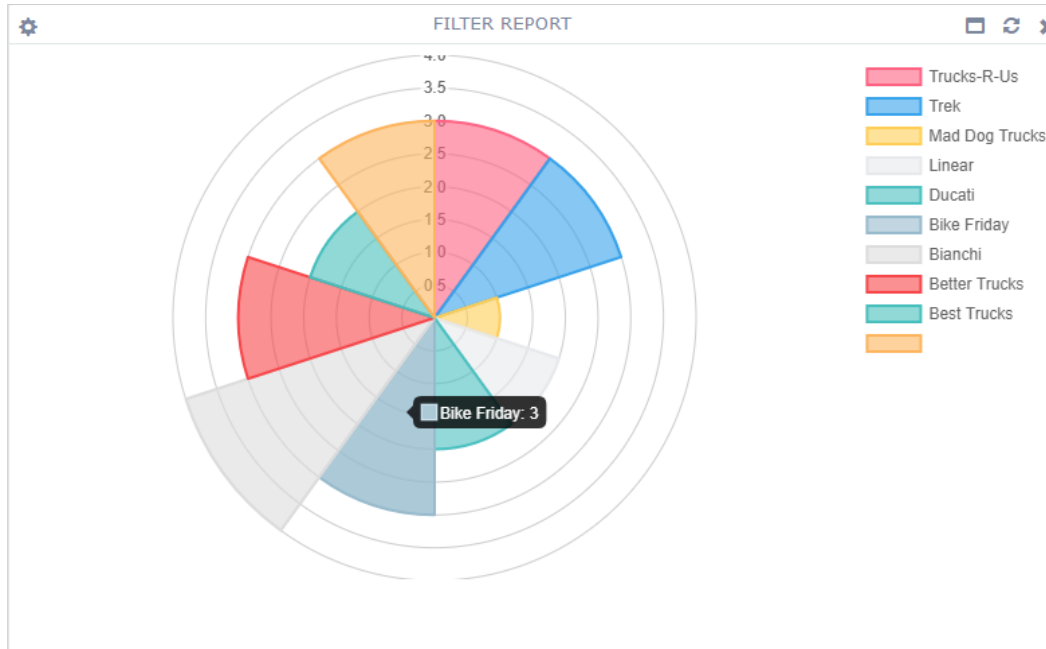
Edit the **Custom Widget** configuration options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget's type, for instance "Enable Login Widget".
- **URL:** The URL of the internal Enable page to display.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.3 Filter Report Widget

The **Filter Report Widget** can be used to count the occurrences of an attribute's values in the selected repository. Optionally, the set of records used can be restricted by the use of a Saved Set or Saved Search.




Filter Report Widget

The **Filter Report Widget** can be configured to display the selected attribute value counts in a list or in one of a variety of graphs. If the results are displayed in a graph, hovering over an attribute value’s display area will cause a small pop-up to display the attribute value and a count of the number of records that contain that attribute value.

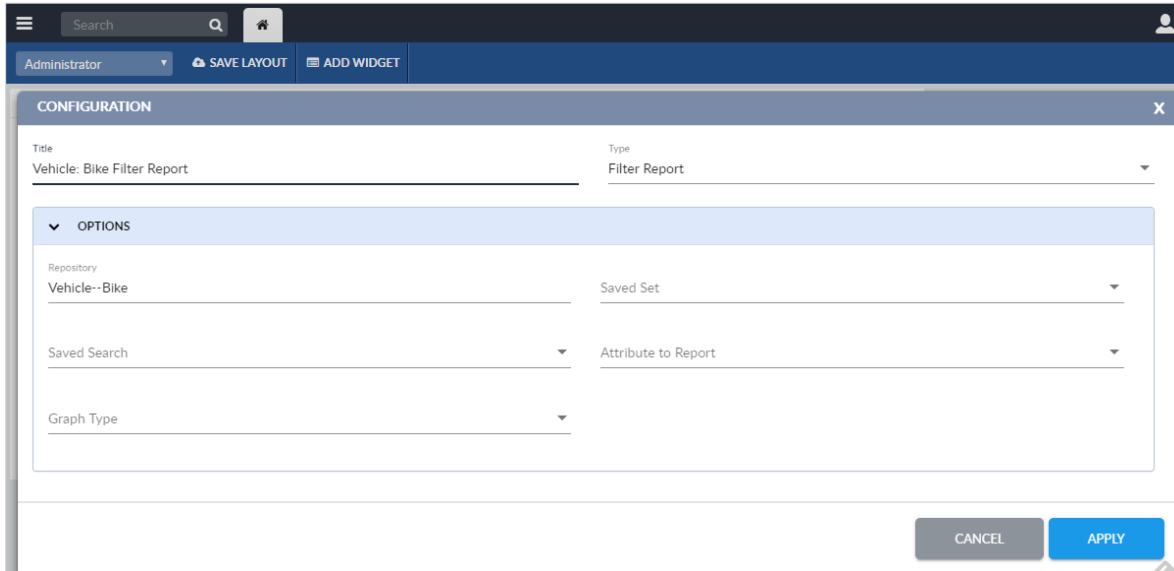
If the **Legend** is displayed, selecting an attribute value on the **Legend** will cause that attribute value to be removed from the graph temporarily. The attribute value will return to the display if it is clicked again or when the Widget refreshes.

9.3.3.1 Configuring Filter Report Widget

To configure a **Filter Report Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget’s **Activity Bar**. Note that a Widget’s **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

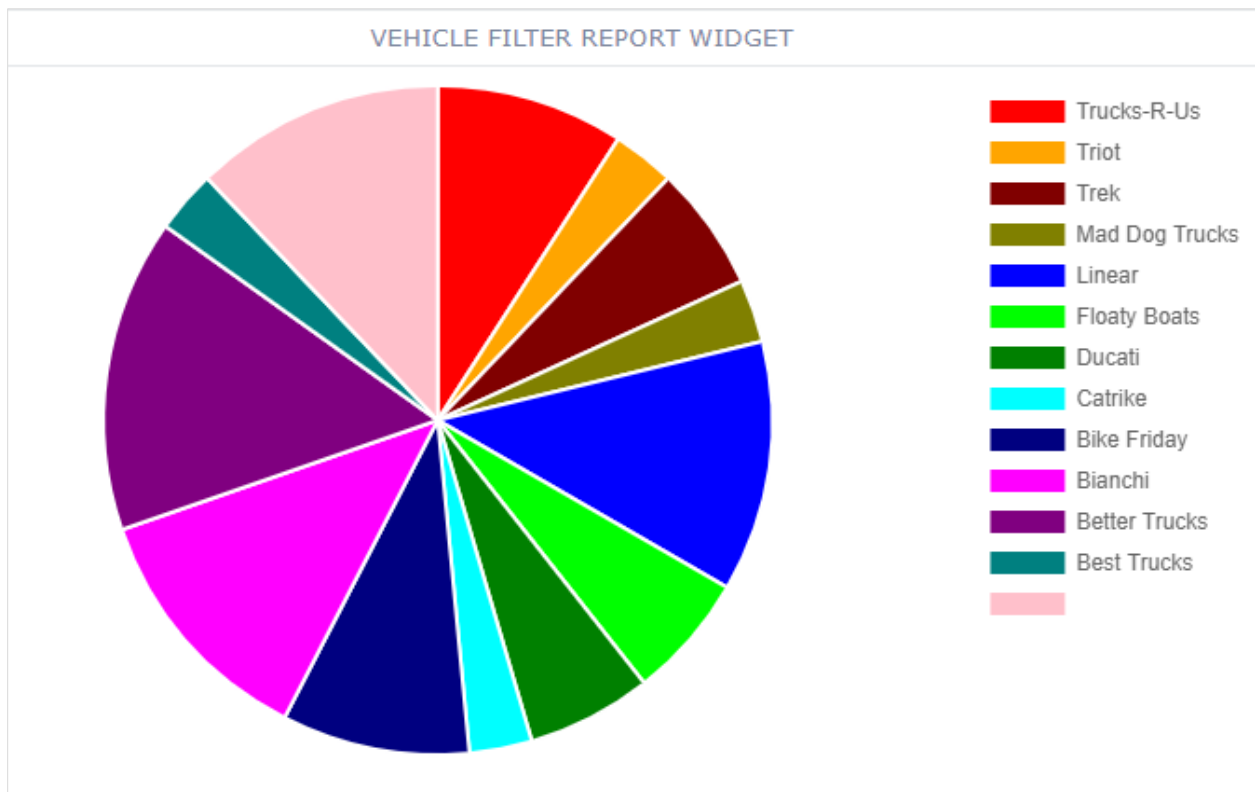
A **Widget Configuration** window will appear. Select **Filter Report** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The **Filter Report Widget** configuration options will appear.



Filter Report Configuration

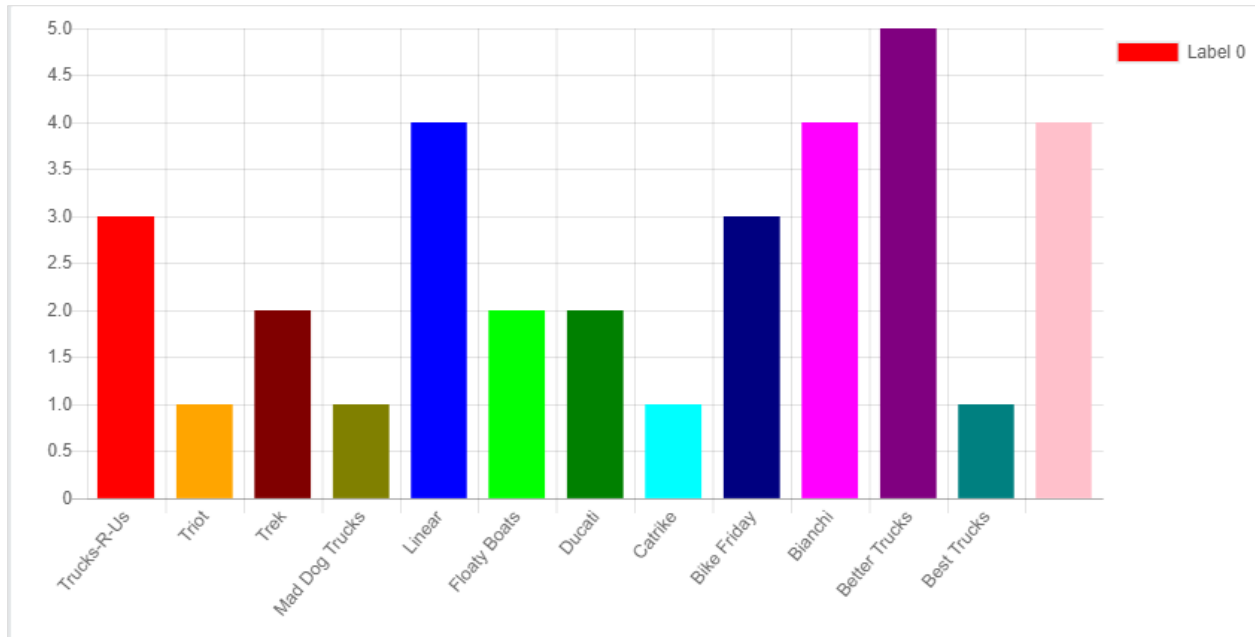
Edit the **Filter Report Widget** configuration options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Brand Filter Report”.
- **Repository:** The repository the records should be drawn from.
- **Saved Set:** (Optional) A Saved Set of records from the selected repository.
- **Saved Search:** (Optional) A Saved Search to use to filter the records from the selected repository.
- **Attribute to Report:** The name of the attribute to use in the count.
 - **Graph Type:** Select the type of graph to display:
 - **Pie:** displays a circular pie graph. Each wedge represents an attribute value. The filter legend lists the color used for each value. Clicking on a filter in the legend removes/adds the value from the pie. Hovering the mouse over a wedge displays the attribute value and the record count. Double-clicking on a wedge opens the repository and displays the corresponding records.



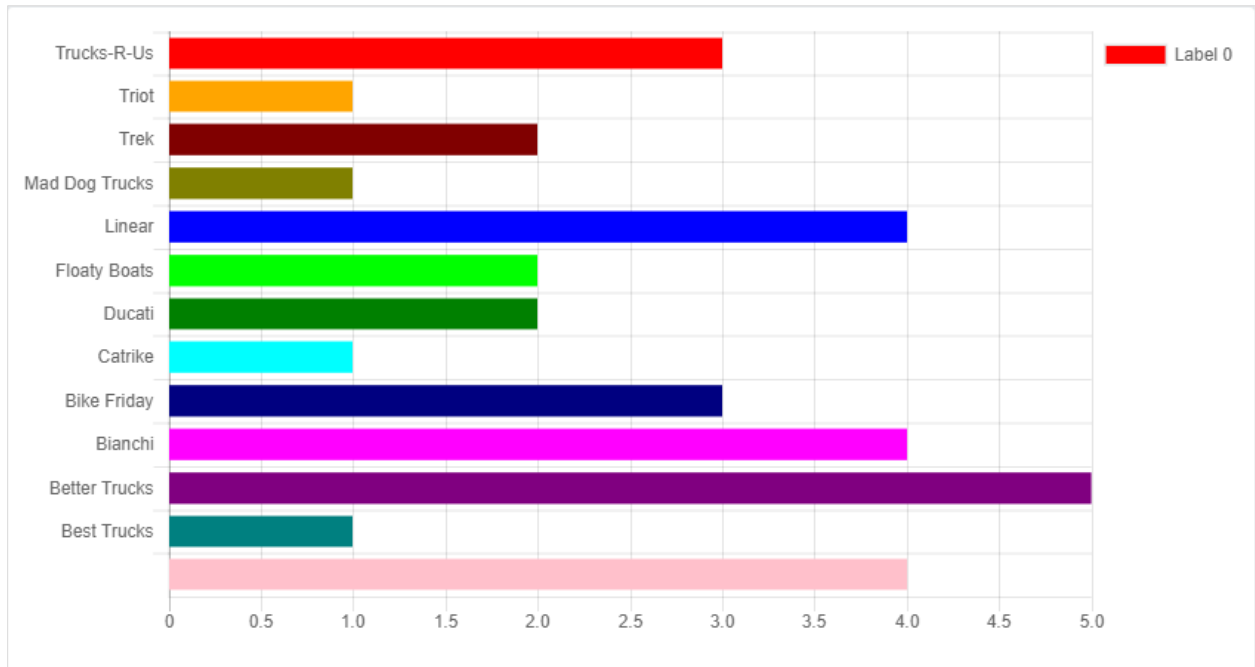
Filter Report Widget Pie Graph

- **Bar:** displays a vertical bar graph. Each discrete attribute value is displayed as a colored column. The height of the bar represents the record count. Hovering the mouse over a bar shows its value and record count.



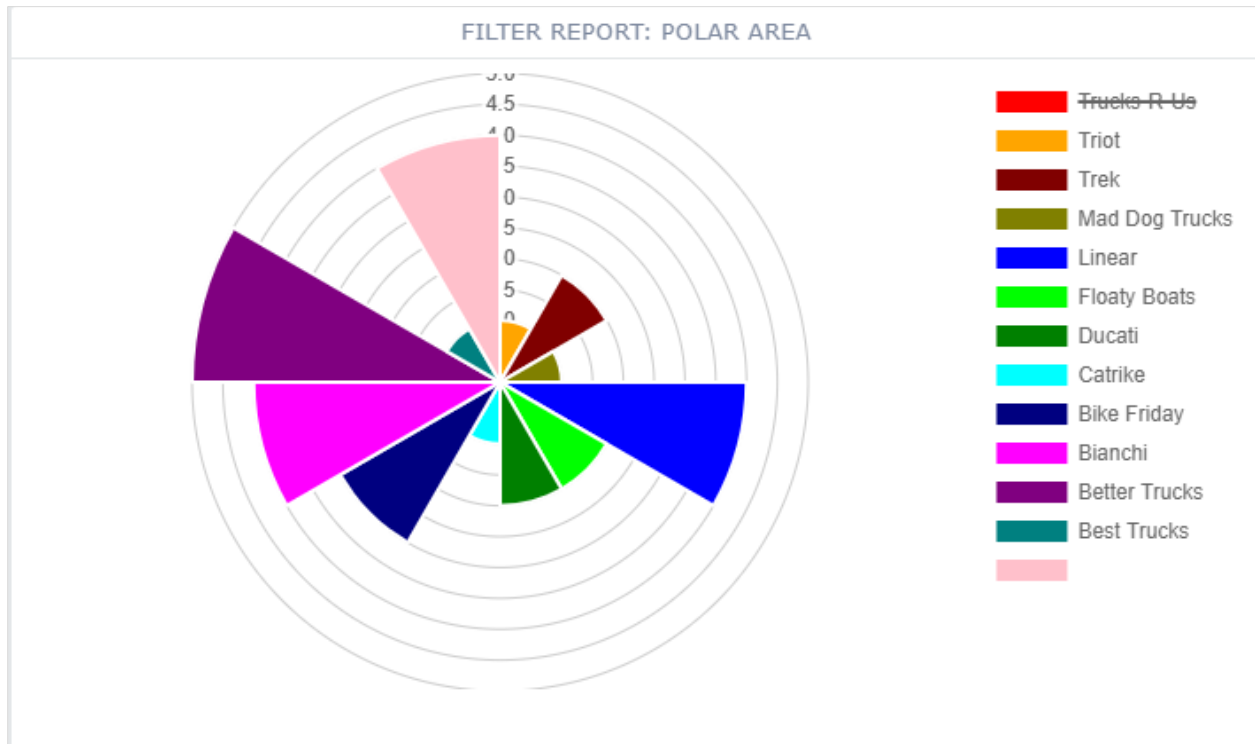
Filter Report Widget Vertical Bar Graph

- Horizontal Bar:** displays a horizontal bar graph. Each discrete attribute value is represented by a colored horizontal bar whose length represents the number of records. Hovering the mouse over a bar shows the value and number of records. Double-clicking on a bar opens the repository and displays the corresponding records.



Filter Report Widget Horizontal Bar Graph

- Polar Area:** Displays a polar graph. Each colored wedge represents a different attribute value. The radius (height) of the wedge indicates the number of records that contain that value. The Filter legend indicates the colors used to represent each attribute value. Clicking on a Filter legend item removes its wedge from the graph, crosses-out the value from the legend, and causes the graph to rescale to better show the distribution of attribute values. Clicking on a crossed-out Filter legend item returns the attribute value to the graph, uncrosses-out the value from the legend, and causes the graph to rescale. Hovering the mouse over a wedge displays the attribute value and the number of records that contain it. Double-clicking on a wedge opens the repository and shows the corresponding records.



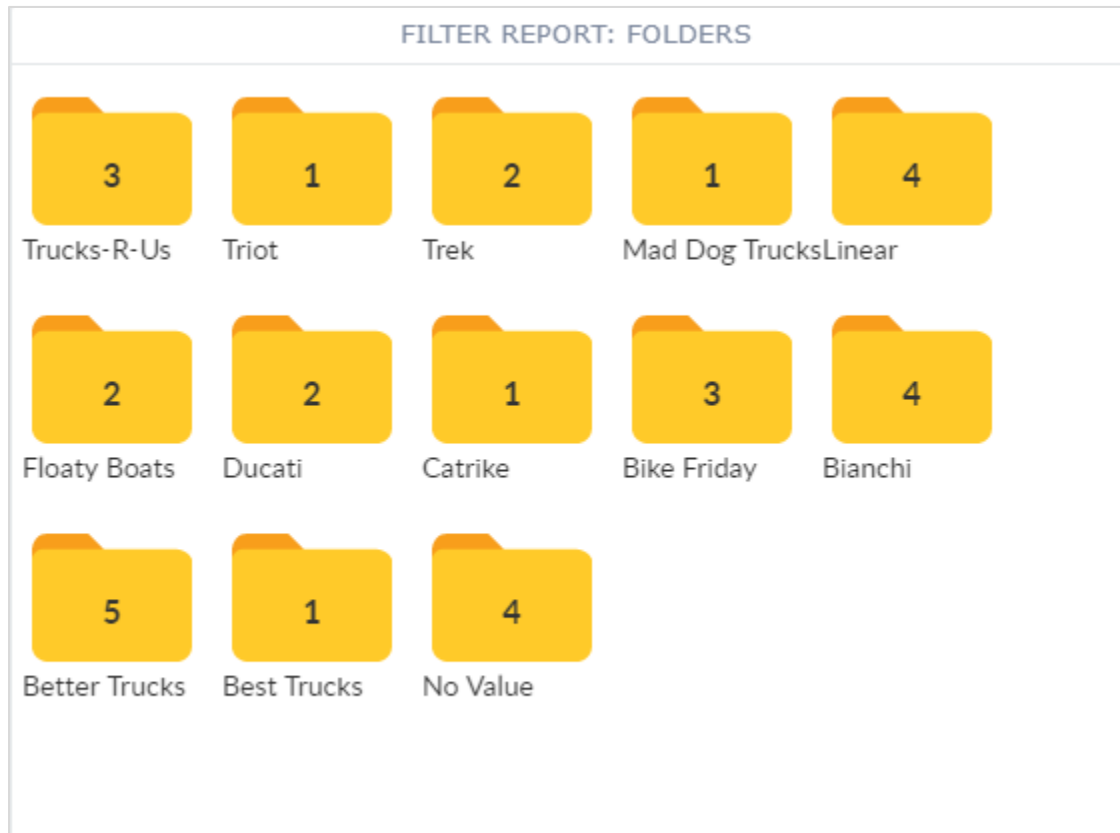
Filter Report Widget Polar Area Graph

- **List:** For the selected attribute, displays a list of discrete values and the number of records containing that value. Double-clicking on an entry opens a **Repository View** displaying the corresponding records.

FILTER REPORT: LIST	
Trucks-R-Us	(3)
Triot	(1)
Trek	(2)
Mad Dog Trucks	(1)
Linear	(4)
Floaty Boats	(2)
Ducati	(2)

Filter Report Widget List

- **Folder:** Displays the different attribute values as folders. The number of records containing a particular attribute value is noted on the folder in parentheses. Double-clicking on a folder or attribute value opens a **Repository View** displaying the corresponding records.



Filter Report Widget Folders

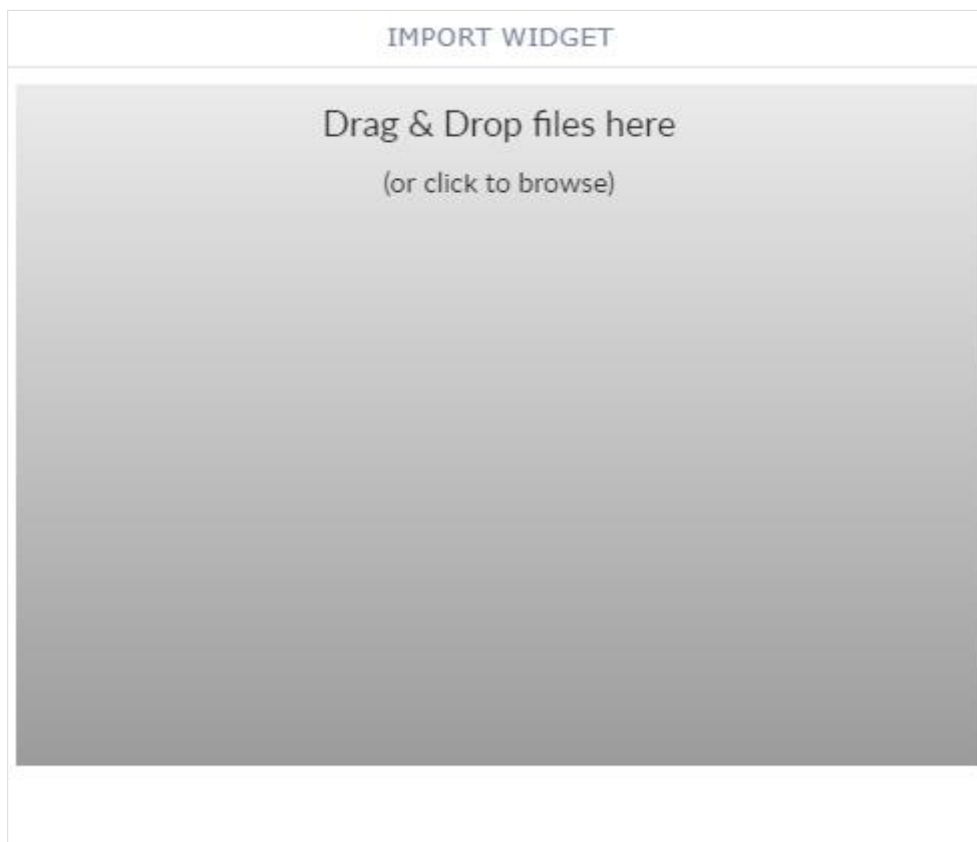
- **Show Filters:** (Depending on the **Graph Type** selected.) If checked, this will display a color-coded legend of attribute values found in the selected records. Depending on the graph type, clicking a color or value will enable/disable that value from the display.
- **Graph Legend Position:** (If **Show Filters** is checked.) Select where the graph’s filter legend will appear.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.4 Import Widget

Depending on the user’s permissions, the **Import Widget** allows the user to import records into the specified repository. The import file can be dragged and dropped into the Widget, or the user can click the Widget’s drop region to browse for the import file.


The **Import Widget** imports record data in the same manner as imports triggered from the **Repository View**. For more information on importing records, see [Import Records](#).



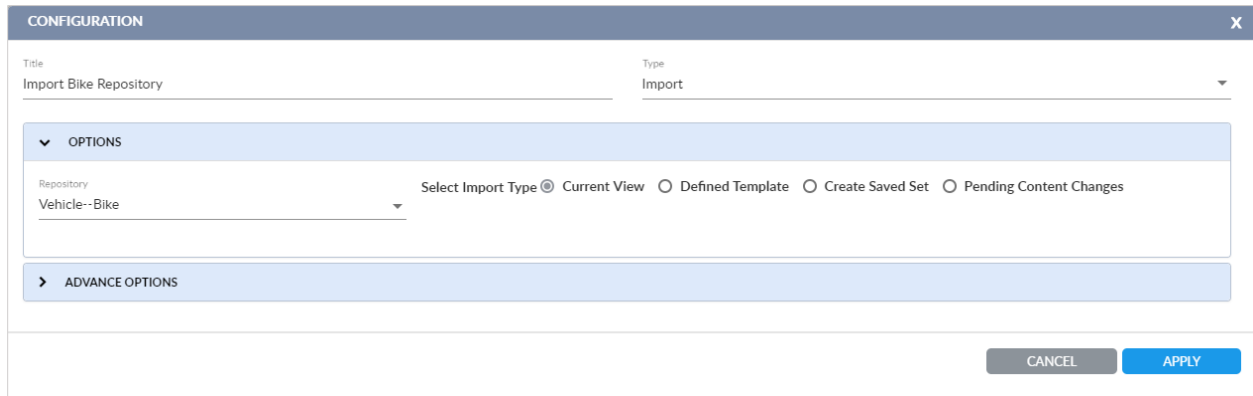
Import Widget

9.3.4.1 Configuring Import Widget

To configure an **Import Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Import** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Import configuration options will appear.



Import Widget Configuration

The options for the **Import Widget** operate in the same manner as the options for importing record data from the **Repository View**. For detailed information on configuring the options, see [Import Records](#).

Edit the Import options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Staging Import”.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

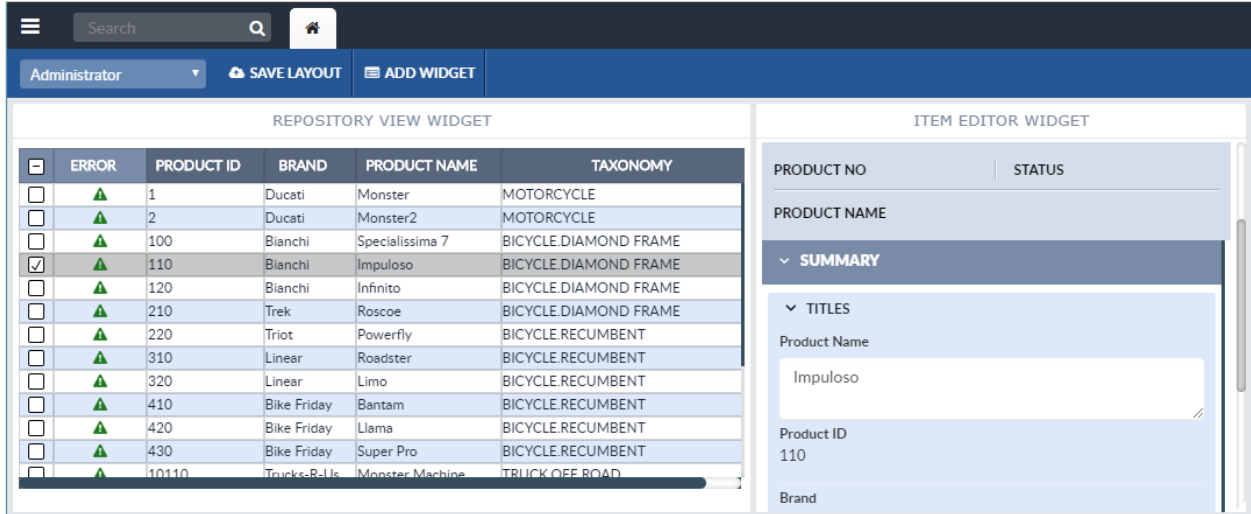
9.3.5 Item Editor Widget

The **Item Editor Widget** works either in conjunction with the **Repository View Widget**, or with both the **Repository Status Report Widget** and the **Repository Report Widget**, allowing the user to edit the selected record.

Note that If more than one **Item Editor Widget** is active, selecting a record will cause all **Item Editor Widgets** to open the record for editing at the same time. It is therefore suggested that only one **Item Editor Widget** is open at a time.

9.3.5.1 Item Editor Widget with Repository View Widget

If used with the **Repository View Widget**, selecting a record in the **Repository View Widget** will bring the record up for editing in the **Item Editor Widget**, in either the **Record Editor** or **Quick Editor** as configured in the **Item Editor Widget**.



Item Editor Widget and Repository View Widget

To edit a record in the **Item Editor Widget**, open the desired repository in a **Repository View Widget**, (see [Repository View Widget](#)) and open an **Item Editor Widget**.

In the **Repository View Widget**, select the record to be edited. The record will be displayed for editing in the **Item Editor Widget**. The record will be opened in either a **Record Editor** (see [Record Editor](#)) or a **Quick Editor** (see [Quick Editor](#)), depending on the configuration of the **Item Editor Widget**.

9.3.5.2 Item Editor Widget with Repository Status and Repository Status Report Widgets

If used in conjunction with the **Repository Status Report Widget** and the **Repository Report Widget**:

- The **Repository Status Report Widget** shows the status of the records in the configured repository.
- The **Repository Report Widget** displays the records in the repository being displayed in the **Repository Status Report Widget**, either all the records or only the records selected by their status.
- The **Item Editor Widget** allows the user to edit a record selected in the **Repository Report Widget**.

The screenshot displays three widgets in a PIM interface:

- REPOSITORY STATUS REPORT WIDGET:** A pie chart showing repository status. The legend includes: Not Valid (black), Severe (red), Valid and in production (green), Valid but not in production (blue), and Warning (yellow). The chart shows a large blue section and a smaller red section.
- ITEM EDITOR WIDGET:** A form for editing a product record. It shows the 'PRODUCT NAME' as 'Mud Duck' and the 'Product ID' as '10210'. A red error message is visible at the bottom: 'duplicate error unique identifier referenced by'.
- REPOSITORY REPORT WIDGET:** A table listing repository records. A filter 'Error: Severe x' is applied. The table has columns for 'ERROR', 'PRODUCT ID', 'BRAND', 'PRODUCT NAME', and 'TAXONOMY'. The second row is selected, showing a 'Severe' error for product ID '10210' with brand 'Better...' and product name 'Mud Duck'.

Item Editor Widget with Repository Status Widget and Repository Report Widget

To edit a record in the **Item Editor Widget**, first open the desired repository in a **Repository Status Report Widget**. (See [Repository Status Report Widget](#).)

Open a **Repository Report Widget**. (See [Repository Report Widget](#).) The **Repository Report Widget** will display all the records in the repository opened in the **Repository Status Report**.

To have the **Repository Report Widget** display a subset of the records, click the desired status color in the graph on the **Repository Status Report Widget**. The **Repository Report Widget** will only show those records with the corresponding status. When the **Repository Status Report Widget** is refreshed, the **Repository Report Widget** will return to displaying all the records in the selected repository.


Open an **Item Editor Widget**.

In the **Repository Report Widget**, select the record to be edited. The record will be displayed for editing in the **Item Editor Widget**. The record will be opened in either a **Record Editor** (see [Record Editor](#)) or a **Quick Editor** (see [Quick Editor](#)), depending on the configuration of the **Item Editor Widget**.

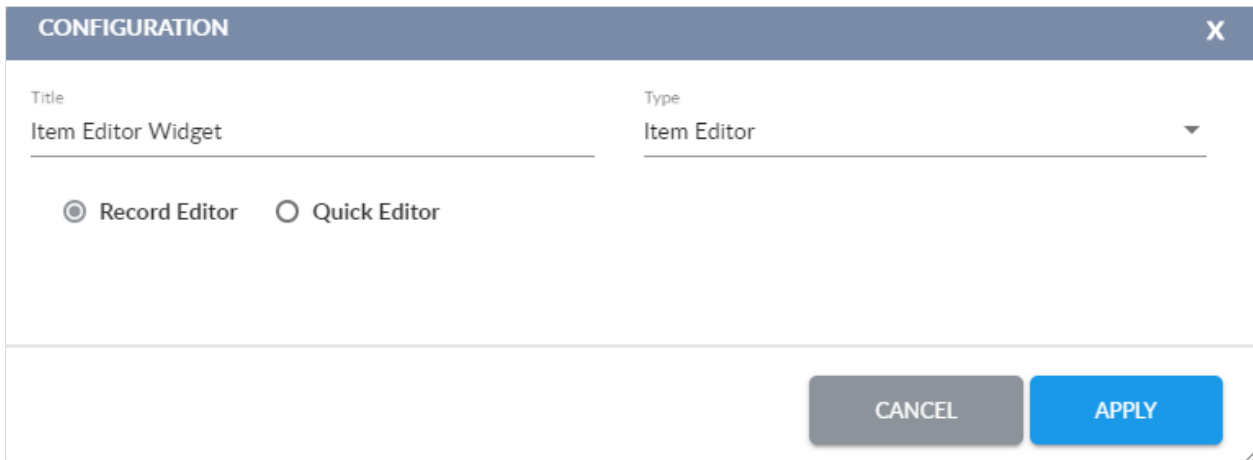
Edit the record as desired. To save the changes to the record, click the **Save** button on the **Item Editor Widget's Activity Bar**.

9.3.5.3 Configuring Item Editor Widget

To configure a **Configuring Item Editor Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Item Editor** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Item Editor configuration options will appear.



The screenshot shows a configuration window titled "CONFIGURATION" with a close button "X" in the top right corner. The window contains two input fields: "Title" with the value "Item Editor Widget" and "Type" with a dropdown menu showing "Item Editor". Below these fields are two radio buttons: "Record Editor" (selected) and "Quick Editor". At the bottom right of the window are two buttons: "CANCEL" and "APPLY".

Item Editor Widget Configuration Window

Edit the **Item Editor Widget's** configuration options as desired.

- **Title:** The title of the Widget. It is helpful if the title of a Widget reflects the source of the data as well as the Widget's type, for instance "Product Staging Item Editor".
- **Record Editor:** If selected, the Widget will open the record in the **Record Editor**, which shows the selected record in a scrollable pane. (For more information, see [Record Editor](#).)
- **Quick Editor:** If selected, the Widget will open the record in the **Quick Editor**. (For more information, see [Quick Editor](#).)

Click **Apply** to save the changes to the **Item Editor Widget** and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.



Job Monitor Widget Configuration Window

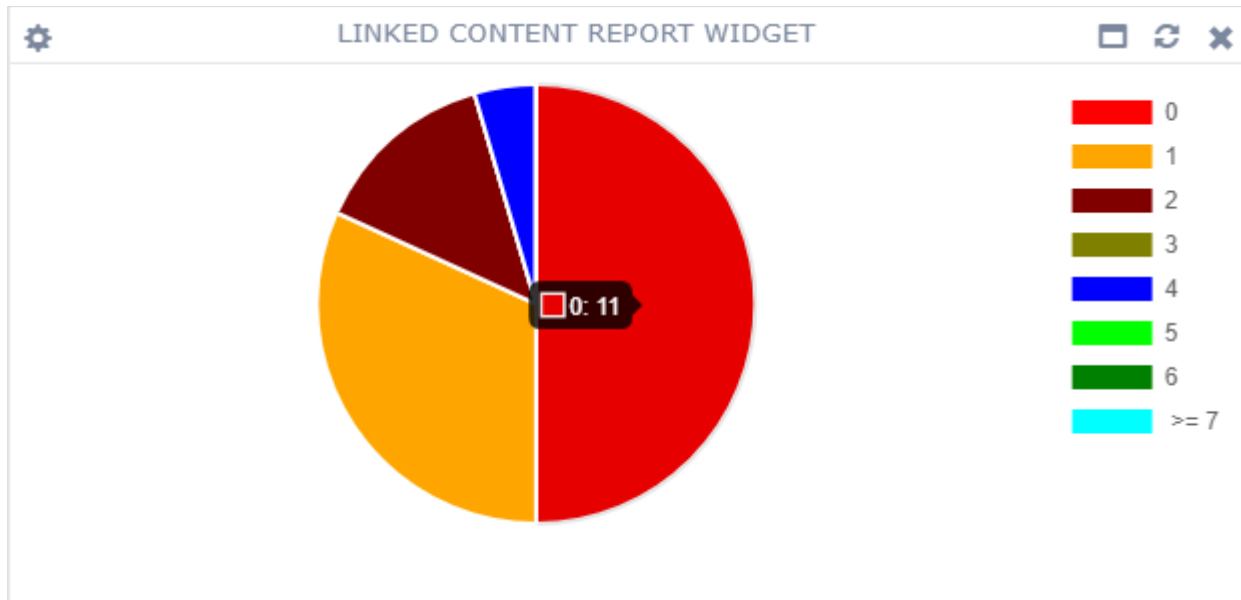
The only **Job Monitor Widget** configuration option is the **Title**.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Job Monitor”.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.7 [Linked Content Report Widget](#)


The **Linked Content Report Widget** generates a graph that displays how many records in a repository have zero linked records, how many have one linked record, how many have two linked records, etc., up to the indicated number of linked records. The values are displayed in a pie diagram, with each number of linked records assigned its own color. If desired, a **Filter Legend** can be displayed that indicates the value each color represents. Clicking on a color in the **Filter Legend** will remove or add that value from the display. Hovering the mouse over a wedge will bring up a pop-up window that indicates the value and how many records meet that criteria.



Linked Content Report Widget

9.3.7.1 Configuring Linked Content Report Widget

To configure a **Linked Content Report Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

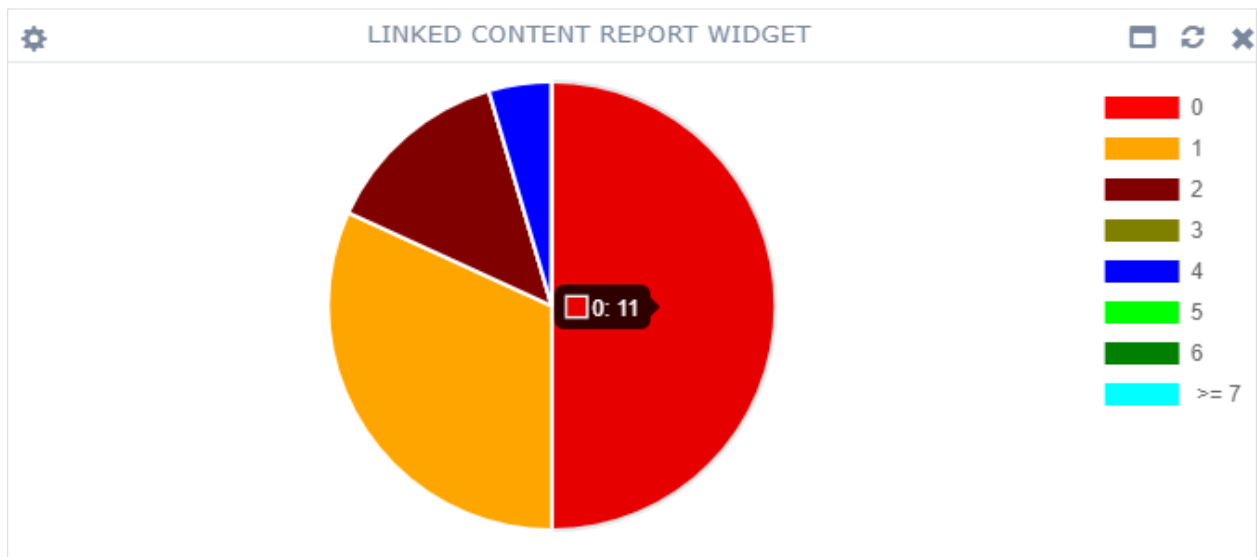
A **Widget Configuration** window will appear. Select **Linked Content Report** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Linked Content Report configuration options will appear.

The screenshot shows a configuration window titled 'CONFIGURATION' with a close button 'X' in the top right corner. Below the title bar, there is a 'Title' text input field and a 'Type' dropdown menu currently set to 'Linked Content Report'. A section titled 'OPTIONS' is expanded, showing several settings: 'Repository' is set to 'Media Library Retail - Media Library : AssetsLink', 'Saved Set' is a dropdown, 'Saved Search' is a dropdown, 'Number of Links' is a text input, 'Graph Type' is set to 'Vertical Bar', there is a checked checkbox for 'Show Filters', and 'Graph Legend Position' is set to 'Right'. At the bottom right of the dialog are two buttons: 'CANCEL' and 'APPLY'.

Linked Content Report Widget Configuration

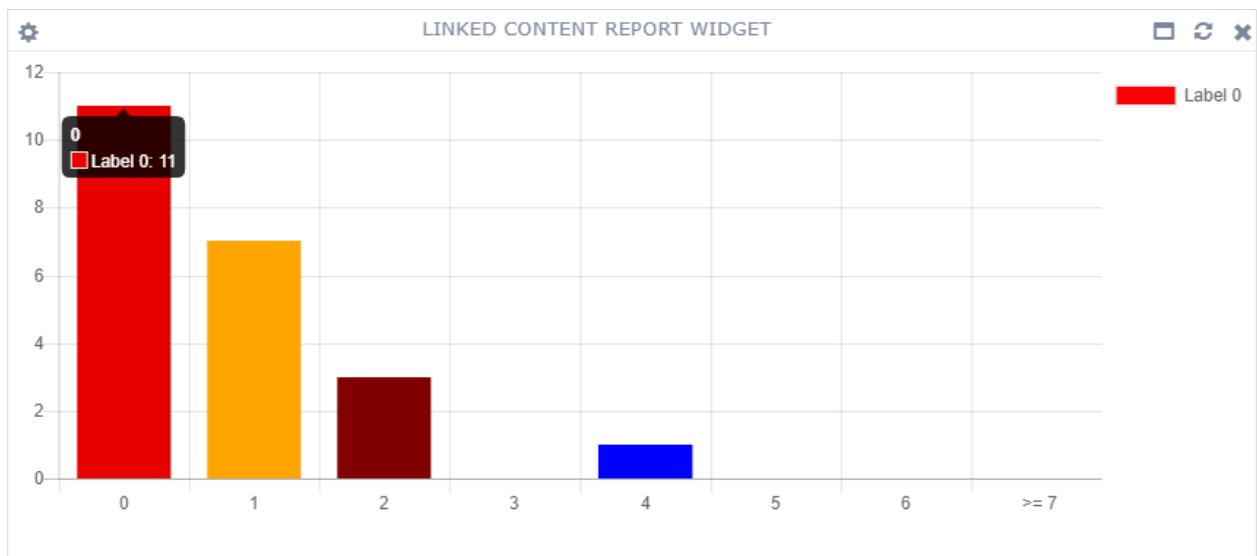
Edit the **Linked Content Report Widget** options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Linked Content Report”.
- **Repository:** Select the link relationship for the repository the report should run against in the **Repository** drop-down list.
- **Saved Set:** (Optional.) Select a Saved Set to further limit the records to report against.
- **Saved Search:** (Optional.) Saved Search to further limit the records to report against.
- **Number of Links:** (Optional.) Enter the maximum number of links to be reported.
- **Graph Type:** Select the type of graph to display:
 - **Pie:** Displays a pie wedge for each number of links value. The size of each wedge is determined by the number of records with the corresponding number of links.



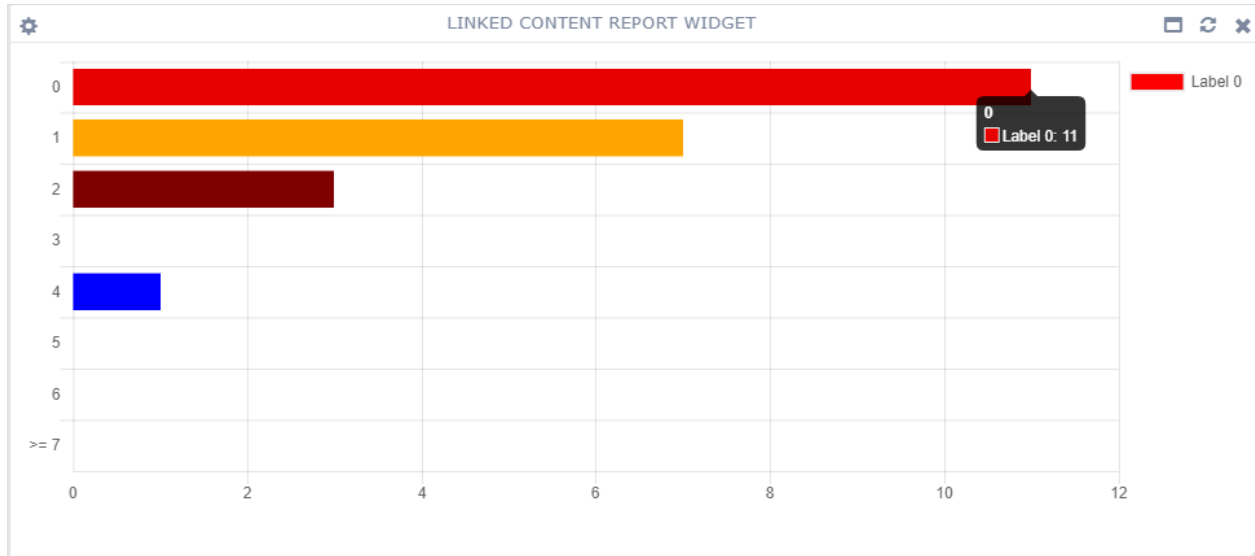
Linked Content Report Widget Pie Chart

- **Vertical Bar:** Displays a vertical bar for each number of links value. The height of each bar is determined by the number of records with the corresponding number of links.



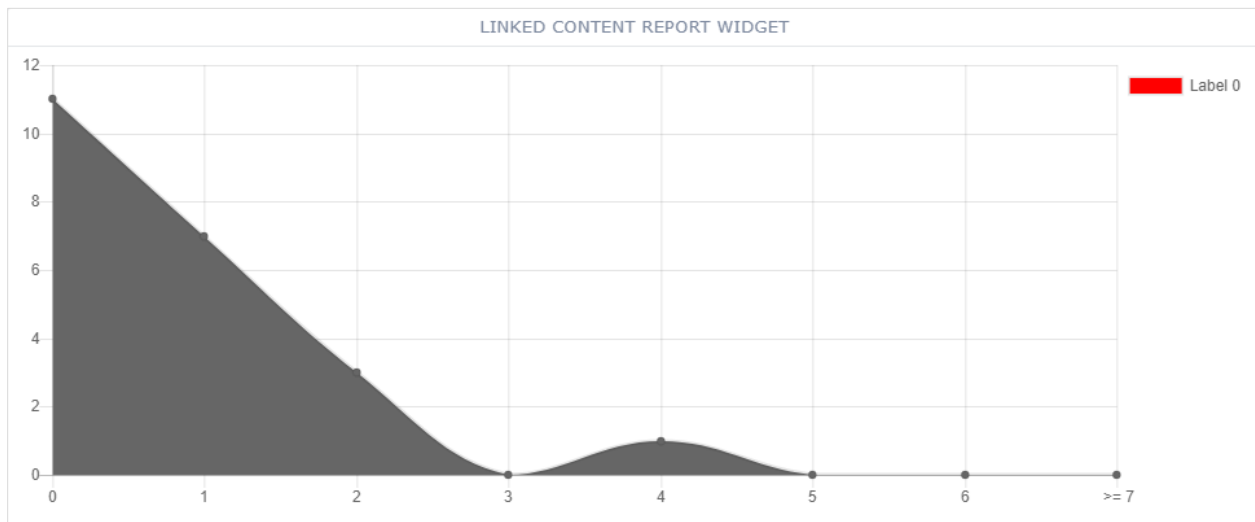
Linked Content Report Widget Vertical Bar Graph

- **Horizontal Bar:** Displays a horizontal bar for each number of links value. The height of each bar is determined by the number of records with the corresponding number of links.



Linked Content Report Horizontal Bar Graph

- **Line:** Line graph with the horizontal axis representing the number of links and the vertical axis representing the number of records having that many links.



Linked Content Report Widget Line Graph

- **Show Filters:** (Optional.) If selected, the **Filters Legend** will be displayed. When displayed, clicking on a legend color will remove or add the corresponding wedge/bar/point from the graph.
- **Graph Legend Position:** (Optional.) Select where the **Filters Legend** is to be displayed. This option will not be displayed unless a **Graph Type** is selected.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.8 Logged in User Listing Widget


The Logged in User Listing Widget displays a list of the users currently logged into the system.

LOGGED IN USER LISTING			
#	LOGIN	NAME	LAST LOGIN
1	system	Administrator, System	2018-06-02T18:00:12.767Z
2	czupke	Zupke, Cassie	2018-06-02T23:40:07.923Z

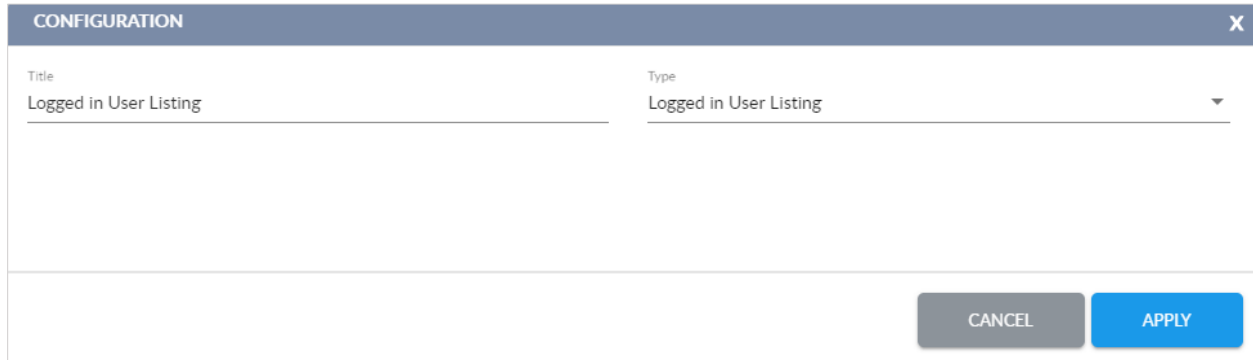
Logged In User Listing Widget

9.3.8.1 Configuring Logged in User Listing Widget

To configure a **Logged in User Listing Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Logged in User Listing** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Logged in User Listing configuration options will appear.



Logged In User Listing Widget Configuration

The only Logged in User Listing option is the **Title**.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Logged In Users”.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.9 Repository Report Widget

The **Repository Report Widget** displays the records of the repository being displayed in the **Repository Status Report Widget**.

The **Repository Report Widget** works in conjunction with the **Repository Status Widget** and the **Item Editor Widget**. The **Repository Status Report Widget** shows the status of the records in the configured repository. The **Repository Report Widget** displays the records in the repository being displayed in the **Repository Status Report Widget**. The **Item Editor Widget** allows the user to edit the record selected in the **Repository Report Widget**.

The screenshot displays three widgets in a PIM interface:

- REPOSITORY STATUS REPORT WIDGET:** A pie chart showing repository status. The legend includes: Not Valid (black), Severe (red), Valid and in production (green), Valid but not in production (blue), and Warning (yellow). The chart shows a large blue section and a smaller red section.
- ITEM EDITOR WIDGET:** A form for editing product information. It shows the product name "Mud Duck" and the product ID "10210". A red error message is visible at the bottom: "duplicate error unique identifier referenced by".
- REPOSITORY REPORT WIDGET:** A table displaying repository records. A filter "Error: Severe" is applied. The table has columns for Error, Product ID, Brand, Product Name, and Taxonomy. The second row is highlighted, showing Product ID 10210, Brand "Better...", Product Name "Mud Duck", and Taxonomy "TRUCK.OFF ROAD".

Repository Report Widget with Repository Status Report Widget and Item Editor Widget

To use the **Repository Report Widget** to view the records in a repository, first open the desired repository in a **Repository Status Report Widget**. (See [Repository Status Report Widget](#).)


Open a **Repository Report Widget**. (See [Repository Report Widget](#).) The **Repository Report Widget** will display all the records in the repository opened in the **Repository Status Report**. The **Repository Report Widget** opens the repository in a **Repository View**. (See [Repositories](#) for details on operating a **Repository View**.)

To have the **Repository Report Widget** display a subset of the records, click the desired status color in the graph on the **Repository Status Report Widget**. The **Repository Report Widget** will only show those records with the corresponding status. When the **Repository Status Report Widget** is refreshed, the **Repository Report Widget** will return to displaying all the records in the selected repository.

Note that the **Repository Report Widget** displays any active Filter Terms in its **Active Filters Bar**.

9.3.9.1 Configuring Repository Report Widget

To configure a **Repository Report Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget’s **Activity Bar**. Note that a Widget’s **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Repository Report** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Repository Report configuration options will appear.



Repository Report Configuration

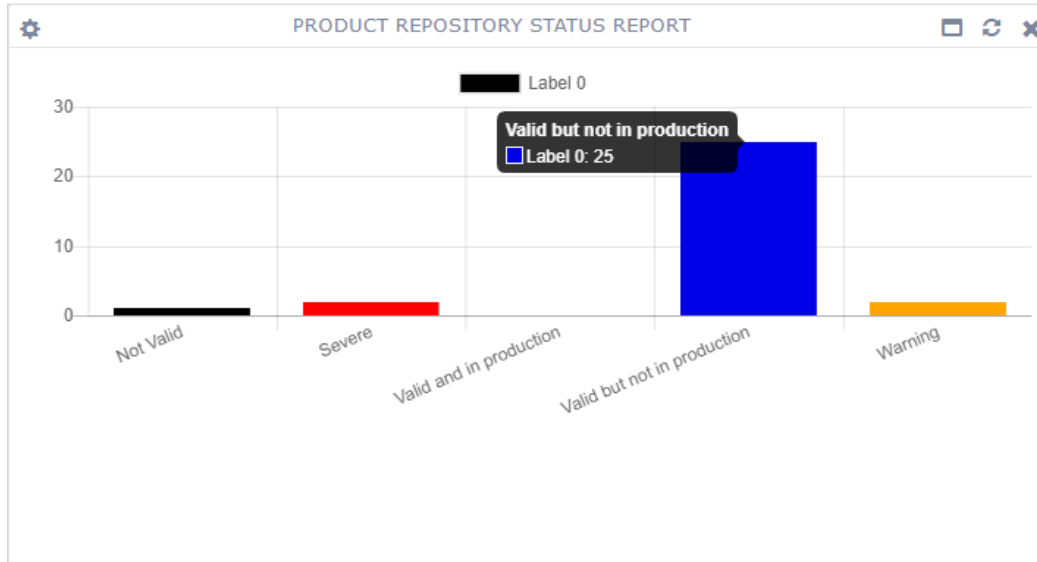
Edit the Repository Report configuration options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Staging Repository Report”.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.10 Repository Status Report Widget

The **Repository Status Report Widget** is used to show the validation level or error status of a repository’s records.



Repository Status Report


The **Repository Report Widget** works in conjunction with the **Repository Status Widget** and the **Item Editor Widget**. The **Repository Status Report Widget** shows the status of the records in the configured repository. The **Repository Report Widget** displays the records in the repository being displayed in the **Repository Status Report Widget**. The **Item Editor Widget** allows the user to edit the record selected in the **Repository Report Widget**.

The screenshot displays three widgets in a dashboard. The top-left widget, 'REPOSITORY STATUS REPORT WIDGET', features a legend with five categories: Not Valid (black), Severe (red), Valid and in production (green), Valid but not in production (blue), and Warning (yellow). A pie chart below the legend shows a large blue section and a smaller red section. The top-right widget, 'ITEM EDITOR WIDGET', is titled 'PRODUCT NAME' and contains a 'SUMMARY' section with a 'TITLES' subsection. The 'Product Name' field contains 'Mud Duck' and the 'Product ID' is '10210'. A red error message is visible at the bottom: 'duplicate error unique identifier referenced by'. The bottom widget, 'REPOSITORY REPORT WIDGET', shows a table of errors. A filter 'Error: Severe x' is applied. The table has columns for 'ERROR', 'PRODUCT ID', 'BRAND', 'PRODUCT NAME', and 'TAXONOMY'. The second row is selected and shows a severe error for product ID 10210, brand 'Better...', product name 'Mud Duck', and taxonomy 'TRUCK.OFF ROAD'. Other rows show errors for 'Best Trucks', 'Peanut', 'Wobbly', and 'Mad Dog'. The bottom of the widget includes pagination controls: '1 To 7 Of 7 (1)', '1 Of 1', and a dropdown menu set to '50'.

Repository Status Report Widget with Repository Report Widget and Item Editor Widget

9.3.10.1 Configuring Repository Status Widget

To configure a **Repository Status Report Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Repository Status Report** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Repository Status Report configuration options will appear. Note that the display is scrollable.

The screenshot shows a configuration window titled 'CONFIGURATION' with a close button 'X' in the top right corner. The window contains the following fields and options:

- Title:** Repository Status Report
- Type:** Repository Status Report
- OPTIONS:**
 - Repository:** Vehicle--Bike
 - Preference:** No Preference
 - Saved Set:** [Select]
 - Saved Search:** [Select]
 - Status**
 - Last Modified Interval**
 - Type:** Validation Level
 - Interval:** Interval
 - Start:** 05/14/2018
 - End:** 06/03/2018

At the bottom right, there are two buttons: 'CANCEL' and 'APPLY'.

Repository Status Report Configuration

Edit the **Repository Status Report** configuration options as desired.

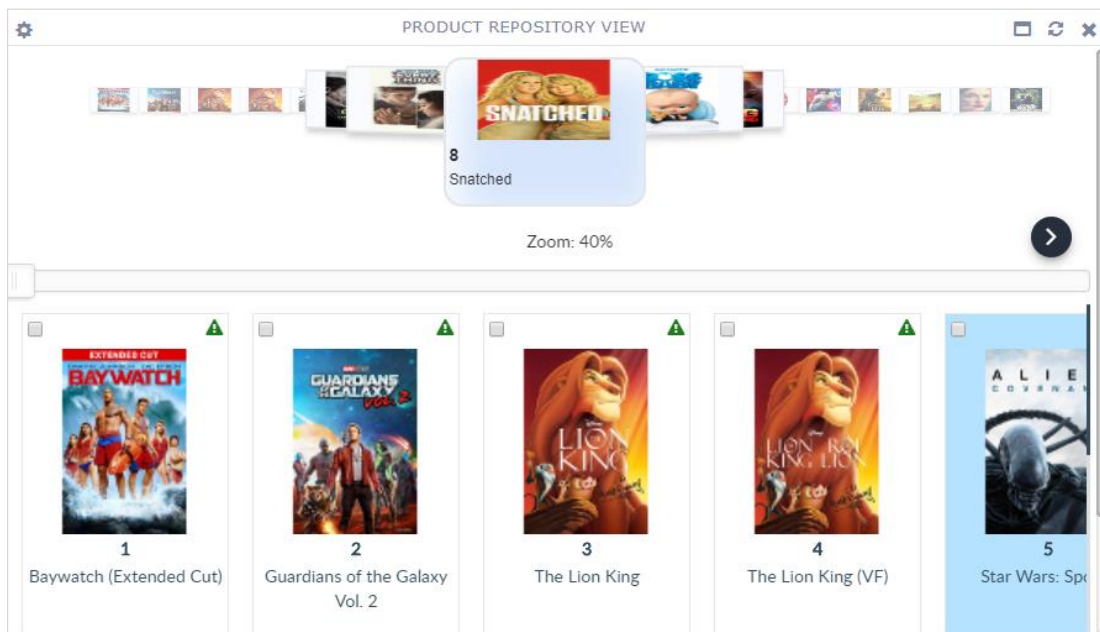
- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Staging Repository Status”.
- **Repository:** Select the repository to be viewed.
- **Preference:** (Optional) Select a Preference View to use (what fields to show in the Widget). If a Preference View is not selected, the Default Preference View will be used. (For more information, see [Preference Views](#).)
- **Saved Set:** (Optional) Select a Saved Set to use. (For more information, see [Saved Sets](#).)
- **Saved Search:** (Optional) Select a Saved Search to use. (For more information, see [Saved Search](#).)
- **Status:** (Optional) Select to display the **Record Status Graph**. If the **Status** option is selected, the following options appear:
 - **Type:** Select to show the records broken down by Error status or Validation Level.
 - **Interval:** (Optional) Limit the records displayed to those modified in the last **Day, Week, Month, or Year**.
 - **Report Graph Type:** Selects the type of graph to display: **Pie, Vertical Bar, Horizontal Bar, or Line**.
- **Last Modified Interval:** (Not yet operational.) (Optional) Check to display the **Last Modified Interval Graph**. If this option is selected, the following options appear:
 - **Start and End:** (Optional) Limit the records displayed to those modified between the entered **Start** and **End** date and times.
 - **Who:** (Optional) Limit the records displayed to those modified by the selected user.

- **Show Filters:** (Optional) If the status values legend is displayed, the user can select a status to remove its effect from the graph. Selecting the status value again or refreshing the Widget will reapply the effect of the status value.
- **Interval Graph Type:** Select the type of graph for the **Last Modified Interval Report:** Pie, Vertical Bar, Horizontal Bar, or Line.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.11 Repository View Widget


The **Repository View Widget** displays the selected repository in a **Repository View**. (See [Repositories](#).)



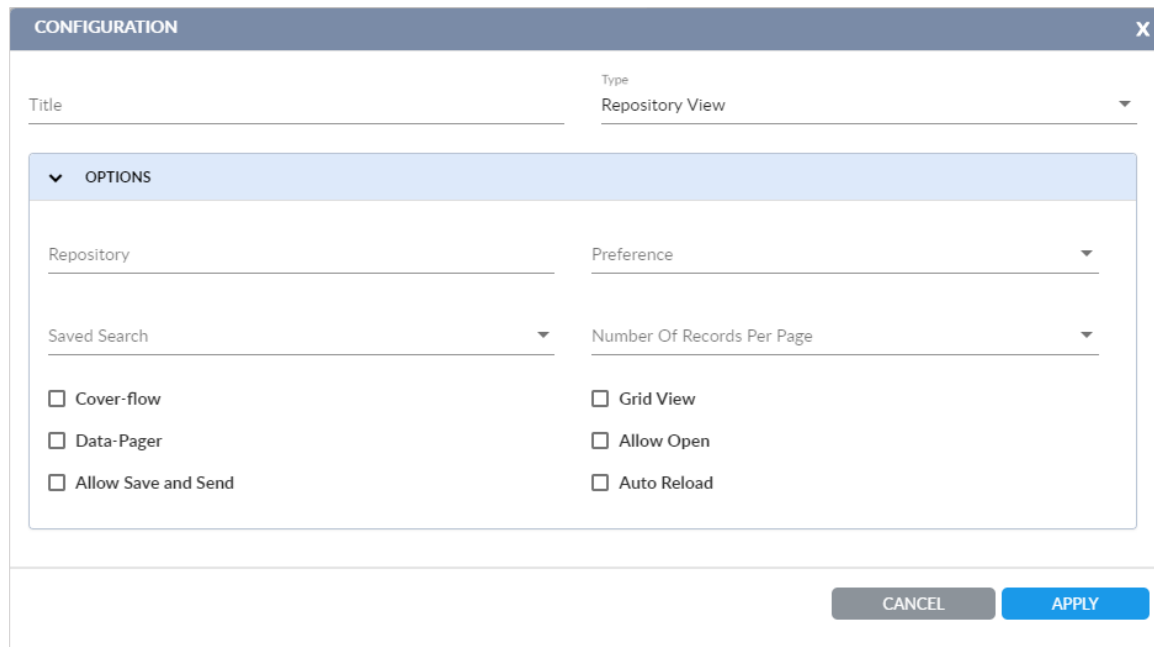
Repository View Widget

9.3.11.1 Configuring Repository View Widget

To configure a **Repository View Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Repository View** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Repository View options will appear.



Repository View Widget Configuration

Edit the Repository View configuration options as desired.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Product Staging Repository View”.
- **Repository:** Select the repository to be viewed.
- **Preference:** (Optional) Select a Preference View to use (what fields to show in the Widget). If a Preference View is not selected, the Default Preference View will be used. (For more information, see [Preference Views](#).)
- **Saved Search:** (Optional) Select a Saved Search to use. (For more information, see [Saved Search](#).)
- **Cover-flow:** (Optional) If checked, the Cover Flow function will be enabled. Cover Flow is a series of record images that appear above the attribute headers in a **Repository View**. The images can be scrolled through and can be enlarged or reduced by sliding the **Zoom** slider beneath the images.
- **Grid View:** (Optional) If checked, the **Repository View** will be displayed in the Grid View.
- **Data-Pager:** (Optional) If checked, the paging displays will appear at the bottom of the Widget display area.

- **Allow Open:** (Optional) If checked, a record can be opened to edit from the Widget.
- **Allow Save & Send:** (Optional) If checked, selected records can be saved and sent to Workflow from the Widget.
- **Auto Reload:** (Optional) If checked, the record list will be automatically be refreshed when changes are made to the repository.

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.12 Shortcuts Widget


The **Shortcuts Widget** allows system administrators to create quick links to certain functions users can access from the **Dashboard**. Links can be available globally or only to specified user groups.



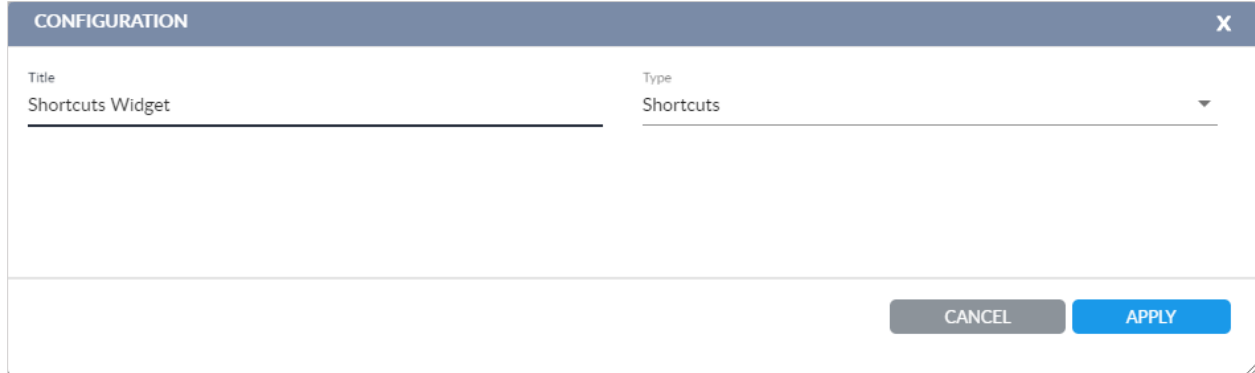
Shortcuts Widget

9.3.12.1 Configuring Shortcuts Widget

To configure a **Shortcuts Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Shortcuts** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Shortcuts configuration options will appear.



Title	Type
Shortcuts Widget	Shortcuts

CANCEL APPLY

Shortcut Widget Configuration

The only Shortcuts configuration option is the **Title**.

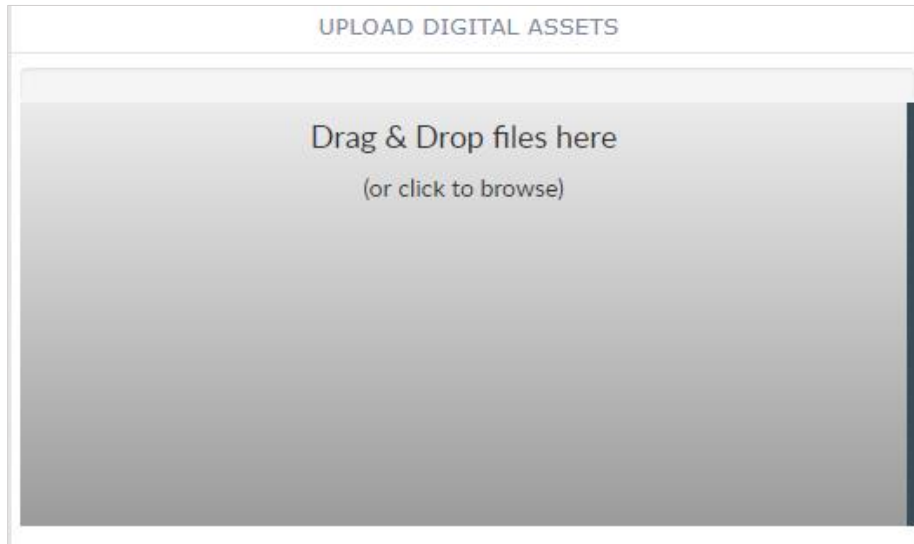
- **Title:** The title of the **Widget**. It is helpful if the title of a widget reflects the Widget's type, for instance "Shortcuts".

Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.13 Upload Digital Assets Widget

The **Upload Digital Assets Widget** is used to quickly upload digital assets into the Enable system. It loads the selected digital asset into the DAM repository and creates any defined image variants, but it does not link the digital asset to a record. Image variants are not created if:

- The asset is not an image recognized by Enable (this is controlled by a code set that lists all valid file name extensions).
- The variant doesn't have a Regex Rule (that is the attribute name in DAMVariants) that would exclude the asset based on the file name.



Upload Digital Assets Widget (before first use)

To use the Upload Digital Assets Widget, drag and drop a Digital Asset file to the **Upload Digital Assets Widget**. The Digital Asset will be uploaded. The **Upload Digital Asset Widget** will show the completion status of the upload.

Icon	Name	Progress	Message	Action
	Icon Channel Inbound.png	100%	Processing complete	
	Icon Eye.png	100%	Processing complete	
	Icon Edit.png	100%	Processing complete	


Drag & Drop files here
(or click to browse)

Select All

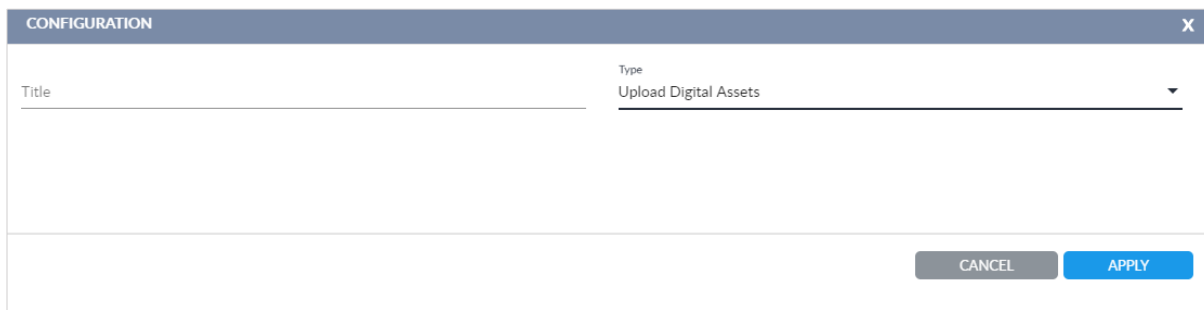
Upload Digital Asset Completion Status (after first use)

9.3.13.1 Configuring Upload Digital Assets Widget

To configure a **Upload Digital Assets Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget’s **Activity Bar**. Note that a Widget’s **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Upload Digital Assets** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Upload Digital Assets configuration options will appear.



Upload Digital Assets Widget Configuration

The only Upload Digital Assets configuration option is the **Title**.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget’s type, for instance “Upload Digital Assets”.

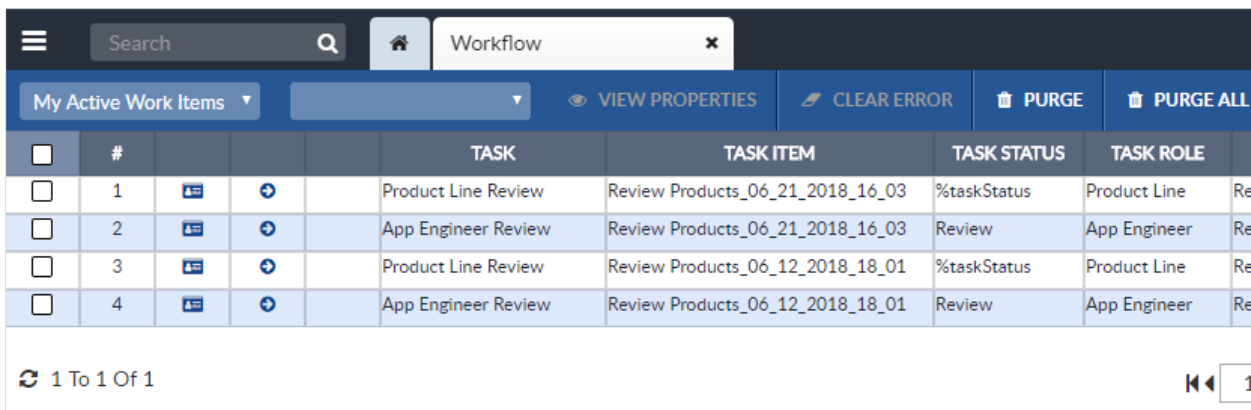
Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

9.3.14 Workflow Task Manager Widget

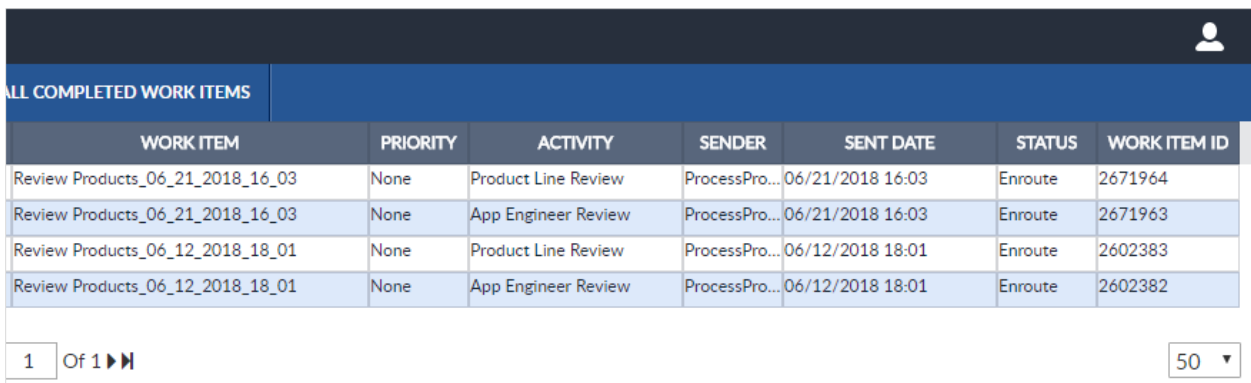
The **Workflow Task Manager Widget** displays the **Workflow Task Manager**. It is used as a shortcut for users to access the work item tasks assigned to them. For more information on workflows and the **Workflow Task Manager**, see [Workflow Task Manager](#).



Workflow Task Manager Widget




Detail of Workflow Task Manager Widget (Left Side)



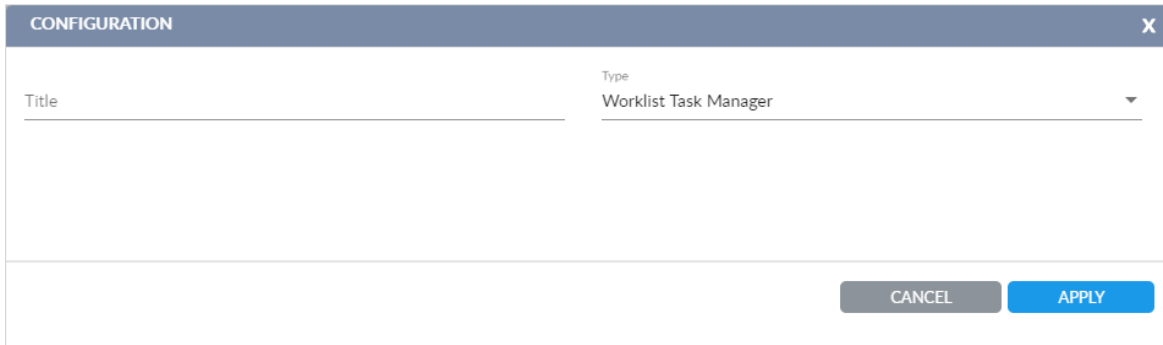
Detail of Workflow Task Manager Widget (Right Side)

9.3.14.1 Configuring Workflow Task Manager Widget

To configure a **Workflow Task Manager Widget**, first configure a new blank Widget. For more information on adding and configuring new Widgets, see [Add a Widget](#).

Select the **Widget Settings** icon  in the upper right of the new Widget's **Activity Bar**. Note that a Widget's **Activity Bar** will not be displayed unless the cursor is hovering over the top of the Widget.

A **Widget Configuration** window will appear. Select **Workflow Task Manager** from the **Type** dropdown list on the far right of the **Widget Configuration** window. The Workflow Task Manager configuration options will appear.



Workflow Task Manager Widget Configuration

The only Workflow Task Manager configuration option is the **Title**.

- **Title:** The title of the **Widget**. It is helpful if the title of a Widget reflects the source of the data as well as the Widget's type, for instance "Workflow Task Manager".


Click **Apply** to save the changes to the Widget and close the **Widget Configuration** window. Click **Cancel** to close the **Widget Configuration** window without saving the changes.

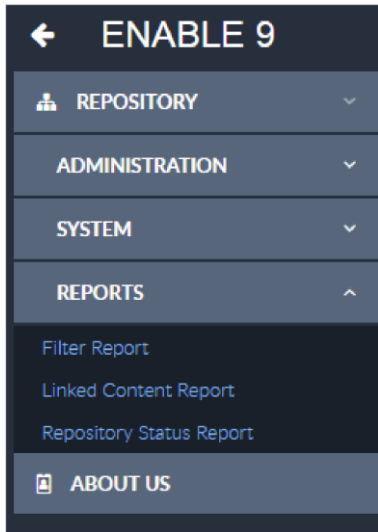
10 Reports

Reports allow a user to monitor the progress of a function or to view data. They are similar to Widgets, however, reports appear in their own tab. The reports functionality may or may not be available to users, depending on the configuration of Enable. The list of available reports is also based on system configuration.

Note that the content of most reports do not auto-refresh.

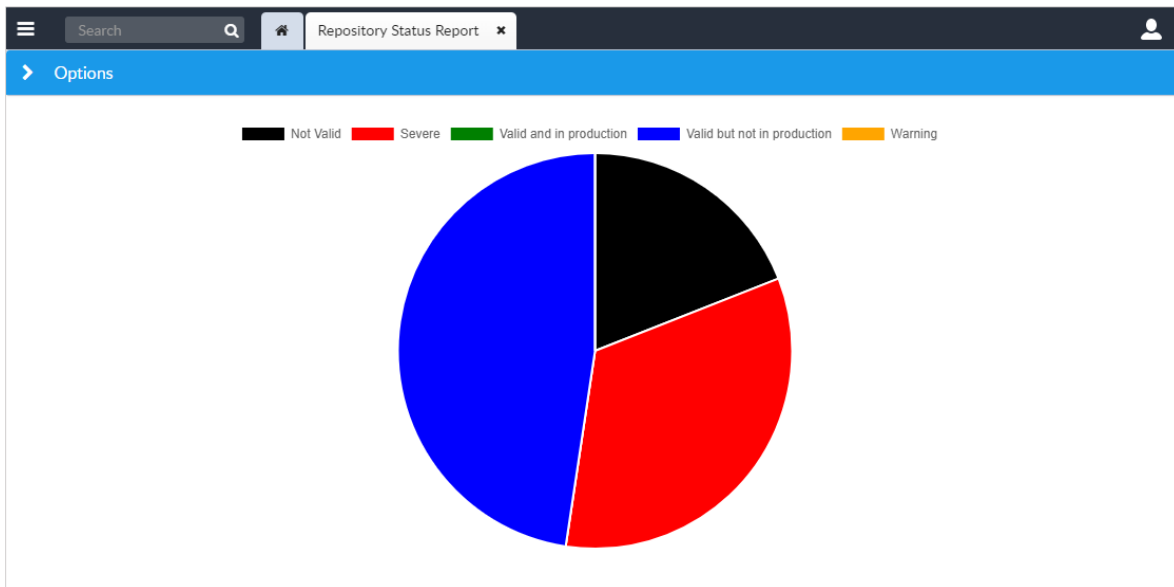
10.1 View a Report

To view a report, open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**. Select **Reports** to display a list of the available reports.



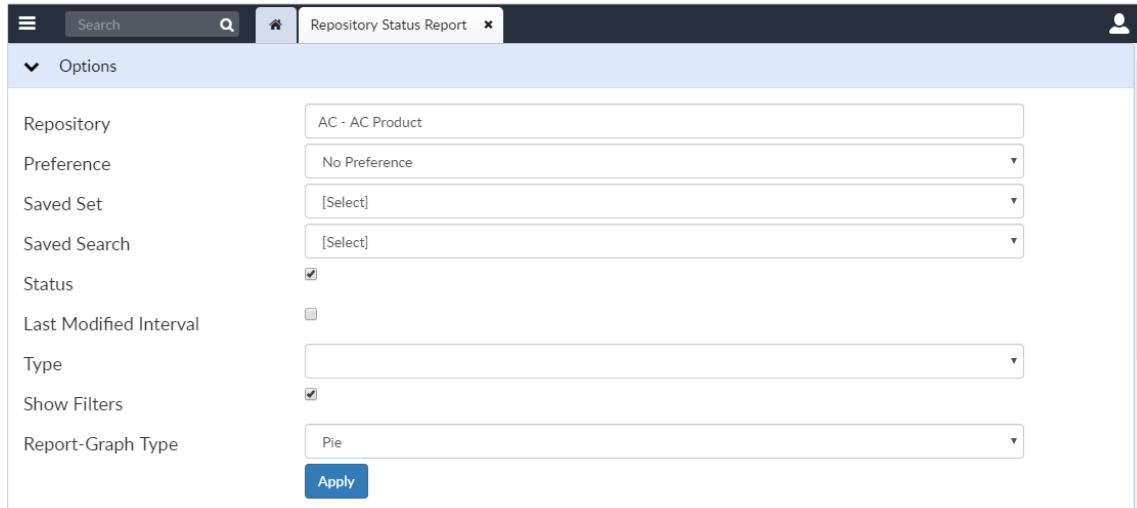
Features Sidebar Report Tab

Select the desired report. The report will open in a new tab.



Repository Status Report

To specify the contents of the report, expand the **Options** on the upper left of the report’s display screen. (Depending on system configuration, the **Options** may be automatically expanded when the report is opened.)



Report Options


Configure the report as you would configure its corresponding Widget. For specifics, see the [Widget Reference Guide](#) section of this document.

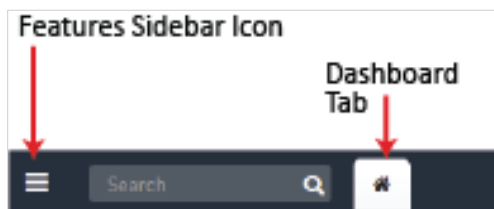
Note that the content of most reports do not auto-refresh.

To close the report, click the **Close** icon **X** on the report’s tab.

11 Repositories

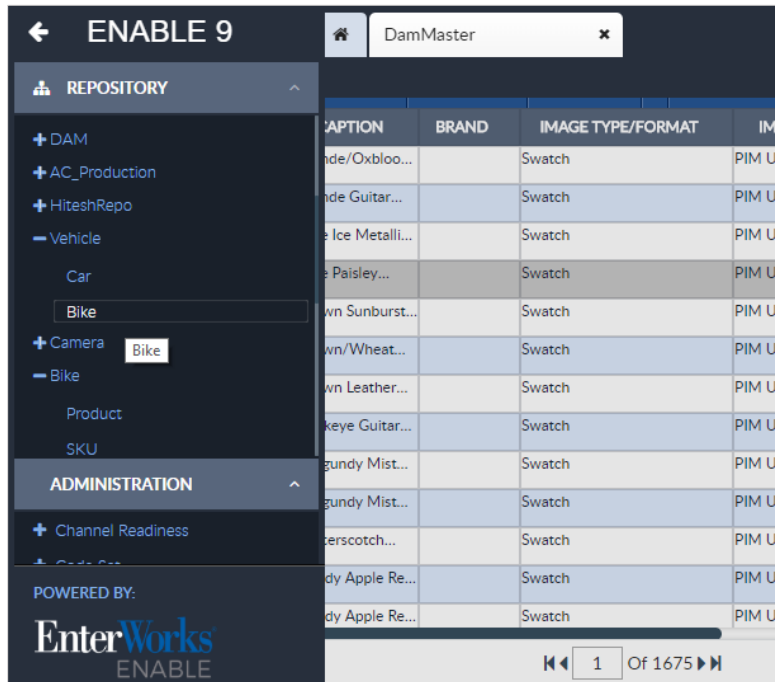
11.1 Viewing a Repository

To view the contents of a repository, open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**.



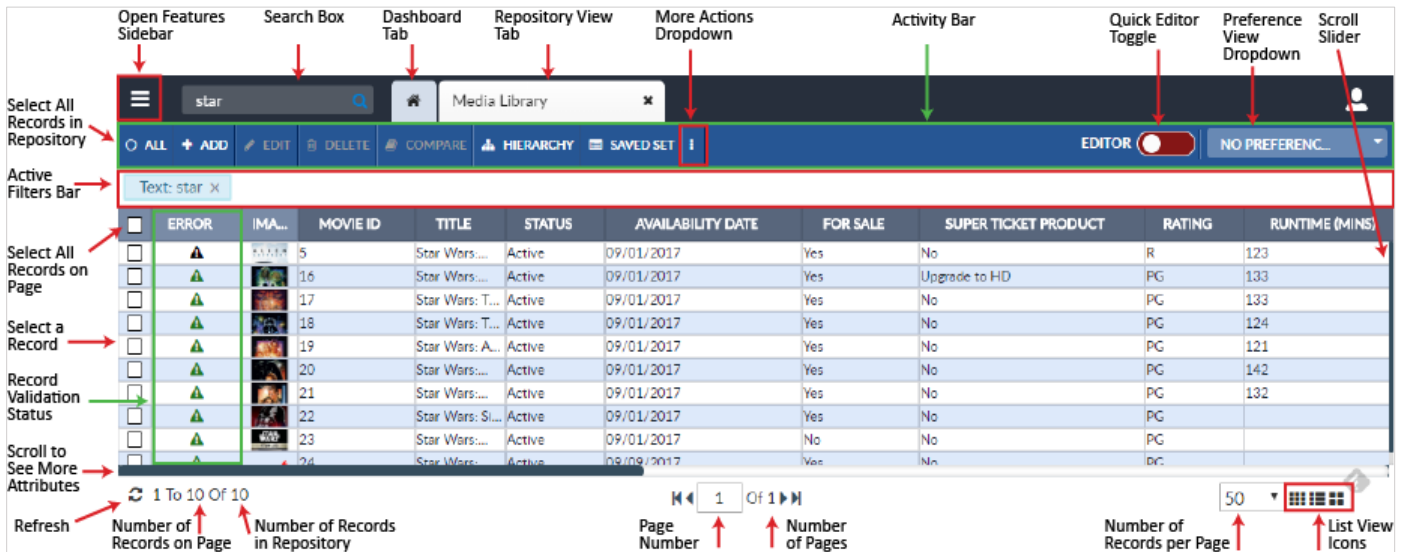
Features Sidebar Button

Select **Repository** to display a list of the accessible folders. Select the desired folder to open it. Select the desired repository.



Select Repository

The **Features Sidebar** will close. A **Repository View** tab is created that displays the records in the selected repository.



Repository View

(For a larger version of the Dashboard Reference Guide, see: [Dashboard Reference Guide.](#))

The selected Preference View determines which record attributes are displayed and in what order they are displayed. See [Preference Views](#) for more details.

A record’s validation status is noted by the icon in the **Error** column. The possible status values are:

= Record is Valid and Promotable.	= Record has Severe Errors.
= Record has Warnings.	= Record has not been validated.

The list of records can be viewed in three different formats: **Grid View**, **Card View** and **Gallery View**. The **List View** icons are located at the bottom right of the **Repository View**.

Grid View shows the records in a table format, with the record attributes and validation status as the columns, as configured in the active Preference View. If the row of attribute columns is too wide to fit on the display screen, use the horizontal slider on the bottom of the **Repository View** to scroll the display horizontally. Unless dictated by a Preference View, attributes are listed in Attribute Tab/Attribute Group order.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott Michael Fasst
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie Amanda Ste
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt Emma Watso
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon Emma Watso
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond Mylène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David... Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger... Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas Ewan McGreg

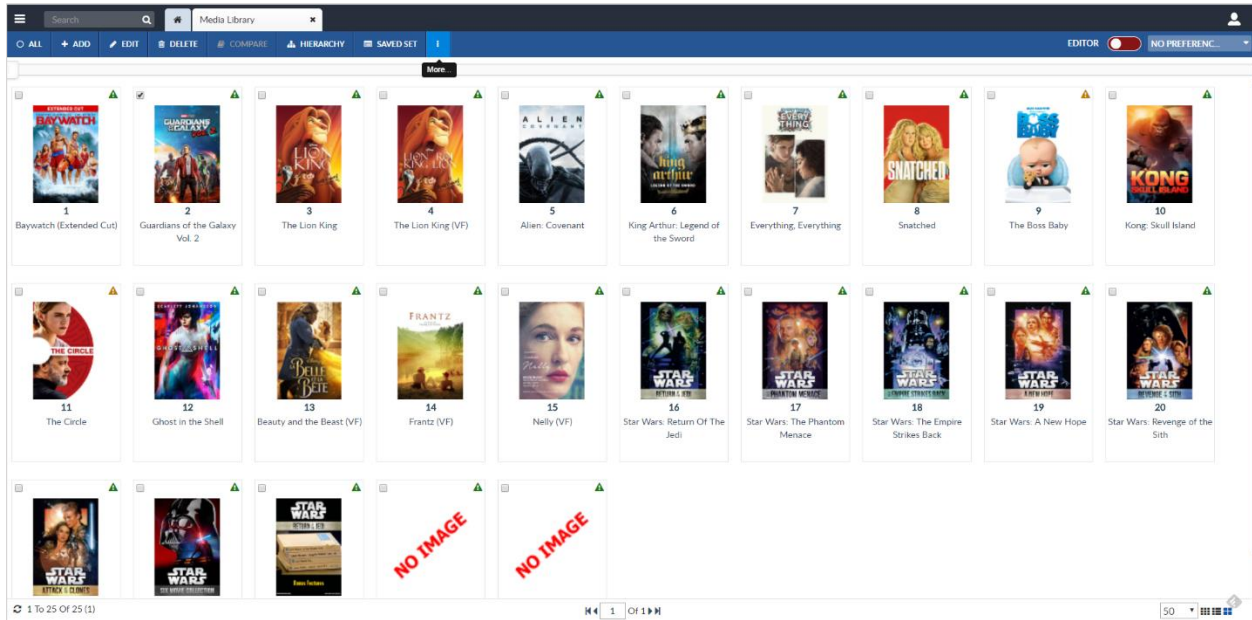
Repository View Grid View

Card View shows the records as a series of “cards”, with each card displaying the selected attributes and validation status, as configured in the active Preference View.

Movie ID	Title	For Sale	Status	Synopsis
1	Baywatch (Extended Cut)	Yes	Review Specifications	Follows devoted lifeguard Mitch Buchannon as he butts heads with a brash new recruit. Together, they uncover a local criminal plot that threatens the future of the Bay.
2	Guardians of the Galaxy Vol. 2	Yes	Active	Set to the all-new sonic backdrop of Awesome Mixtape #2, Marvel's "Guardians of the Galaxy Vol. 2" continues the team's adventures as they traverse the outer reaches of the cosmos. The
3	The Lion King	Yes	Active	A heroic coming-of-age story which follows the epic adventures of a young lion cub named Simba as he struggles to accept the responsibilities of adulthood and his destined role as king

Repository View Card View

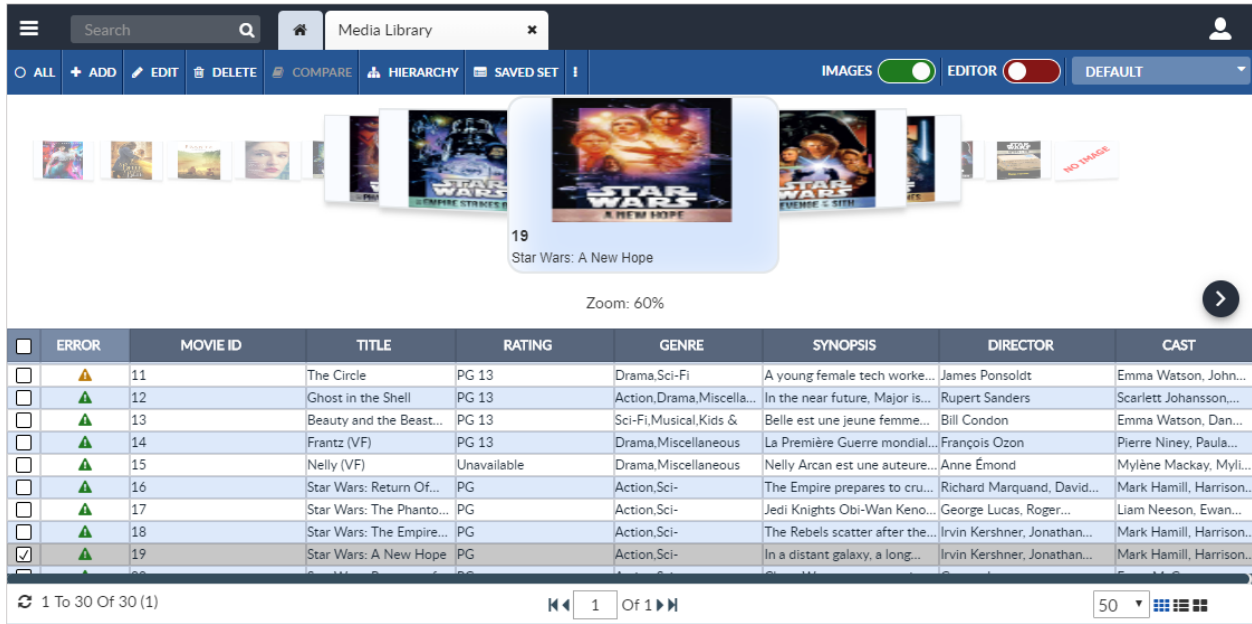
Gallery View displays for each record a thumbnail image of the digital asset associated with the record (if available), as well as selected attributes and validation status, as configured in the active Preference View.



Repository View Gallery View

If the Cover Flow capability is enabled in the active Preference View, the **Image** toggle will appear on the **Repository View's Activity Bar**. If the **Image** toggle is brown, the Cover Flow capability is turned off. If the **Image** toggle is green, the Cover Flow capability is turned on.

If the Cover Flow capability is on, instead of the records' images being displayed in-line with the records, they will be displayed in a series above the attribute headers in a Repository View. The images can be scrolled through and can be enlarged or reduced by sliding the **Zoom** slider below the images. Clicking on an image will cause its record to be selected. Selecting a record will cause its image to be displayed. Clicking the right or left arrows to the sides of the Cover Flow images will cause the Repository View to page forward or backward.



Repository View with Cover Flow

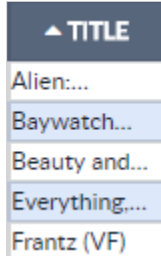
The **Editor** toggle on the **Repository View's Activity Bar** enables and disables the **Quick Editor**. If the **Editor** toggle is brown, the **Quick Editor** is turned off. If the **Editor** toggle is green, the **Quick Editor** is turned on.

For a more detailed description of the items in the **Repository View's Activity Bar**, see the [Repository View Quick Start](#) and the individual sections of this document that describe their functionality.

For a detailed description about record validation and the Record Error Status Indicator, see the [Record Validation](#) section later in this document.

11.2 Sorting Records

If the repository's records are displayed in **Grid View**, the records can be sorted according to the values in some of the attribute and validation status columns. Clicking the title of a sortable column (or the triangle just to the left of the title) will cause the record list to sort in ascending order. Clicking the column title again will cause the record list to sort in descending order. Clicking the column title a third time will cause the record list to return to its original sort order.

A screenshot of a dropdown menu titled "TITLE" with an upward-pointing triangle icon. The menu lists five repository titles: "Alien...", "Baywatch...", "Beauty and...", "Everything...", and "Frantz (VF)". The "Everything..." option is currently selected and highlighted in blue.

▲ TITLE
Alien...
Baywatch...
Beauty and...
Everything...
Frantz (VF)

Sort Repository

11.3 Filter Records

Two methods exist for applying Filters to repositories: Predefined Filters and Dynamic Filters. For detailed information, see [Filters](#).

11.4 Change Repository View Column Order

If the **Repository View** is being displayed in **Grid View**, a column can be moved by dragging and dropping the column header into the desired position. To move a column, click the column header, hold the mouse button, drag the column header to its desired position, and release the mouse button.

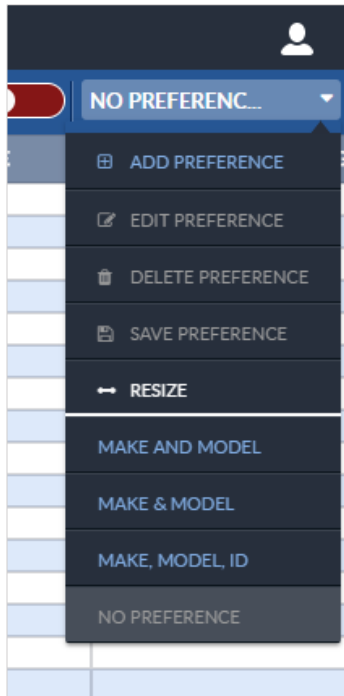
11.5 Change Repository View Column Width

If the **Repository View** is being displayed in **Grid View**, a column's width can be changed by placing the cursor on the right edge of the column's header (when the cursor is in the right location, it will display as a double-headed arrow), clicking and holding the mouse, and sliding the cursor in the desired direction to widen or narrow the column. When the column is the desired width, release the mouse button.

11.6 Resize Repository View Column Width to Fit Screen

If the **Repository View** is being displayed in **Grid View**, the width of the columns can be resized in an attempt to fit as many columns as possible onto the display screen, without restricting the view of attribute values. The columns will minimally be sized to the width necessary to display the record attribute values. If the minimally sized columns cannot all fit onto the screen, a scroll bar at the bottom of the grid view will allow the user to scroll to the right to see more column data.

To resize the width of columns in a **Repository View**, expand the **Preference View Dropdown** in the **Activity Bar**. Select **Resize**. The width of the columns will be minimized.



Resize Repository

11.7 Preference Views

The Preference View capability allows users to define a view of repository record data by selecting which attribute values to display, the attribute display order, and which (of any) linked relationships to show. A Preference View establishes how record data will be displayed in the **Repository View, Quick Editor, and the Record Editor.**

Preference Views are named and saved so they can be used again later. A Preference View can only be used with the repository it was created for.

Users can create their own Preference Views, share their Preference Views, select which (if any) Preference View to use, edit Preference Views, delete Preference Views, save Preference Views, select a Preference View to be their Default Preference View, and select a Favorite Record Editor Preference View.

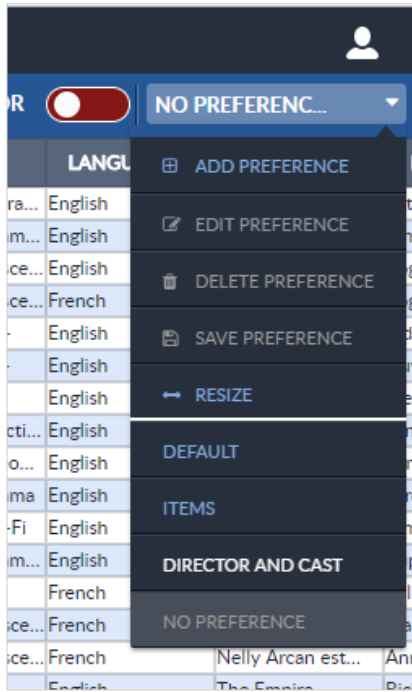
If no Preference View has been designated as the Default Preference View or the Favorite **Record Editor** Preference View, when a repository or record is opened, all record attributes will be displayed.

11.7.1 Preference View in Repository View

To use a Preference View while viewing a repository, open the desired repository.

When a repository is opened, it will be displayed as defined in the Default Preference View. If no Default Preference View has been selected, all record attributes will be shown.

Expand the **Preference View Dropdown** in the **Activity Bar**.



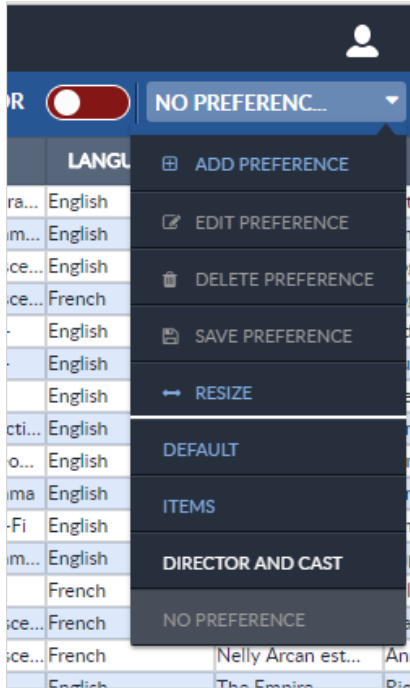
Preference View Dropdown List

Select the desired Preference View. The repository will be displayed according to the format defined in the selected Preference View.

To stop using a Preference View, expand the **Preference View Dropdown** in the **Activity Bar** and select **No Preference**.

11.7.2 Set Default Preference View

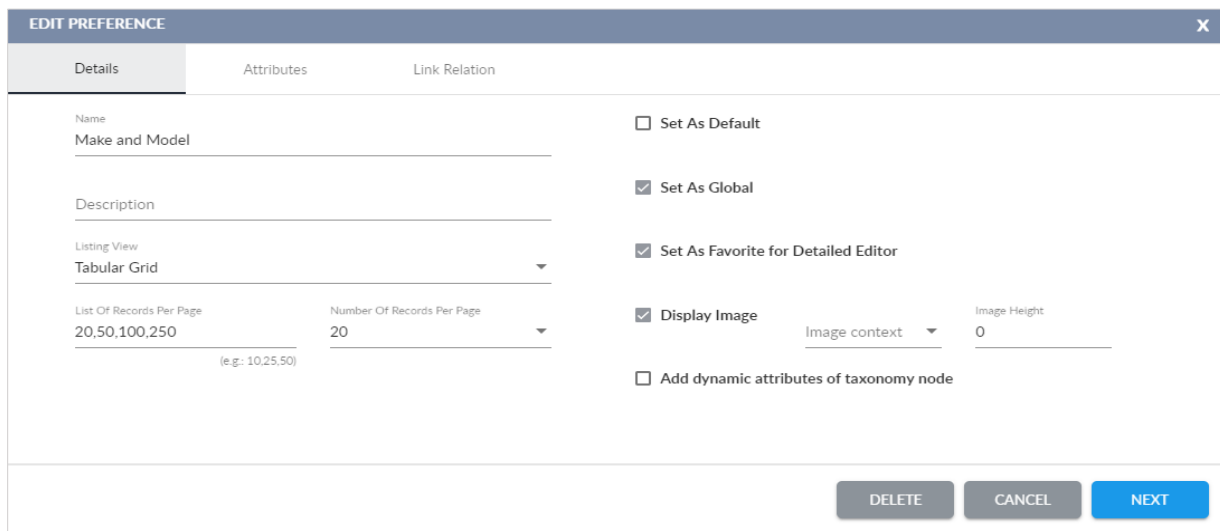
To establish a Preference View as the Default Preference View for a repository, first open the repository. Expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**. Select the desired Preference View.



Preference View Dropdown List

The repository will be displayed according to the format defined in the selected Preference View.

Expand the **Preference View Dropdown** in the **Activity Bar** again and select **Edit Preference**. The **Edit Preference** pop-up window will appear.



Edit Preference View Details

The **Edit Preference** window has three tabs: the **Details** tab, the **Attributes** tab, and the **Link Relation** tab. Select the **Details** tab. Check the **Set As Default** checkbox. Select the **Link Relation** tab. Select **Apply** to save your changes to the Preference View, select **Cancel** to exit without saving your changes to the Preference View, or select **Delete** to delete the Preference View.

11.7.3 Preference View in Record Editor

The Favorite Record Editor Preference View defines how record data will be displayed in the **Record Editor** and the **Quick Editor**. When a record is opened in the **Record Editor**, it is displayed according to the Favorite Record Editor Preference View. If no Preference View has been designated as the Favorite Record Editor Preference View, the record will be displayed as defined in the repository's Default Preference View. If no Default Preference View has been selected, all record attributes will be shown.

While in the **Record Editor**, the user can use Preference Views but not manage them. Preference Views can be chosen or disabled, but not edited, added, deleted, saved or resized.

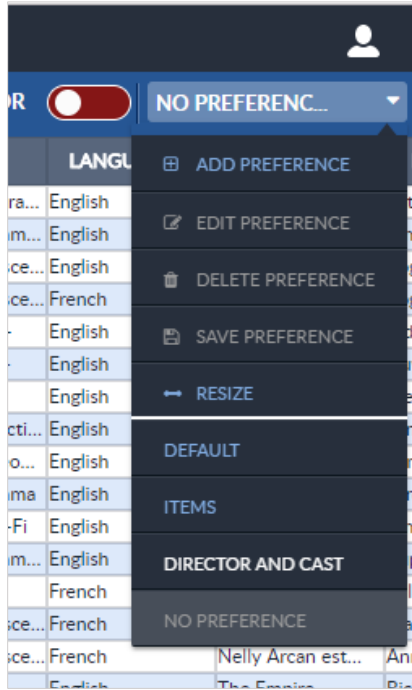
11.7.4 Preference View in Quick Editor

The Favorite Record Editor Preference View defines how record data will be displayed in the **Quick Editor** and the **Record Editor**. When a record is opened in the **Quick Editor**, it is displayed according to the Favorite Record Editor Preference View. If no Preference View has been designated as the Favorite Record Editor Preference View, the record will be displayed as defined in the Default Preference View. If no Default Preference View has been selected, all record attributes will be shown.

While in the **Quick Editor**, the user has full Preference View use and management capabilities. Preference Views can be chosen, disabled, edited, added, deleted, saved and resized.

11.7.5 Set Favorite Record Editor Preference View

To establish a Preference View as the Favorite Record Editor Preference View, open the repository in a Repository View. Expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**.



Preference View Dropdown List

Select the desired Preference View. The repository or record will be displayed according to the format defined in the selected Preference View.

Expand the **Preference View Dropdown** again and select **Edit Preference**. The **Edit Preference** pop-up window will appear.

The screenshot shows the 'EDIT PREFERENCE' dialog box with the 'Details' tab selected. The dialog has a title bar with a close button (X). Below the title bar are three tabs: 'Details', 'Attributes', and 'Link Relation'. The 'Details' tab contains the following fields and options:

- Name:** 'Make and Model' (text input)
- Description:** (text input)
- Listing View:** 'Tabular Grid' (dropdown menu)
- List Of Records Per Page:** '20,50,100,250' (text input)
- Number Of Records Per Page:** '20' (text input)
- Image context:** (dropdown menu)
- Image Height:** '0' (text input)

On the right side of the dialog, there are five checkboxes:

- Set As Default
- Set As Global
- Set As Favorite for Detailed Editor
- Display Image
- Add dynamic attributes of taxonomy node

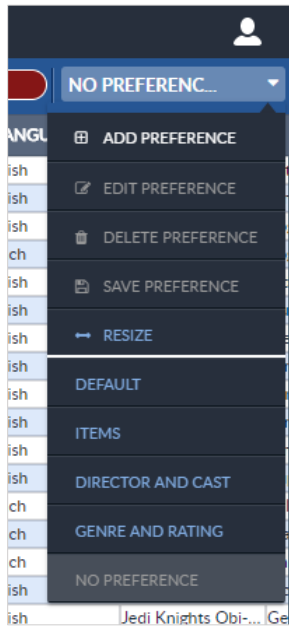
At the bottom right of the dialog are three buttons: 'DELETE', 'CANCEL', and 'NEXT'.

Edit Preference View Details

The **Edit Preference** window has three tabs: the **Details** tab, the **Attributes** tab, and the **Link Relation** tab. Select the **Details** tab. Check the **Set As Favorite for Record Editor** checkbox. Select the **Link Relation** tab. Select **Apply** to save your changes to the Preference View, select **Cancel** to exit without saving your changes to the Preference View, or select **Delete** to delete the Preference View.

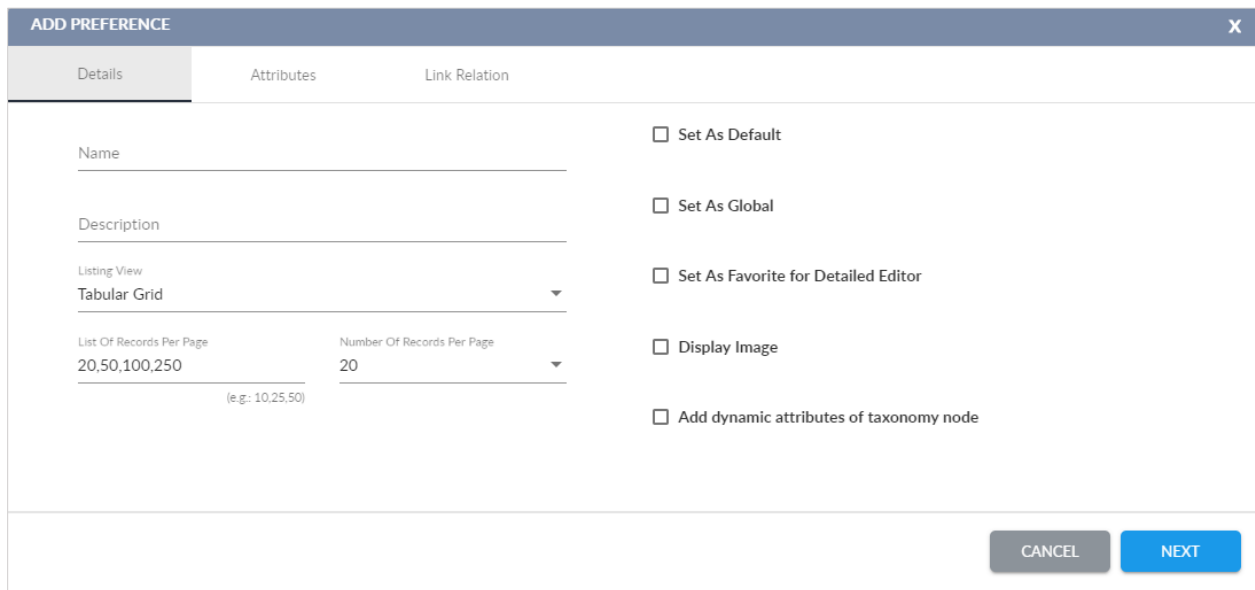
11.7.6 Add a Preference View

To create a new Preference View, open the desired repository in a **Repository View**. Expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**. Select **Add Preference**.



Add Preference View

The **Add Preference** window will appear.



Add Preference View

The **Add Preference** window has three tabs: the **Details** tab, the **Attributes** tab, and the **Link Relation** tab. See the following sections for details on each tab.

11.7.6.1 Details Tab

Select the **Details** tab and set the values as desired:

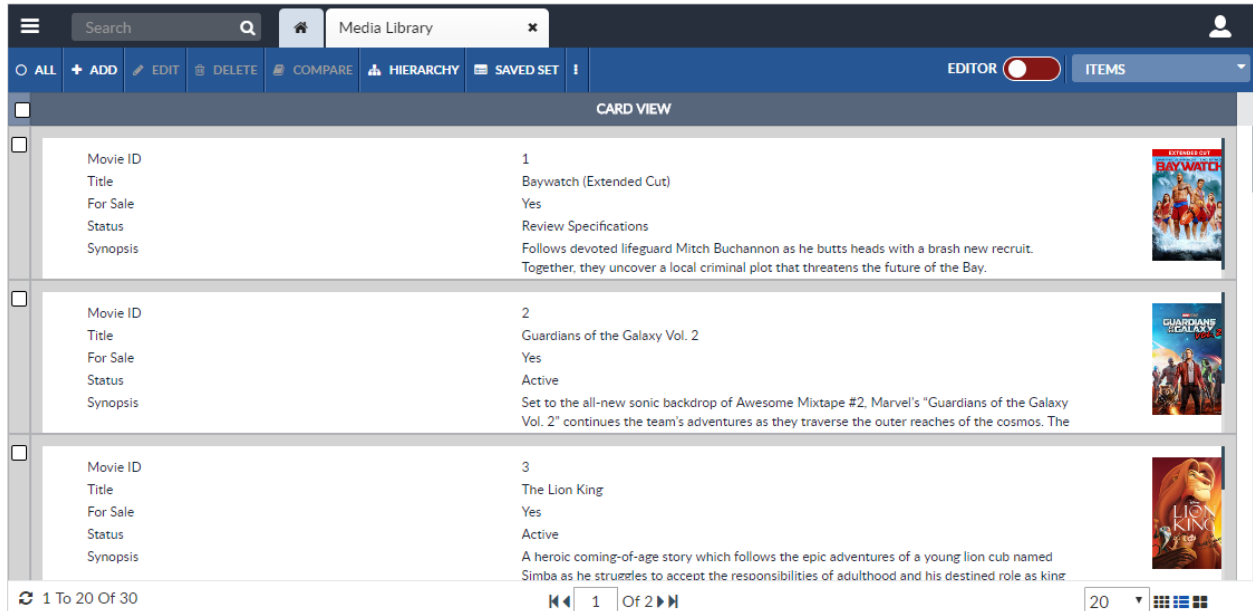
- **Name:** (Required) The name of the Preference View.
 - Note:** This field can support multi-language translations. See the [Multi-Language](#) section of this document for additional information.
- **Description:** (Optional) A description of the Preference View.
 - Note:** This field can support multi-language translations. See the [Multi-Language](#) section of this document for additional information.
- **Listing View.** (Required) Sets the default Listing View. It defaults to **Tabular Grid**.

Grid View shows the records in a table format, with the record attributes and validation status as the columns, as configured in the active Preference View. If the row of attribute columns is too wide to fit on the display screen, use the horizontal slider on the bottom of the **Repository View** to scroll the display horizontally.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

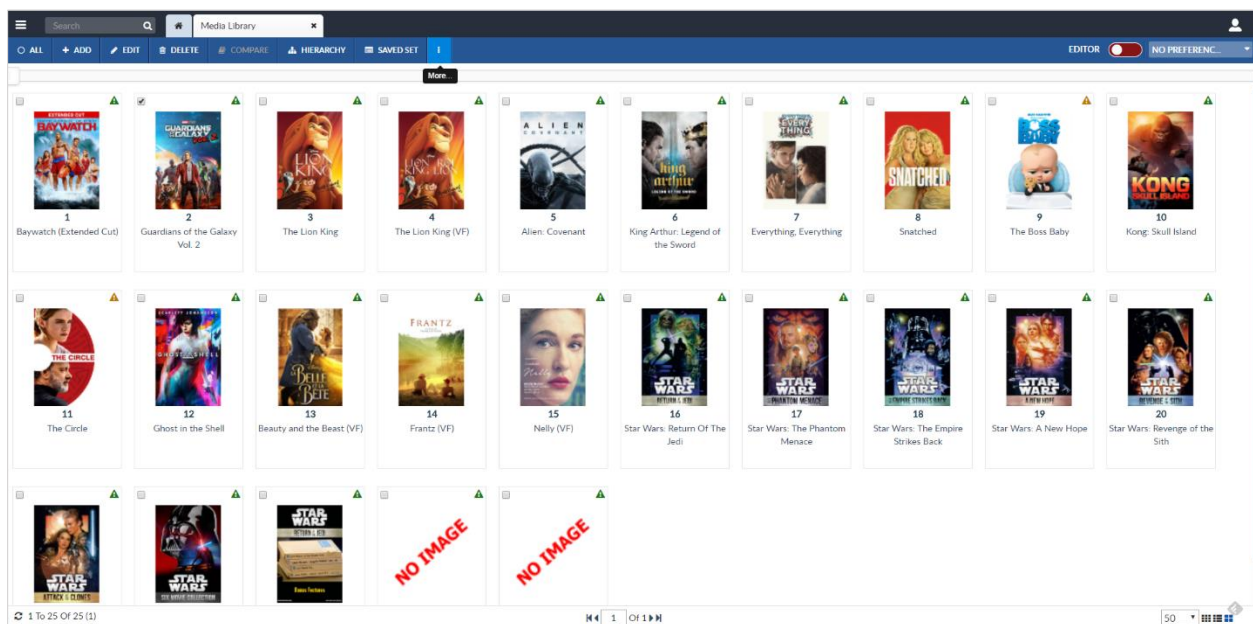
Repository View Grid View

Card View shows the records as a series of “cards”, with each card displaying the selected attributes and validation status, as configured in the active Preference View.



Repository View Card View

Gallery View displays a thumbnail image of a digital asset associated with a record (if available), as well as selected attributes and validation status, as configured in the active Preference View.



Repository View Gallery View

At the bottom right of a Repository View, the **Records Per Page** drop-down list lets the user select how many records are displayed on a page.



Records Per Page

Define the **Records Per Page** drop-down list by setting the **List Of Records Per Page** and the **Number of Records Per Page** values.

- **List Of Records Per Page:** (required) The list of the available choices in the **Records Per Page** drop-down list. The field accepts a list of numbers separated by commas. It defaults to “20, 50, 100, 250”.
- **Number Of Records Per Page:** (optional) A drop-down list that sets the default number of records to display on a page. The list of values in the **Number Of Records Per Page** drop-down list is the list of values specified in **List Of Records Per Page**.
- **Set As Default:** (optional) If selected, the Preference View will be set as the Default Preference View. It will be active when the repository is first opened. If no Favorite Record Editor Preference View is active when a repository is opened, the Default Preference View will be active in the **Record Editor** and **Quick Editor** as well.

- **Set As Global:** (optional). If selected, the Preference View will be available to all users.

Note that only the creator of a global Preference View or a system administrator can modify or delete it.

- **Set as Favorite for Record Editor:** (optional) If selected, the Preference View will be used as the Favorite Record Editor Preference View. The Favorite Record Editor Preference View determines the format of record data in the **Record Editor** and **Quick Editor**. If no Favorite Record Editor Preference View is active when a repository is opened, the Default Preference View will be active in the **Record Editor** and **Quick Editor** as well.
- **Display Image:** (optional) Specifies if the Cover Flow capability is activated in **Repository View**. If selected, the following settings will appear:
 - **Image Context:** (optional) Allows the user to select the context of the displayed images, such as: **Lg** (large), **Med** (medium), **Original**, **Sm** (small), or **Thumbnail**.

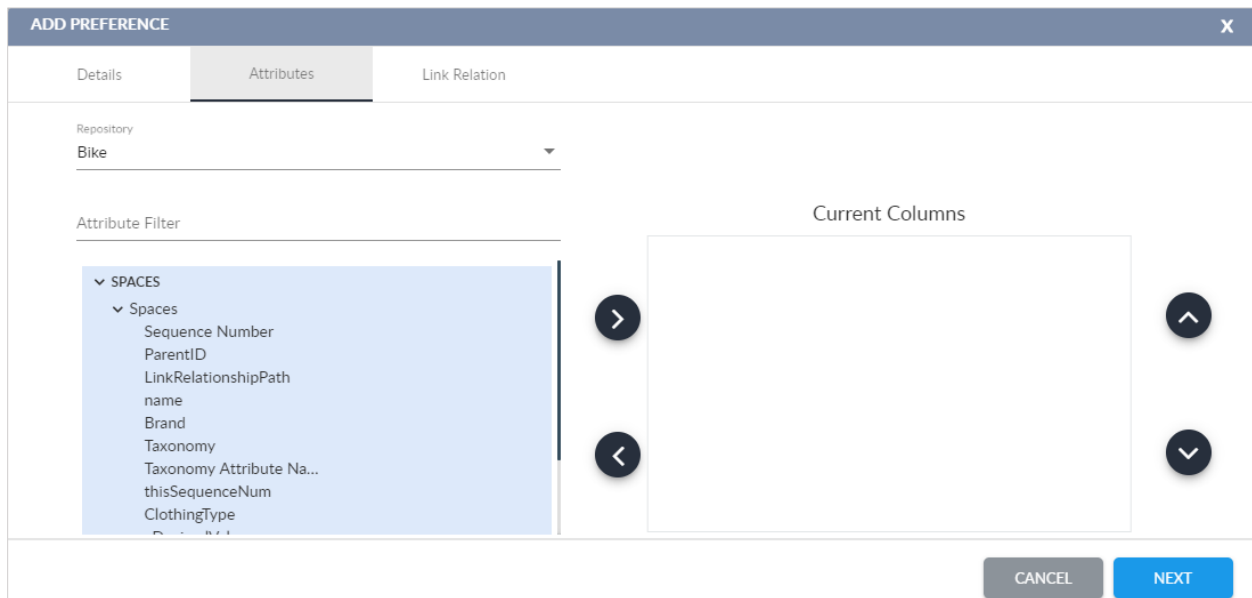
NOTE: Be careful what image size is selected as it could slow the load time of the records being displayed.

- **Height:** (optional) Allows the user to override the default size of the Thumbnail and specify the images’ height in pixels. This also controls the size of the images displayed in **Card View** and **Gallery View**.
- **Add dynamic attributes of taxonomy node:** If selected, Category Attributes will be displayed. For information regarding this field, contact EnterWorks.

Select **Next** to switch to the **Attributes** tab or select **Cancel** to exit without saving the Preference View.

11.7.6.2 Attributes Tab

The **Attributes** tab is used to select which record attributes will be displayed in the Preference View.





Add Preference View Attributes Tab

On the **Attributes** tab, set the values as desired:

- **Repository** dropdown list: (required) Lists the names of the repositories the Preference View can access to retrieve attributes to display. The value of the **Repository** field defaults to the name of the active repository (the repository the Preference View is being created for). The **Repository** dropdown list will only show linked repositories that are parents of the active repository.


Select a repository from the **Repository** dropdown list.


Beneath the **Attribute Filter** field is the **Available Attributes** list. It displays the attributes of the repository selected in the **Repository** dropdown list, arranged in their Attribute Tabs. Click the > next to an Attribute to expand it. Click the < to collapse an Attribute Tab.



- **Attribute Filter:** (optional) Filters the **Available Attributes** list so that it only displays attributes whose names contain the text specified in the **Attribute Filter**.
- **Add Attribute** icon . Permitted users may select the **Add Attribute** icon  to add an attribute to the repository. For information on adding attributes, see [Add/Edit an Attribute](#).
- **Current Columns:** (required) The list of attributes that will be displayed as columns in the Preference View. The display order of the columns is determined by the positions of the attributes in the **Current Column** list. The first attribute will be the first column, the second attribute will be the second column, etc.

Note that the attributes listed in the **Available Attributes** list include an attribute group titled **(STATE)**. The (State) attribute group contains system attributes that describe the state of the record. The Preference View treats these attributes like any other. They may be added to **Current Columns** field.

Attributes can be selected individually or as a group (shift-select the desired attributes). Attribute Groups and Tabs can also be selected and added; all their component attributes will be added to the **Current Columns** field.

To add an attribute in the **Available Attributes** list to the **Current Columns** list, select the attribute and click the **Right Arrow** icon . The attribute will be added to **Current Columns**.

To remove an attribute from **Current Columns**, select the attribute from **Current Columns** and click the **Left Arrow** icon . The attribute will be removed from **Current Columns**.

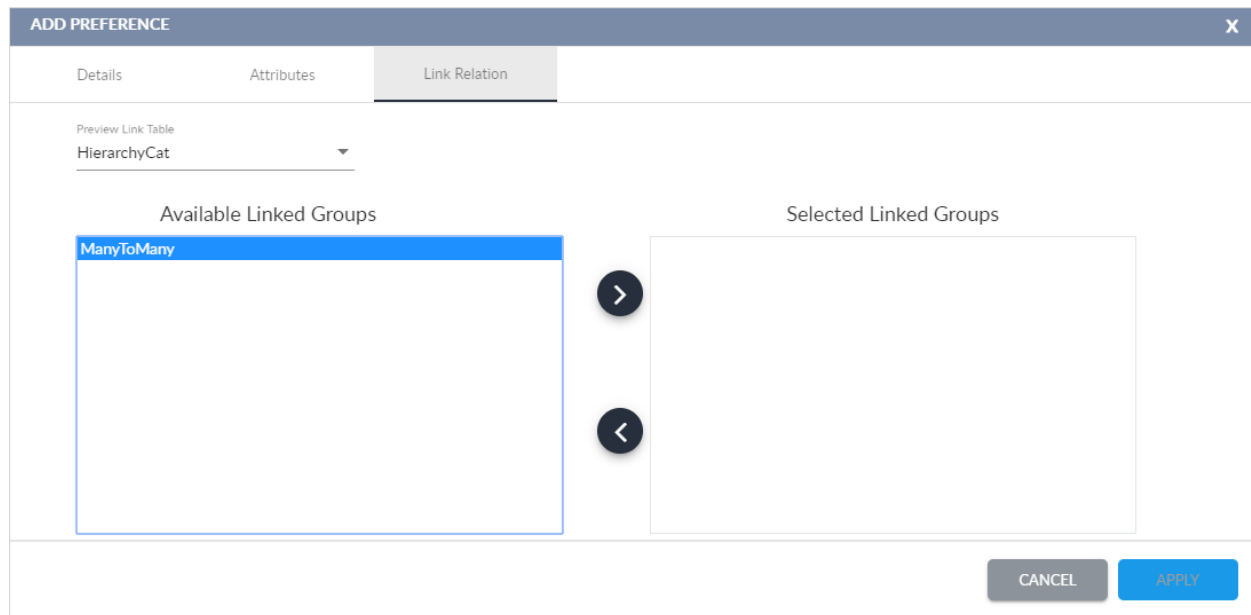
To change an attribute's display order, select the attribute in **Current Columns** and use the **Up-Arrow** icon  to move the attribute earlier in the display order or use the **Down Arrow** icon  to move the attribute later in the display order.

Note that attributes may be provided in multiple languages. When adding a multi-language attribute to **Current Columns**, select the desired language version of the attribute. For more information, see the [Multi-Language](#) section in this document.

11.7.6.3 Link Relation Tab

Select **Next** to switch to the **Link Relation** tab or select **Cancel** to exit without saving the Preference View.

The **Link Relation** tab is used to select which Linked Repositories will be displayed when a record is being edited.



Add Preference View Link Relation Tab


On the **Link Relation** tab, set the values as desired:

- **Preview Link Table:** If desired, select a table to be displayed in the **Record Preview**. For more information about the **Record Preview**, contact EnterWorks.
- **Available Linked Groups:** Linked Relationship Groups in the repository (linked repositories) that will not be displayed in the Preference View.
- **Selected Linked Groups:** Linked Relationship Groups in the repository (linked repositories) that will be displayed in the Preference View.

If a Linked Table is to be displayed in the **Record Preview**, select the desired Linked Table from the **Preview Linked Table** dropdown. When the repository is viewed in a **Repository View** using **Gallery View**, this table will show up in the **Record Preview**. For more information on **Record Preview**, contact EnterWorks.

Linked Groups can be selected individually or as a group (shift-select the desired Linked Groups).

To add a Linked Group to **Selected Linked Groups**, select the desired Linked Group from the **Available Linked Groups** list and click the **Right Arrow** icon . The Linked Group is added to **Selected Linked Groups**.

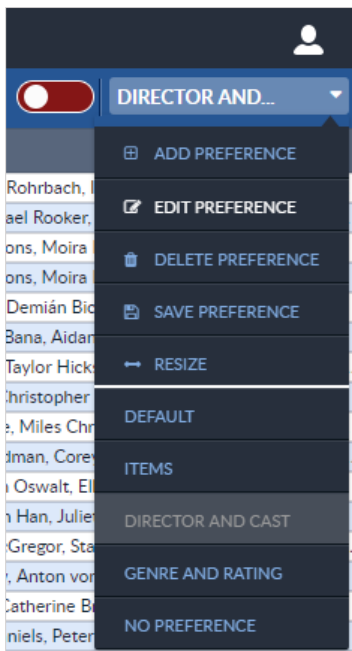
To remove a Linked Group from **Selected Linked Groups**, select the Linked Group from **Selected Linked Groups** and click the **Left Arrow** icon . The attribute is removed from **Selected Linked Groups**.

Select **Apply** to save and create the Preference View or select **Cancel** to exit without adding the Preference View.

11.7.7 Edit a Preference View

Note that only system administrators and the creator of a Preference View can edit it, even if the Preference View is global.

To edit an existing Preference View, open the desired repository in a **Repository View**. Expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**. Select **Edit Preference**.



Edit Preference View

The **Edit Preference** window will appear. Change the values in the **Edit Preference** window as desired. For a detailed description of the fields in the **Edit Preference** window, see the [Add a Preference View](#) section of this document.

EDIT PREFERENCE
✕

Details

Attributes

Link Relation

<p>Name Make and Model</p> <hr/> <p>Description</p> <hr/> <p>Listing View Tabular Grid</p> <hr/> <p>List Of Records Per Page 20,50,100,250</p> <p style="font-size: small; text-align: center;">(e.g.: 10,25,50)</p>		<p><input type="checkbox"/> Set As Default</p> <p><input checked="" type="checkbox"/> Set As Global</p> <p><input checked="" type="checkbox"/> Set As Favorite for Detailed Editor</p> <p><input checked="" type="checkbox"/> Display Image</p> <p><input type="checkbox"/> Add dynamic attributes of taxonomy node</p>
<p>Number Of Records Per Page 20</p> <hr/>		<p>Image Height 0</p> <hr/> <p>Image context</p>

DELETE
CANCEL
NEXT

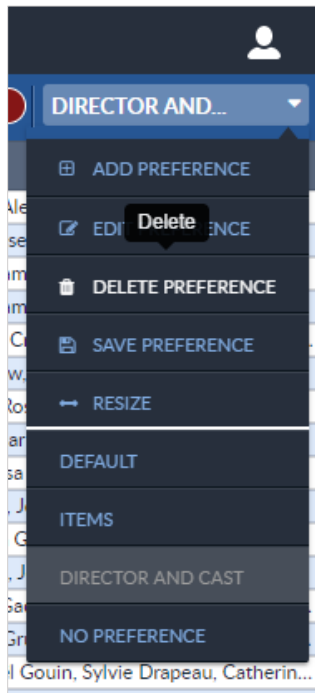
Edit Preference View

11.7.8 Delete a Preference View

To delete a Preference View for a repository or record, open the repository and expand the **Preference View Dropdown** in the **Activity Bar**. Select the desired Preference View.

The repository will be displayed according to the format defined in the selected Preference View.

Expand the **Preference View Dropdown** in the **Activity Bar** again and select **Delete Preference**. A **Confirm** window will appear that asks if you want to delete the preference. Select **Yes**. The Preference View will be deleted and the view will revert to the Default Preference View.



Delete Preference View

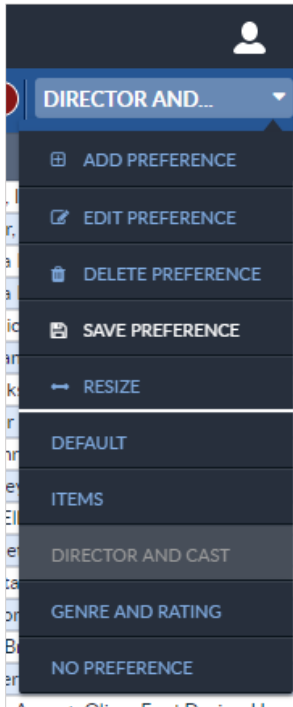
An alternative method of deleting a Preference View is through the **Edit Preference** window. Open the repository. Expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**. Select **Edit Preference**. The **Edit Preference** window will appear.

A **Delete** button appears at the bottom of each of the **Edit Preference** window's tabs. Select any of the **Delete** buttons. A **Confirm** window will appear that asks if you want to delete the selected preference. Select **Yes** and the active Preference View will be deleted. The view will revert to the Default Preference View.

11.7.9 Save a Preference View

If the user activates a Preference View, then changes the display options for the **Repository View** (such as the sort order, List View, or column width), the user can save the changed display options to the active Preference View.

To save the current display options for the active Preference View, expand the **Preference View Dropdown** in the **Activity Bar**. Alternatively, select a record, open the **Quick Editor**, then expand the **Preference View Dropdown**. Select **Save Preference**.




Save Preference View

The changes made to the active Preference View will be saved and applied in future uses of the selected Preference View.

11.8 Generate Import/Export Template

For more information on the Generate Import/Export Template capability, contact EnterWorks.

11.9 Configurable Functionality

Depending on system configuration, the **More Actions** button  in the **Repository View's Activity Bar** may contain selections specific to a particular organization. These site-specific functionalities are not described in this document. For more information, see the system administrator.

12 Records

For a detailed description about record validation and **Record Validation Status**, see the [Record Validation](#) section later in this document.

12.1 Linked Records

Linked records are records that have a relationship with another record. For example, a product record may contain links to accessory products or related products. The records can be in the same repository or in different repositories. Linked relationships can be “one-to-one” (one record linked to another record), “one-to-many” (one record linked to more than one record), or “many-to-many” (records can both have more than one record link to them and can link to more than one record).

12.2 View a Record

To view a list of records in a repository, first open the repository in a **Repository View**. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything: Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schume
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watso
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watso
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Nin
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

To view a record in more detail, open the record in the **Quick Editor** (see the [Quick Editor](#) section of this document) or the **Record Editor** (see the [Record Editor](#) section of this document).

To open the record in the **Quick Editor**, select the record and click the **Editor** toggle on the right end of the **Repository View's Activity Bar**. The **Editor** toggle will turn green and the record will be opened in a **Quick Editor** window on the right side of the **Repository View**.



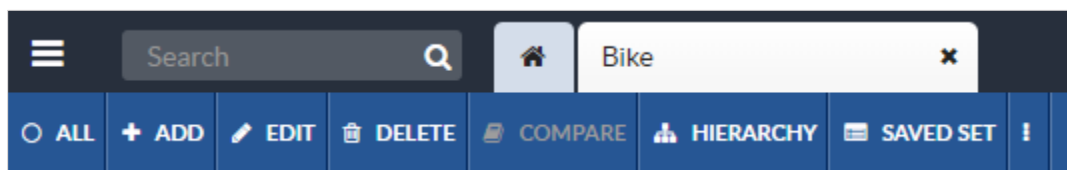
Quick Editor Toggle

To open the record in the **Record Editor**, select the record and click the **Edit** button on the left side of the **Repository View's Activity Bar**. Alternatively, in the **Repository View**, double click any of the record's attribute fields.

For a detailed description about record validation and **Record Validation Status**, see the [Record Validation](#) section later in this document.

12.3 Edit a Record

For details about adding a new record, see the [Add a New Record](#) section of this document.



Repository View Activity Bar Buttons

Enable has three ways for users to modify records: **Inline Edit**; the **Quick Editor**; and the **Record Editor**.

Inline Edit allows users to directly edit attribute values from the **Repository View**. See the [Inline Editor](#) section in this document for more details.

The **Quick Editor** opens the selected record in a small window on the right side of the **Repository View**. The **Quick Editor** does not open a new tab; it allows the user to edit attribute

values while still viewing the repository’s records in the **Repository View**. See the [Quick Editor](#) section in this document for more details.

The **Record Editor** opens the record in a new tab. It provides a full-screen view of the record’s attributes. The **Record Editor** can also be used to edit more than one record at once (Multi-Edit). See the [Record Editor](#) section in this document for more details.

Note that the values of any attributes that are calculated fields will be generated when the record is saved. They will overwrite any values entered by the user unless Enable is configured otherwise.

12.3.1 Inline Editor

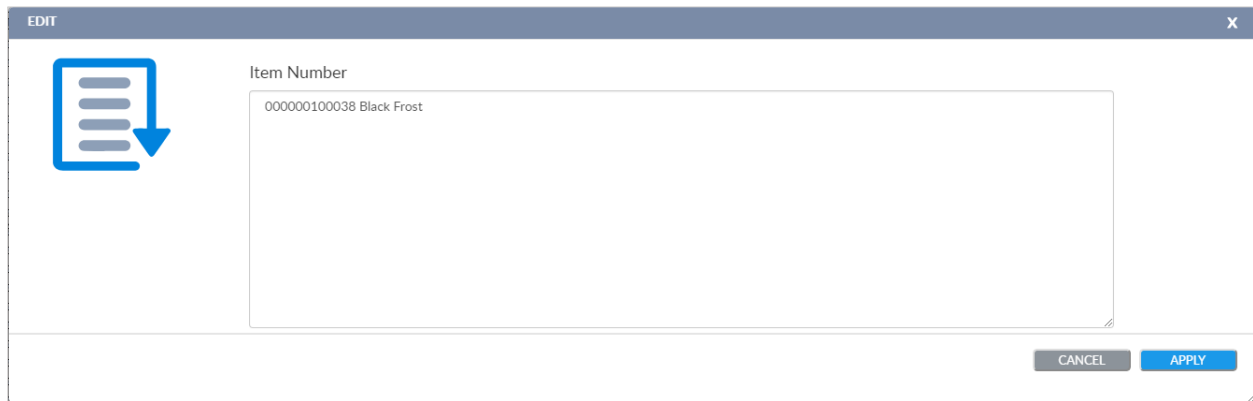
The Inline Editing capability allows users to edit visible record attribute values while in the **Repository View**.

To edit a record using the Inline Editor, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Clicking once on an attribute field will either allow the user to directly edit that attribute’s value or it will open up a pop-up **Edit** window. (Double clicking on the field will open the record in the **Record Editor**.)



Inline Editor Edit Window

In the **Edit** window, modify the value of the attribute as desired. Click **Apply** to save the changes to the attribute's value or click **Cancel** to exit without saving.

According to their permissions, some users may edit the record's primary key using the Inline Editor.

According to their permissions, some users may add a code set to an attribute field or modify an existing code set.

12.3.2 Quick Editor

The **Quick Editor** allows user to select a record from a **Repository View** and open it in a sidebar display for editing. It does not open the record in a new tab; the user can still see the repository's records in the **Repository View**. The **Quick Editor** does not have Multi-Edit capability.

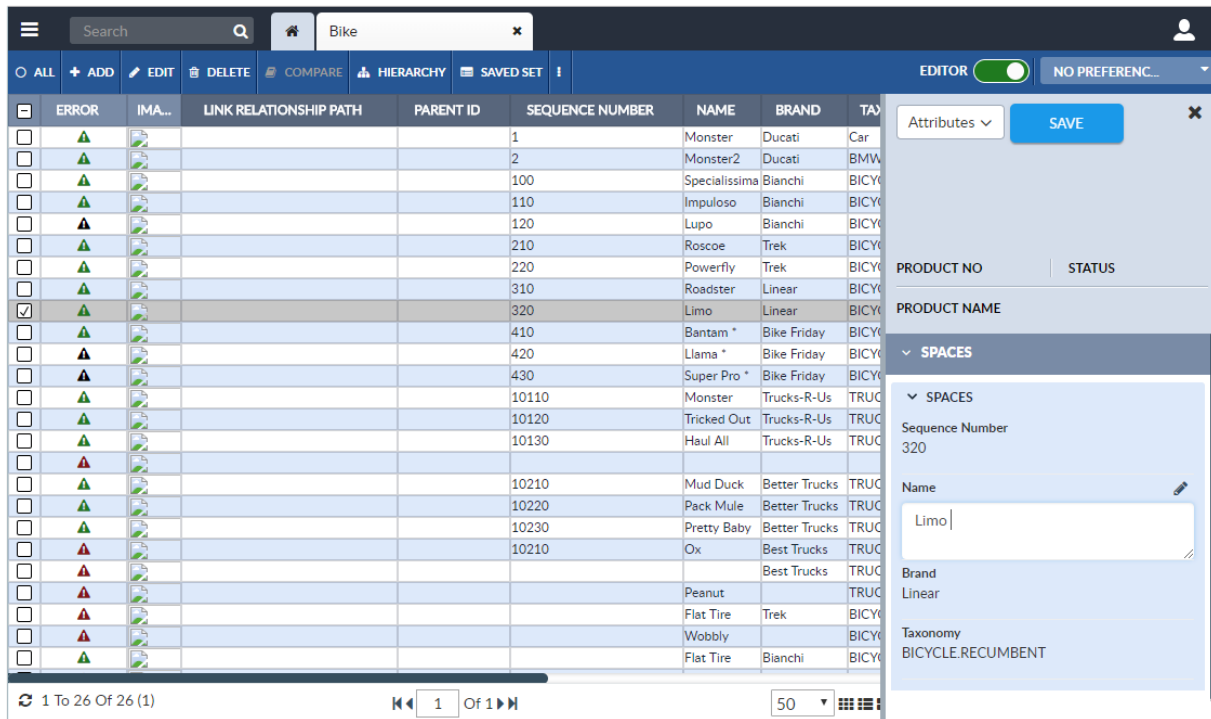
The Preference View that has been designated as the Favorite Record Editor Preference View defines how record data will be displayed in the **Record Editor** and the **Quick Editor**. When a record is opened in the **Quick Editor**, it is displayed according to the Favorite Record Editor Preference View. If no Preference View has been designated as the Favorite Record Editor Preference View, the record will be displayed as defined in the repository's Default Preference View. If no Default Preference View has been selected, all record attributes will be shown.

To edit a record in the **Quick Editor**, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST	
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Sten
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Turn on the **Quick Editor** capability by clicking the **Editor** toggle on the right end of the **Repository View's Activity Bar**. It will display green. Select the record to be edited. The **Quick Editor** window will appear on the right of the **Repository View**. The selected record will appear in the **Quick Editor**.



Quick Editor

(For a detailed labeled reference guide image, see [Quick Editor Reference Guide](#).)

Before making changes to a record in the Quick Editor, make sure it is pointed to the correct record. If more than one record is selected, the **Quick Editor** will only act upon the last record selected. If a record is unselected in the **Repository View** while it is still open in the **Quick Editor**, the **Quick Editor** will keep the record open and continue to allow it to be edited. If the user then selects another record, the **Quick Editor** will switch to the new record. Any unsaved changes to the first record will be retained and displayed again if the record is reopened in the **Quick Editor** – even if the **Quick Editor** has been closed without saving the changes. This behavior may change in future releases of Enable 9.

Note that it is possible to edit a record in the **Quick Editor** and the **Record Editor** simultaneously. This is not recommended as it could result in the editors exhibiting unpredictable behavior.

The **Quick Editor** displays the record’s data in a column. The record’s summary attributes and validation status are displayed at the top of the column, followed by a list of the Attribute Tabs. The Attribute Tabs can be expanded to show the Attribute Groups they contain. The Attribute Groups can be expanded to show the attributes they contain and their values.

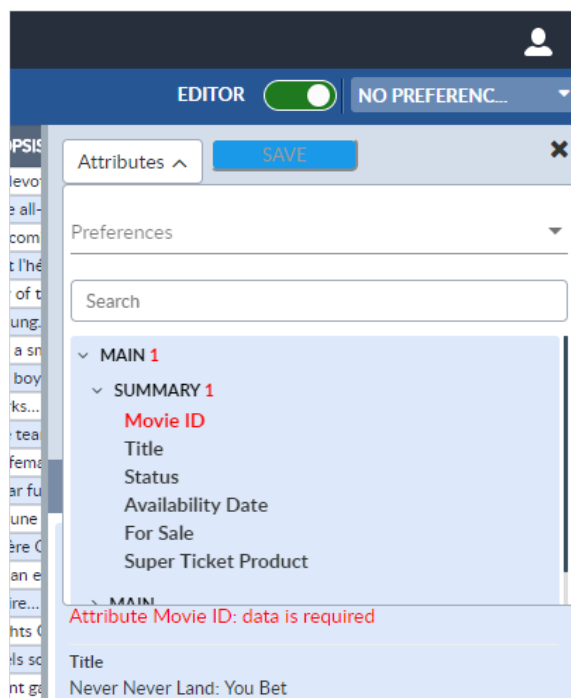
The **Quick Editor** notes errors in the attribute values in red and warnings in yellow.

Note that records can be saved with errors. The level of each error and its effect on the record’s validation status is discussed in more detail in the [Record Validation](#) section of this

document. When a record with errors or warnings is saved, a warning message appears at the bottom of the **Quick Editor**.



The attribute list can be scrolled by using the scroll slider bar on the right of the **Quick Editor** window. Alternatively, the user may select the **Attribute** dropdown list in the **Quick Editor's Activity Bar** and select an attribute. The **Quick Editor** will scroll to display that attribute.

Preference Views may be selected while the **Quick Editor** is active. Selecting the **Attribute** dropdown list allows the user to select a Preference View or perform a Basic Text Search.



Quick Editor Attributes Dropdown List

Attribute values may be edited by clicking their attribute field. Different attribute data types determine how each attribute will be edited. For instance, clicking a DATE field will allow the user to edit the text of the field or to select a date from a pop-up calendar.

A **Multi-Language** icon  will appear at the far right of attribute fields configured for Multi-Language capability. Clicking the **Multi-Language** icon  will bring up a **Multi-Language Editor** window that will allow the user to enter text to be displayed for each supported language. The list of supported languages are determined during system configuration.

Note that the values of any attributes that are calculated fields will be generated when the record is saved. They will overwrite any values entered by the user unless Enable is configured otherwise.

When finished editing the record, the user clicks **Save** to save their changes. To close the **Quick Editor**, click the **Close** icon **X** on the **Quick Editor's** upper right corner. Currently, any unsaved changes to a record will be retained in the **Quick Editor** after it is closed and can be accessed until the user logs out and logs back in.

12.3.3 Record Editor

The **Record Editor** allows users to select a record from a **Repository View** and open it in a full-screen display for editing.

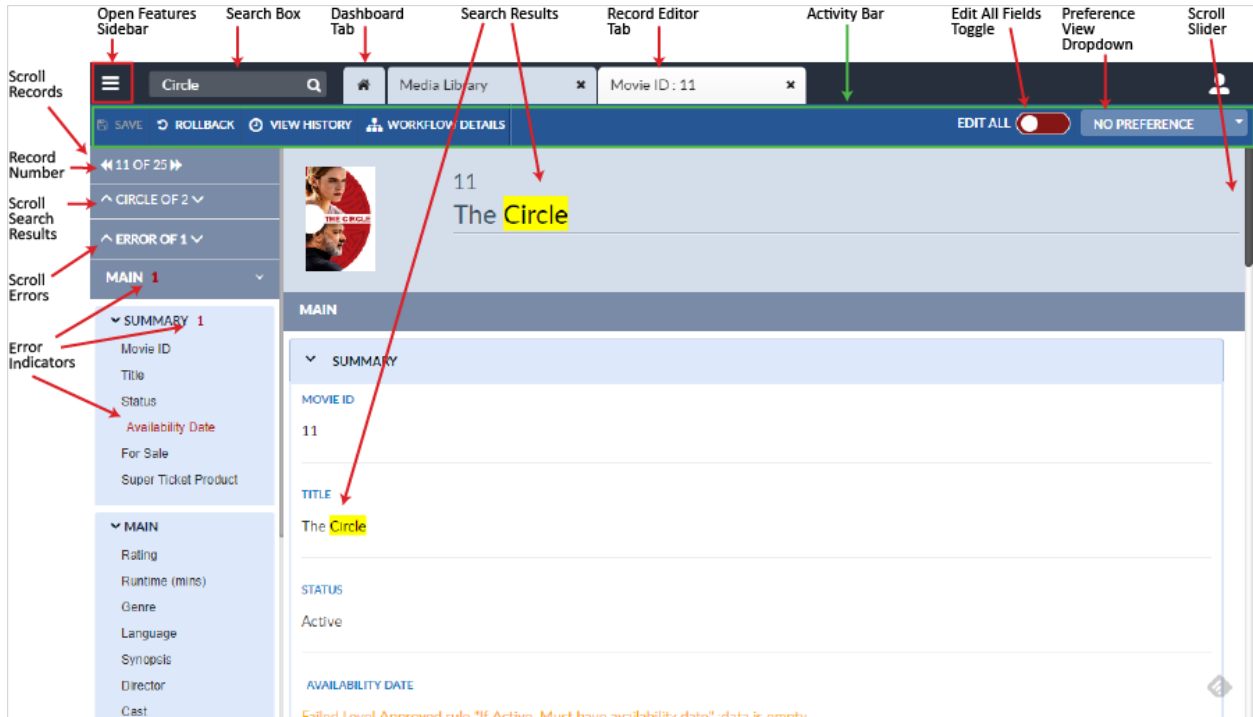
The Preference View that has been designated as the Favorite Record Editor Preference View defines how record data will be displayed in the **Record Editor** and the **Quick Editor**. When a record is opened in the **Record Editor**, it is displayed according to the Favorite Record Editor Preference View. If no Preference View has been designated as the Favorite Record Editor Preference View, the record will be displayed as defined in the repository's Default Preference View. If no Default Preference View has been selected, all record attributes will be shown.

To edit a record in the **Record Editor**, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Double clicking on an attribute field will open the record in the **Record Editor**. (Clicking once on an attribute field will activate the Inline Editor capability – see [Inline Editor](#).) Alternatively, a user may select the record, then click the **Edit** button on the **Repository View's Activity Bar**.



Record Editor

(For a larger labeled reference guide image, see [Record Editor Reference Guide](#).)

At the top of the **Record Editor Sidebar** is a **Scroll Records** controller. It allows the user to scroll through the repository's records without leaving the **Record Editor**. The records are displayed in the order of their sequence number (which should not be confused with the records' primary key or item id). If the user switches to the **Repository View** tab, sorts the records into a different order, then reopens the **Record Editor** tab, the **Scroll Records** controller will use the new sort order.

The **Scroll Search Results** controller allows the user to scroll through the list of attributes and attribute values that contain the Text Search term by clicking the up and down arrows.

The **Scroll Errors** controller allows the user to scroll through the list of attributes and attribute values that contain errors by clicking the up and down arrows.

Below the **Scroll** controllers, the **Record Editor Sidebar** lists the record's Attribute Tabs. Clicking an Attribute Tab's name expands it to display the Attribute Groups it contains. It also causes the **Edit Attribute** pane to display the tab's Attribute Groups, expanded. Clicking an Attribute Group's name in the **Record Editor Sidebar** will cause the Edit Attribute Pane to scroll

to the Attribute Group. The user may also scroll through the list of attributes by using the scroll slider on the right of the **Edit Attribute** pane.

The **Record Editor Sidebar** notes any errors or warnings the record may have, by highlighting affected attributes in red. The Attribute Groups and Attribute Tabs display a count of their attribute values with errors (in red) and warnings (in yellow). Hovering over an affected attribute will cause its error or warning message to display.



The **Edit Attributes** pane displays error message in red and warning messages in yellow.


Note that records can be saved with errors. The level of each error and their effect on the record's validation status is discussed in more detail in the [Record Validation](#) section of this document. When a record with errors or warnings is saved, a warning message appears at the bottom of the **Record Editor**.

The user can scroll through the Edit Attribute pane's list of attributes by using the mouse's scroll wheel or by using the pane's vertical scroll slider on the right.

Hovering over an attribute's label will cause a pop-up window to appear that displays the attribute's history. Clicking the **Full History** button in the pop-up window, causes the **Record History** tab to open and display the attribute's change history. (See [Record Change History](#).)

Attribute values may be edited by clicking their attribute field. Different attribute data types determine how each attribute will be edited. For instance, clicking on a DATE field will allow the user to edit the text of the field or to select a date from a pop-up calendar.

A **Multi-Language** icon  will appear at the far right of attribute fields configured for Multi-Language capability. Clicking the **Multi-Language** icon  will bring up a **Multi-Language Editor** window that will allow the user to enter text to be displayed for each supported language. The list of supported languages are determined during system configuration.

An **External Editor** icon  will appear at the far right of some attribute fields. For more information on the External Editor, contact EnterWorks.

Clicking the **Edit All** toggle in the **Record Editor's Activity Bar** opens all the attribute fields for editing.

Note that the values of any attributes that are calculated fields will be generated when the record is saved. They will overwrite any values entered by the user unless Enable is configured otherwise.

Click the **Save** button on the left end of the **Record Editor's Activity Bar** to save the changes to the record, then close the **Record Editor's** tab. To exit the **Record Editor** without saving changes, close the **Record Editor's** tab without clicking the **Save** button.

12.3.4 Multi-Edit

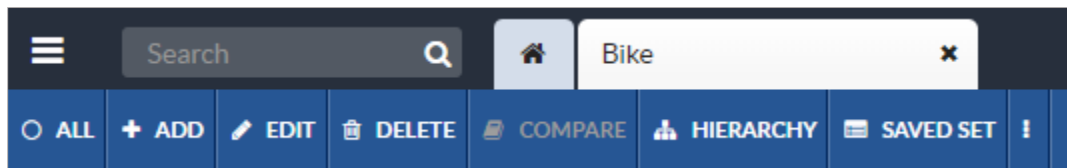
If two or more records have an attribute whose value is the same, the value can be edited in the records at the same time. The Multi-Edit capability is available in the **Record Editor**, but not in the **Quick Editor** or during **Inline Editing**.

To edit multiple records, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired records. This can be done individually, or through the use of a Search, Hierarchy, or Saved Set. Click the **Edit** button on the **Repository View's Activity Bar** to open the [Record Editor](#).



Repository View Activity Bar Buttons

The **Record Editor** will be opened in the Multi-Edit state. All attributes with identical values will be opened for editing. Other attributes can be edited; any changes made will be saved to all the edited records.

If an attribute value is changed while using Multi-Edit, it will be changed in all the records being multi-edited.

To clear an attribute value across all selected records, type anything into the attribute’s field then erase it. This will clear the attribute value in all the records.

To save any changes, click the **Save** button.

To close the **Record Editor**, click the **Close** icon **X** on the **Record Editor’s** tab.

12.3.5 Managing Link Relationships

To manage a record’s links to other records, first open the record’s repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Sten
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddleste
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record and open it in the **Record Editor** by clicking the **Edit** button in the **Repository View’s Activity Bar**, or open it in the **Quick Editor** by clicking the **Editor** toggle on the right end of the **Repository View’s Activity Bar**. For the purpose of this document, this is record is now referred to as the “active record”. Scroll to find the active record’s attribute that

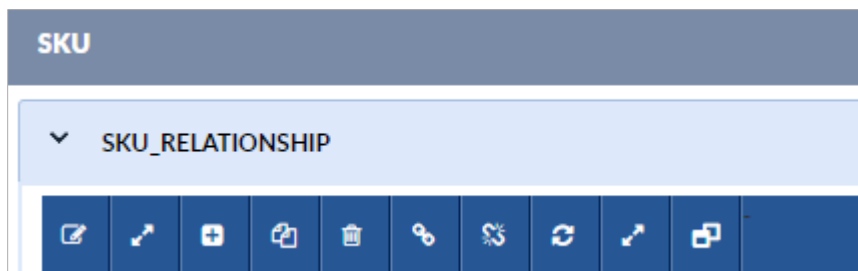
defines the linked relationships to be edited. Note that a record may have more than one attribute that defines linked relationships. An attribute’s linked records are listed in a **Links Editor**.

#	STATE	BRAND	MODEL NUMBER	SKU OWNER	TYPE	SE
<input type="checkbox"/>	▲	Panasonic	124D			51
<input type="checkbox"/>	▲	Panasonic	124D			52
<input type="checkbox"/>	▲	Panasonic	124D			53

Record Editor Linked Records

(For a detailed labeled reference guide image, see [Links Editor Reference Guide](#) .)

Each button on the **Links Editor’s Activity Bar** is described below. The set of functions available to perform on Linked Records is based on system configuration and on the functions that apply to the particular type of link relationship. The names of the buttons are configurable, so they may be named differently on different system.




Links Editor Activity Bar

Select one or more records and then select:

- **Add Link** button to link the active record to an existing record in the linked repository.
- **Add New** button to create a new record in the linked repository, link it to the active record, and open it in the **Record Editor**.

- **Copy** button to create a new item record based on an existing linked item record.
- **Delete button** to delete one or more linked item records. **WARNING:** This button deletes both the link to the item record and the item record itself. Use the **Remove Link** button to remove only the link and keep the underlying child record.
- **Edit** button to open the linked record in the **Record Editor**.
- **Open in a New Window** to open the selected linked record in a **Record Editor** window. This only works if only one record is selected.
- **Open Link Table in Window** to open the list of linked records in a **Repository View** window.
- **Open Link Table in Tab** to open the list of linked records in a separate **Repository View** tab.
- **Remove Link** button to remove one or more link relationships from the active record.
- **Refresh** button to reload the list of linked records displayed in the **Links Editor**.

If the link relationships are to digital assets, an **Upload** icon  will appear on the far right of the **Links Editor**. This allows the user to upload one or more digital asset files to the target repository, create a metadata record in DamMaster for each of the files, and link the metadata record(s) to the active record.

The order in which linked records are displayed can be changed by clicking the column headers to sort on column values.

The **List View** controls in the bottom right of the **Links Editor** allow the user to view the linked records in the **Grid View** or the **Card View**.

At the bottom of the **Link Editor** are **Number of Pages**, **Page Selector**, and **Number of Records Per Page** controls.

12.3.5.1 Add Linked Relationship

To add a link relationship to a record, first open the record in the **Records Editor**. For the purpose of this document, this record is now referred to as the “active record”. Scroll to find the active record’s attribute that defines the linked relationships to be edited. Note that a record may have more than one attribute that defines linked relationships. An attribute’s linked records are listed in a **Links Editor**.

#	STATE	BRAND	MODEL NUMBER	SKU OWNER	TYPE	SE
<input type="checkbox"/>	▲	Panasonic	124D			51
<input type="checkbox"/>	▲	Panasonic	124D			52
<input type="checkbox"/>	▲	Panasonic	124D			53

Record Editor Linked Records

Click the **Add Link** button in the **Link Editor’s Activity Bar**. The linked repository will be brought up in a **Repository View**. A green **Add Link** button will appear in the **Repository View’s Activity Bar**.

ERROR	IMAGE	PRODUCT NO	FULL PRODUCT NAME	BRAND	SERIES	TAXONOMY	PRODUCT DISPLA
<input checked="" type="checkbox"/>	▲	0056295000	CASE JB BLK SPKT SHRT BRT ORNG	Fender	Bags & Cases	Accessories.Cases	
<input type="checkbox"/>	▲	014810	Blacktop™ Stratocaster® HH (2010-...	Fender	Standard	Guitars.Electric Guitars	15

Add Linked Record

If adding a link to an existing digital asset, the slider bar just below the **Repository View’s Activity Bar** will increase or decrease the size of the image in the viewscreen. This does not actually change the image; it only displays the image larger or smaller.

Select the record to be linked to the active record and click the **Add Link** button. The link will be added to the active record’s list of linked relationships.

12.3.5.2 Add New Linked Record

To create a new record and link it to an existing record, first open the existing record in the **Record Editor**. For the purpose of this document, this record is now referred to as the “active

record”. Scroll to find the active record’s attribute that defines the linked relationships to be edited. Note that a record may have more than one attribute that defines linked relationships. An attribute’s linked records are listed in a **Links Editor**.

#	STATE	BRAND	MODEL NUMBER	SKU OWNER	TYPE	SE
<input type="checkbox"/>	⚠	Panasonic	124D			51
<input type="checkbox"/>	⚠	Panasonic	124D			52
<input type="checkbox"/>	⚠	Panasonic	124D			53

1 To 3 Of 3 Page 1 Of 1 10

Record Editor Linked Records

Click the **Add New** button on the **Links Editor’s Activity Bar**.

A new record will be created in the linked repository, linked to the active record, and opened in a new **Record Editor** tab. Note that any calculated field values will be generated when the linked record has been saved.

12.3.5.3 Edit a Record’s Linked Record

Note that if the linked record is a digital asset record, the data being edited is actually the metadata for the digital asset, not the digital asset itself.

To edit a record’s linked record, first open the record in the **Record Editor**. For the purpose of this document, this record is now referred to as the “active record”. Scroll to find the active record’s attribute that defines the linked relationships to be edited. Note that a record may have more than one attribute that defines linked relationships. An attribute’s linked records are listed in a **Links Editor**.

SKU

SKU_RELATIONSHIP

#	STATE	BRAND	MODEL NUMBER	SKU OWNER	TYPE	SE
<input type="checkbox"/>	▲	Panasonic	124D			51
<input type="checkbox"/>	▲	Panasonic	124D			52
<input type="checkbox"/>	▲	Panasonic	124D			53

1 To 3 Of 3 Page 1 Of 1 10

Record Editor Linked Records

Select the linked record to be edited and click the **Edit** button on the **Links Editor’s Activity Bar**. Alternatively, double click any of the linked record’s attribute fields.

The linked record will be opened in a new **Record Editor** tab. It may be edited and saved as described in the [Record Editor](#) section of this document.

12.3.5.4 Remove Link Relationship

Removing a link relationship from a record will not delete the linked record. It will only disassociate the record from the linked record.

To disassociate one or more linked records from a record, first open the record in the **Record Editor**. For the purpose of this document, this is record is now referred to as the “active record”. Scroll to find the active record’s attribute that defines the linked relationships to be removed. Note that a record may have more than one attribute that defines linked relationships. An attribute’s linked records are listed in a **Links Editor**.

SKU						
SKU_RELATIONSHIP						
#	STATE	BRAND	MODEL NUMBER	SKU OWNER	TYPE	SE
<input type="checkbox"/>		Panasonic	124D			51
<input type="checkbox"/>		Panasonic	124D			52
<input type="checkbox"/>		Panasonic	124D			53

1 To 3 Of 3 Page 1 Of 1 10


Record Editor Linked Records

Select one or more linked records to be disassociated from the active record. Click the **Remove Link** button in the **Links Editor’s Activity Bar**. The links will be removed from the active record. The now unlinked records are not deleted from the system.

12.3.5.5 Refresh Link


Links Editors do not refresh automatically as their content changes. To refresh the content of a **Links Editor**, select the **Refresh** button in the **Links Editor’s Activity Bar**. The contents of the **Links Editor** will be updated.

12.3.5.6 Upload Digit Asset File and Add Link

By clicking the **Upload** icon  on the far right of the **Links Editor**, a user can trigger Enable to upload one or more digital asset files to the target repository, create a metadata record in DamMaster for each of the new files or update the metadata records for existing files, and link the metadata record(s) to the active record.

For details on uploading a digital asset file and linking it to a record, see the [Digital Asset Management](#) section of this document.

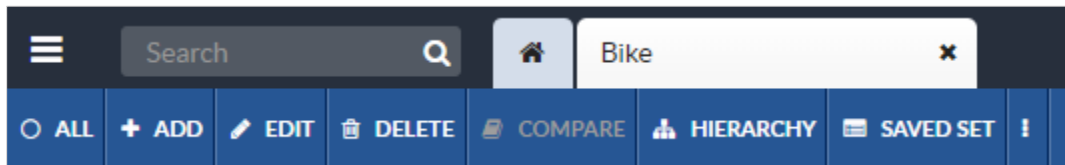
12.4 Add a New Record

To add a record to a repository, open the repository in a **Repository View**. Open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**. Select **Repository** to display a list of the accessible folders. Select the desired folder to open it. Select the desired repository. A **Repository View** tab will appear that displays the records in the selected repository.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything: Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the **Add** button on the left end of the **Repository View's Activity Bar**.



Repository View Activity Bar Buttons

An empty record will be created in the repository and opened in the **Record Editor**.

The screenshot displays the EnterWorks Record Editor interface. At the top, there is a search bar and two tabs: 'Bike' and 'New Item'. Below the search bar is a navigation bar with buttons for 'SAVE', 'ROLLBACK', and 'VIEW HISTORY'. On the right side of the navigation bar, there is a toggle for 'EDIT ALL' and a button for 'MAKE AND MODEL'. The main content area is titled 'SPACES' and contains a form with the following fields: 'SEQUENCE NUMBER', 'NAME', 'BRAND', and 'TAXONOMY'. A left sidebar shows a tree view of 'SPACES' with sub-items: 'Sequence Number', 'name', 'Brand', and 'Taxonomy'.

New Record

For detailed information about editing records, see the [Edit a Record](#) section of this document.


Note that the values of any attributes that are calculated fields will be generated when the record is saved. They will overwrite any values entered by the user unless Enable is configured otherwise.

If the record contains an auto-sequenced attribute field and Enable has been configured to allow the user to set a value for that field, any value the user enters will be saved. If the user has not entered a value, Enable will generate the field value based upon the next number in the sequence and any configured rules. Once the new record is saved, the value of the auto-sequenced field cannot be changed.

When finished editing the record, click the **Save** button on the far left of the **Record Editor's Activity Bar**. To exit, select the **Close** icon **X** on the **Record Editor's** tab.

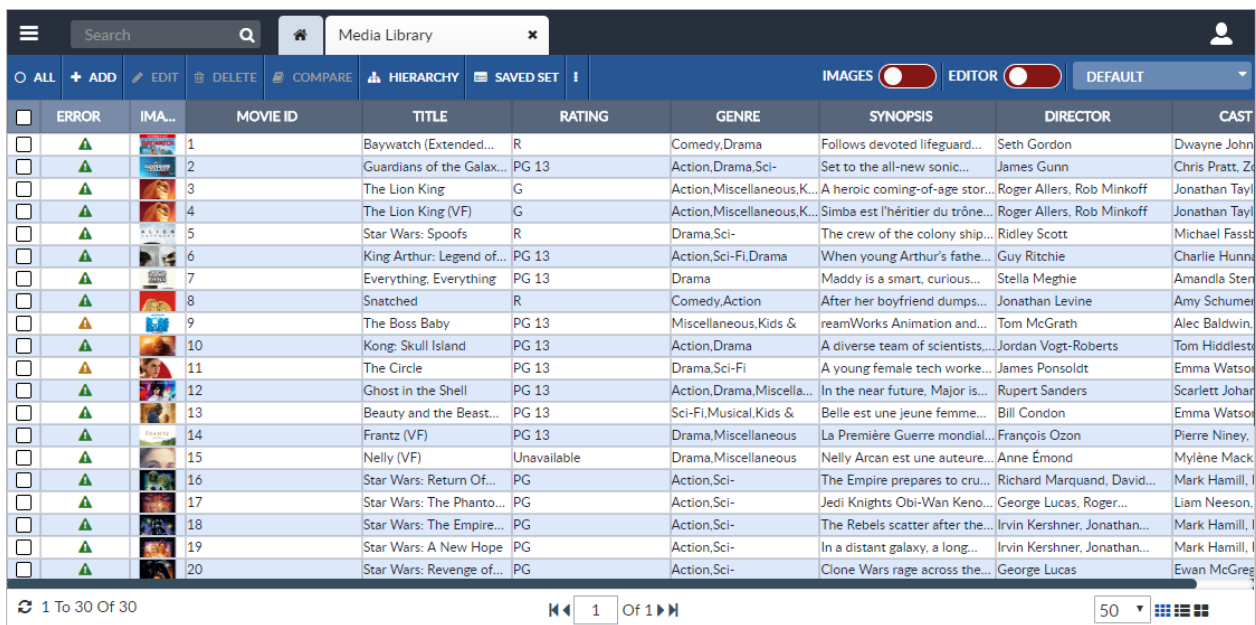
If the record's primary key is not auto-generated and the user does not enter a primary key, the field will be left empty and an error for the record will be generated. If the user enters a value in a primary key attribute that has been used elsewhere in the repository, a duplicate identifier error for the record will be generated. Enable may also be configured to ensure that within a set of repositories, no duplicate identifiers are generated or saved.

When a new record is saved, its validation status will be derived from any errors or warnings in the record and any defined validation rules. For more information about record validation, see the [Record Validation](#) section of this document.

The new record may appear at the bottom of the list of records in the **Repository View**. To re-sequence the records, click the **Refresh** icon  in the bottom left corner of the **Repository View**, or click the header of the column to sort the records by that attribute.


12.5 Copy a Record

To copy a record in a repository, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.



ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
<input type="checkbox"/>		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
<input type="checkbox"/>		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumei
<input type="checkbox"/>		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watso
<input type="checkbox"/>		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watso
<input type="checkbox"/>		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myène Mack
<input type="checkbox"/>		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
<input type="checkbox"/>		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
<input type="checkbox"/>		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
<input type="checkbox"/>		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the record to be copied. Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Select the **Copy** option from the **More Actions** dropdown List. Note that only one record may be copied at a time. If the **Copy** option is inactive (grayed out) make sure only one record is selected.

The screenshot shows the 'Media Library' interface. At the top, there is a search bar and navigation tabs for 'ALL', '+ ADD', 'EDIT', 'DELETE', 'COMPARE', 'HIERARCHY', and 'SAVED SET'. Below this is a table with columns: 'ERROR', 'IMA...', 'MOVIE ID', 'TITLE', 'STATUS', 'AVAILABILITY DATE', 'FOI', and 'PRODUCT'. The table contains 24 rows of records. A context menu is open over the table, listing actions: 'SAVED SEARCH', 'FILTER', 'IMPORT', 'EXPORT', 'VALIDATE', 'SET VALIDATION LEVEL', 'MANAGE STATE', 'HISTORY', 'ROLLBACK', 'DOWNLOAD', 'SEND TO WORKFLOW', 'EVENTS', and 'COPY'.

ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOI	PRODUCT
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017	Yes
<input checked="" type="checkbox"/>			2	Guardians of...	Active	09/01/2017	Yes
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017	Yes
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017	Yes
<input type="checkbox"/>			5	Alien...	Active	09/01/2017	Yes
<input type="checkbox"/>			6	King Arthur...	Active	09/01/2017	Yes
<input type="checkbox"/>			7	Everything....	Active	09/01/2017	Yes
<input type="checkbox"/>			8	Snatched	Active	09/01/2017	Yes
<input type="checkbox"/>			9	The Boss Baby	Active		Yes
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017	Yes
<input type="checkbox"/>			11	The Circle	Active		Yes
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017	Yes
<input type="checkbox"/>			13	Beauty and...	Active	09/15/2017	Yes
<input type="checkbox"/>			14	Frantz (VF)	Active	09/01/2017	Yes
<input type="checkbox"/>			15	Nelly (VF)	Active	09/01/2017	Yes
<input type="checkbox"/>			16	Star Wars:...	Active	09/01/2017	Yes
<input type="checkbox"/>			17	Star Wars: T...	Active	09/01/2017	Yes
<input type="checkbox"/>			18	Star Wars: T...	Active	09/01/2017	Yes
<input type="checkbox"/>			19	Star Wars: A...	Active	09/01/2017	Yes
<input type="checkbox"/>			20	Star Wars:...	Active	09/01/2017	Yes
<input type="checkbox"/>			21	Star Wars:...	Active	09/01/2017	Yes
<input type="checkbox"/>			22	Star Wars: Si...	Active	09/01/2017	Yes
<input type="checkbox"/>			23	Star Wars:...	Active	09/01/2017	No
<input type="checkbox"/>			24	Star Wars:...	Active	09/09/2017	Yes

Copy a Record

A copy of the record is generated and opened in the **Record Editor**. The source record’s attribute values will be copied to the new record. The exceptions to this are any calculated fields, auto-generated fields, and the record’s primary key.

Edit the contents of the new record as desired. For a detailed discussion on editing records, see the [Edit a Record](#) section of this document.

The values of any attributes that are calculated fields will be generated when the record is saved. They will overwrite any values entered by the user unless Enable is configured otherwise.

If the record contains an auto-sequenced attribute field and Enable has been configured to allow the user to set a value for that field, if the user enters a value, it will be saved. If the user has not, Enable will generate the field value based upon the next number in the sequence and any configured rules. Once the new record is saved, the value of the auto-sequenced field cannot be changed.

If the record’s primary key is not auto-generated and the user does not enter a primary key, the field will be left empty and an error for the record will be generated. If the user enters a value in a primary key attribute that has been used elsewhere in the repository, a duplicate identifier

error for the record will be generated. Enable may also be configured to ensure that within a set of repositories, no duplicate identifiers are generated or saved.

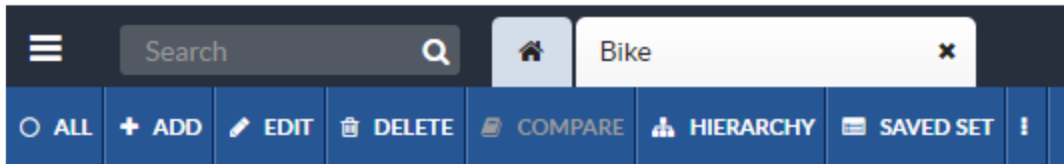
12.6 Delete a Record

To delete a record from a repository, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney...
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select one or more records to be deleted. The records may be selected individually or as a group by shift-selecting the desired records. Select the **Delete** button on the **Repository View's Activity Bar**.



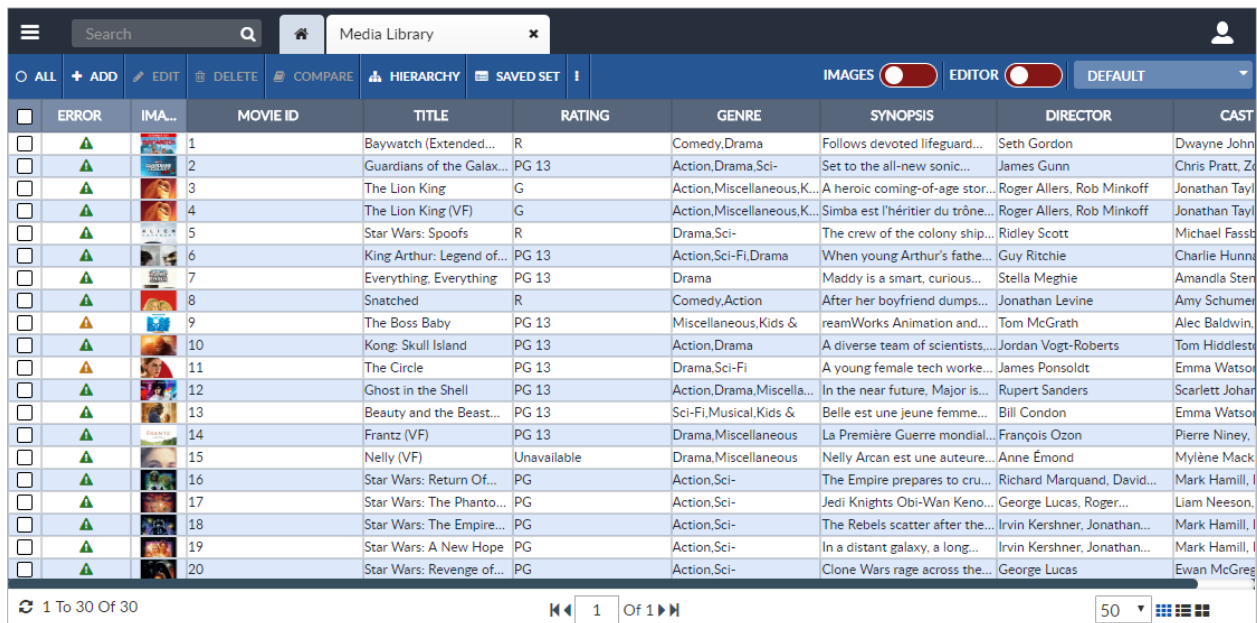
Repository View Activity Bar Buttons

A **Confirmation** window will appear that asks if the user wants to delete the selected record(s). Select **Yes** to delete the records or **No** to keep the records.

12.7 Compare Records

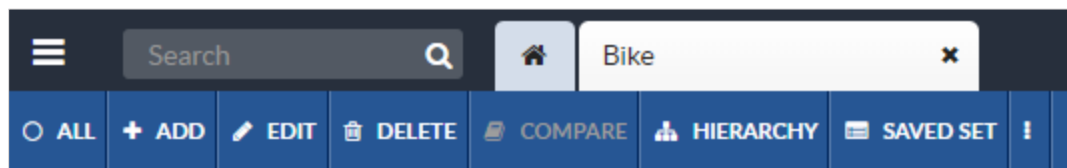
The **Compare Records** feature allows the user to display the attributes of two or more records in a tab side by side in order to visually note the similarities and differences in the values of the records' attributes. The user may specify whether they wish to see all of the records' attributes or only the attributes that have different values.

To compare two or more records, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.



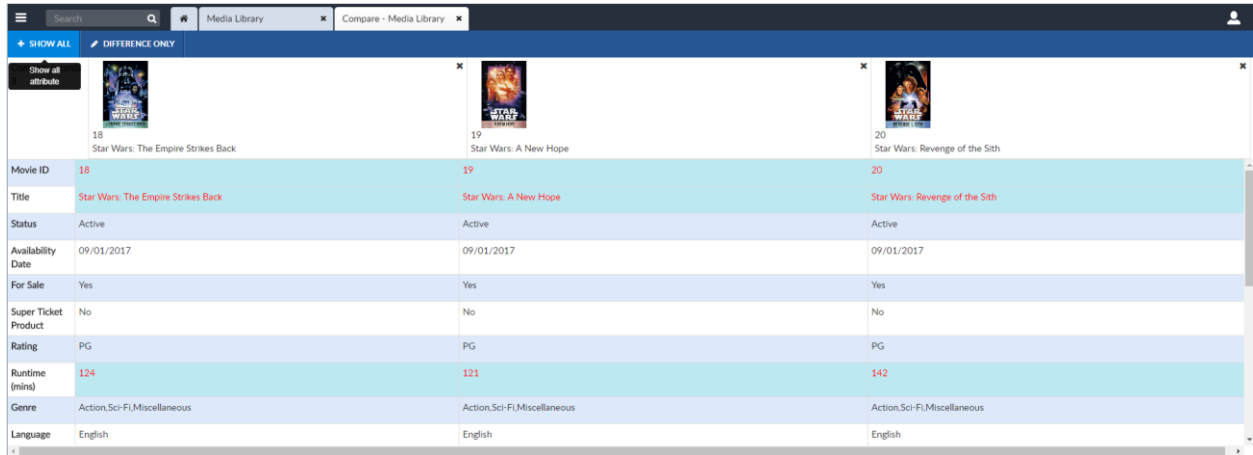
Repository View Grid View

Select the record or records you wish to view. Click the **Compare** button on the **Repository View's Activity Bar**.



Repository View Activity Bar Buttons

A **Compare** window will appear. It contains a table, with the name of the record attributes down the left side and the values of each record’s attributes in adjacent columns.



Compare Records: Show All Attributes

A scroll bar on the side of the **Compare** window lets the user scroll down the list of attributes. A slider bar on the bottom of the **Compare** window lets the user scroll sideways to view all the records being compared.

There are two options for viewing the record attributes in the **Compare** window. The user can choose between the views by selecting the buttons on the left end of the **Compare** window’s **Activity Bar**. **Show All** causes all the attributes to be shown, with the dissimilar attribute values marked in red. **Difference Only** displays only the attributes whose values are different.

	18	19	20
Compare records	3		
Movie ID	18	19	20
Title	Star Wars: The Empire Strikes Back	Star Wars: A New Hope	Star Wars: Revenge of the Sith
Runtime (mins)	124	121	142
Synopsis	The Rebels scatter after the Empire attacks their base on the ice planet Hoth. Han Solo and Princess Leia are pursued by Imperials, while Luke trains with Jedi Master Yoda. Luke must battle Darth Vader and learns the shocking truth of his past	In a distant galaxy, a long time ago, young Luke Skywalker assembles his motley crew of allies including space rogue Han Solo and two "droids" -- C3PO and R2D2 -- to rescue Princess Leia, the rebel leader of her planet from the clutches of the evil Empire as embodied by its enforcer Darth Vader.	Clone Wars rage across the galaxy as Anakin Skywalker turns to the dark side and corrupts Anakin Skywalker's apprentice, Obi-Wan Kenobi, as the Jedi Order confronts his fallen friend Darth Vader.
Director	Irvin Kershner, Jonathan Barry, Peter MacDonald, Harley Cokeliss	Irvin Kershner, Jonathan Barry, Peter MacDonald, Harley Cokeliss	George Lucas
Cast	Mark Hamill, Harrison Ford, Carrie Fisher, Billy Dee Williams, Anthony Daniels, David Prowse, Peter Mayhew, Kenny Baker, Alec Guinness, Jeremy Bulloch	Mark Hamill, Harrison Ford, Carrie Fisher, Billy Dee Williams, Anthony Daniels, David Prowse, Peter Mayhew, Kenny Baker, Alec Guinness, Jeremy Bulloch	Ewan McGregor, Natalie Portman, Hayden Christensen, Jimmy Smits, Frank Oz, A... (truncated)
URL for poster art	https://cinplex.cpxstoreimages.com/cinplex?set=imageSize[large227],imageURL[http://cinplex.cdn2.dmlib.com/u/Assets/a1/A3/49/a1-336051/s1-4370193/p_800x1200_starwarsV.jpg&call=ur[file:web/sizing].&sink=quality[70]	https://cinplex.cpxstoreimages.com/cinplex?set=imageSize[large227],imageURL[http://cinplex.cdn2.dmlib.com/u/Assets/a1/5B/CC/a1-341944/s1-4393963/p_800x1200_New_Hope_A_En_033015.jpg&call=ur[file:web/sizing].&sink=quality[70]	https://cinplex.cpxstoreimages.com/cinplex?set=imageSize[large227],imageURL[http://cinplex.cdn2.dmlib.com/u/Assets/a1/5B/CC/a1-336049/s1-4370192/p_800x1200_sith.jpg&call=ur[file:web/sizing].&sink=quality[70]
Manifest URL	u/Assets/a1/CF/09/a1-178619/s1-3448361/a1-178619-s1-3448361.ism/manifest	u/Assets/a1/CF/09/a1-178620/s1-3448362/a1-178620-s1-3448362.ism/manifest	u/Assets/a1/CF/09/a1-178621/s1-3448363/a1-178621-s1-3448363.ism/manifest

Compare Records: Show Differences Only

12.8 Record Change History

To view a record's change history, first open the record's repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST	
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Sten
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientis...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

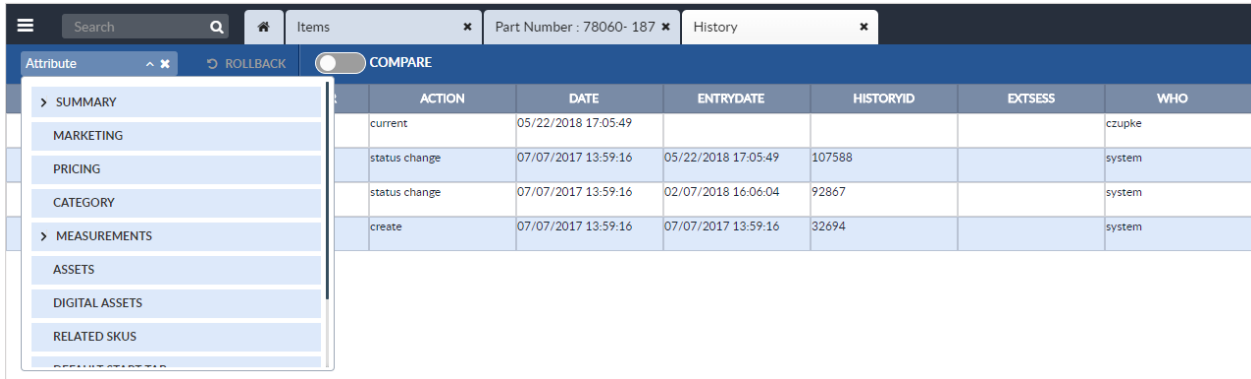
Select the desired record. Open the **More Actions** dropdown list by clicking the on the **Repository View's Activity Bar**. Click the **History** button. Alternatively, open the record in the **Record Editor** and click the **View History** button on the **Record Editor's Activity Bar**. The record's change history will be opened in a **Record History** tab.

#	MOVIE ID	TITLE	ACTION	DATE	ENTRYDATE	HISTORYID
<input type="checkbox"/>	63	The Lincoln Years: Change 10	current	05/27/2018 00:01:41		
<input type="checkbox"/>	63	The Lincoln Years: Change 9	update	05/27/2018 00:00:21	05/27/2018 00:01:41	107770
<input type="checkbox"/>	63	The Lincoln Years: Change 8	update	05/27/2018 00:00:09	05/27/2018 00:00:21	107769
<input type="checkbox"/>	63	The Lincoln Years: Change 7	update	05/26/2018 23:59:52	05/27/2018 00:00:09	107768
<input type="checkbox"/>	63	The Lincoln Years: Change 6	update	05/26/2018 23:59:30	05/26/2018 23:59:52	107767

Record History Tab

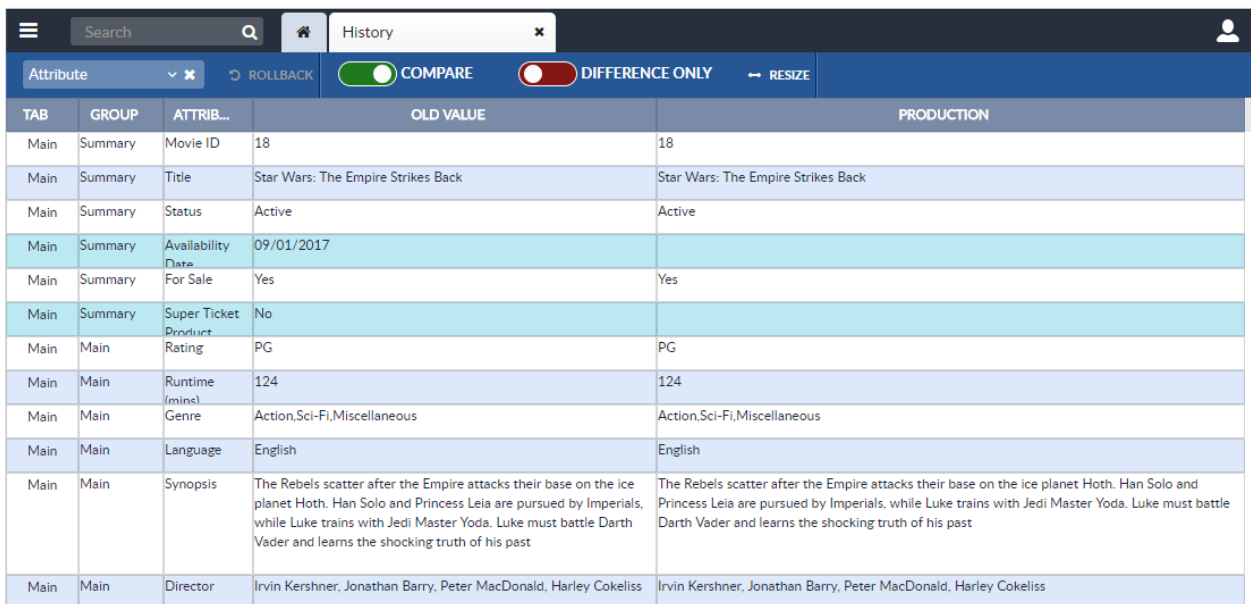
The **Record History** tab displays a table that lists the state of all the record's attributes each time one or more of them were changed. A slider bar on the bottom of the **Record History** tab allows the user to scroll right or left to see all the record's attributes.

The **Attribute** dropdown list allows the user to view only the entries that contain changes to a particular attribute. To remove the effect of the **Attribute** dropdown list selection, click the **Close** icon **X** on the **Attribute** dropdown list.



Record History Select Attribute

Two change history entries can be compared by selecting the entries and clicking the **Compare** toggle on the **History** tab's **Activity Bar**. All the record's attributes will be displayed for both change entries. The attribute values that are different between the entries will be highlighted.



Compare Record Change History Entries: Show All Attributes

To display only the differences in the record's change history entries, select the **Difference Only** toggle (it will turn green).

TAB	GROUP	ATTRIBUTE	OLD VALUE	PRODUCTION
Main	Summary	Availability Date	09/01/2017	
Main	Summary	Super Ticket Product	No	
States	Record States	Date	2017-09-08 08:19:14.12	
States	Record States	validationLevelInd	Ready to Syndicate	
States	Record States	recordState	2	
States	Record States	productionState	0	
States	Record States	workflowState	0	
States	Record States	stateUpdateTime	2017-09-07 10:34:14.7	

Compare Record Change History Entries: Show Differences Only


12.9 Rollback Record Changes

The Rollback Record Changes capability allows the user to undo the last saved changes to a record – to roll it back to the previous version. Rolling back the record again will cause the record to undo the last change (which was to roll back the record) and the record will revert to the state it was in before the rollbacks were done.

To rollback changes to a record, first open the record’s repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record. Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Click the **History** button. Alternatively, open the record in the **Record Editor** and click the **View History** button on the **Record Editor's Activity Bar**. The record's change history will be opened in a **History** tab.

#	MOVIE ID	TITLE	ACTION	DATE	ENTRYDATE	HISTORYID
<input type="checkbox"/>	63	The Lincoln Years: Change 10	current	05/27/2018 00:01:41		
<input type="checkbox"/>	63	The Lincoln Years: Change 9	update	05/27/2018 00:00:21	05/27/2018 00:01:41	107770
<input type="checkbox"/>	63	The Lincoln Years: Change 8	update	05/27/2018 00:00:09	05/27/2018 00:00:21	107769
<input type="checkbox"/>	63	The Lincoln Years: Change 7	update	05/26/2018 23:59:52	05/27/2018 00:00:09	107768
<input type="checkbox"/>	63	The Lincoln Years: Change 6	update	05/26/2018 23:59:30	05/26/2018 23:59:52	107767

Record History Before Rollback

The **History** tab displays a table that lists the state of all the record's attributes each time one or more of them were changed. A slider bar on the bottom of the **History** tab allows the user to scroll right or left to see all the record's attributes.

Select any previous version of the record and click the **Rollback** button on the **History** tab's **Activity Bar**. The record's attributes will revert to the values they had before the record was last modified. (It does not matter which version of the record is selected – the Rollback Record Changes capability only rolls the record values back to the last time the record was modified.)

The **History** tab does not automatically refresh to show the changes to the record. To see the changes, the user must refresh their browser or close and reopen the **History** tab. The record's changes will be shown as a new entry in the **History** tab.

#	MOVIE ID	TITLE	ACTION	DATE	ENTRYDATE	HISTORYID
<input type="checkbox"/>	63	The Lincoln Years: Change 9	current	05/26/2018 16:25:52		
<input type="checkbox"/>	63	The Lincoln Years: Change 10	update	05/26/2018 15:53:08	05/26/2018 16:25:52	107759
<input type="checkbox"/>	63	The Lincoln Years: Change 9	update	05/26/2018 15:52:48	05/26/2018 15:53:08	107741
<input type="checkbox"/>	63	The Lincoln Years: Change 8	update	05/26/2018 15:52:27	05/26/2018 15:52:48	107740
<input type="checkbox"/>	63	The Lincoln Years: Change 7	update	05/26/2018 15:47:23	05/26/2018 15:52:27	107739
<input type="checkbox"/>	63	The Lincoln Years: Change 6	update	05/26/2018 15:47:15	05/26/2018 15:47:23	107738

Record History After First Rollback

Note that rolling back the state of the record again causes the record's attributes to revert to their values prior to the last change, in effect, reversing the first rollback.

#	MOVIE ID	TITLE	ACTION	DATE	ENTRYDATE
<input type="checkbox"/>	63	The Lincoln Years: Change 10	current	05/26/2018 16:32:59	
<input type="checkbox"/>	63	The Lincoln Years: Change 9	update	05/26/2018 16:25:52	05/26/2018 16:32:59
<input type="checkbox"/>	63	The Lincoln Years: Change 10	update	05/26/2018 15:53:08	05/26/2018 16:25:52
<input type="checkbox"/>	63	The Lincoln Years: Change 9	update	05/26/2018 15:52:48	05/26/2018 15:53:08
<input type="checkbox"/>	63	The Lincoln Years: Change 8	update	05/26/2018 15:52:27	05/26/2018 15:52:48
<input type="checkbox"/>	63	The Lincoln Years: Change 7	update	05/26/2018 15:47:23	05/26/2018 15:52:27

Record History After Second Rollback


12.10 Download Digital Assets

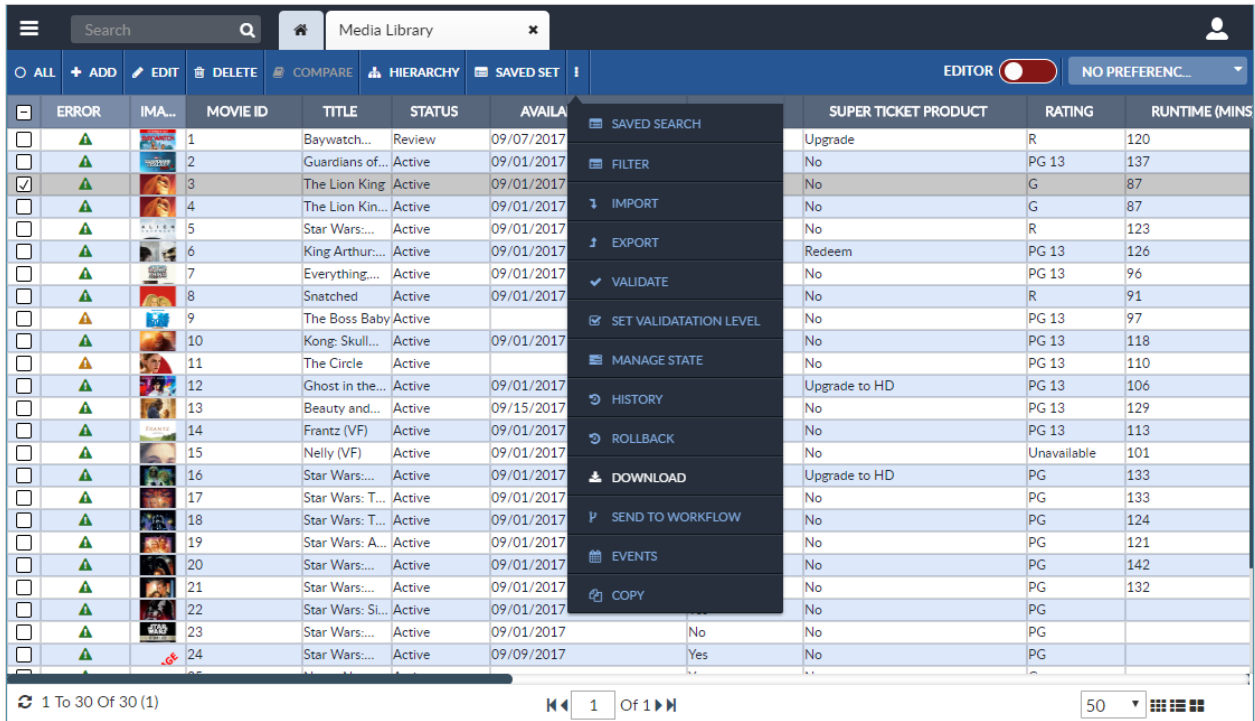
The Download Records functionality allows a user to create and download a compressed file of the selected records’ digital assets.

To download assets from one or more records, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

Media Library											
ALL	ADD	EDIT	DELETE	COMPARE	HIERARCHY	SAVED SET	IMAGES		EDITOR		DEFAULT
ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR		CAST		
<input type="checkbox"/>		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon		Dwayne John		
<input type="checkbox"/>		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn		Chris Pratt, Z		
<input type="checkbox"/>		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff		Jonathan Tayl		
<input type="checkbox"/>		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff		Jonathan Tayl		
<input type="checkbox"/>		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott		Michael Fasst		
<input type="checkbox"/>		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie		Charlie Hunne		
<input type="checkbox"/>		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie		Amanda Ster		
<input type="checkbox"/>		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine		Amy Schumer		
<input type="checkbox"/>		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath		Alec Baldwin,		
<input type="checkbox"/>		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts		Tom Hiddlest		
<input type="checkbox"/>		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt		Emma Watson		
<input type="checkbox"/>		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders		Scarlett Johar		
<input type="checkbox"/>		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon		Emma Watson		
<input type="checkbox"/>		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon		Pierre Ninety,		
<input type="checkbox"/>		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond		Mylène Mack		
<input type="checkbox"/>		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...		Mark Hamill, I		
<input type="checkbox"/>		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...		Liam Neeson,		
<input type="checkbox"/>		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...		Mark Hamill, I		
<input type="checkbox"/>		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...		Mark Hamill, I		
<input type="checkbox"/>		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas		Ewan McGreg		

Repository View Grid View

Select the record or records whose assets are to be downloaded. Open the **More Actions** dropdown list by clicking the **More** button  on the **Repository View's Activity Bar**. Click the **Download** button. Alternatively, open a record in the **Record Editor** or the **Quick Editor** and click on the record's image.



More Actions: Download Record

A **Download Files** window will appear.



Download Record Window

The **Download Type** dropdown list applies to images and allows the user to select the variants of images they want to download.

The **Compressed File Name** field allows the user to enter the name of the file to be downloaded.


Currently the only option for type of downloaded file is .zip.

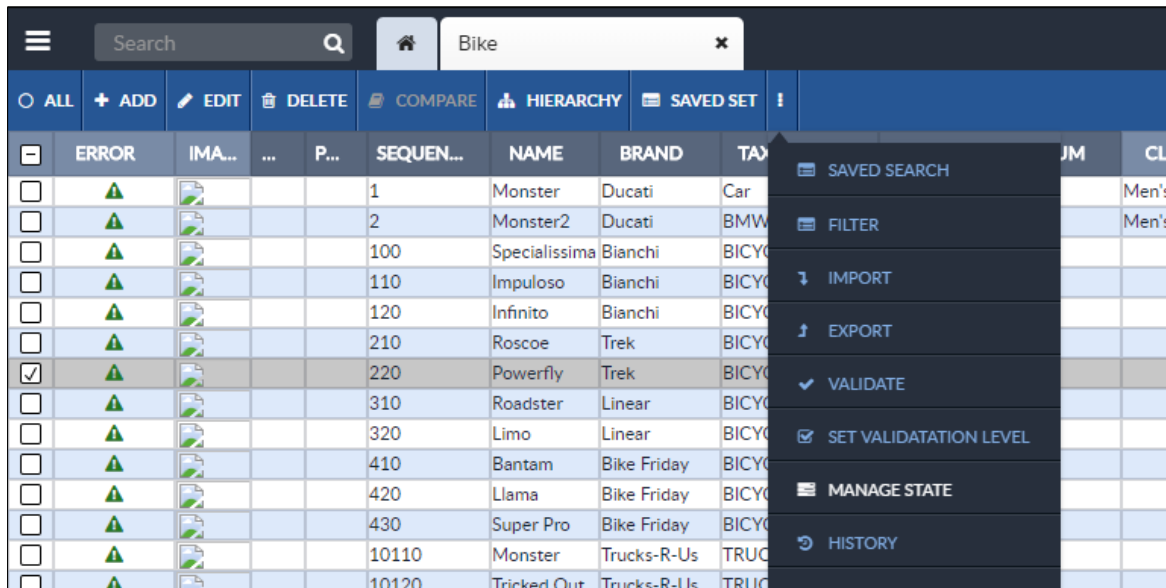
Select **Download** to create a compressed file and download it to the user’s computer. Select **Cancel** to exit without creating a download file.

12.11 Manage a Record’s State

The Manage Record State functionality allows the user to manage several different record state indicators for one or more records. The choice of state indicators included in this functionality and their available values are configurable by the system administrator.

To modify the state of one or more records, first open their repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

Select the record or records whose state is to be edited. Open the **More Actions** dropdown list by clicking the **More** button  on the **Repository View’s Activity Bar**. Click the **Manage State** button.



More Dropdown Menu: Manage State

The **Manage Record State** window will appear.

Manage Record State

The **Manage Record State** window displays status indicators for the record. The choice of status indicators and their values are configurable by the system administrator.

- **Record Status:** Indicates if the record is in sync with the Production record. Possible values include: New (the record is new), Sync (the record is in sync), Change (record has been changed but not re-synced), and Delist.
- **Workflow State:** If locked, the record is associated with a work item that is in a workflow.
- **Share Record Across Security Context:** Indicates if the record is shared or if it can only be accessed by users within the same Security Context.
- **Assigned Security Context:** The Security Context of the record.

Select the desired values in the state dropdown lists. Click **Save** to save the new state(s) and exit the window. Select **Cancel** to exit the window without saving the state(s).

13 Search

13.1 Filters

Filters provide a way for the user to quickly find a set of records based on the values of selected attributes.

Users can apply Filters in two ways, through the Predefined Filter functionality and the Dynamic Filter functionality. The first requires the repository be prepared for drill down Filters; the second is available on all repositories.

If a Filter placed on a Repository View is the only Active Filter, it restricts the **Repository View's** record list to only those records that contain the specified attribute value. See [Multiple Filter Interaction](#) for information regarding the effect of multiple Active Filters.

Creating a Filter also causes an **Active Filter** box to be displayed in the **Active Filters Bar** that indicates the name of the attribute and what Filter is being applied to its values. To remove a Filter, close its **Active Filter** box.

13.1.1 Multiple Filter Interaction

A repository can have more than one Active Filter at a time. The manner in which they interact depends on the manner in which they were created.

First Filter	Second Filter	Interaction	Results
Predefined	Predefined; Same Attribute	OR	Records with the first value OR the second will be displayed.
Predefined	Predefined; Different Attribute	AND	Records with the first value AND the second will be displayed.
Predefined	Dynamic	AND	Records with the first value AND the second will be displayed.
Dynamic	Dynamic	AND	Records with the first value AND the second will be displayed.
Dynamic	Predefined	Predefined Only	The Dynamically created Filter is removed. The Predefined Filter is applied.

13.1.2 Predefined Filters

During configuration, the system administrator selects particular attributes in a repository to be drill down indexes.


When the user opens the **Filter Sidebar**, a list of the drill down index attributes appear. Upon the user expanding an index attribute, a list of all the values that attribute has in the repository is displayed. Each attribute listing includes a count of how many times that attribute value appears in the repository. If a Saved Set is in use in the **Repository View**, the Filter will show attribute values and counts applicable to the Saved Set only.

Selecting an attribute value causes a Filter to be placed on the **Repository View**. If the new Filter is the only Active Filter, it will cause the Repository View to only lists those records that contain the specified attribute value. See [Multiple Filter Interaction](#) for information regarding the effect of multiple Active Filters.

Creating a filter causes an **Active Filter** box to be displayed in the **Active Filters Bar** that indicates the name of the attribute and what Filter is being applied to its values.

13.1.2.1 Apply a Predefined Filter

To apply a Filter to a repository using the Predefined Filter capability, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Filter** option.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunne
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

The Filter Sidebar will appear.

FILTER	ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOR SAL
			1	Baywatch...	Review	09/07/2017	Yes
			2	Guardians of...	Active	09/01/2017	Yes
			3	The Lion King	Active	09/01/2017	Yes
			4	The Lion Kin...	Active	09/01/2017	Yes
			5	Star Wars:...	Active	09/01/2017	Yes
			6	King Arthur:...	Active	09/01/2017	Yes
			7	Everything,....	Active	09/01/2017	Yes
			8	Snatched	Active	09/01/2017	Yes
			9	The Boss Baby	Active		Yes
			10	Kong: Skull...	Active	09/01/2017	Yes
			11	The Circle	Active		Yes
			12	Ghost in the...	Active	09/01/2017	Yes
			13	Beauty and...	Active	09/15/2017	Yes
			14	Frantz (VF)	Active	09/01/2017	Yes
			15	Nelly (VF)	Active	09/01/2017	Yes
			16	Star Wars:...	Active	09/01/2017	Yes

Filter Sidebar

Expand an attribute name to see a list of all the values it has in the repository and a count of how many times each attribute value appears. If a Saved Set is in use, the **Filter Sidebar** will show attribute values and counts applicable to the Saved Set only.

Select an attribute value to place a Filter on the repository.

<input type="checkbox"/>	ERROR	SEQUENCE NUMBER	BRAND	NAME	TAXONOMY
<input type="checkbox"/>	▲	410	Bike Friday	Bantam	BICYCLE.RECUMBE
<input type="checkbox"/>	▲	420	Bike Friday	Llama	BICYCLE.RECUMBE
<input type="checkbox"/>	▲	430	Bike Friday	Super Pro	BICYCLE.RECUMBE

Select an Attribute Filter

If the new Filter is the only Active Filter on the repository, it will restrict the **Repository View's** record list to only records that contain the selected attribute value. Selecting more attribute values will create additional Active Filters. See [Multiple Filter Interaction](#) for information regarding the effect of multiple Active Filters.

Applying a Filter also causes an **Active Filter** box to appear in the **Active Filter Bar**. To remove a Filter, close its **Active Filter** box.

13.1.3 Dynamic Filters

Filters can be placed on any repository using the Dynamic Filter capability, not just those assigned drill down indexes by the system administrator. The user can click any of a repository's attribute headers to create an Active Filter.

If the new Filter is the only Active Filter, it will cause the **Repository View** to list only the records containing that attribute value. For information regarding the interaction between multiple Active Filters, see [Multiple Filter Interaction](#).

When a new Filter is created, an **Active Filter** box for it will appear in the **Active Filter Bar**. Closing the **Active Filter** box will remove the Filter’s effect from the **Repository View**.

13.1.3.1 Apply a Dynamic Filter

To apply a Filter to a repository using the Dynamic Filter capability, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

On the desired attribute column header, select the **Filter** icon to the right of the attribute’s name. Note that the **Filter** icon will not appear until the cursor is hovering over the attribute column header.

Search <input type="text"/>				Home	Bike
ALL	+ ADD	EDIT	DELETE	COMPARE	
ERROR	SEQUENCE NUMBER	☰	BRAND		
▲	1		Ducati		
▲	2		Ducati		
▲	100		Bianchi		

Dynamic Filter

An **Add Filter** window will appear. The options available in the **Add Filter** window depend on the attribute's data type.

FILTER
X

Title Contains

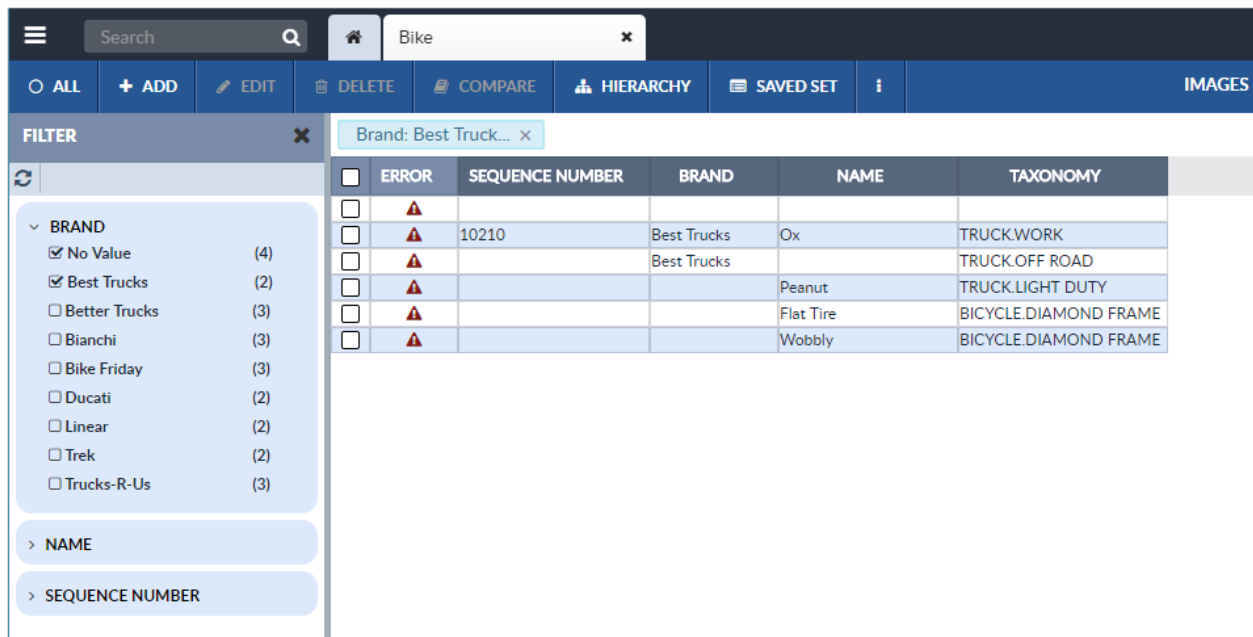
Title

CANCEL
APPLY

Dynamic Filter Options

Enter the desired attribute value. Select **Apply** to establish the attribute Filter. Select **Cancel** to exit the window without establishing the attribute Filter.

If the new Filter is the only Active Filter, it will cause the **Repository View** to list only the records containing that attribute value. For information regarding the interaction between multiple Active Filters, see [Multiple Filter Interaction](#).



Active Filter

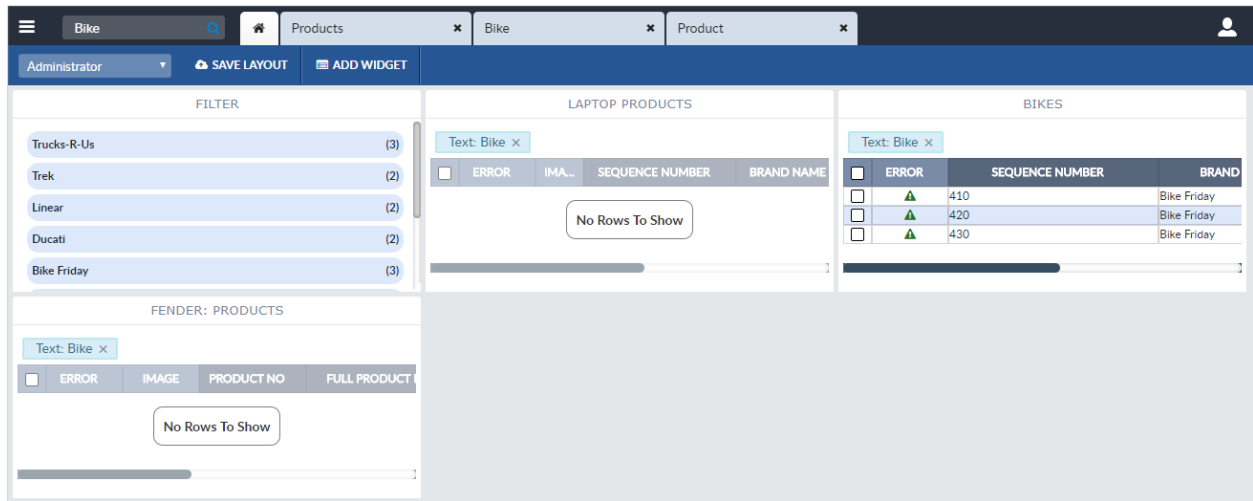
13.2 Basic Text Search

The most simple search is a Basic Text Search. For this search, the user enters text into the **Text Search** box on the far left of the **Tab Bar**. Enable searches the current view to find any occurrences of the search term. The search term becomes a Filter. An **Active Filter** box for it is displayed in the **Active Filter Bar**; its title indicating that it is a Text Filter. Closing the Active Filter box removes the effect of the Filter.

The Basic Text Search acts upon **Repository View** tabs, **Repository View** Widgets, the **Record Editor**, and the **Saved Set Editor**.

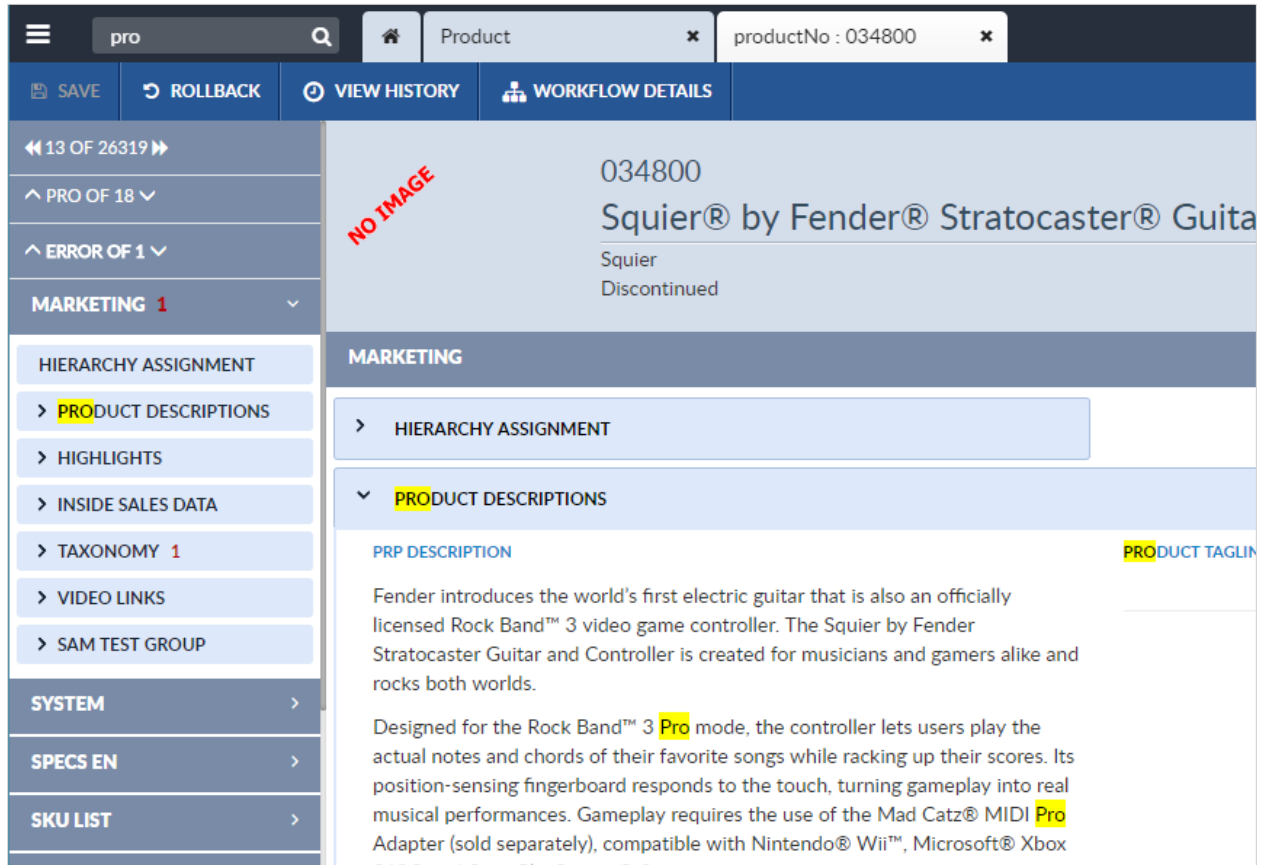
In **Repository View** tabs and Widgets, executing a Basic Text Search adds a Text Filter to the **Repository View**, causing it to only display records that contain the search term somewhere in the record, either as an attribute name or as an attribute value.

If a Basic Text Search is executed from the Dashboard and there is more than one open **Repository View** Widget, the Text Filter will be applied to all the **Repository View Widgets**. Closing the Text Filter box in one **Repository View** Widget will close the Text Filter in all the Widgets.



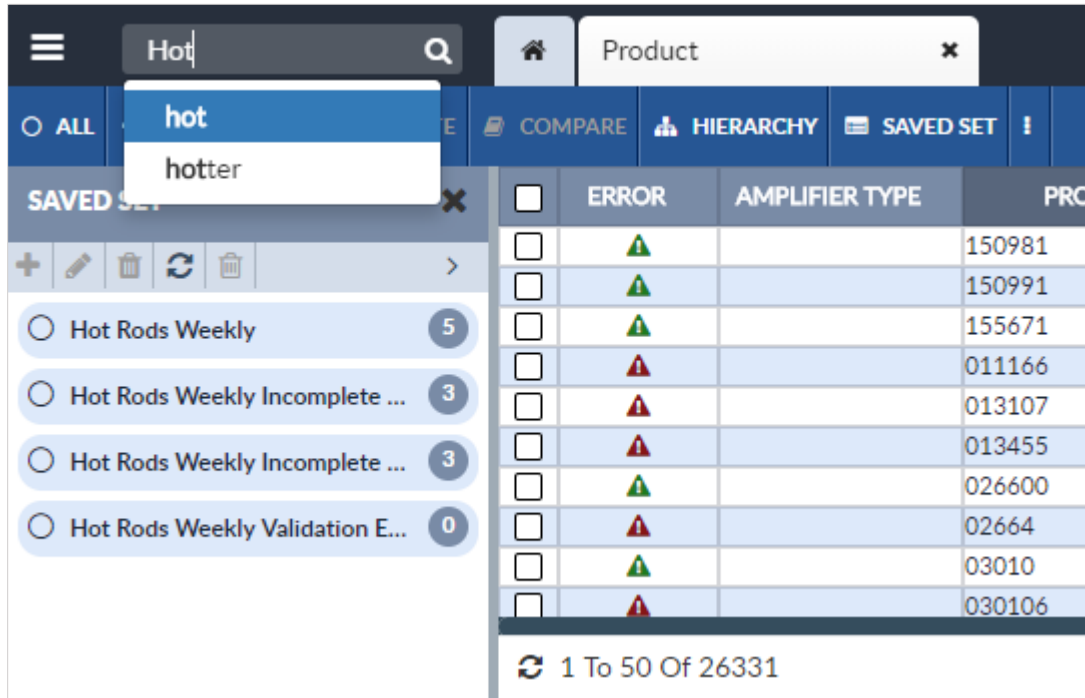
Text Search in Dashboard

In the **Record Editor**, executing a Basic Text Search causes every occurrence of the search term to be highlighted, in both attribute names and attribute values.



Basic Text Search in the Record Editor

If the **Saved Set Editor** is active, typing inside the **Text Search** box causes the list of Saved Sets to be restricted to only those whose name starts with the entered text.



Basic Text Search in Saved Set Editor

13.2.1 Basic Text Search Behaviors

The Basic Text Search has the following behaviors:

- There can be only one active Text Filter at a time. If there is an active Text Filter and another Basic Text Search is started, the first Text Filter will be cleared and replaced by the second Text Filter.
- Position: The Basic Text Search will find any occurrence of a text string, whether it is in the beginning, middle, or end of a word.
- Case: The Basic Text Search ignores a character’s case. It will find any occurrence of the entered text, whether it is in upper case, lower case, or a mix of cases.
- Wildcards: The Basic Text Search recognizes the * (meaning a string of characters) and % (a single character) as wildcards, but only at the end a word with at least 5 characters entered. For instance, Enable will recognize “Produ*” or “Product*” but not “P*” or “Produ*t”.
- Multiple search terms: If multiple words (sets of characters separated by blanks) are entered into the **Text Search Box**, Basic Search Text will treat them as one Text Filter. Closing the **Text Filter** box will remove the Filter for all the words.

In a **Repository View**: The Text Filter words will be treated as a phrase. A record must contain the whole phrase (all the words, in order) for it to appear in the **Repository View**.

In the **Record Editor**: All occurrence of any of the words in the Text Filter will be noted.

- Hovering over a **Text Filter** box will cause a small pop-up to display the entire Search Term.

13.3 Saved Search

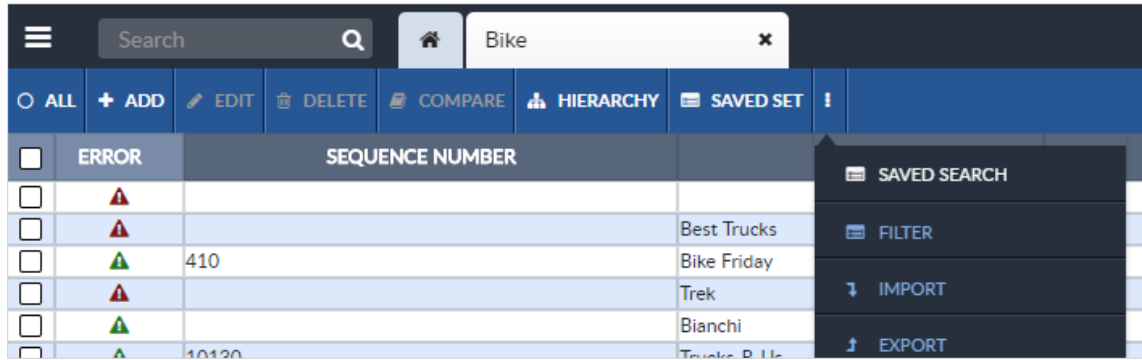
13.3.1 View/Use Saved Search

To view the Saved Searches available for a repository, first open the repository in a **Repository View**. To do this, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

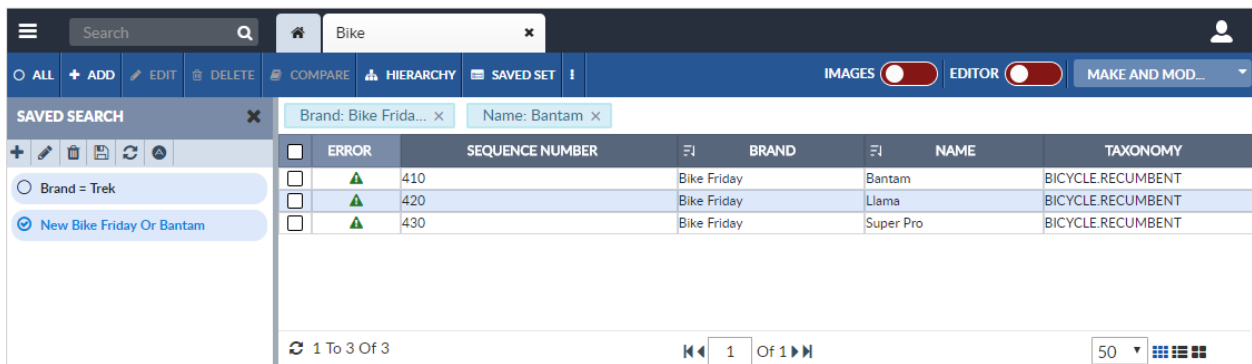
Repository View Grid View

Open the **More Actions** dropdown by clicking the on the **Repository View's Activity Bar**. Select the **Saved Search** option.



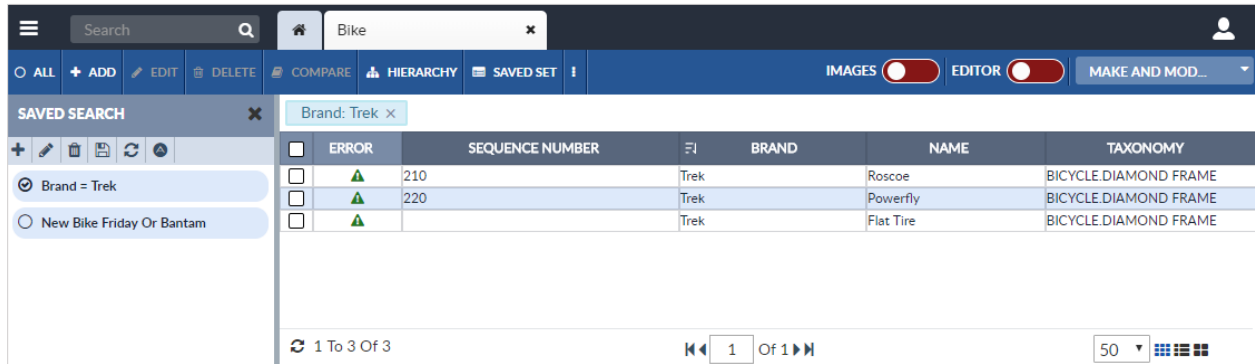
More Actions: Saved Search

The **Saved Search Sidebar** will appear. The available Saved Searches are listed.



Saved Search Sidebar

Select the desired Saved Search to apply it. The repository will be filtered as specified in the Saved Search. A **Filter Term** box for the Saved Set will be created in the Active Filters Bar.



Saved Search in Use

To disable a Saved Search, either unselect the Saved Search or close the **Filter Term** box in the **Repository View**. Note that refreshing the **Saved Set Sidebar** clears the selected Saved Set’s checkbox but does not remove the filter.

13.3.2 Create a Saved Search

Permitted users can create a Saved Search.

To create a Saved Search for a repository, first open the repository in a **Repository View**. To do this, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

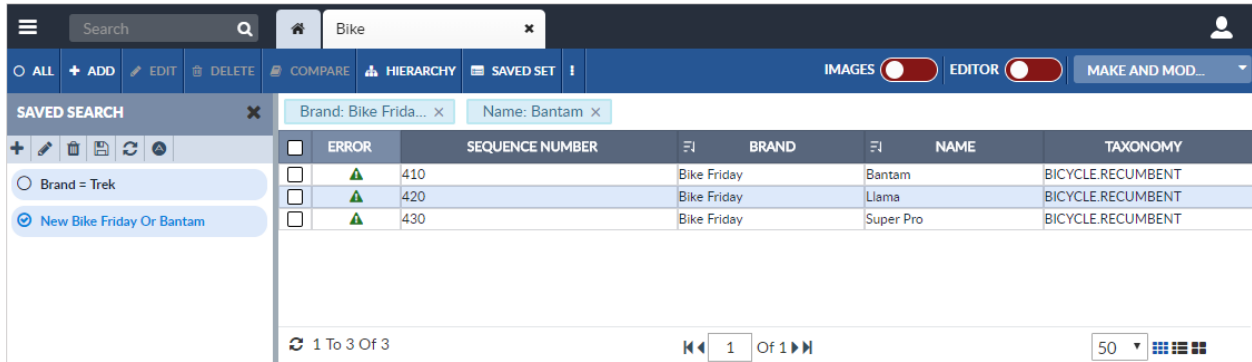
Open the **More Actions** dropdown by clicking the on the **Repository View's Activity Bar**. Select the **Saved Search** option.

ERROR	SEQUENCE NUMBER	
		Best Trucks
	410	Bike Friday
		Trek
		Bianchi
	10120	Trucks B. H...

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT

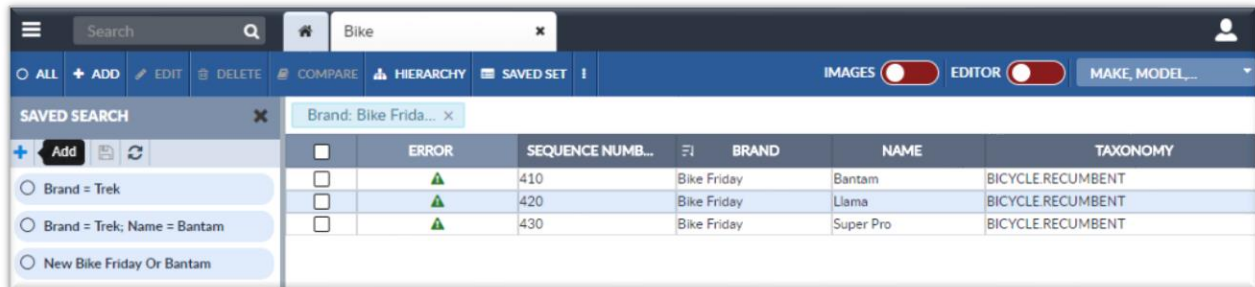
More Actions: Saved Search

The **Saved Search Sidebar** will appear.



Saved Search Sidebar

Click attribute column headers to create Dynamic Filters. (See [Dynamic Filters](#).) When the Dynamic Filters have been applied as desired, click the **Add Saved Search** button.



The Saved Search will be displayed in the **Saved Search Sidebar**. The **Saved Search Sidebar** may need to be refreshed before the new Saved Set appears.


13.3.3 Modify a Saved Search

A Saved Search can be modified by the user who created it.





To modify a Saved Search for a repository, first open the repository in a **Repository View**. To do this, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

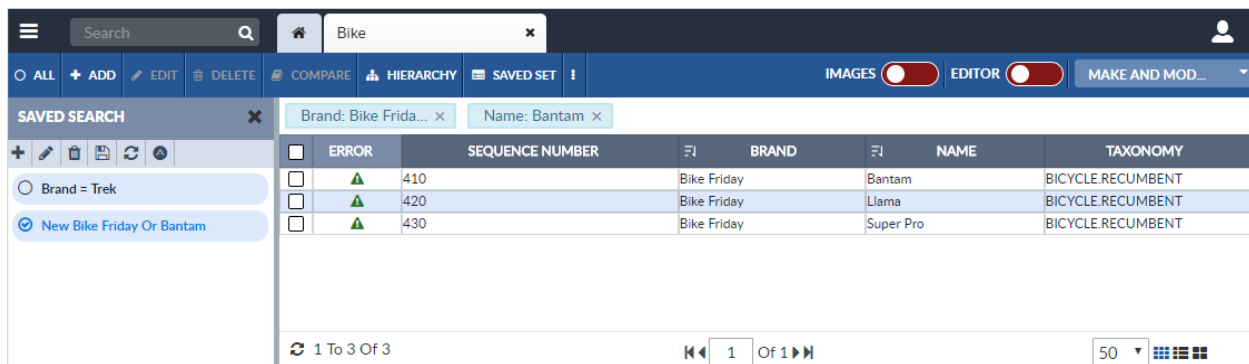
Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Saved Search** option.

ERROR	SEQUENCE NUMBER	
		Best Trucks
	410	Bike Friday
		Trek
		Bianchi
	10120	Trucks, B. H...


-  SAVED SEARCH
-  FILTER
-  IMPORT
-  EXPORT

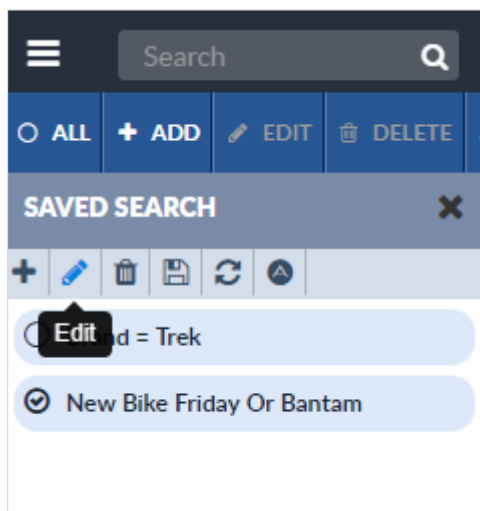
More Actions: Saved Search

The **Saved Search Sidebar** will appear.



Saved Search Sidebar

Select the Saved Search to be modified. Select the **Edit** button  on the **Saved Search Editor's Activity Bar**.



Edit Saved Search

The **Edit Saved Search** window will appear.

The screenshot shows a dialog box titled "EDIT SAVED SEARCH" with a close button (X) in the top right corner. The dialog contains the following elements:

- Name:** A text input field containing "New Bike Friday and Bantam".
- Description:** A text input field with a small icon on the right side.
- Shared:** A checkbox labeled "Shared".
- AND/OR:** Two buttons labeled "AND" and "OR".
- Filter Tags:** Two tags at the bottom left: "Brand: Bike Frida..." and "Name: Bantam", each with a close icon (X).
- Buttons:** "CLOSE" and "OK" buttons at the bottom right.

Edit a Saved Search

Edit the Saved Search options as desired.

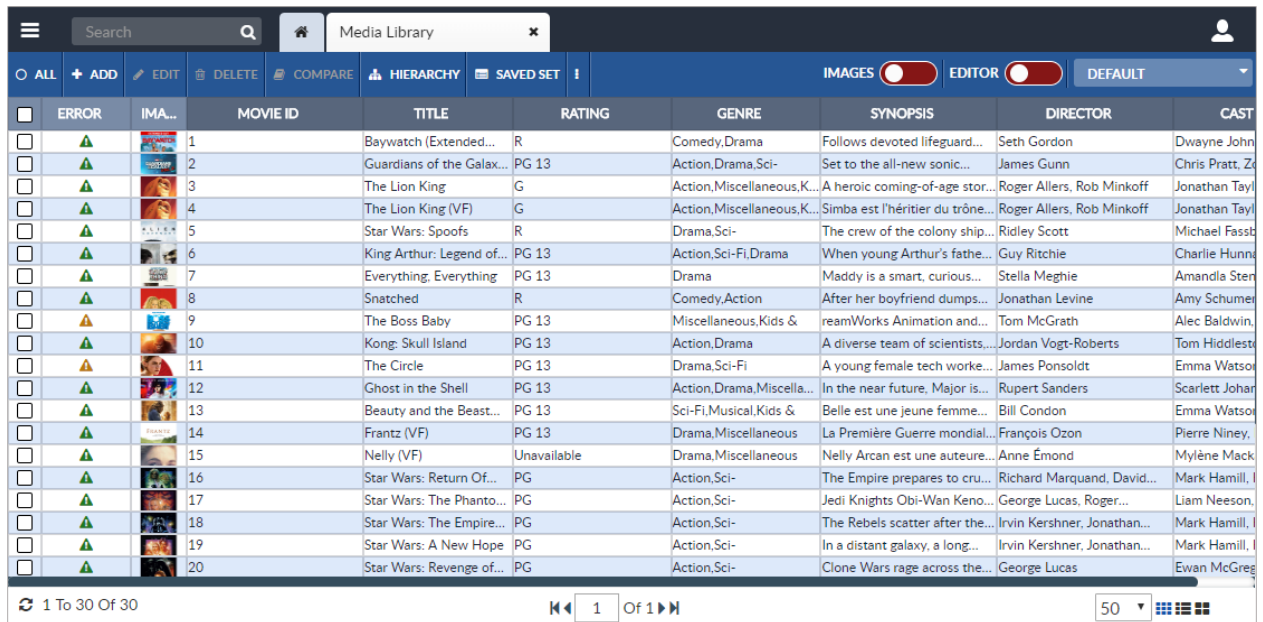
- **Name:** The name of the Saved Search.
- **Description:** (Optional) A description of the Saved Search.
- **Shared:** (Optional) If checked, the Saved Search will be available to all other users.
- **Search Filter Terms:** A list of the Saved Search's Active Filters. To remove an Active Filter, click the **Filter** box's **Close** icon **X**.
- **And/Or:** Defines the interaction between Active Filters if there are more than one.
 - **And:** Records will be displayed if they meet the conditions of all the Active Filters.
 - **Or:** Records will be displayed if they meet the conditions of any Active Filter.

To save any changes to the Saved Search and exit the **Edit Saved Search** window, click the **Ok** button. To exit the **Edit Saved Search** window without saving any changes, click the **Close** button.


13.3.4 Delete a Saved Search

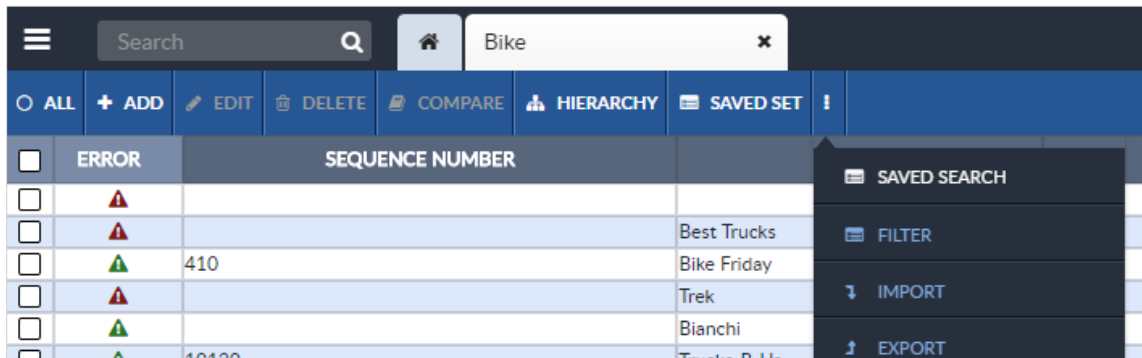
Permitted users can delete a Saved Search.

To delete a Saved Search for a repository, first open the repository in a **Repository View**. To do this, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.



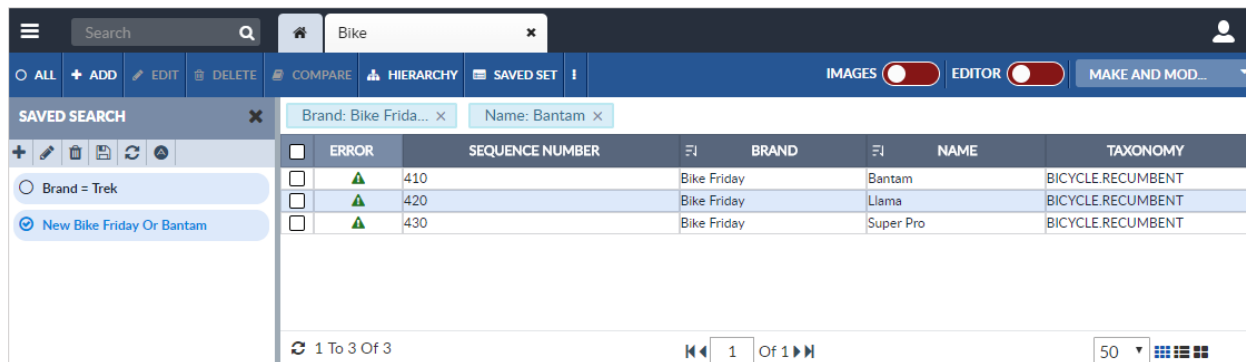
Repository View Grid View

Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Saved Search** option.



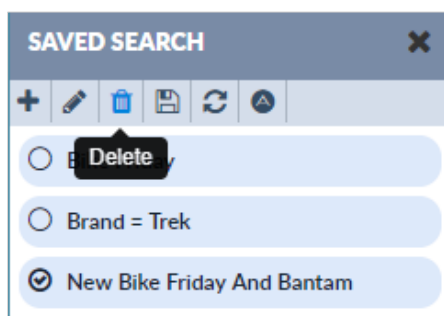
More Actions: Saved Search

The **Saved Search Sidebar** will appear.



Saved Search Sidebar

Select the Saved Search to be deleted. Click the **Delete Saved Search** button .



Delete Saved Search

The Saved Search will be deleted from the **Saved Search Sidebar**. The **Saved Search Sidebar** may need to be refreshed before the Saved Set disappears from the display.

13.4 Advanced Saved Search

An Advanced Search allows the user to create an Active Filter based on a repository's attribute value, the state of its records, a linked repository's attribute values, or the repository's owner.

To perform an Advanced Search on a repository, first open the repository in a **Repository View**. To do this, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

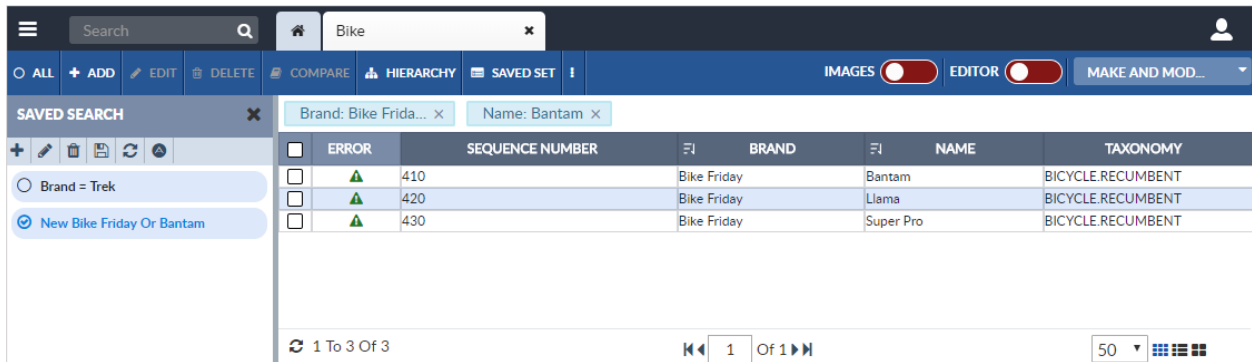
Open the **More Actions** dropdown by clicking the on the **Repository View's Activity Bar**. Select the **Saved Search** option.

ERROR	SEQUENCE NUMBER	
		Best Trucks
	410	Bike Friday
		Trek
		Bianchi
	10120	Trucks B. H...

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT

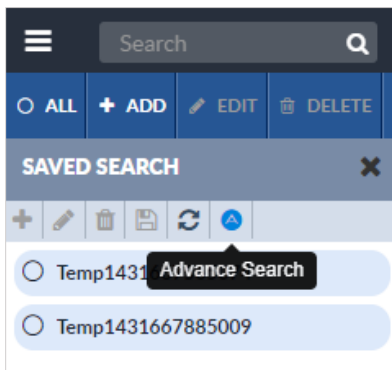
More Actions: Saved Search

The **Saved Search Sidebar** will appear.



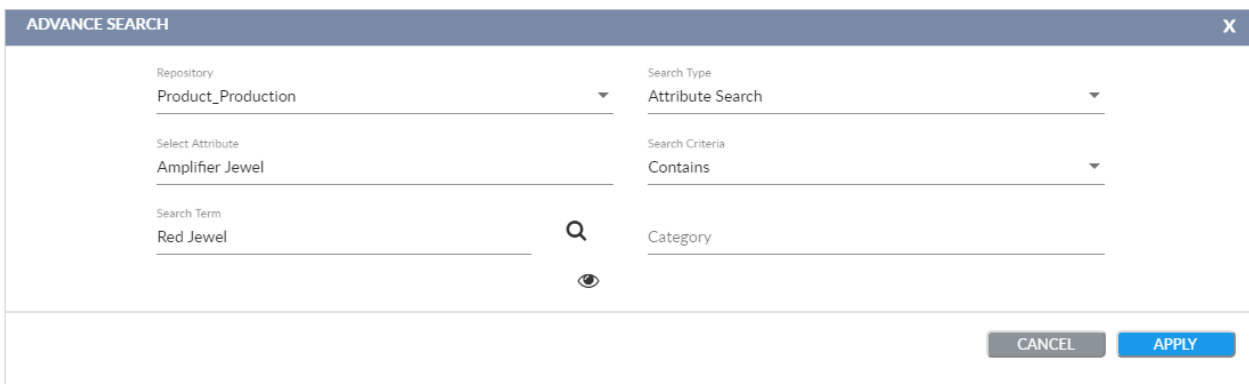
Saved Search Sidebar

Click the **Advanced Search** button (the **A**) on the **Saved Search Sidebar's Activity Bar**.



Advanced Search

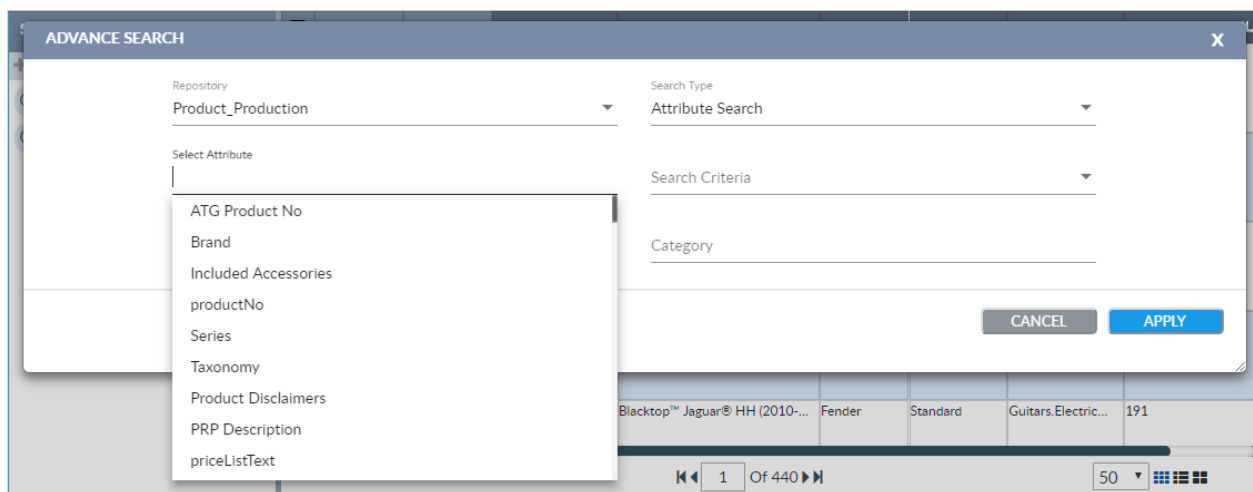
The **Advanced Search** window will appear.



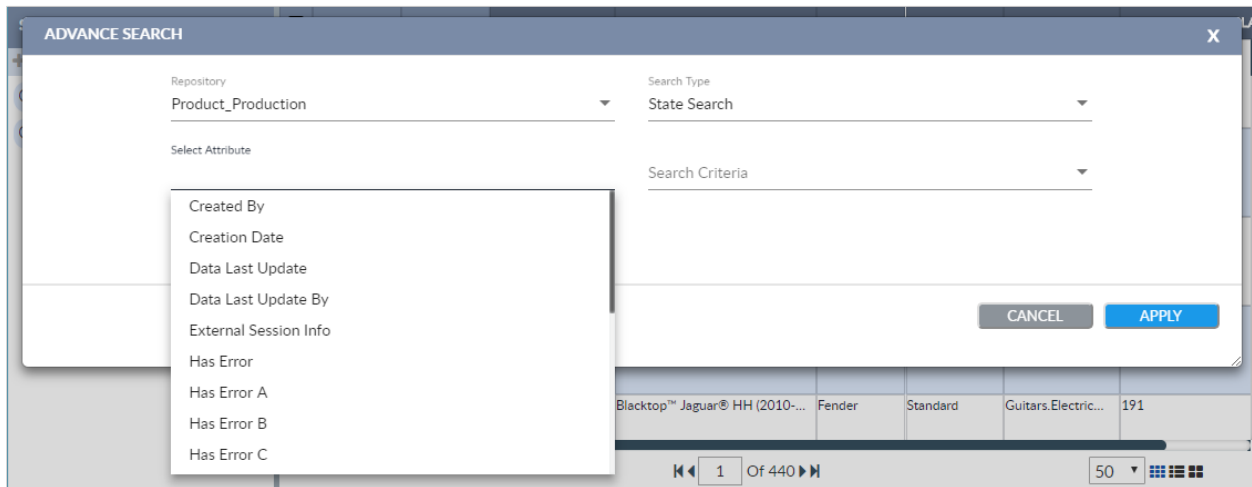
Advanced Search Window

Edit the Advanced Search options as desired:

- **Repository:** Select the repository the Advanced Search will be applied to. This allows the search of a linked repository if the linked repository has been configured to allow it to be searched.
- **Search Type:** The type of search:
 - **Attribute Search:** Filter on the values of a repository’s attributes.
 - **State Search:** Filter on the state of repository records.
 - **Link Search:**
 - To filter on the values of a linked repository’s attributes, select **Attribute Search**, then select **Link Search**.
 - To filter on the state of a linked repository’s records, select **State Search**, then select **Link Search**.
- **Select Attribute:** Which repository attribute or record state to filter by. The contents of the **Select Attribute** dropdown list vary depending on the selected **Search Type**.

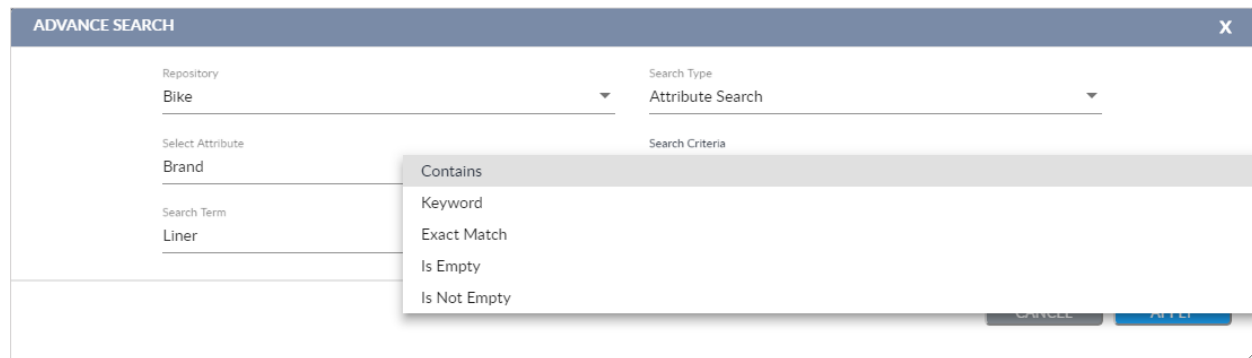


Advanced Search on Attribute Value

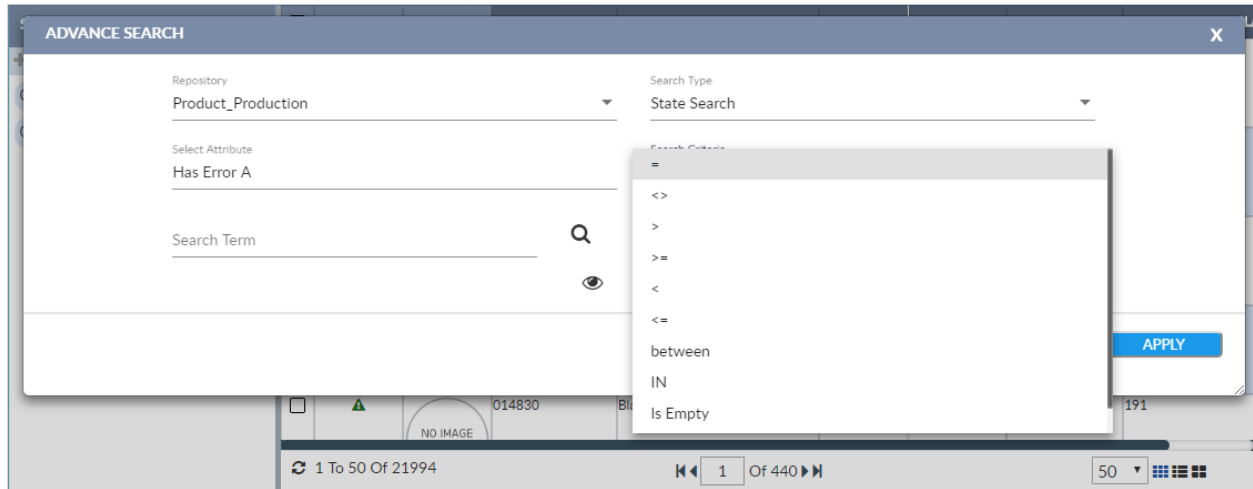


Advanced Search on Record State


- **Search Criteria:** Varies depending on the type of the attribute indicated in **Select Attribute**.



Advanced Search Criteria



Advanced Search Criteria

- **Search Term:** Either enter text to search for or if the **Search Type** is **Attribute Search**, click the **Eye** icon  to get a list of attribute values to select from.
- **Category:** Appears if the **Search Type** is **Attribute Search**. If a taxonomy node is selected from the dropdown Taxonomy Node Tree for the repository, only attribute records assigned to that node will be searched.

To apply the Advanced Search, click the **Apply** button. To exit the **Advanced Search** window without applying the Advanced Search, click the **Close** button.

14 Saved Sets

A Saved Set is a set of one or more records in a repository. Each Saved Set has a unique name and can be saved for later use. Saved Sets can be used to revisit the same group of records without having to search for them again.

Saved Sets can contain records from only one repository. A repository can have many Saved Sets. For instance, a repository that contains products might have a Saved Set named “Brand A Products” that contains all the records whose brand is “Brand A”. It might have another Saved Set named “Cold Regions” that contains all the products sold in regions that have cold winters. A snowshoe made by “Brand A” and sold in Antarctica would be listed in both Saved Sets. A jet ski made by “Brand A” and sold in the tropics would only be listed in the “Brand A” Saved Set. A stove made by “Brand B” and sold in the tropics would be listed in neither Saved Set.

Saved Sets can be shared so all other users can also see them and use them.

14.1 Viewing Saved Sets

To view a list of a repository’s Saved Sets, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the desired repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunna
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumei
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. The **Saved Set Sidebar** will appear in the **Repository View**. It displays a list of the Saved Sets for the repository. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

The screenshot shows the Media Library interface. At the top, there is a search bar and a 'Media Library' header. Below this is a navigation bar with buttons for ALL, ADD, EDIT, DELETE, COMPARE, HIERARCHY, SAVED SET, and an information icon. The main area contains a table with columns: ERROR, IMA..., MOVIE ID, TITLE, STATUS, and AVAILABILITY DATE. The table lists 12 records with various movie titles and their availability dates. On the left side, there is a 'SAVED SET' sidebar with a list of sets: Named Set (2), Test (1), Dramas (13), Mark (3), PG 13 (9), and Star (9). Each set has a corresponding icon and a right-pointing arrow.

SAVED SET	ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE
			1	Baywatch...	Review	09/07/2017
			2	Guardians of...	Active	09/01/2017
			3	The Lion King	Active	09/01/2017
			4	The Lion Kin...	Active	09/01/2017
			5	Alien:...	Active	09/01/2017
			6	King Arthur:...	Active	09/01/2017
			7	Everything,...	Active	09/01/2017
			8	Snatched	Active	09/01/2017
			9	The Boss Baby	Active	
			10	Kong: Skull...	Active	09/01/2017
			11	The Circle	Active	
			12	Ghost in the...	Active	09/01/2017

Saved Set Sidebar

(For a detailed labeled reference guide image, see [Saved Set Sidebar Reference Guide](#).)

On the **Saved Set Sidebar's Activity Bar**, click the > on the right. More information about the Saved Sets will appear. To collapse the additional information, click the < on the **Saved Sets Sidebar's Activity Bar**.

14.2 Use a Saved Set

Selecting a Saved Set will cause the **Repository View** to only show the records in the Saved Set.

To use a saved set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn Chris Pratt, Z...
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie Amanda Ster
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond Myliène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David... Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger... Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas Ewan McGreg

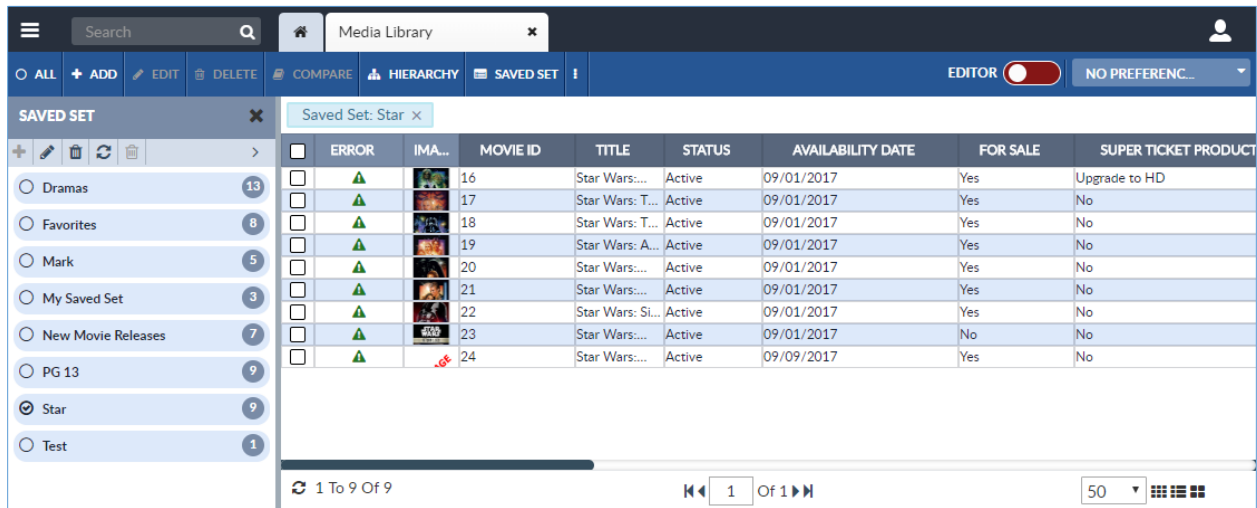
Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. The **Saved Set Sidebar** will appear on the left of the **Repository View**. It displays a list of the existing Saved Sets for the repository. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

SAVED SET	ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017
<input type="checkbox"/>			5	Alien:...	Active	09/01/2017
<input type="checkbox"/>			6	King Arthur:...	Active	09/01/2017
<input type="checkbox"/>			7	Everything,...	Active	09/01/2017
<input type="checkbox"/>			8	Snatched	Active	09/01/2017
<input type="checkbox"/>			9	The Boss Baby	Active	
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017
<input type="checkbox"/>			11	The Circle	Active	
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017

Saved Set Sidebar

Select a Saved Set in the **Saved Set Sidebar**. Note that only one Saved Set can be in use at a time. The **Repository View** will change to display only the records in the Saved Set. The name of the Saved Set will appear in a Filter Term box in the **Effective Filters Bar**. Additional Searches and Filters can be used on the Saved Set to create additional search filters.



Saved Set in Use

To stop using the Saved Set, close the Saved Set’s **Filter Term** box in the **Effective Filters Bar**.

14.3 Create a Saved Set

Selecting a Saved Set will cause the **Repository View** to display only the records in the Saved Set.

To create a Saved Set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie Amanda Ster
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond Myène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David... Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger... Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas Ewan McGreg

Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. A list of the Saved Sets for that repository will appear in the **Saved Set Sidebar**. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

SAVED SET	ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017
<input type="checkbox"/>			5	Alien:...	Active	09/01/2017
<input type="checkbox"/>			6	King Arthur:...	Active	09/01/2017
<input type="checkbox"/>			7	Everything,...	Active	09/01/2017
<input type="checkbox"/>			8	Snatched	Active	09/01/2017
<input type="checkbox"/>			9	The Boss Baby	Active	
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017
<input type="checkbox"/>			11	The Circle	Active	
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017

Saved Set Sidebar

Select the records to be included in the Saved Set. This can be done by clicking the **All Records** checkbox at the top of the Repository View to select all the repository’s records, or by using one or more **Searches** to create search filters, and/or by individually selecting records.

After selecting the desired records, click the **Add New** button **+** in the **Saved Sets Sidebar’s Activity Bar**.

An **Add Saved Set** window will appear.

Add Saved Set

Enter the title of the Saved Set and, if desired, a description of the Saved Set. If the **Shared** checkbox is marked, the Saved Set will be visible and useable by all other users. Click the **Ok** button to save the Saved Set or the **Close** button to exit without creating the Saved Set.

ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOR SALE	SUPER TICKET PRODU
<input type="checkbox"/>		13	Beauty and...	Active	09/15/2017	Yes	No
<input type="checkbox"/>		14	Frantz (VF)	Active	09/01/2017	Yes	No
<input type="checkbox"/>		15	Nelly (VF)	Active	09/01/2017	Yes	No

New Saved Set

The new Saved Set will be added to the bottom of the **Saved Set Sidebar**. The user may need to scroll the list of Saved Sets to find the new Saved Set. When the **Saved Set Sidebar** is refreshed, the list of Saved Sets will be sorted alphabetically. If the Saved Set does not appear, ensure that the **Text Search** box is empty so that it doesn't restrict the list of Saved Sets.

14.4 Edit a Saved Set

Editing a Saved Set lets you change the title and description of a Saved Set, and whether it is shared or not.

To edit a Saved Set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunna
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. A list of the Saved Sets for that repository will appear in the **Saved Set Sidebar**. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

SAVED SET		ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017	
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017	
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017	
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017	
<input type="checkbox"/>			5	Alien:...	Active	09/01/2017	
<input type="checkbox"/>			6	King Arthur...	Active	09/01/2017	
<input type="checkbox"/>			7	Everything...	Active	09/01/2017	
<input type="checkbox"/>			8	Snatched	Active	09/01/2017	
<input type="checkbox"/>			9	The Boss Baby	Active		
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017	
<input type="checkbox"/>			11	The Circle	Active		
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017	

Saved Set Sidebar

Select the Saved Set to be edited. Click the **Edit** button at the top of the **Saved Set Sidebar**. The **Edit Saved Set** window appears, which allows the user to edit the title and description of the Saved Set. The user may also change the setting on the **Shared** checkbox. If the **Shared** checkbox is checked, the Saved Set will be visible to other users and available for their use.

EDIT SAVED SET X

Name:

Shared

Description:

Edit a Saved Set

Click the **OK** button to save the changes to the Saved Set or the **Close** button to exit without saving the changes.

14.5 Add Records to a Saved Set.

To add records to a Saved Set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the

repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie Amanda Ster
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond Mylène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David... Mark Hamill, I
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger... Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan... Mark Hamill, I
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas Ewan McGreg

Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. A list of the Saved Sets for that repository will appear in the **Saved Set Sidebar**. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

The screenshot shows the Media Library interface. At the top, there is a search bar and a 'Media Library' header. Below the header is a navigation bar with buttons for ALL, ADD, EDIT, DELETE, COMPARE, HIERARCHY, and SAVED SET. On the left, there is a 'SAVED SET' sidebar with a list of sets: Named Set (2), Test (1), Dramas (13), Mark (3), PG 13 (9), and Star (9). The main table has columns: ERROR, IMA..., MOVIE ID, TITLE, STATUS, and AVAILABILITY DATE. The table contains 12 rows of records.

ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017
<input type="checkbox"/>			5	Alien:...	Active	09/01/2017
<input type="checkbox"/>			6	King Arthur...	Active	09/01/2017
<input type="checkbox"/>			7	Everything...	Active	09/01/2017
<input type="checkbox"/>			8	Snatched	Active	09/01/2017
<input type="checkbox"/>			9	The Boss Baby	Active	
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017
<input type="checkbox"/>			11	The Circle	Active	
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017

Saved Set Sidebar

Select the records to be included in the Saved Set. This can be done by clicking the **All Records** checkbox at the top of the **Repository View** to select all the repository's records, or by using one or more Searches to create search filters, and/or by individually selecting records. The records can be on one page or on multiple pages.

After selecting the desired records, click on any data in a record (that is not a digital asset) and hold the mouse button, drag the records to the desired Saved Set, and release the mouse button. All the selected records will be added to the Saved Set.

The screenshot shows the Media Library interface with a 'SAVED SET' sidebar on the left. The sidebar includes: Dramas (13), Favorites (8), Mark (5), My Saved Set (3), New Movie Releases (7), PG 13 (9), Star (9), Test (1), and Just In (3). The main table has columns: ERROR, IMA..., MOVIE ID, TITLE, STATUS, AVAILABILITY DATE, FOR SALE, and SUPER TICKET PRODU. The table contains 15 rows of records. The bottom of the screen shows a pagination bar: '1 To 30 Of 30 (1)', 'Beauty and... Active', '09/15/2017', 'Yes', '1', 'Of 1', 'No', and a dropdown menu set to '50'.

ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE	FOR SALE	SUPER TICKET PRODU
<input type="checkbox"/>		1	Baywatch...	Review	09/07/2017	Yes	Upgrade
<input type="checkbox"/>		2	Guardians of...	Active	09/01/2017	Yes	No
<input type="checkbox"/>		3	The Lion King	Active	09/01/2017	Yes	No
<input type="checkbox"/>		4	The Lion Kin...	Active	09/01/2017	Yes	No
<input type="checkbox"/>		5	Beauty and... Active	Active	09/15/2017	Yes	No
<input type="checkbox"/>		6	King Arthur...	Active	09/01/2017	Yes	Redeem
<input type="checkbox"/>		7	Everything...	Active	09/01/2017	Yes	No
<input type="checkbox"/>		8	Snatched	Active	09/01/2017	Yes	No
<input type="checkbox"/>		9	The Boss Baby	Active		Yes	No
<input type="checkbox"/>		10	Kong: Skull...	Active	09/01/2017	Yes	No
<input type="checkbox"/>		11	The Circle	Active		Yes	No
<input type="checkbox"/>		12	Ghost in the...	Active	09/01/2017	Yes	Upgrade to HD
<input checked="" type="checkbox"/>		13	Beauty and...	Active	09/15/2017	Yes	No
<input type="checkbox"/>		14	Frantz (VF)	Active	09/01/2017	Yes	No
<input type="checkbox"/>		15	Nelly (VF)	Active	09/01/2017	Yes	No

Drag Records to Add to a Saved Set

14.6 Remove Records from a Saved Set.

To remove records from a Saved Set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. A list of the Saved Sets for that repository will appear in the **Saved Set Sidebar**. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.

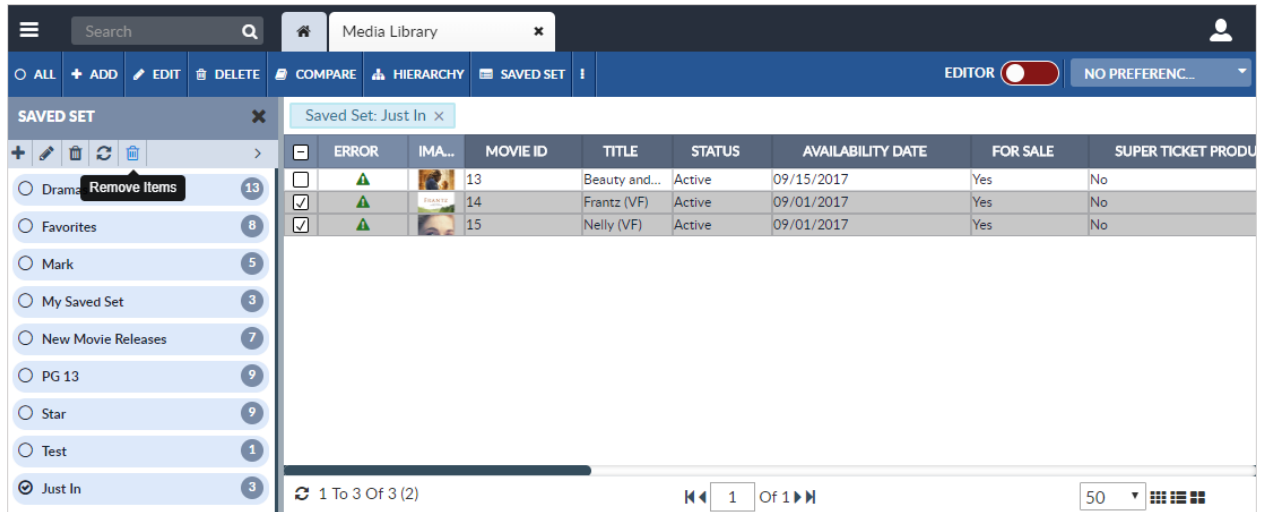
SAVED SET		ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILABILITY DATE
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017	
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017	
<input type="checkbox"/>			3	The Lion King	Active	09/01/2017	
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017	
<input type="checkbox"/>			5	Alien:...	Active	09/01/2017	
<input type="checkbox"/>			6	King Arthur...	Active	09/01/2017	
<input type="checkbox"/>			7	Everything...	Active	09/01/2017	
<input type="checkbox"/>			8	Snatched	Active	09/01/2017	
<input type="checkbox"/>			9	The Boss Baby	Active		
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017	
<input type="checkbox"/>			11	The Circle	Active		
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017	

Saved Set Sidebar

Select the desired Saved Set. The **Repository View** will display only the records in the Saved Set.

Select the records to be deleted from the Saved Set. This can be done by clicking the **All Records** checkbox at the top of the **Repository View** to select all the Saved Set’s records, or by using one or more Searches to create search filters, and/or by individually selecting records.

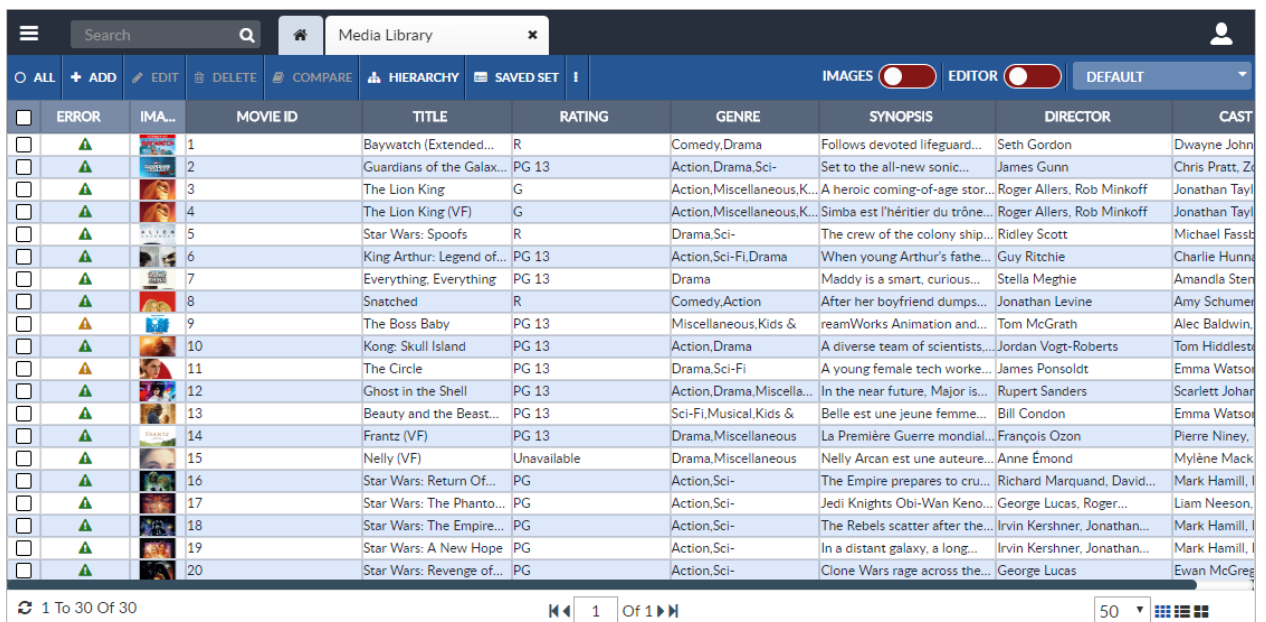
Once the records are selected, click the **Remove Records** button (the right most trashcan) in the **Saved Set Sidebar’s Activity Bar**. The records will be removed from the Saved Set.



Remove Records from a Saved Set

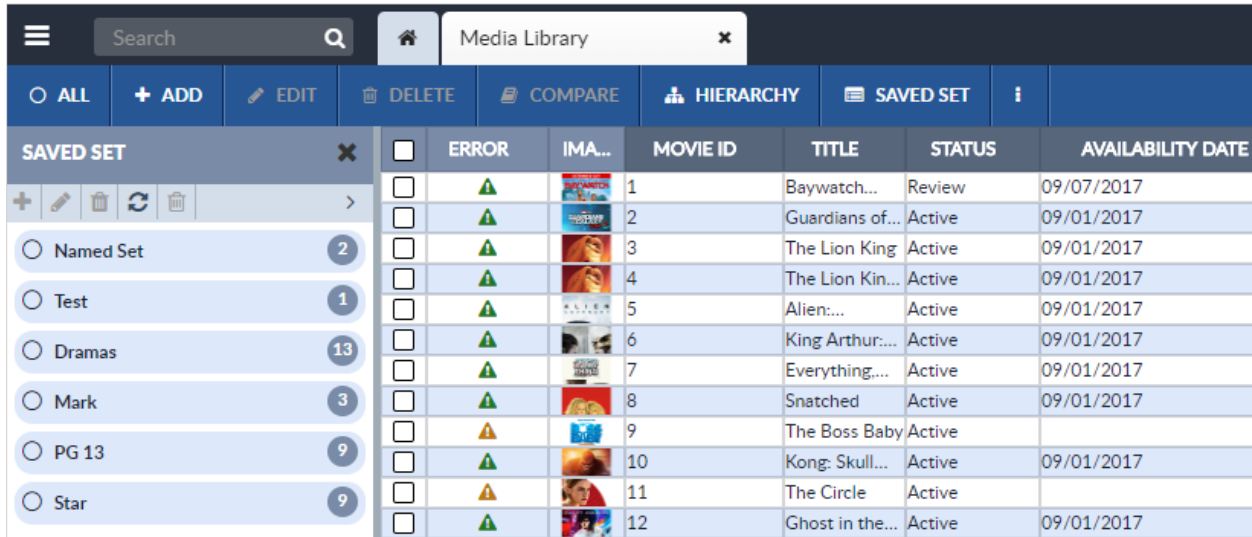
14.7 Delete a Saved Set

To delete a Saved Set, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.



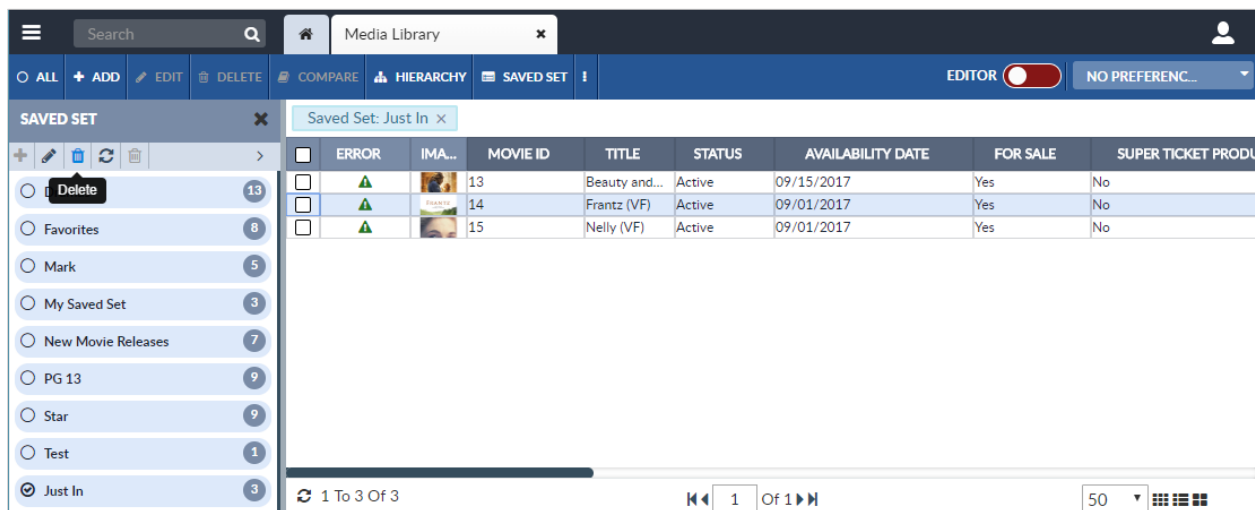
Repository View Grid View

Click the **Saved Set** button in the **Activity Bar**. A list of the Saved Sets for that repository will appear in the **Saved Set Sidebar**. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list.



Saved Set Sidebar

Select the desired Saved Set. The **Repository View** will display only the records in the Saved Set. Click the **Delete Saved Set** button (the leftmost trashcan) on the **Saved Set Sidebar's Activity Bar**. The Saved Set will be deleted.



Delete a Saved Set

15 Job Monitor

15.1 View the Job Monitor

The **Job Monitor** allows the user to view and manage their jobs. The **Job Monitor** can be accessed two ways: as a Widget (see also the [Job Monitor Widget](#)) or as a report tab. Both operate as described below.

To open the **Job Monitor** tab, open the **Feature Sidebar**, select the **Systems** folder, then select **Job Monitor**. The **Job Monitor** will open in a tab.

JOB MONITOR										
✖ ABORT JOB ■ END JOB ▶ RESTART JOB 🗑 DELETED JOB 🕒 JOB HISTORY ⏪ TRANSMIT FILE										
				JOB TYPE	STATUS	REPOSITORY	DATE	USER	PUBLISH NAME	SERVER
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input checked="" type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034

Job Monitor

(For a detailed labeled reference guide image, see [Job Monitor Reference Guide](#).)

Note that there are three unlabeled columns on the right of the **Job Monitor**. These are used to hold downloadable content generated by the jobs. The functions of the columns are:

- **[Unlabeled column 1]:** Job Log File.
- **[Unlabeled column 2]:** Job Download File.
- **[Unlabeled column 3]:** Job Error File.

15.1.1 Sort Jobs

If the repository’s records are displayed in **Grid View**, the records can be sorted according to the values in some of the attribute and validation status columns. Clicking the title of a sortable column (or the triangle just to the left of the title) will cause the record list to sort in ascending order. Clicking the column title again will cause the record list to sort in descending order. Clicking the column title a third time will cause the record list to return to its original sort order.



▲ TITLE
Alien...
Baywatch...
Beauty and...
Everything...
Frantz (VF)

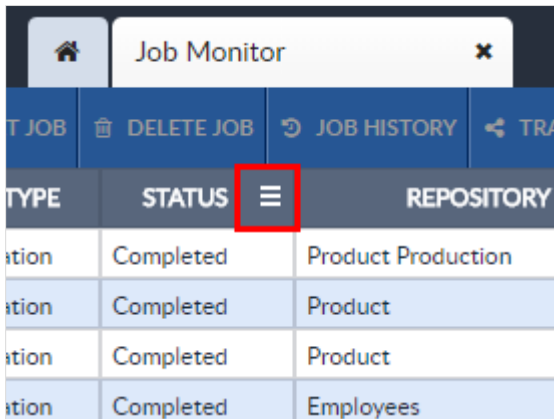
Sort Repository

15.1.2 Filter

The user can restrict the list of jobs shown in the **Job Monitor** by applying a Filter to one of its columns.

When a Filter is created, an **Active Filter** box for it will appear in the **Job Monitor's Active Filter Bar**. Closing the **Active Filter** box will remove the Filter's effect from the **Job Monitor**.

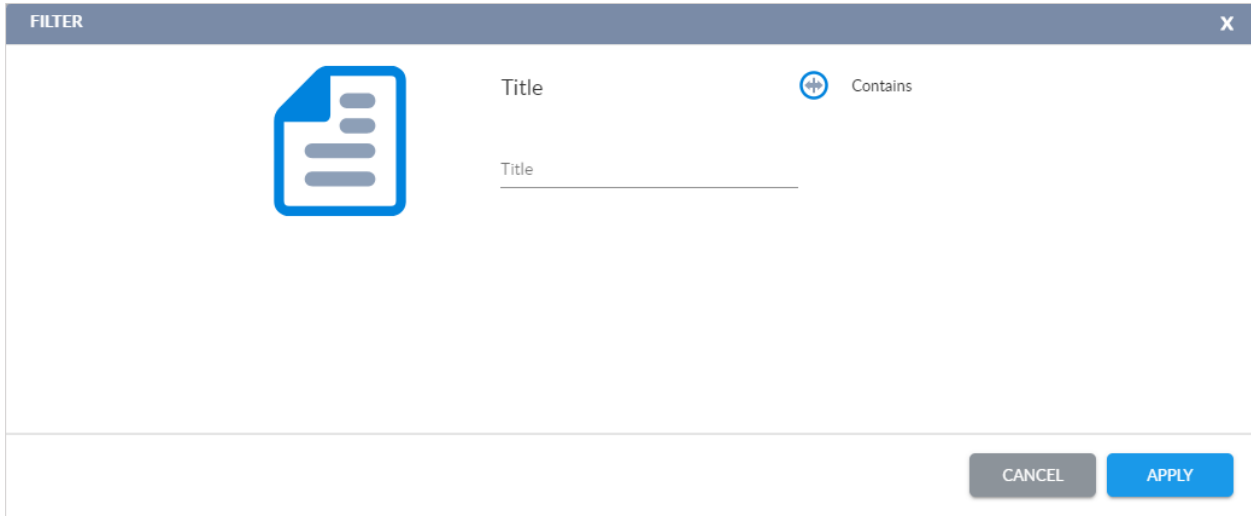
To apply a Filter to a Job Monitor column, select the **Filter** icon  to the right of the column's name. Note that the **Filter** icon  will not appear until the cursor is hovering over the column header.



Job Monitor		
TYPE	STATUS	REPOSITORY
ation	Completed	Product Production
ation	Completed	Product
ation	Completed	Product
ation	Completed	Employees

Job Monitor Filter

An **Add Filter** window will appear. The options available in the **Add Filter** window depend on the attribute's data type.



The screenshot shows a 'FILTER' dialog box. It features a document icon on the left. The main content area displays a filter rule: 'Title' followed by a blue plus icon and the word 'Contains'. Below this is a text input field with 'Title' written inside. At the bottom right are two buttons: 'CANCEL' and 'APPLY'.

Dynamic Filter Options

Enter the desired attribute value. Select **Apply** to establish the Filter. Select **Cancel** to exit the window without establishing the Filter.

15.1.3 Column Order

The user can change the order of the **Job Monitor's** columns by dragging and dropping a column header into the desired position. To move a column, click the column header, hold the mouse button, drag the column header to its desired position, and release the mouse button.

15.1.4 Column Width

The user can change the width of a **Job Monitor's** column by placing the cursor on the right edge of the column's header (when the cursor is in the right location, it will display as a double-headed arrow), clicking and holding the mouse, and sliding the cursor in the desired direction to widen or narrow the column. When the column is the desired width, release the mouse button.

15.2 Manage Jobs

To manage a job through the Job Monitor, first open it in tab or Widget (see [Job Monitor Widget](#)).

To open the **Job Monitor** tab, open the **Feature Sidebar**, select the **Systems** folder, then select **Job Monitor**. The **Job Monitor** will open in a tab.

JOB MONITOR										
✖ ABORT JOB ■ END JOB ▶ RESTART JOB 🗑 DELETE JOB 🕒 JOB HISTORY ⏪ TRANSMIT FILE										
				JOB TYPE	STATUS	REPOSITORY	DATE	USER	PUBLISH NAME	SERVER
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input checked="" type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034

Job Monitor

The current and past jobs the user is permitted to see and manage will be displayed.

To act upon a job, select it and click one of the buttons on the **Job Monitor’s Activity Bar**.

- **Abort Job:** Stops the job – gives the job the opportunity to see the abort request and end cleanly.
- **End Job:** Stops the job – stops the job immediately, no matter what it was doing. It is recommended the user only uses **End Job** if the job has not responded to **Abort Job**.
- **Restart Job:** Re-submits the job; runs it again.
- **Delete Job:** Delete the job from the **Job Monitor** display.

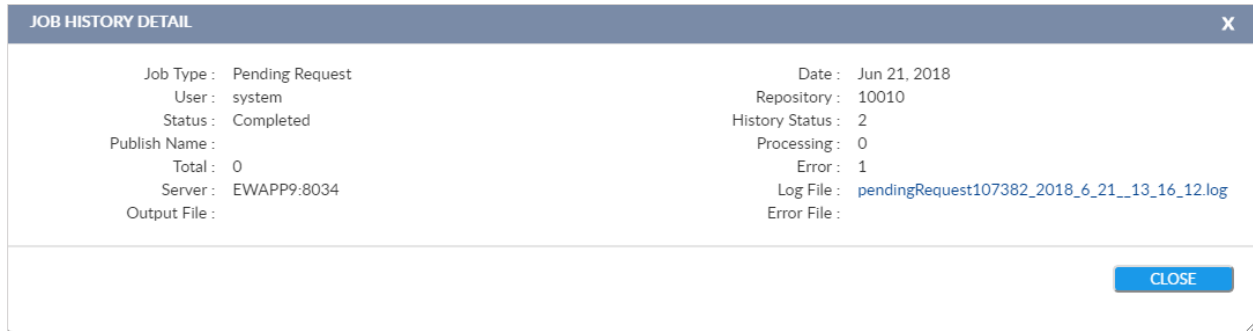
15.3 Job History

To access the history of a job, first open the **Job Monitor** in tab or Widget (see [Job Monitor Widget](#)). To open the **Job Monitor** tab, open the **Feature Sidebar**, select the **Systems** folder, then select **Job Monitor**. The **Job Monitor** will open in a tab.

JOB MONITOR										
✖ ABORT JOB ■ END JOB ▶ RESTART JOB 🗑 DELETE JOB 🕒 JOB HISTORY ⏪ TRANSMIT FILE										
				JOB TYPE	STATUS	REPOSITORY	DATE	USER	PUBLISH NAME	SERVER
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input checked="" type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	<input type="checkbox"/>			Pending Request	Queued		06-13-2018	system		EWAPP6:8034

Job Monitor

Select a job, then click the **Job History** button on the **Job Monitor's Activity Bar**. The **Job History Detail** window will appear.



Job History from Job Monitor

The **Job History Detail** window will list the job's completion status, error status, and links to any output files.

15.4 Job Output Files

When a job runs, it may produce one or more files, including a Log file, a Download file, and an Error file. These files can be downloaded via the **Job Monitor**. A job may also transmit files to another process.

To access these files via the **Job Monitor**, first open the **Job Monitor** in tab or Widget (see [Job Monitor Widget](#)). To open the **Job Monitor** tab, open the **Feature Sidebar**, select the **Systems** folder, then select **Job Monitor**. The **Job Monitor** will open in a tab.

The screenshot shows the "JOB MONITOR" interface with a toolbar at the top containing buttons for ABORT JOB, END JOB, RESTART JOB, DELETE JOB, JOB HISTORY, and TRANSMIT FILE. Below the toolbar is a table with the following columns: JOB TYPE, STATUS, REPOSITORY, DATE, USER, PUBLISH NAME, and SERVER. The table contains eight rows of data, all with "Pending Request" as the Job Type and "Queued" as the Status. The third row is highlighted with a checkmark in the first column.

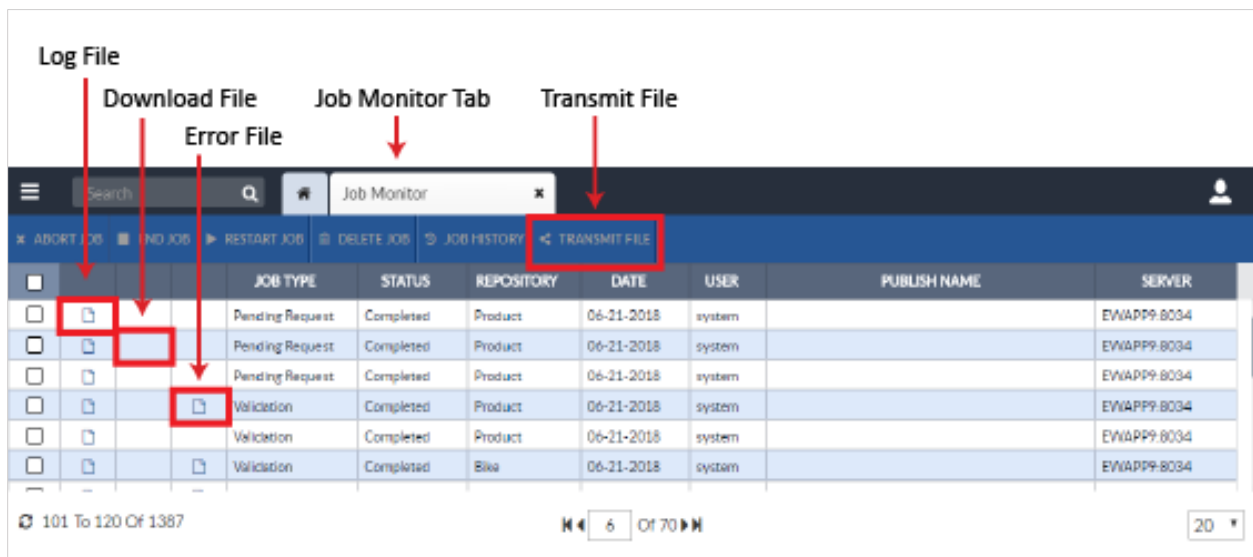
	JOB TYPE	STATUS	REPOSITORY	DATE	USER	PUBLISH NAME	SERVER
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input checked="" type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034
<input type="checkbox"/>	Pending Request	Queued		06-13-2018	system		EWAPP6:8034

Job Monitor

The three untitled columns on the left of the **Job Monitor** are (in the order listed):

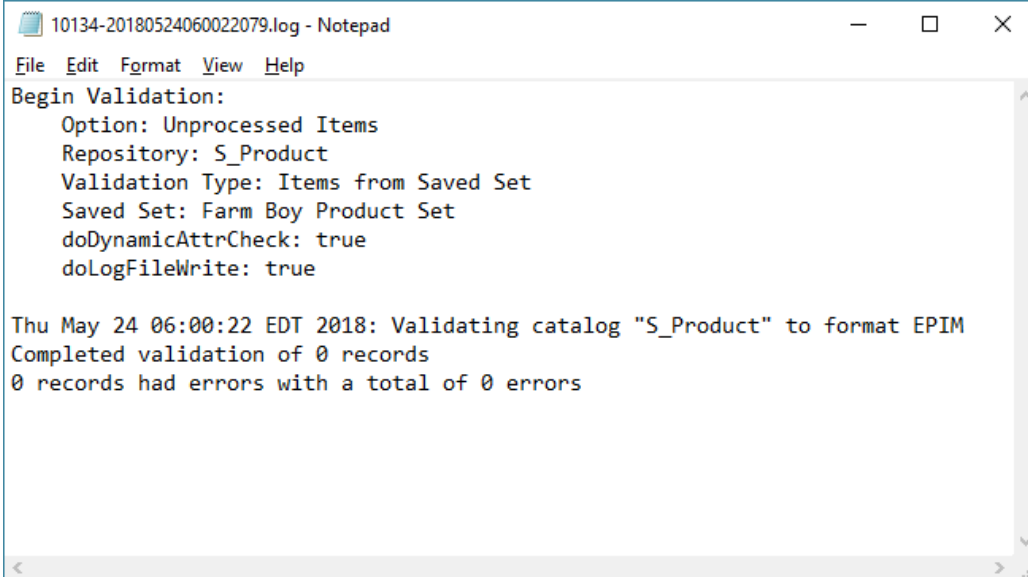
- **Log File**
- **Download File**
- **Error File**

If a file has been produced for a record, an icon will appear in the record's indicated column. Hovering over the icon will bring up an information window that indicates the contents of the file.



Download/Transmit Job Monitor Files

To download an output file, select it.



```
10134-20180524060022079.log - Notepad
File Edit Format View Help
Begin Validation:
  Option: Unprocessed Items
  Repository: S_Product
  Validation Type: Items from Saved Set
  Saved Set: Farm Boy Product Set
  doDynamicAttrCheck: true
  doLogFileWrite: true

Thu May 24 06:00:22 EDT 2018: Validating catalog "S_Product" to format EPIM
Completed validation of 0 records
0 records had errors with a total of 0 errors
```

Job Monitor Log

If the job was configured to transmit a file to another process, the user can trigger the job to retransmit the file by clicking the **Transmit File** button on the **Job Monitor's Activity Bar**.

16 Import Records

Tip: To quickly import modifications or additions to a repository, modify or add records to a spreadsheet generated by exporting the repository, then import the spreadsheet.

16.1 Import Current View

To import data to a repository, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

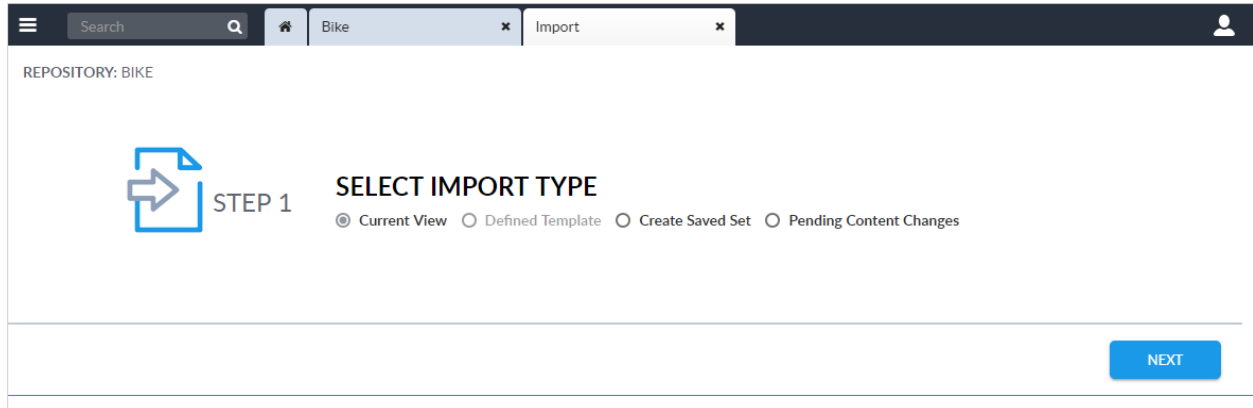
Open the **More Actions** dropdown by clicking the on the **Repository View's Activity Bar**. Select the **Import** option.

ERROR	BRAND	NAME	MY
	Ducati	Monster	
	Ducati	Monster2	
	Bianchi	Specialissima	ME
	Bianchi	Impuloso	ME
	Bianchi	Infinito	ME
	Trek	Roscoe	ME
	Trek	Powerfly	ME
	Linear	Roadster	
	Linear	Limo	
	Bike Friday	Bantam	
	Bike Friday	Llama	
	Bike Friday	Super Pro	
	Trucks-R-U	Monster Machine	
	Trucks-R-U	Tricked Out	
	Trucks-R-U	Haul All	

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS
- COPY

More Actions: Import

The **Import Configuration Step 1** window will appear.



Import Records: Step 1

16.1.1 Step 1: Import Configuration

Select **Current View** as the type of Import to be performed.

- **Current View:** The record attribute values are imported simply from a delimited file or spreadsheet.
- **Defined Template:** Allows the user to specify an Import Template to be used. Import Templates are typically created by the system administrator.
- **Create Saved Set:** (Optional) Stores the imported records in a Saved Set.
- **Pending Content Changes:** (Optional) Select to enter changes that take effect in the future (see [Events](#)).

Click **Next** to continue to **Import Configuration Step 3**, **Back** to return to **Import Configuration Step 1** or click the **Close** icon **X** on the **Import** tab to exit the **Import** procedure.

16.1.2 Step 2: Import Configuration

REPOSITORY: BIKE

STEP 2

File Name * import-bike 1.xlsx

OPTIONS

File Format
 Delimited Excel 97 - 2003 (xls) Excel Workbook (xlsx)

File Encoding: DEFAULT

Language: English

Save Records Imported From Source As Set

Save Records In Repository but Not Imported From Source As Set

ADVANCED OPTIONS

Import Records: Step 2

Edit the **Option** values in the **Import Configuration Step 2** window:

- **File Name:** The name of the file to import.
- **File Format:** This option will be selected automatically based on the type of file selected above.
- **File Encoding** – Select the file encoding method. Optionally, leave as **Default** unless the data does not import correctly, then see the system administrator for the correct option.
- **Language** – Select the language for the export (for multi-language attributes).
- **Save Records Imported from Source as Set** – This option will create a Saved Set consisting of all records that have been imported.
- **Send above Saved Set to Workflow** – Set this checkbox if the records are to be sent into the workflow. It is just like editing each record and clicking the **Save & Send** button.
- **Save Records in Repository but not Imported from Source as Set** – This option will create a Saved Set of all records that were not affected by the import within the repository. This is used when updating all records within a repository, in order to identify any records that were not updated.

Optionally, expand the **Advanced Options** and edit as desired. Scroll through the **Advanced Options** as necessary to access options.

Import Records: Step 2 Advanced Options

The **Advanced Options** are described in the following table.

Note: To execute a predefined import without a template, save the temporarily created mappings using the **File Definition Name**, **Data Source Name**, **Mapping Name**, **Save Mapping** options.

Import Options	Description
File Definition Name	It names the file definition object that will contain the columns found in the file. Most import jobs auto-generate this object then remove it after the import has completed.
Data Source Name	It names the data source object file that identifies the source. Most import jobs auto-generate this object then remove it after the import has completed.
Mapping Name	The name of the mapping object that will be created. Most import jobs auto-generate this object then remove it after the import has completed.

Import Options	Description
Field Delimiter	Enter the character(s) that delimit field values in the import file.
Row Delimiter	Enter the character(s) that delimit rows in the import file.
Text Qualifier	Enter the character(s) that indicate the start and end of a text string value.
Header row number	Defaults to 1.
Start at line #	Defaults to 2.
Start after line text	Enter the text that identifies the line before the start of the import records.
Stop at end of file	The default option.
Stop at line #	Instead of stopping at the end of the file, stop at the specified line number.
Stop before line text	Instead of stopping at the end of the file or at a line number, stop before reaching the entered line of text.
Validate Import File Options:	
Non-Primary Key Data	Use a non-primary key attribute as the primary key.
Column Count	If set, this option will flag any row having a different number of columns than the header row.
Required Attributes	This option will prevent a record that is missing required attributes from being imported.
Unique Business Key (If defined in configuration)	If a business key is defined in the profile, use it as the primary key.
Column Data Type	This option will prevent a record with incorrect data types from being imported.

Import Options	Description
Sync In Options:	
Keep repository values if Import values are empty/null	If the import file's attribute value is empty, keep the existing attribute value instead of clearing the value.
Use alternative primary keys	Designate a combination of attributes as the primary key.
Ignore white space	Ignore any extra spaces before or after the data in the import file. This option defaults to checked.
If an error occurs, discard saved objects	If an error occurs in the import process, the underlying import objects will be deleted
Allow External Trigger	Allow triggers to be executed.
Disallow Null Primary Keys	Ignore import record if any of its primary keys are blank.
File Contains Taxonomy Node	Deprecated.
Extended Data in One Row Format	Deprecated.
Update Only	Only update records that already exist in repository; do not create new records.
Create Only	Only add new records, do not update any records that already exist in the repository.
Sync In	Starts import job. Uncheck to save objects without starting import.
Save Mapping	Save underlying objects as mappings which can be rerun again: related to the use of File Definition Name , Data Source Name , and Mapping Name .

Import Options	Description
Force job to execute as a 1st-time data load	Runs the job as if it were a first-time data load. This increases performance and decreases load time, however it may create duplicate records that will not have accurate record histories.
Sync Format Date for PLT	The format for dates found during the import process. It allows the user to ensure that all dates are consistently formatted. For information regarding this field, contact EnterWorks.
Sync Scan XML for PLT	For information regarding this field, contact EnterWorks.
Sync Scan HTML for PLT	For information regarding this field, contact EnterWorks.

Click **Next** to continue to **Import Configuration Step 3**, **Back** to return to **Import Configuration Step 1** or click the **Close** icon **X** on the **Import** tab to exit the **Import** procedure.

16.1.3 Step 3: Import Configuration

STEP 3

Taxonomy Name: Bike

Taxonomy Node: _____

Map Across All Taxonomies

Update All Records on Partial Key Matching

LINKRELATIONSHIPPATH	SEQUENCENUMBER	NAMES	BRAND	TAXONOMY	TAXONOMY A
<input checked="" type="checkbox"/> LinkRelationshipPath <input type="checkbox"/> [Attribute Not Selected]	<input checked="" type="checkbox"/> Sequence Number <input type="checkbox"/> [Attribute Not Selected]		<input checked="" type="checkbox"/> Brand	<input checked="" type="checkbox"/> Taxonomy	<input checked="" type="checkbox"/> Taxonomy A
	2	Monster2	Ducati	BMW	
	100	Specialissima	Bianchi	BICYCLE DIAMOND FRAME	
	110	Impuloso	Bianchi	BICYCLE DIAMOND FRAME	

BACK IMPORT

Import Records: Step 3: Verify Mappings

Verify the input records' attribute field mappings.

If a file previously exported from a repository with the same profile is used and the column names were not changed, all the fields should map automatically.

A **Primary Key** indicator (blue key) will appear next to the name of the attribute that has been determined to be the primary key.

A **Confidence Indicator** is displayed next to each attribute name:

- Green box with green checkmark: Confidence is high that this attribute has been properly mapped.
- Green box: Request for confirmation that this attribute was properly mapped. To confirm, click the green checkbox.
- Red X: This attribute has not been mapped.

SEQUENCENUMBER	NAMES	BRAND
<input type="checkbox"/> Sequence Number ▾	<input checked="" type="checkbox"/> [Attribute Not Selected] ▾	<input checked="" type="checkbox"/> Brand ▾

Import Records: Attribute Mapping Indicators

If any column is not properly mapped, click its column header and select the correct attribute name.

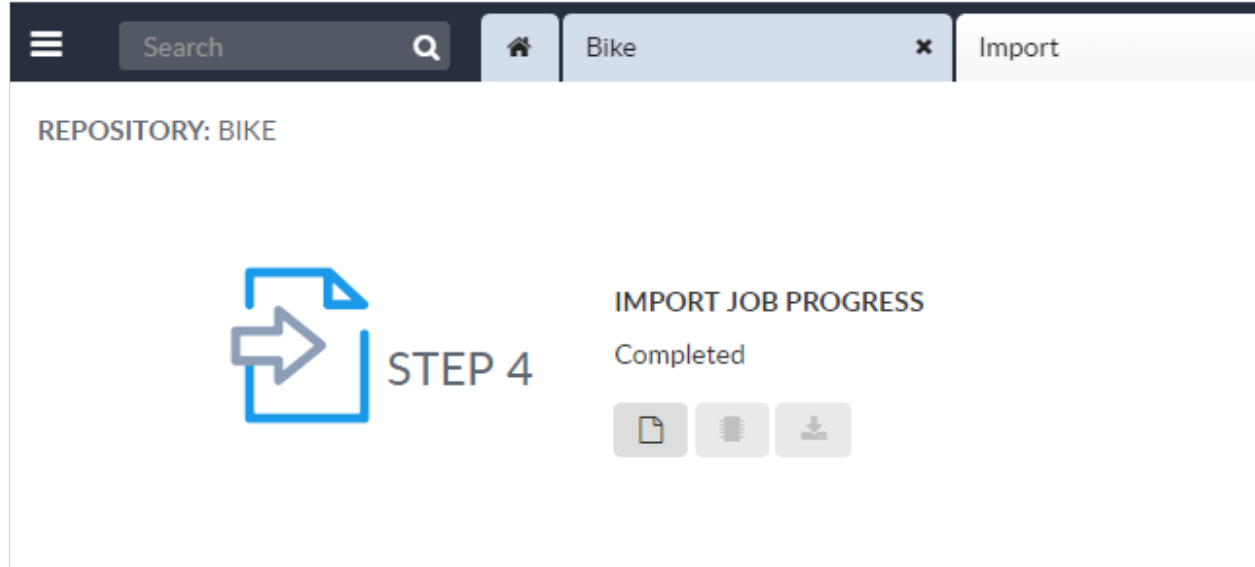
- **Taxonomy Node** dropdown list - If all Category Attributes in the input file are associated with one taxonomy node, the taxonomy node can be selected and only those Category Attributes will be shown for selection mapping. This is particularly useful for implementations with large numbers of Category Attributes.
- **Map Across All Taxonomies** checkbox - If a field in the input file is a Category Attribute, use this checkbox to have the Category Attributes map automatically and/or show in the dropdown list for manual mapping. Category Attributes don't show in the mapping list automatically because it could make the selection list very large.
- **Update all records on partial key matching** – This checkbox is used to update multiple records based on a partial key. This option should be used with care because one record in the input file could update multiple records in the database. It is recommended that the system administrator be contacted before using this option.

Click the **Import** button to import the data file, click the **Back** button to return to the previous **Import Configuration** page, or click the **Close** button on the Import tab to quit without importing the data file.

16.1.4 Step 4: Import Configuration

An Import job is created and placed in the Job Queue. To view the job's progress, open the **Job Monitor** from the **Features Sidebar's System** tab or open a **Job Monitor Widget** in the **Dashboard**.

The Imported record files are prepared and made available for download and transmission. Upon completion, an **Import Job Completed** message will appear in the **Import Configuration's Step 4** window.

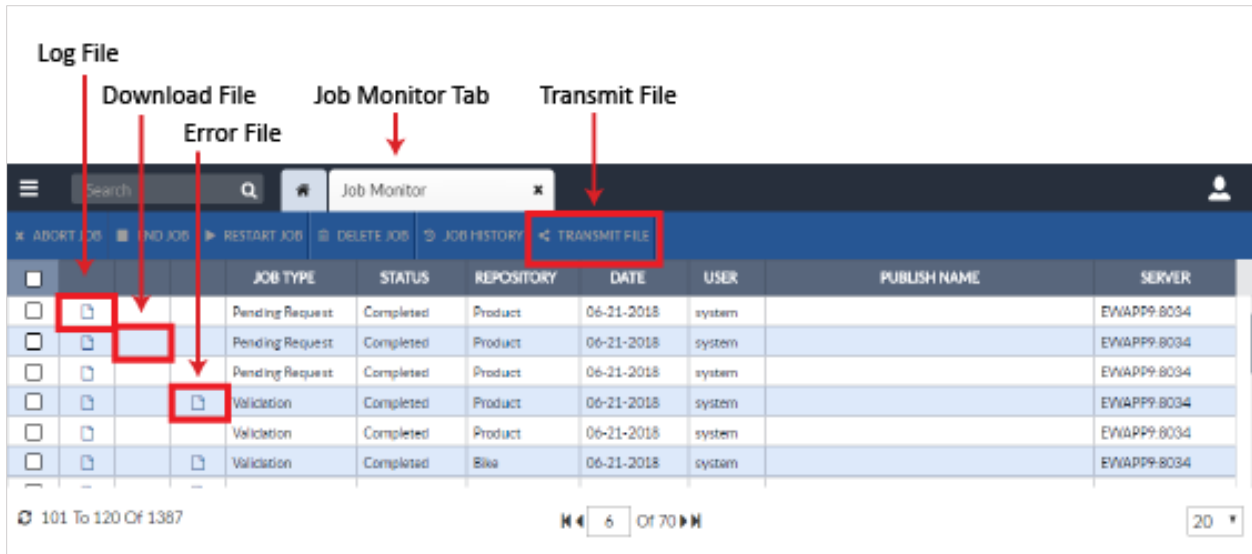


Import Records: Step 4


The user can download the files created by the Import procedure by clicking the buttons below the Job Completion Status message:

- **Download Log File:** Download the Import Job Log file. It contains status about the contents of the Import Job, the date and time the Import Job was run, completion status, and the number of records processed and imported.
- The second file button is not used during imports.
- The third file button is not used during imports.

The user can also download the resulting output files from a **Job Monitor Widget**.



Download/Transmit Job Monitor Files

If a Saved Set was created, to view it, click the **Refresh** icon  on the bottom left of the **Repository View** and click the **Saved Set** button on the **Repository View's Activity Tab**. The **Saved Set Sidebar** will appear. Click on the Saved Set that was created to see the added or modified records.

16.2 Import Template

Import templates can be used to import data into one or more Enable repositories. The easiest way to create an import template is to create an export file, then use it to create an import template. Import templates are typically created by the system administrator.

To import data to a repository, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

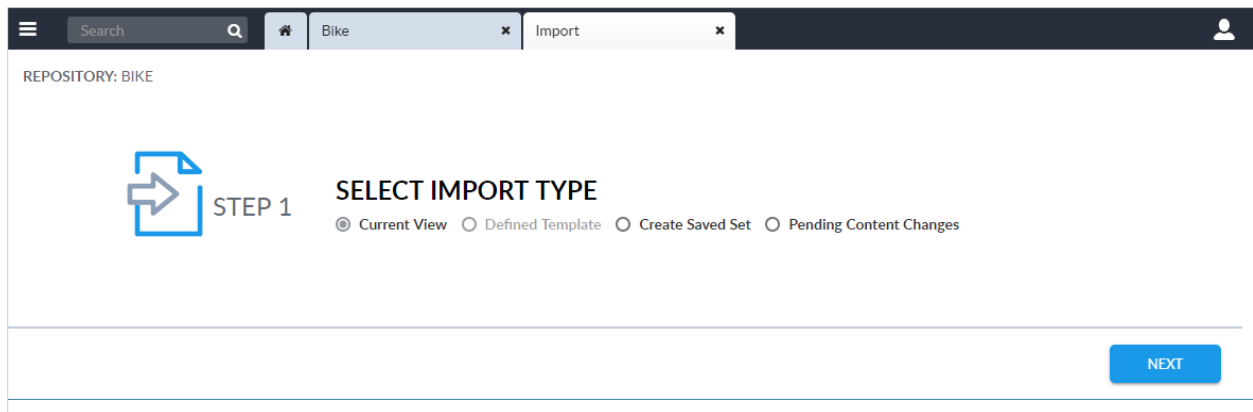
Open the **More Actions** dropdown by clicking the on the **Repository View's Activity Bar**. Select the **Import** option.

ERROR	BRAND	NAME	MY
	Ducati	Monster	
	Ducati	Monster2	
	Bianchi	Specialissima	ME
	Bianchi	Impuloso	ME
	Bianchi	Infinito	ME
	Trek	Roscoe	ME
	Trek	Powerfly	ME
	Linear	Roadster	
	Linear	Limo	
	Bike Friday	Bantam	
	Bike Friday	Llama	
	Bike Friday	Super Pro	
	Trucks-R-U	Monster Machine	
	Trucks-R-U	Tricked Out	
	Trucks-R-U	Haul All	

- SAVED SEARCH
- FILTER
- IMPORT**
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS
- COPY

More Actions: Import

The **Import Configuration Step 1** window will appear.



Import Records: Step 1

16.2.1 Step 1: Import Configuration

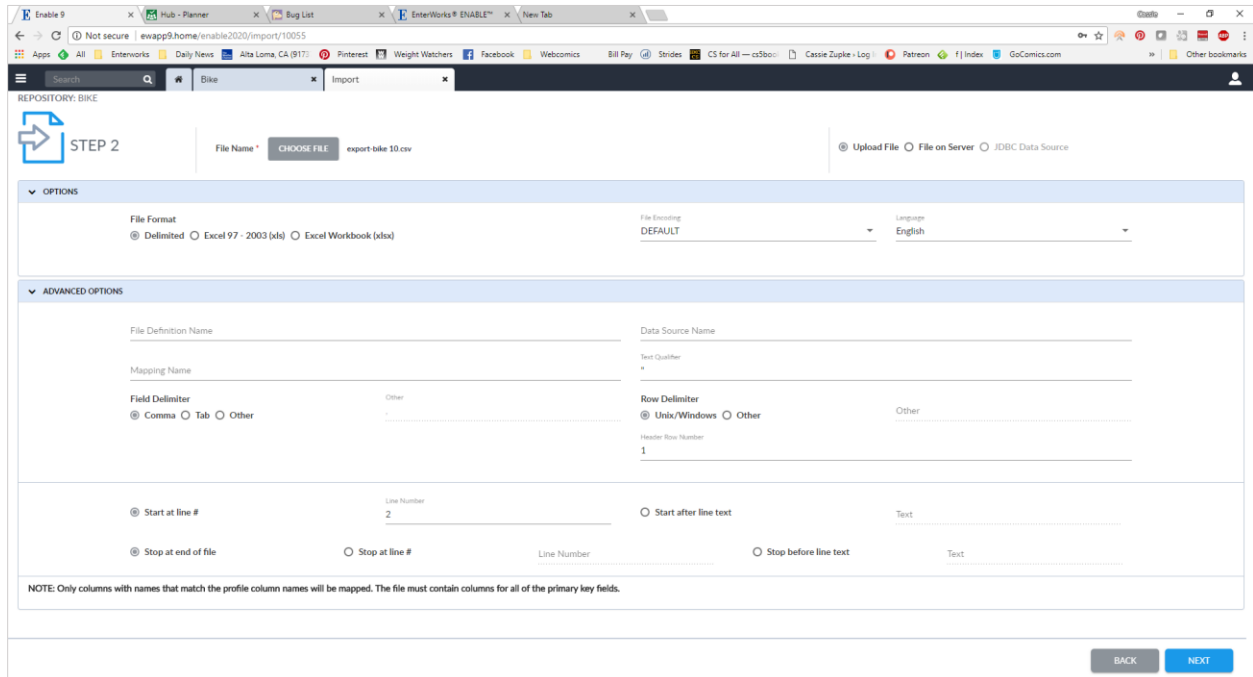
Select **Defined Template** as the type of Import to be performed.

- **Current View:** The record attribute values are imported simply, in a delimited or spreadsheet file.
- **Defined Template:** Allows the user to specify an Import Template to be used. Import Templates are typically created by the system administrator.
- **Create Saved Set:** (Optional) Stores the imported records in a Saved Set.
- **Pending Content Changes:** (Optional) Select to enter changes that take effect in the future (see [Events](#)).

Select Defined Template dropdown: Select the Import Template to be used.

Click **Next** to continue to **Import Configuration Step 3**, **Back** to return to **Import Configuration Step 1** or click the **Close** icon **X** on the **Import** tab to exit the **Import** procedure.

16.2.2 Step 2: Import Configuration



Import Records via Template: Step 2

Edit the **Option** values in the **Import Configuration Step 2** window:

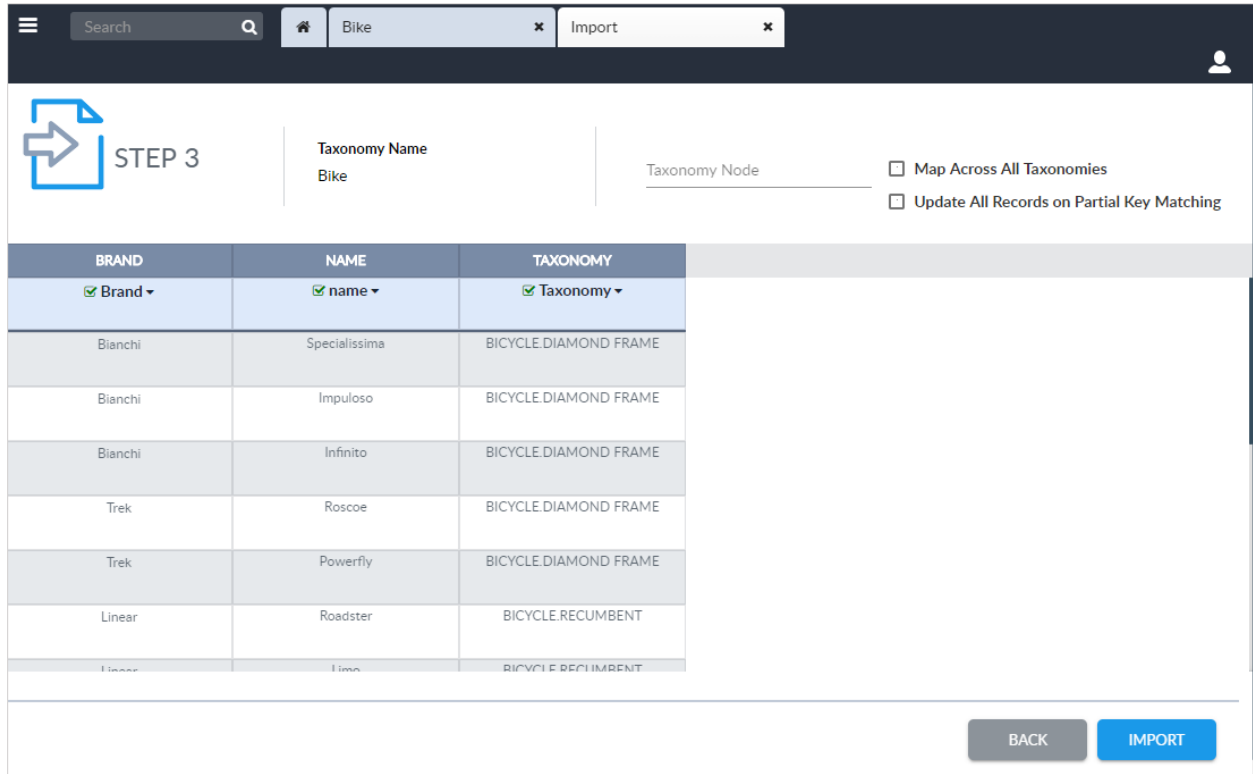
- **File Name:** The name of the file to import.
- **Upload File/File on Server/JDBC Data Source:** Select the location of the import file.
- **File Format:** This option will be selected automatically based on the type of file selected above.
- **File Encoding** – Select the file encoding method. Optionally, leave as **Default** unless the data does not import correctly, then see the system administrator for the correct option.

Optionally, expand the **Advanced Options** and edit as desired. Scroll through the **Advanced Options** as necessary to access options.

Note: To execute a predefined import without a template, save the temporarily created mappings using the **File Definition Name, Data Source Name, Mapping Name, Save Mapping** options.

Import Options	Description
File Definition Name	It names the file definition object that will contain the columns found in the file. Most import jobs auto-generate this object then remove it after the import has completed.
Data Source Name	It names the data source object file that identifies the source. Most import jobs auto-generate this object then remove it after the import has completed.
Mapping Name	The name of the mapping object that will be created. Most import jobs auto-generate this object then remove it after the import has completed.
Text Qualifier	Enter the character(s) that indicate the start and end of a text string value.
Field Delimiter	Enter the character(s) that delimit field values in the import file.
Row Delimiter	Enter the character(s) that delimit rows in the import file.
Header row number	Defaults to 1.
Start at line #	Defaults to 2.
Start after line text	Enter the text that identifies the line before the start of the import records.
Stop at end of file	The default option.
Stop at line #	Instead of stopping at the end of the file, stop at the specified line number.
Stop before line text	Instead of stopping at the end of the file or at a line number, stop before reaching the entered line of text.

16.2.3 Step 3: Import Configuration



Import Records: Step 3

Verify the field mappings. If a file previously exported from a repository with the same profile is used and the column names were not changed, all the fields should map automatically. If any column is not properly mapped, click its column header and select the correct attribute name.

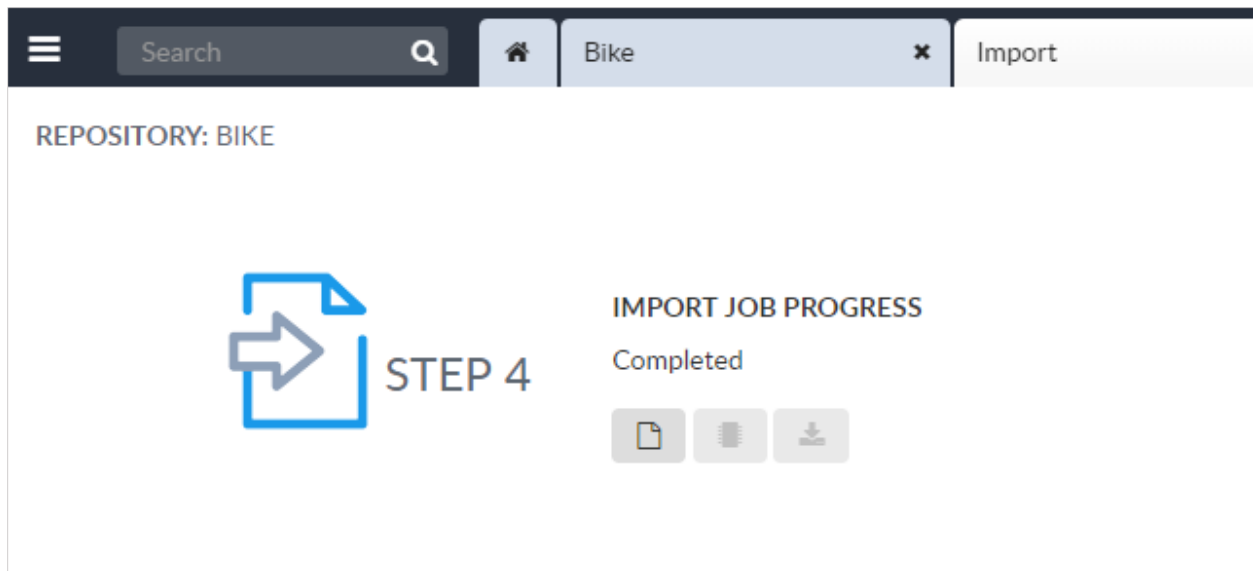
- **Taxonomy Node** dropdown list - If all Category Attributes in the input file are associated with one taxonomy node, the taxonomy node can be selected and only those Category Attributes will be shown for selection mapping. This is particularly useful for implementations with large numbers of Category Attributes.
- **Map Across All Taxonomies** checkbox - If a field in the input file is a Category Attribute, use this checkbox to have the Category Attributes map automatically and/or show in the dropdown list for manual mapping. Category Attributes don't show in the mapping list automatically because it could make the selection list very large.
- **Update all records on partial key matching** – This checkbox is used to update multiple records based on a partial key. This option should be used with care because one record in the input file could update multiple records in the database. It is recommended that the system administrator be contacted before using this option.

Click the **Import** button to import the data file, click the **Back** button to return to the previous **Import Configuration** page, or click the **Close** icon **X** on the Import tab to quit without importing the data file.

16.2.4 Step 4: Import Configuration

An Import job is created and placed in the Job Queue. To view the job’s progress, open the **Job Monitor** from the **Features Sidebar’s System** tab or open a **Job Monitor Widget** in the **Dashboard**.

The Imported record files are prepared and made available for download and transmission. Upon completion, an **Import Job Completed** message will appear in the **Import Configuration’s Step 4** window.

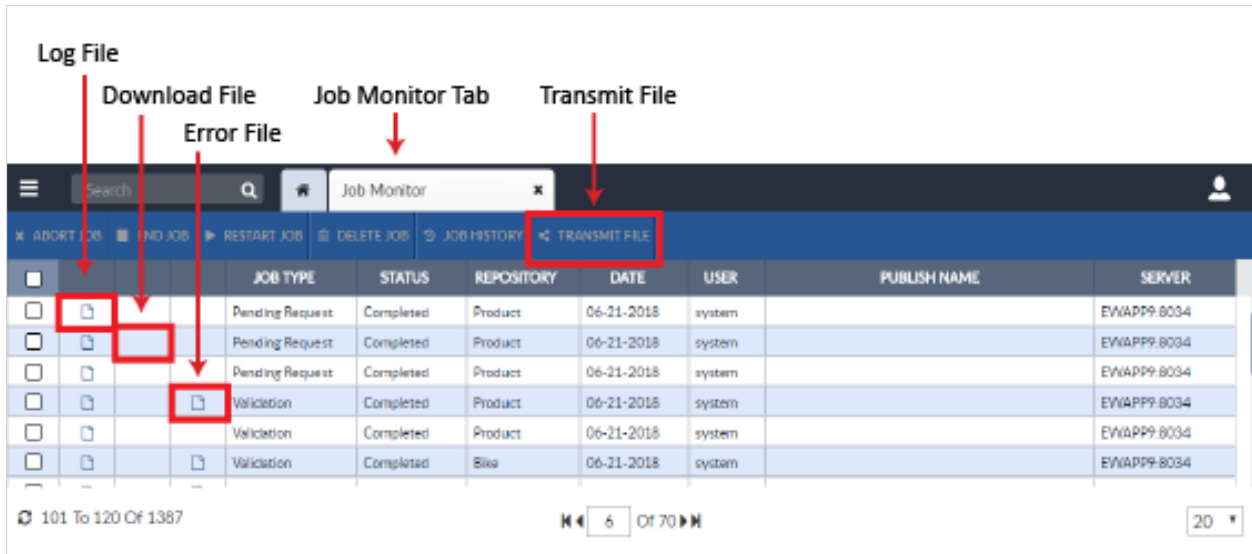


Import Job Completed: Step 4


The user can download the files created by the Import procedure by clicking the buttons below the Job Completion Status message:

- **Download Log File:** Download the Import Job Log file. It contains status about the contents of the Import Job, the date and time the Import Job was run, completion status, and the number of records processed and imported.
- The second file button is not used during imports.
- The third file button is not used during imports.

The user can also download the resulting output files from a **Job Monitor Widget**.



Download/Transmit Job Monitor Files

If a Saved Set was created, to view it, click the **Refresh** icon  on the bottom left of the **Repository View** and click the **Saved Set** button on the **Repository View's Activity Tab**. The **Saved Set Sidebar** will appear. Click on the Saved Set that was created to see the added or modified records.


17 Export Records

To export one or more records from a repository, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-Fi	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunna
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddleste
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record or records in the **Repository View**. The user may select records individually or may use Saved Sets, Filters or Search to select the records. A Preference View can be defined and enabled to select the attribute values to be included in the export. See [Preference Views](#) for more information.

Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Export** option.

	ERROR	BRAND	NAME
<input type="checkbox"/>	▲	Ducati	Monster
<input type="checkbox"/>	▲	Ducati	Monster2
<input checked="" type="checkbox"/>	▲	Bianchi	Specialissima
<input checked="" type="checkbox"/>	▲	Bianchi	Impuloso
<input checked="" type="checkbox"/>	▲	Bianchi	Infinito
<input checked="" type="checkbox"/>	▲	Trek	Roscoe
<input checked="" type="checkbox"/>	▲	Trek	Powerfly
<input checked="" type="checkbox"/>	▲	Linear	Roadster
<input checked="" type="checkbox"/>	▲	Linear	Limo
<input checked="" type="checkbox"/>	▲	Bike Friday	Bantam
<input checked="" type="checkbox"/>	▲	Bike Friday	Llama
<input checked="" type="checkbox"/>	▲	Bike Friday	Super Pro
<input checked="" type="checkbox"/>	▲	Trucks-R-Us	Monster Machine
<input checked="" type="checkbox"/>	▲	Trucks-R-Us	Tricked Out
<input checked="" type="checkbox"/>	▲	Trucks-R-Us	Haul All

1 To 15 Of 15 (13) 1 Of 1

More Actions: Export Records

The **Export Configuration Step 1** window will appear.

REPOSITORY: BIKE

STEP 1

SELECT EXPORT TYPE

Current View
 Defined Template

Use Advanced Options

EXPORT

Export Records: Step 1

Export Configuration Step 1:

Select the type of Export to be performed.

- **Current View:** The record attribute values are exported simply, in a .csv file.
- **Defined Template:** Allows the user to specify an Export Template to be used.
- **Use Advanced Options:** Allows the user to control aspects of the Export.

If **Current View** is selected, click the **Export** button to begin the export. If **Defined Template** is selected, click the **Next** button to continue to configure the Export procedure. To exit the Export procedure, click the **Close** button on the **Export** tab.

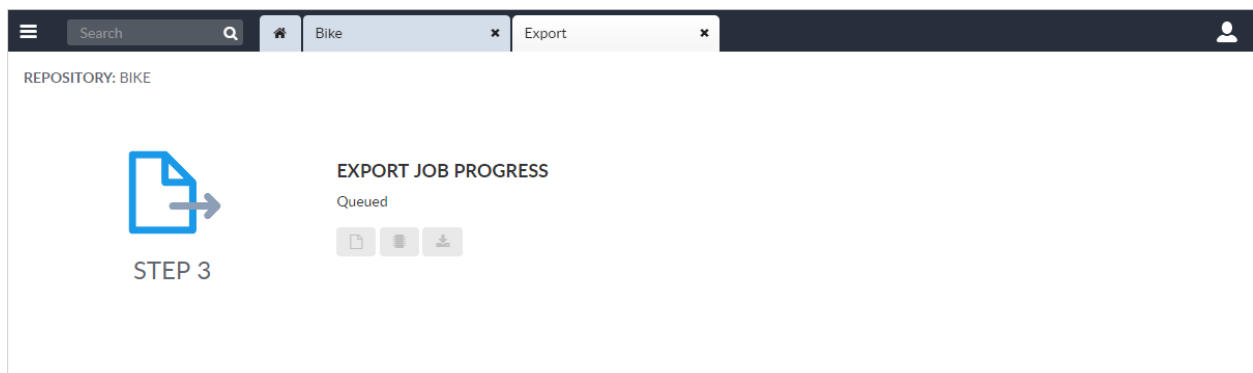
Export Configuration Step 2:

This screen appears if **Use Advanced Options** is checked. Edit the Advanced Options as desired. For details see [Advanced Options](#) below.

Click **Next** to continue to **Export Configuration Step 3** or click the **Close** icon **X** on the **Export** tab to exit the Export procedure.

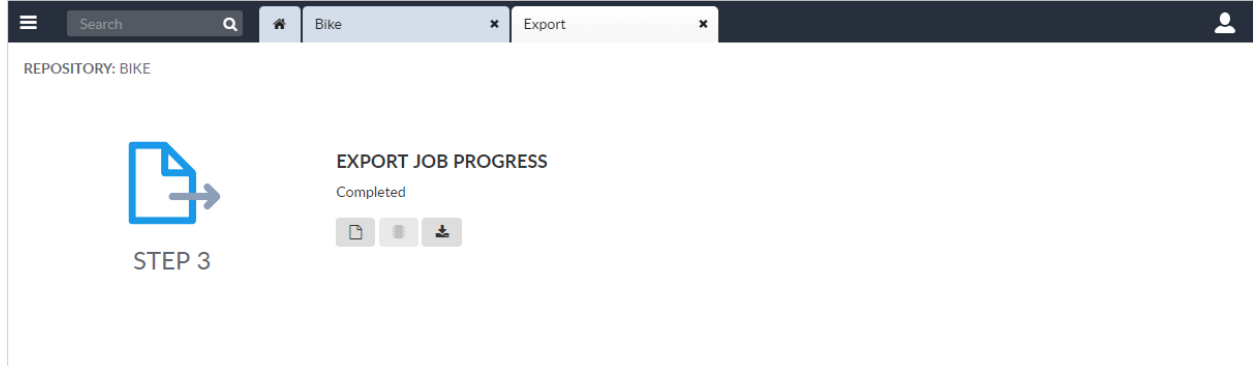
Export Configuration Step 3:

An Export is created and placed in the Job Queue. To view the job's progress, open the **Job Monitor** from the **Features Sidebar's System** tab or open a **Job Monitor Widget** in the **Dashboard**.



Export Records Step 3: Job Queued

The Exported record files are prepared and made available for download and transmission. Upon completion, an **Export Job Completed** message will appear in the **Export Configuration's Step 3** window.

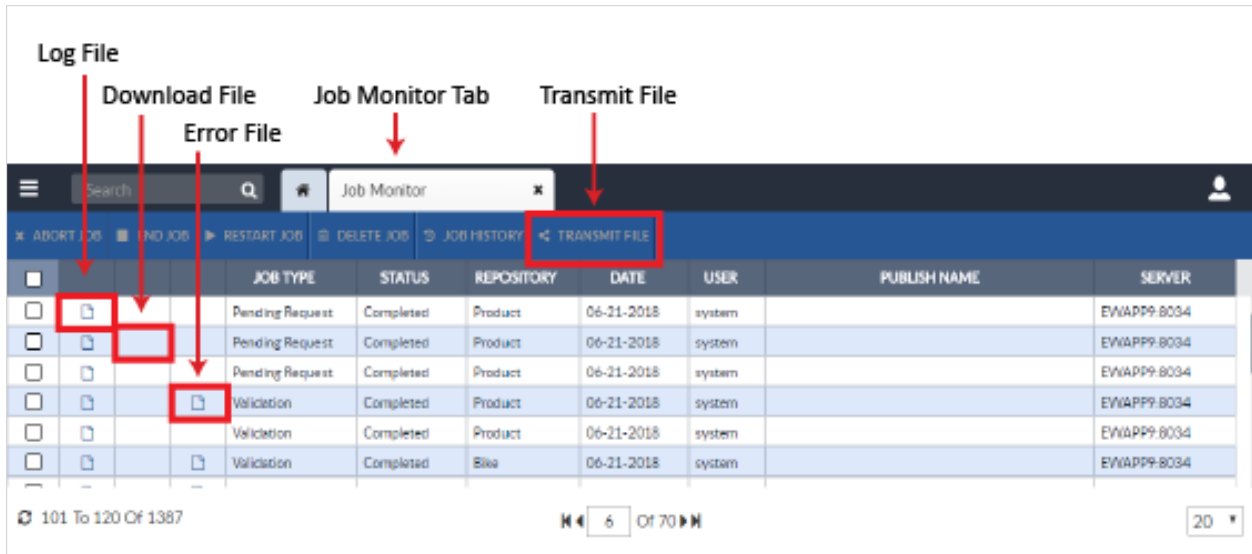


Export Records Step 3: Completed

The user can download the files created by the Export procedure by clicking the buttons below the Job Completion Status message:

- **Download Log File:** Download the Export Job Log file. It contains status about the contents of the Export Job, the date and time the Export Job was run, completion status, and the number of records processed and exported.
- **Error Log File:** A log of any errors encountered while generating the Export file. The types of errors tracked are related to the success of the generation of the file, not the validity of the record attributes.
- **Download Export File:** The Export file generated by the Export Job.

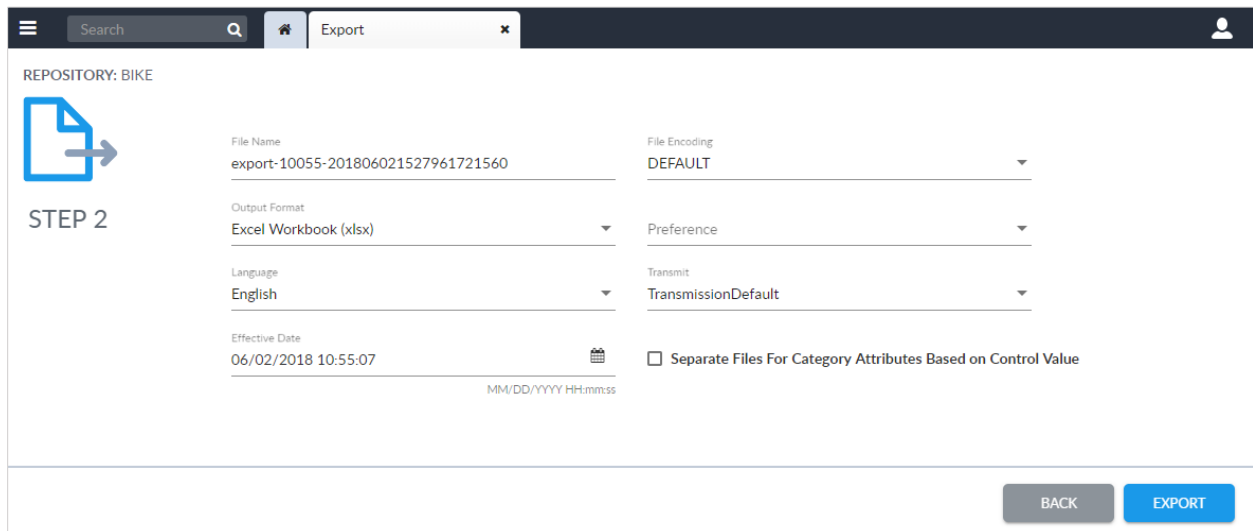
The user can also download the generated files through the **Job Monitor** Widget or tab.



Download/Transmit Job Monitor Files

17.1 Advanced Options

If **Advanced Options** is checked on the **Export Configuration** window's **Step 1**, the **Step 2** screen will appear.




Export Records Step 2: Advanced Options

Edit the advanced options as desired:

- **File Name:** Enter the name of the Export file to be generated.

- **Output Format:** Select the format of the Export file.
- **Language:** Selecting a language will trigger the use of the corresponding values for any multi-language attribute fields.
- **Effective Date:** (Optional) If the **Effective Date** option is used, Enable examines any Pending Events that relate to the selected records to determine what the records values would be upon that date. It then exports these future record values.
- **File Encoding:** Specify the file encoding method to be used.
- **Preference:** (Optional) Select a Preference View to restrict the list of attributes exported.
- **Transmit:** (Optional) Select a Transmission Option to select a transmission configuration and upon generation of the Export file, transmit it.
- **Separate Files For Category Attributes Based on Control Value:** If selected, for each taxonomy node in the selected records, a separate Export file will be generated that includes only the values of global attributes and the Category Attributes attached to the taxonomy node. This option can be especially useful if the purpose of generating the Export file is to use it to facilitate the importation of data, as there is a 1022 column limit on imported files.

When the advanced options have been edited as desired, lick **Next** to continue to **Export Configuration Step 3** or click the **Close** icon  on the **Export** tab to exit the Export procedure.

17.2 Syndication Templates Function

The use of a syndication template for exporting record data is especially useful if any data transformations or validations are required before the Export file(s) is generated. Syndication templates are typically created by the system administrator.

17.3 Exporting Digital Assets

Export and syndication templates can be set up to include a zipped folder containing any digital assets linked to the exported records. Export and syndication templates are typically defined by the system administrator.

18 Taxonomy and Hierarchies

For detailed information about the use and functioning of Taxonomies and Hierarchies, see [Enable Basics: Taxonomies and Hierarchies](#).

For detailed information regarding managing Taxonomy and Hierarchies through the Model, see “Enable 9 Product Information Management (PIM) Administrator’s Manual”.

This section describes the Taxonomy and Hierarchy management tasks available to most users through the **Hierarchy/Taxonomy Sidebar**. The **Hierarchy/Taxonomy Sidebar** can be used for most tasks associated with maintaining Taxonomies, and for creating and maintaining Hierarchies, including adding, editing, moving and deleting nodes, and assigning Category Attributes and records to nodes.

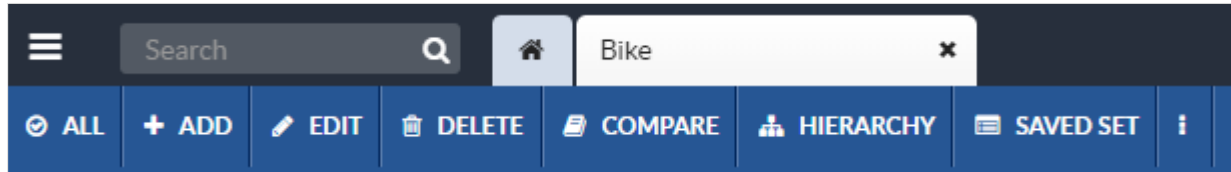
18.1 View Taxonomy and Hierarchies

To view and manage a repository’s hierarchies or taxonomy, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

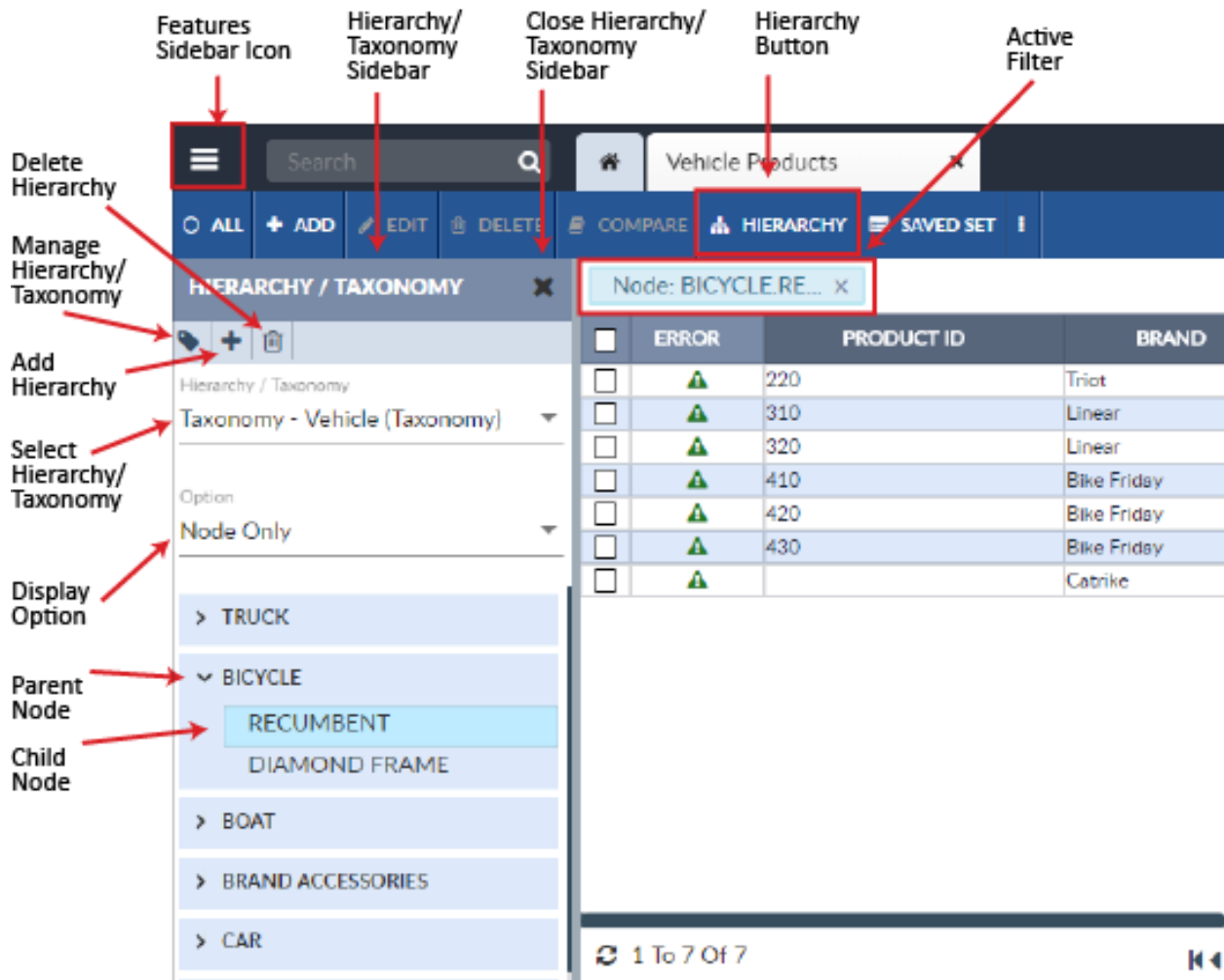
Repository View Grid View

Click the **Hierarchy** button on the **Repository View’s Activity Bar**.



Repository View Activity Bar

The **Hierarchy/Taxonomy Sidebar** will appear. All the functionality of the **Repository View** is retained.




Hierarchy/Taxonomy Sidebar

The **Hierarchy/Taxonomy Sidebar** will appear on the left. It displays the name of the hierarchy or taxonomy being displayed, and the nodes of that taxonomy or hierarchy.

Select the desired taxonomy or hierarchy in the **Hierarchy/Taxonomy** dropdown list. The hierarchy/taxonomy's first level nodes will be displayed. Nodes with children nodes can be expanded to show the children nodes.




Selecting a hierarchy or taxonomy node will cause the **Repository View** to display only the records assigned to that node. If the selected node has no records assigned to it, no records will be displayed. Note that if a taxonomy is being viewed, the taxonomy attribute field of the records shown indicate the selected node.

A filter box will be added to the **Repository View's Filter Bar** that indicates which nodes' records are currently being displayed. Hovering over the filter term shows the node's taxonomy/hierarchy.

The records shown in the Repository View can also be filtered through using the **Filter** button on the **Repository View's Activity Bar's More**  dropdown list. For more information about Filters, see [Filters](#).

The **Hierarchy/Taxonomy Sidebar's Display Option** dropdown list allows the user to choose if only the records attached to the node are displayed, or if the records attached to the children or parent nodes are also displayed.

The user can access the following functionality by clicking the buttons listed in the **Hierarchy/Taxonomy Sidebar's Activity Bar**. The functions will be described more fully in the following sections.

- **Manage**  : Opens a selected hierarchy in the **Hierarchy Editor** or opens the taxonomy in the **Taxonomy Editor**. See [Manage a Hierarchy](#) or [Manage a Taxonomy](#).
- **Add Hierarchy**  : Allows the user to create a new hierarchy. See [Add a Hierarchy](#).
- **Delete Hierarchy**  : Allows the user to delete an existing hierarchy. See [Delete Hierarchy Node](#).

18.2 Manage a Taxonomy

To manage a taxonomy, open the taxonomy in the **Taxonomy Editor**. To do so, first open the repository by opening the **Feature Sidebar**, selecting the desired folder, and selecting the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg


Repository View Grid View

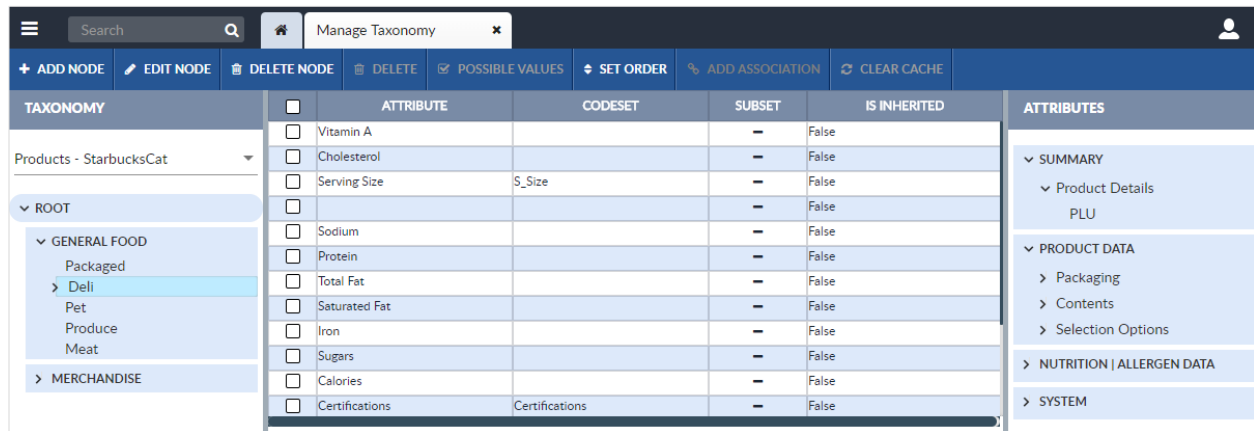
Click the **Hierarchy** button on the **Repository View's Activity Bar**. The **Hierarchy/Taxonomy Sidebar** will appear.

ERROR	SE...	BRAND	NAME	TAXONOMY
	1	Ducati	Monster	Car
	2	Ducati	Monster2	BMW
	100	Bianchi	Specialissima	BICYCLE.DIAMOND FRAME
		Bianchi	Impuloso	BICYCLE.DIAMOND FRAME
		Bianchi	Infinito	BICYCLE.DIAMOND FRAME
		Trek	Roscoe	BICYCLE.DIAMOND FRAME
		Trek	Powerfly	BICYCLE.DIAMOND FRAME
		Linear	Roadster	BICYCLE.RECUMBENT
		Linear	Limo	BICYCLE.RECUMBENT
		Bike Friday	Bantam	BICYCLE.RECUMBENT
		Bike Friday	Llama	BICYCLE.RECUMBENT
		Bike Friday	Super Pro	BICYCLE.RECUMBENT

Hierarchy/Taxonomy Sidebar

At the top of the **Hierarchy/Taxonomy Sidebar** is a **Hierarchy/Taxonomy** dropdown list that displays a list of the repository’s taxonomy and hierarchies. Select the repository’s taxonomy. The **Hierarchy/Taxonomy Sidebar** will display a list of the taxonomy’s nodes.

To manage the taxonomy, select the **Manage** button  on the left of the **Hierarchy/Taxonomy Sidebar’s Activity Bar**. The taxonomy will be opened in the **Taxonomy Editor**.



Taxonomy Editor

(For a detailed labeled reference guide image, see [Taxonomy Editor Reference Guide](#).)

The left pane of the **Taxonomy Editor** displays the nodes of the taxonomy in the **Taxonomy Node Tree**. Nodes preceded by a > have children nodes. Click on the > to expand a node and display its children nodes.

The central pane of the **Taxonomy Editor** is the **Assigned Category Attributes** pane. It shows the Category Attributes assigned to the selected node. Attributes with assigned Code Sets indicate the Code Set name. If a Category Attribute is assigned subset of the indicated Code Set, a checkmark appears in the SUBSET column. Inherited Category Attributes are indicated by an **Is Inherited** value of **True**.

The right pane of the **Taxonomy Editor** is the **Available Category Attributes** pane. It displays the Category Attributes that can be assigned to taxonomy nodes. The attributes are organized by Attribute Tabs and Attribute Groups.

The actions on the **Taxonomy Editor’s Activity Bar** are:

- **Add Node:** Add a node to the **Taxonomy Tree**. See: [Add a Node](#).
- **Edit Node:** Edit a node on the **Taxonomy Tree**. This allows the user to change the node’s name and description. See: [Edit a Node](#).
- **Delete Node:** Delete a node from the **Taxonomy Tree**. See: [Delete a Node](#).

- **Remove Assignment:** Unassign the selected Category Attribute from a taxonomy node (to remove it from the node). See: [Manage Category Attribute Assignment](#).
- **Possible Values:** Restrict the contents of the selected Category Attribute to a subset of its associated Code Set. See: [Possible Values](#).
- **Set Order:** Clicking this causes an informational pop-up to appear that instructs the user to drag and drop a Category Attribute to change its display order. See: [Set Category Attribute Display Order](#).
- **Add Association:** Used to assign an Associated Object to the taxonomy. See: [Add an Association Object](#).
- **Clear Cache:** Clears the system cache.

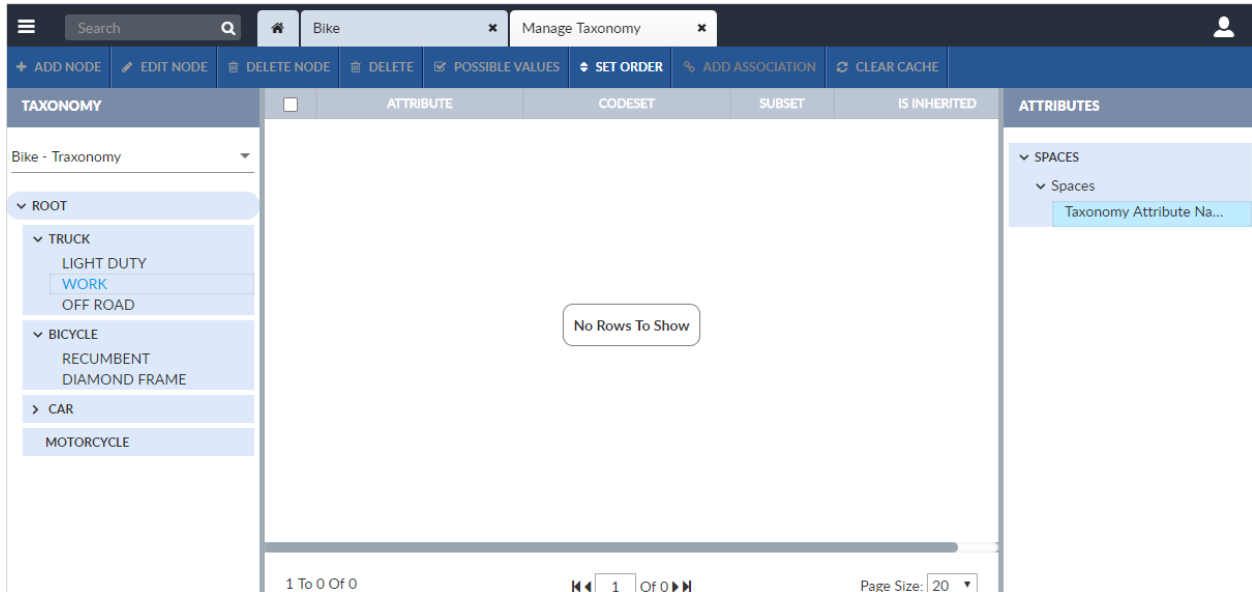
Note: Modifying the taxonomy changes the system model. Anytime the system model has been changed, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.1 Add an Association Object

The Add an Association Object functionality has not yet been implemented in Enable 9. Please use Enable 8 to Add an Association Object. For more information, contact the system administrator or EnterWorks for information regarding Taxonomy Association Objects.

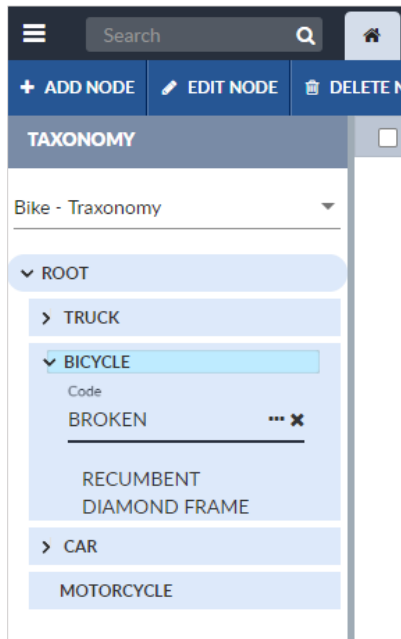
18.2.2 Add a Node

To create a new taxonomy node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.





Taxonomy Editor

New nodes are added as children of existing nodes. Select the node that will be the parent of the new node. Click the **Add Node** button on the **Taxonomy Editor's Activity Bar**. A small **Node Editor** box will appear beneath the parent node.



Add Node to a Taxonomy

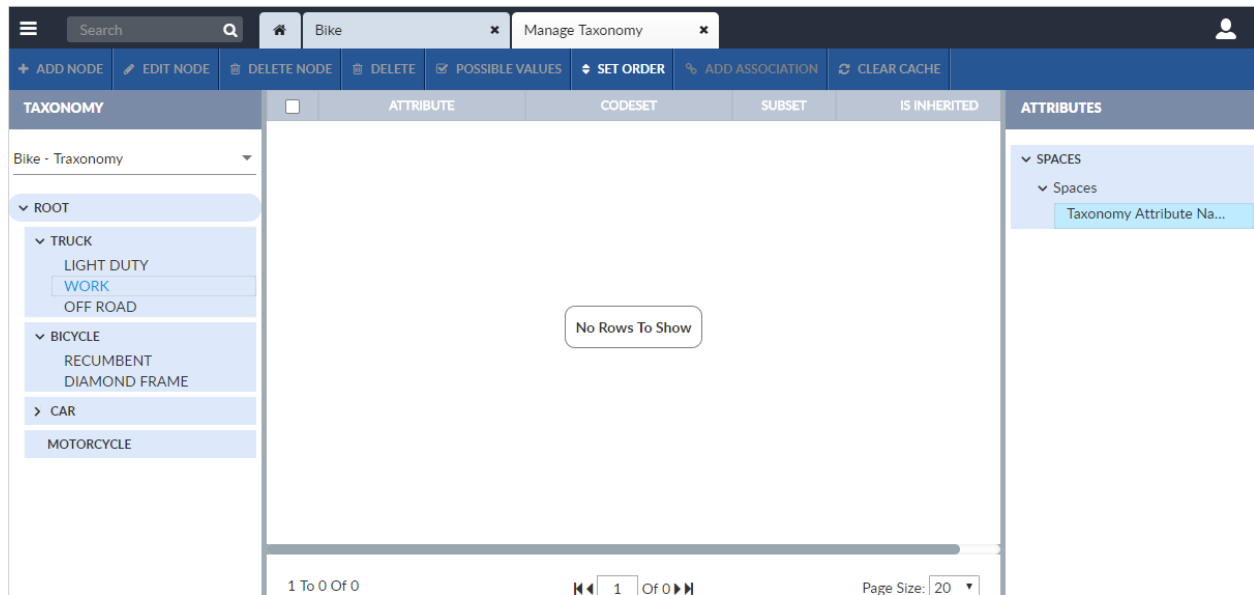
Enter the node’s name as desired. To enter the node’s description, select the **More Actions** icon  at the end of the node’s name field to expand the node.

To save the new node and exit the **Node Editor**, position the cursor to the end of the node name or description and hit enter. To exit without saving the changes to the node, click the **Close** icon  on the right end of the **Node Editor**.

If changes were made to the Taxonomy, clear the cache and refresh displays to ensure the changes have been propagated throughout the system and displays are accurately reflecting system status.

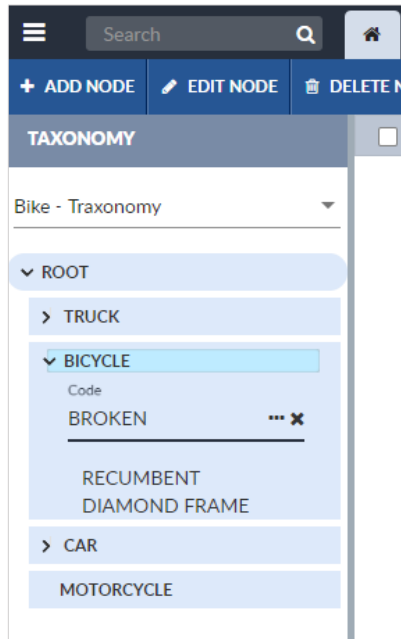
18.2.3 Edit a Node

To edit a node in a taxonomy, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.





Taxonomy Editor

Select the node to be edited. Click the **Edit Node** button on the **Taxonomy Editor’s Activity Bar**.



Edit a Taxonomy Node

Modify the node’s name as desired. To modify the node’s description, select the **More Actions** icon  at the end of the node’s name field to expand the node. Edit the description as desired.

To save changes to the node and exit the **Node Editor**, position the cursor to the end of the node name or description and hit enter. To exit without saving the changes to the node, click the **Close** icon  on the right end of the **Node Editor**.

If changes were made to the Taxonomy, clear the cache and refresh displays to ensure the changes have been propagated throughout the system and displays are accurately reflecting system status.

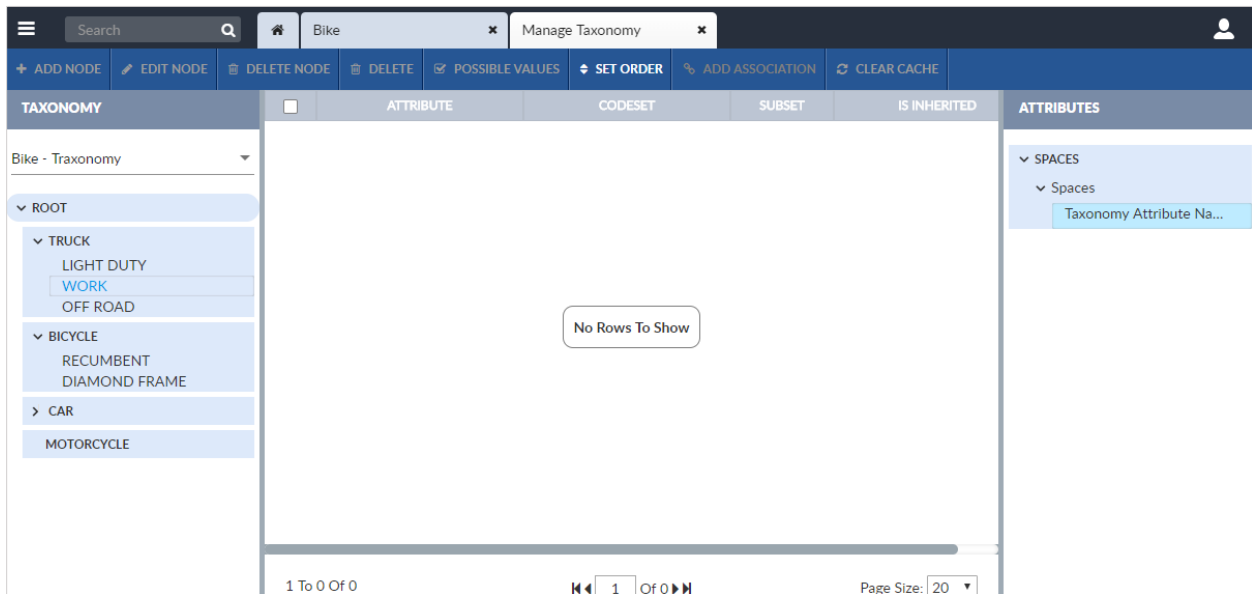
18.2.4 Move/Reorder a Node

Taxonomy nodes with no descendent nodes can be moved from one parent node to another. When a taxonomy node is moved, it becomes the first node in the parent node’s list of descendent nodes.

Attempting to move a node to its current parent node effectively moves the node to the first position in the parent node’s list of descendants. Reordering a parent node’s list of descendants can be accomplished by moving different nodes to the first position until the desired list order is achieved.

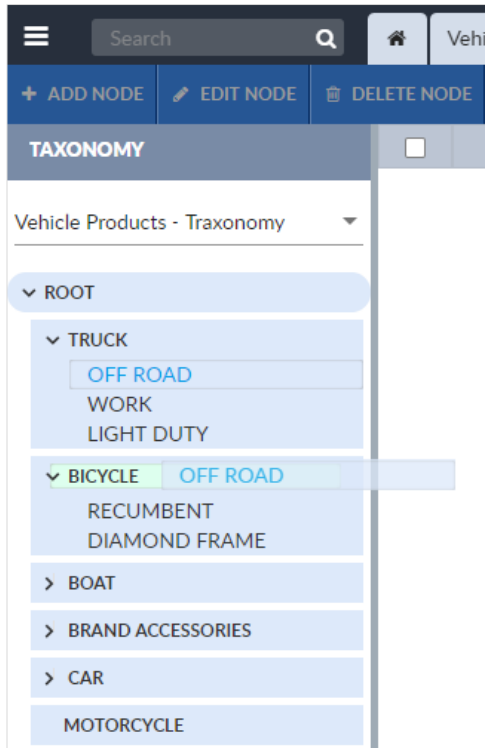
WARNING: Moving a taxonomy node to a new parent node will invalidate the taxonomy attribute for repository records assigned to the node and will result in the loss of any Category Attributes.

To move a taxonomy node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Drag and drop the node to its new parent node (or the same parent node).



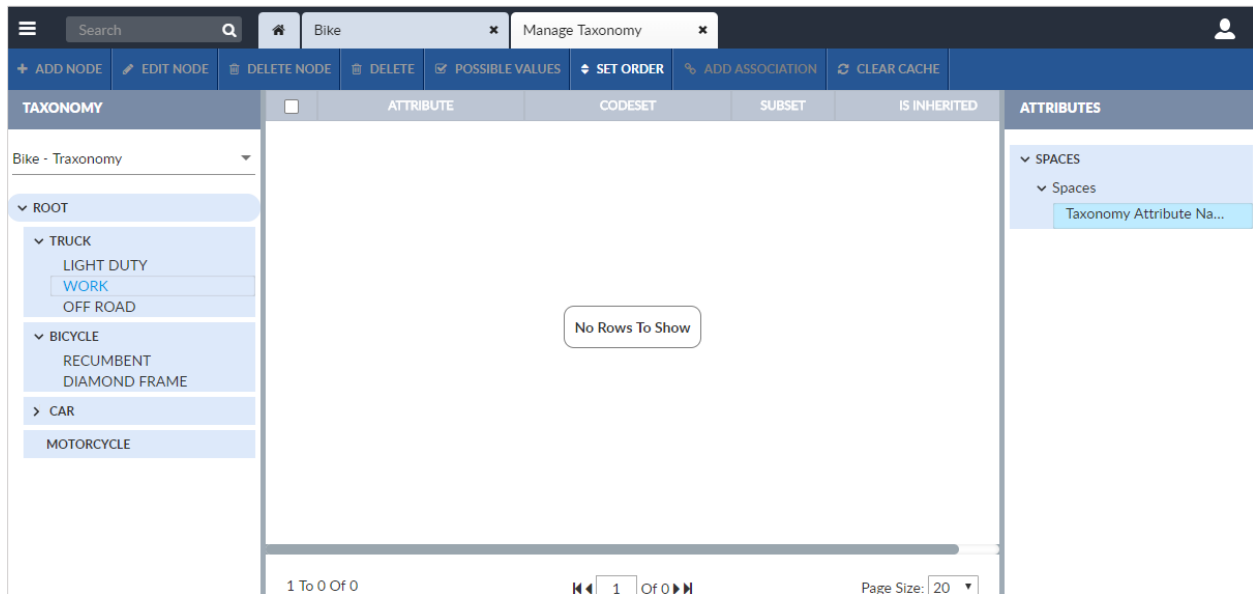
Move Taxonomy Node

The node will be moved to the first position in the list of the parent node’s descendent nodes. Clear the cache and refresh displays to ensure the change to the taxonomy has been propagated throughout the system and displays are accurately reflecting system status.

18.2.5 Delete a Node

WARNING: Deleting a taxonomy node that repository records are assigned to will result in the loss of any Category Attributes assigned to that node or any of its children nodes.

To delete a node from a taxonomy, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Select the node to be deleted. Click the **Delete Node** button on the **Taxonomy Editor’s Activity Bar**. A **Confirm** window will appear. Select **Yes** to delete the node. Select **No** to exit the **Confirm** window without deleting the node.

Clear the cache and refresh displays to ensure the change to the taxonomy has been propagated throughout the system and displays are accurately reflecting system status.

18.2.6 Assign/Reassign a Record to a Taxonomy Node

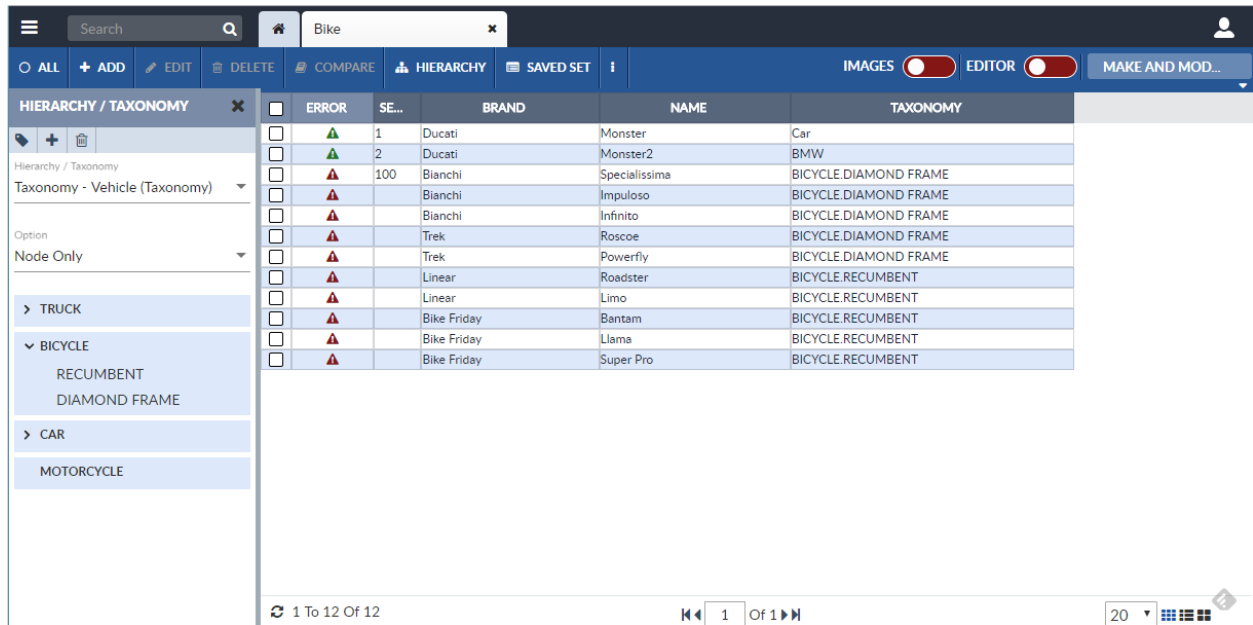
Records are assigned or reassigned to a taxonomy node by editing their attribute that is used to identify the taxonomy node they are assigned to. When editing a record, selecting the record’s taxonomy attribute value will bring up an **Edit** window that allows the user to select a new taxonomy for the record. For more information on editing record attributes, see [Edit a Record](#).

After changes to the taxonomy, clear the cache and refresh displays to ensure the change to the taxonomy has been propagated throughout the system and displays are accurately reflecting system status.

18.2.7 Manage Attributes and Category Attributes

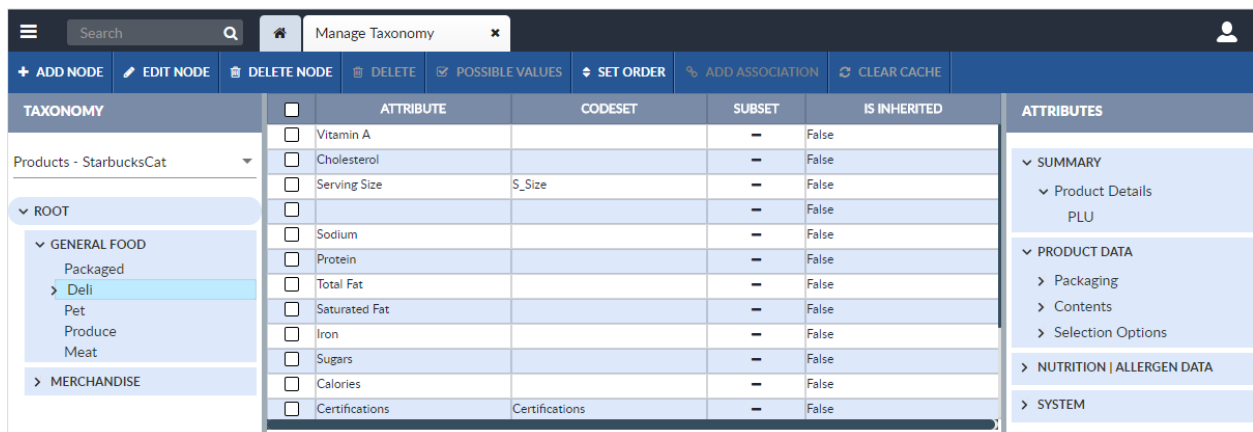
The **Taxonomy Editor’s Category Attribute Tree** (on the right of the **Taxonomy Editor** screen) displays all Attribute Tabs and Attribute Groups, as well as the attributes themselves. It allows permitted users to create, move, and modify these Attribute Tabs, Attribute Groups, attributes and Category Attributes.

To manage Category Attributes for a taxonomy, first bring up the taxonomy for editing. See [Managing a Taxonomy](#) for instructions on opening the taxonomy in the **Hierarchy/Taxonomy Sidebar**.



Hierarchy/Taxonomy Sidebar


Click the **Manage Taxonomy** icon . The **Taxonomy Editor** will appear.

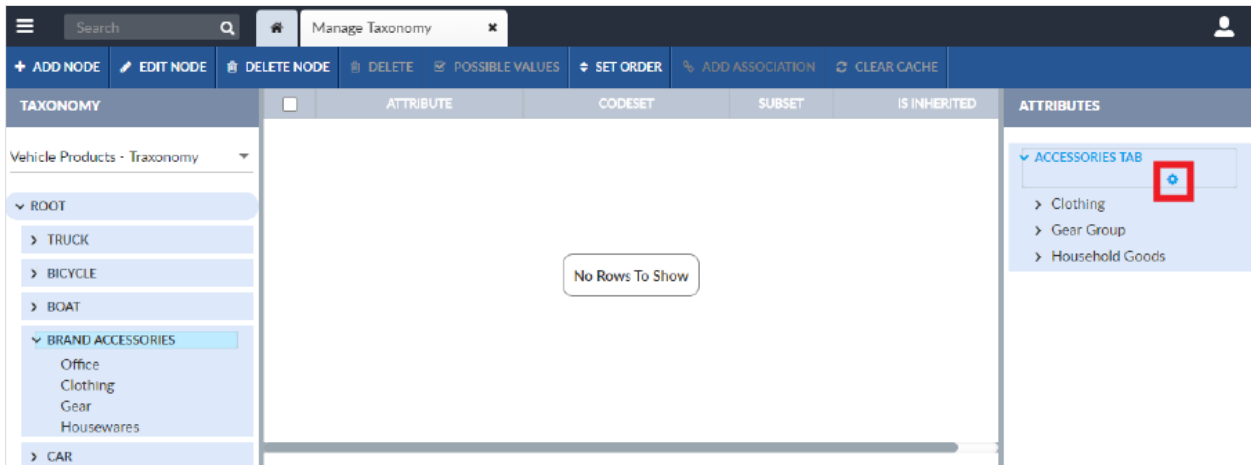


Taxonomy Editor


18.2.7.1 Add/Edit an Attribute Tab

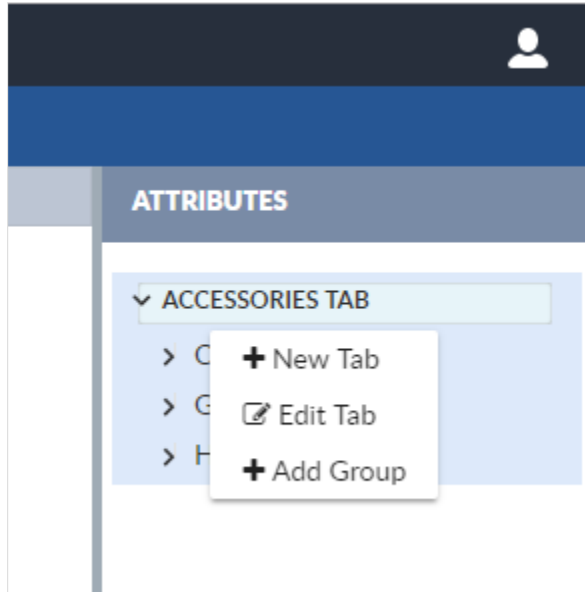
To add or edit an Attribute Tab in the **Taxonomy Editor**, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.

Hover over an existing tab in the **Category Attribute Tree** (on the right of the **Taxonomy Editor's** screen). If the user has sufficient permissions, a **Manage Tab** icon  will appear.



Manage Tab icon

Click the **Manage Tab** icon  and a dropdown list will appear that allows the user to create a new Attribute Tab (**New Tab**), edit an existing Attribute Tab (**Edit Tab**), or add a new Attribute Group (**Add Group**).

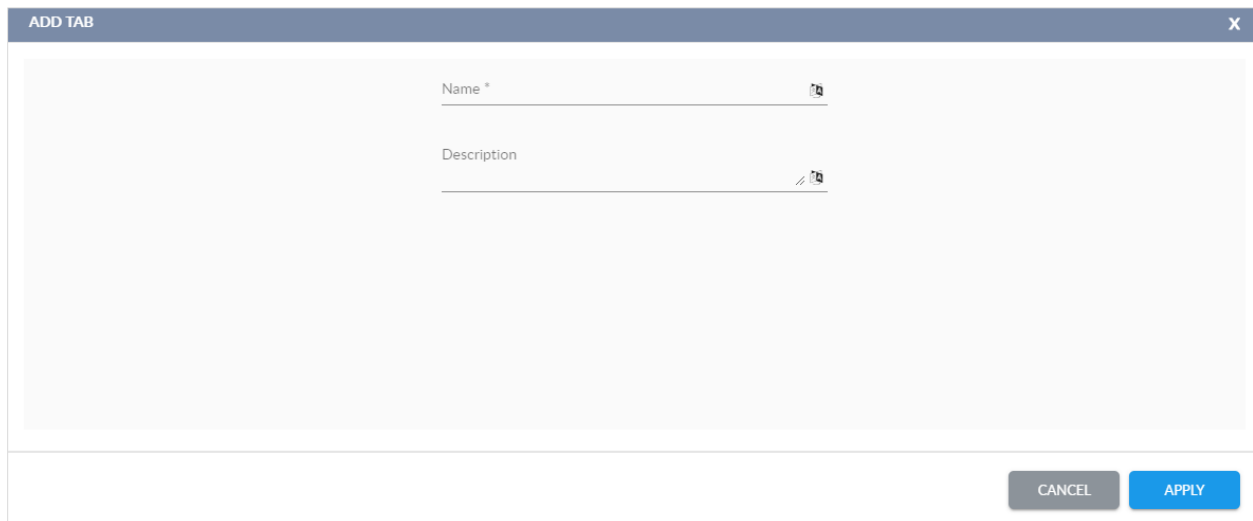


Taxonomy Editor: Manage Attribute Tabs


To add an Attribute Tab, select **New Tab**. An **Add Tab** pop-up window will appear that allows the user to enter a name and description for the new Attribute Tab.

To edit an Attribute Tab, select **Edit Tab**. An **Edit Tab** pop-up window will appear that allows the user to change the name and/or description for the Attribute Tab.

Except for the titles of the windows, the **Add Tab** window and the **Edit Attribute** window are the same.






Taxonomy Editor: Add/Edit Attribute Tab


Edit the name and description of the Attribute Tab as desired. Click **Apply** to save the changes and return to the **Taxonomy Editor**. Click **Cancel** or the **Close** icon  to return to the **Taxonomy Editor** without creating the new Attribute Tab (if **New Tab** was selected) or saving changes to the Attribute Tab (if **Edit Tab** was selected).

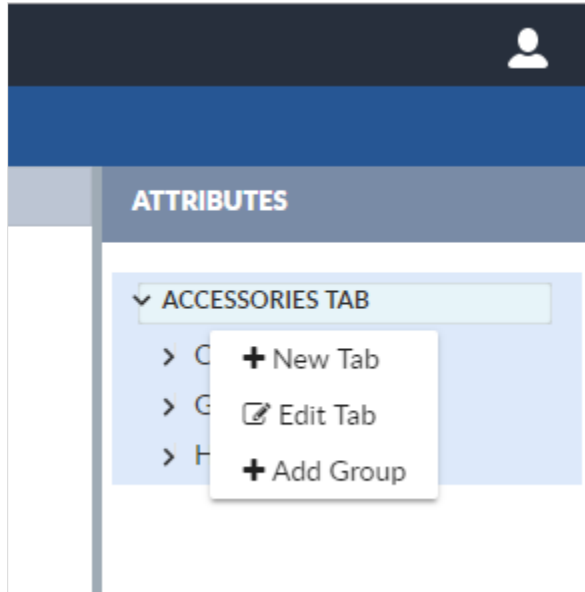
After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.7.2 Add an Attribute Group

To add an Attribute Group in the **Taxonomy Editor**, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.

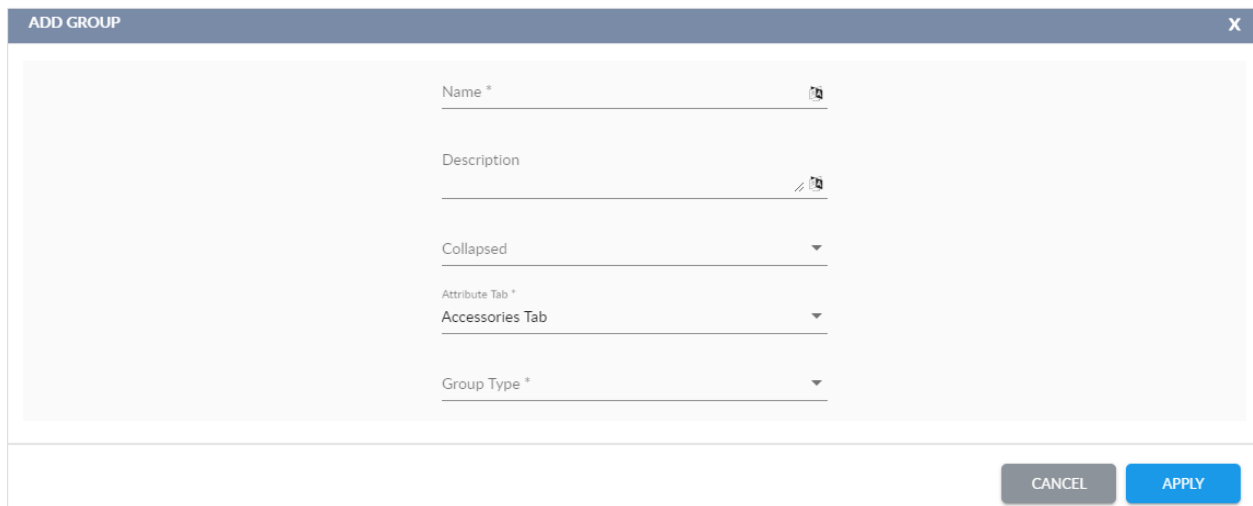
Attribute Groups are added through the **Add Group** pop-up window. There are two ways to access the **Add Group** window: via the **Manage Tab**  icon (found by hovering over an existing Attribute Tab) or via the **Manage Group**  icon (found by hovering over an existing Attribute Group). It doesn't matter which Attribute Group or Attribute Tab is used to access the **Add Group** window; the user will be able to choose any Attribute Tab for the new Attribute Group to belong to. **Note:** If the user does not have sufficient permissions, the **Manage Tab** icon  will not appear.

The first way to bring up the **Add Group** window is to hover over an Attribute Tab in the **Category Attribute Tree** and click the **Manage Tab**  icon. A dropdown list will appear that allows the user to create a new Attribute Tab (**New Tab**), edit an existing Attribute Tab (**Edit Tab**), or add a new Attribute Group (**Add Group**).




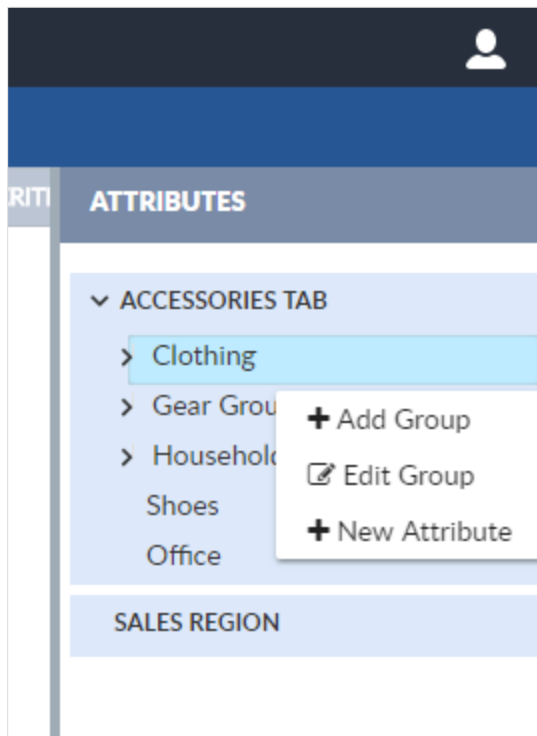
Taxonomy Editor: Manage Attribute Tabs/Add Attribute Group

Select **Add Group**. An **Add Group** pop-up window will appear.



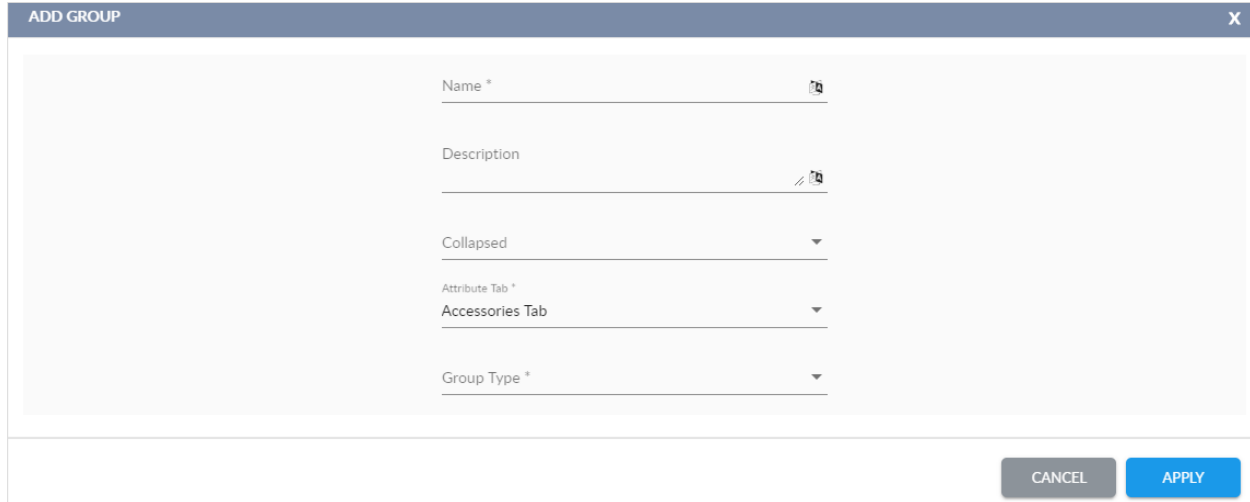
Taxonomy Editor: Add an Attribute Group

The second way to access the **Add Group** pop-up window is to hover over an existing group and click the **Manage Group**  icon. A dropdown list will appear that allows the user to create a new Attribute Group (**Add Group**), edit an existing Attribute Group (**Edit Group**), or add a new attribute (**New Attribute**).



Taxonomy Editor: Manage Attribute Tabs/Add Attribute Group

Select **Add Group**. An **Add Group** pop-up window will appear.



ADD GROUP

Name *

Description

Collapsed

Attribute Tab *

Accessories Tab

Group Type *

CANCEL APPLY

Taxonomy Editor: Add an Attribute Group

Edit the **Add Group** window values as desired:



- **Name:** (Required) The name of the new Attribute Group.
- **Description:** A description of the new Attribute Group.
- **Collapsed** dropdown list: This value determines if the new Attribute Group should be **Collapsed** or **Expanded** when initially displayed.
- **Attribute Tab** dropdown list: (Required) Select the Attribute Tab in which the new Attribute Group will be displayed. Note that the selected Attribute Tab does not have to be the Attribute Tab that was selected to bring up the **Add Group** window.
- **Group Type** dropdown list: Select the type of Attribute Group to be created. There are three types of Attribute Groups:
 - Attribute (displays as blank) – for a collection of attributes.
 - Link Relationship – for displaying the records of a linked repository.
 - Variant – for qualifying the Category Attributes as Variants.

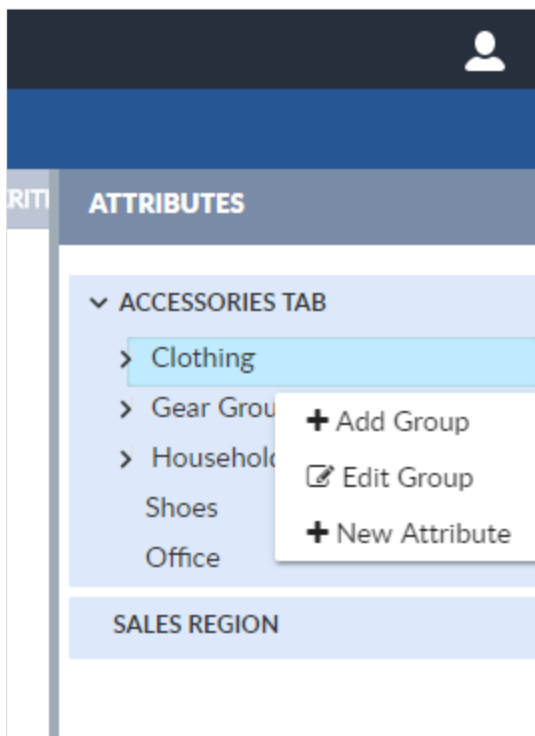
Click **Apply** to save the changes and return to the **Taxonomy Editor**. Click **Cancel** or the **Close** icon **X** to return to the **Taxonomy Editor** without creating the new Attribute Group.

After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.7.3 Edit an Attribute Group

To edit an existing Attribute Group in the **Taxonomy Editor**, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.

To edit an existing Attribute Group, hover over the Attribute Group in the **Category Attribute Tree**. If the user has sufficient permissions, a **Manage Tab** icon  will appear. Click the **Manage Group**  icon. A dropdown list will appear that allows the user to create a new Attribute Group (**Add Group**), edit an existing Attribute Group (**Edit Group**), or add a new attribute (**New Attribute**).



Taxonomy Editor: Manage Attribute Group/Add Attribute

Select **Edit Group**. An **Edit Group** pop-up window will appear.

Taxonomy Editor: Edit Group

Edit the **Edit Group** window values as desired:

Name: (Required) The name of the Attribute Group.

Description: A description of the Attribute Group.

Collapsed dropdown list: This value determines if the Attribute Group should be **Collapsed** or **Expanded** when initially displayed.



Attribute Tab dropdown list: (Required) Select the Attribute Tab in which the Attribute Group will be displayed. Note that the Attribute Group can be moved from one Attribute Tab to another by modifying the value selected in the **Attribute Tab** dropdown.

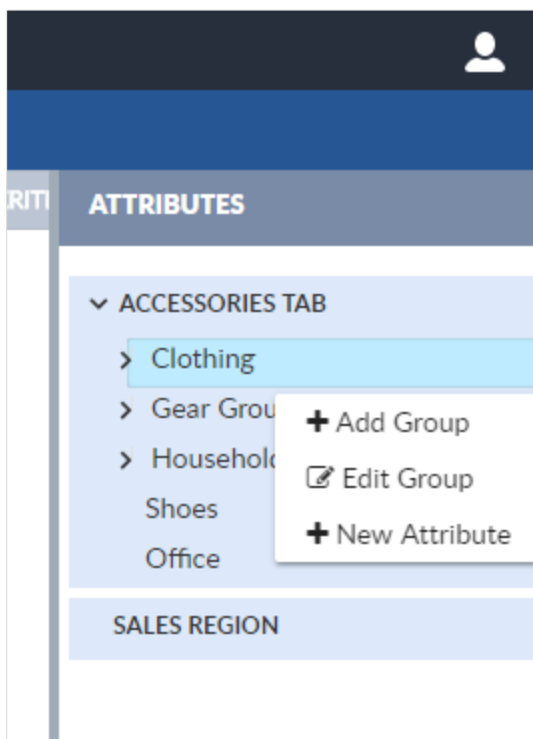
- **Group Type** dropdown list: The type of the Attribute Group. There are three types of Group Types:
 - Attribute (displays as blank) – for a collection of attributes.
 - Link Relationship – for displaying a linked repositories records.
 - Variant – for qualifying the Category Attributes as Variants.

After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.7.4 Add/Edit an Attribute

To add or edit an attribute via the **Taxonomy Editor**, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.

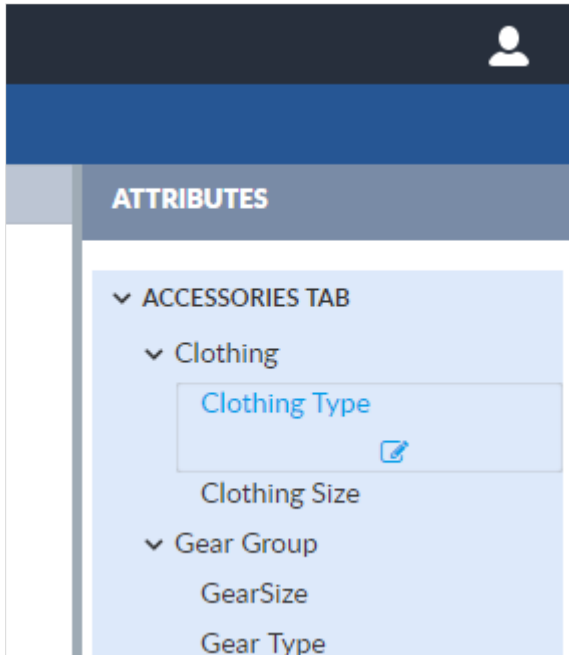
To create a new attribute, hover over the Attribute Group (in the **Category Attribute Tree**) in which the attribute is to belong. If the user has sufficient permissions, a **Manage Tab** icon  will appear. Click the **Manage Group**  icon. A dropdown list will appear that allows the user to create a new Attribute Group (**Add Group**), edit an existing Attribute Group (**Edit Group**), or add a new attribute (**New Attribute**). Note: The Manage Group icon will only appear when in “expert mode” (link to how to enter expert mode)



Taxonomy Editor: Manage Attribute Group/Add Attribute

Select **New Attribute**. A **New Attribute** pop-up window will appear.

To edit an existing attribute, hover over the attribute (in the **Category Attribute Tree**).



Edit Attribute

Click the **Edit Attribute**  icon. An **Edit Attribute** pop-up window will appear.

Except for the titles of the windows, the **Edit Attribute** window and the **New Attribute** window are the same.

Taxonomy Editor: Add/Edit Attribute Window

Edit the attribute characteristics as desired:

- **Name:** (Required) Name of the attribute.
- **Restricted Name:** (Required) The relational database snapshot column name. Typically this is comprised of only alphanumeric and underscore characters. The auto-conversion function will change any blank characters to underscores.
- **Description:** (Optional) An optional description of the attribute.
- **Data Type:** (Required) The data type of the attribute.
- **Data Type specific:** The appearance of the following characteristics depends on the **Data Type** selected for the attribute.
 - **Data Precision:** Appears for Data Types: BIGINT, CURRENCY, DECIMAL, INTEGER. This is the number of digits the value can have.
 - **Data Size:** Appears for Data Type VARCHAR. This is the maximum number of characters in the data field.
- **Group:** The Attribute Group the attribute is to belong to.
- **Associated Group:** (Optional) An Associated Group is a set of Is Repeatable attributes that are associated with each other. When the record appears in the **Record Editor**, the attributes in the Associated Group will appear as a table on the screen.
- **Code Set:** (Optional) The Code Set the values for the attribute are to be chosen from.
- **Control Type:** (Required) Indicates the manner in which the attribute is to be displayed. The available selections for this characteristic are based on system configuration.
- **Special Function Indicator:** (Optional) Allows the user to specify that the attribute serves a special function, such as a Taxonomy Node Link or a status indicator. The available selections for this characteristic are based on the type of profile being defined.
- **Category Attribute Association:** This is only used for Taxonomy Attributes. It identifies the Category Attribute Association Object to be used.
- **Is Variant:** A configuration dependent variable.
- **Copywriter:** A configuration dependent variable.
- **Is Multi-Language:** Indicates if this attribute is to use the Multi-Language capability. For more information on the Multi-Language capability, see [Multi-Language Support](#).

- **Is Global/Is Category/Is Dynamic:** Indicates if this attribute is a global attribute, Category Attribute or Dynamic Attribute. Note that the new attribute will only be displayed in the **Category Attribute** tree if it is a Category Attribute.
- **Is Required:** Indicates this attribute is required.
- **Is Primary Key:** Indicates if this attribute contains the record's unique identifier.
- **Seq Gen Ind:** (Sequentially Generated Indicator) This indicates that the attribute is the repository's sequence attribute and its value will be automatically generated by Enable unless it is supplied by the user or an import when the record is created. There can be only one Auto-sequenced Attribute per repository.
- **Is Repeatable:** Indicates if a record can have multiple values for this attribute. When checked, a field appears to the right to specify the delimiter between values (default is a comma).

Note that other attribute definition fields may be present, depending on system configuration.

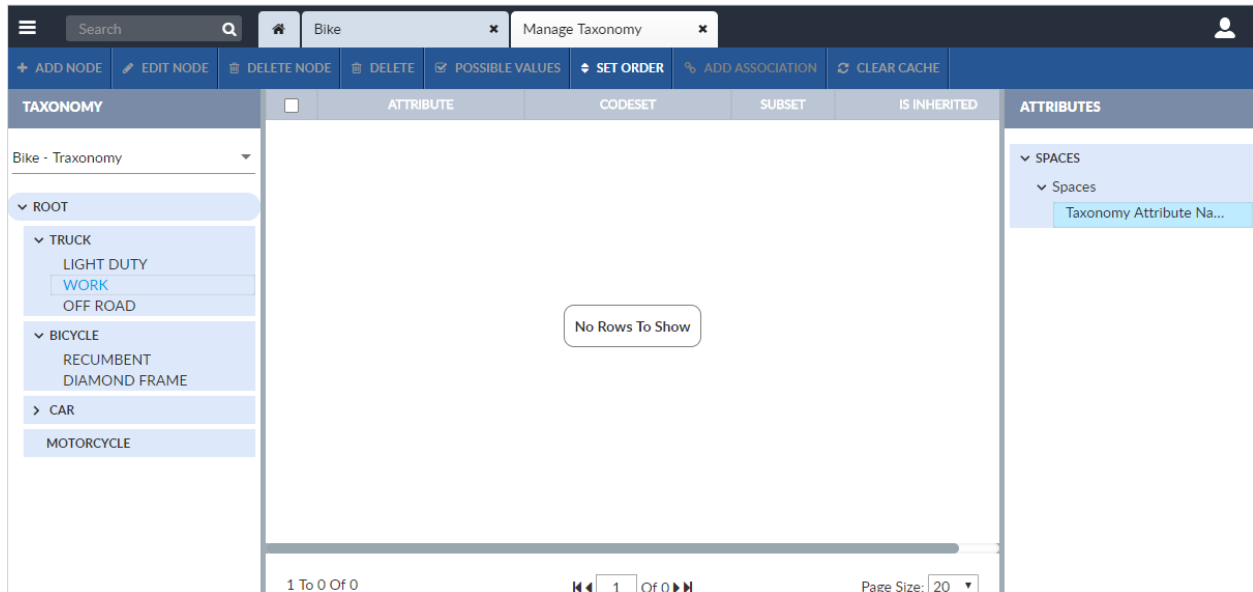
After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.8 Manage Category Attribute Assignment

For a description of Category Attributes, see [Enable Basics: Category Specific Attributes](#).

18.2.8.1 View Assigned Category Attributes

To view the Category Attributes assigned to a taxonomy node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

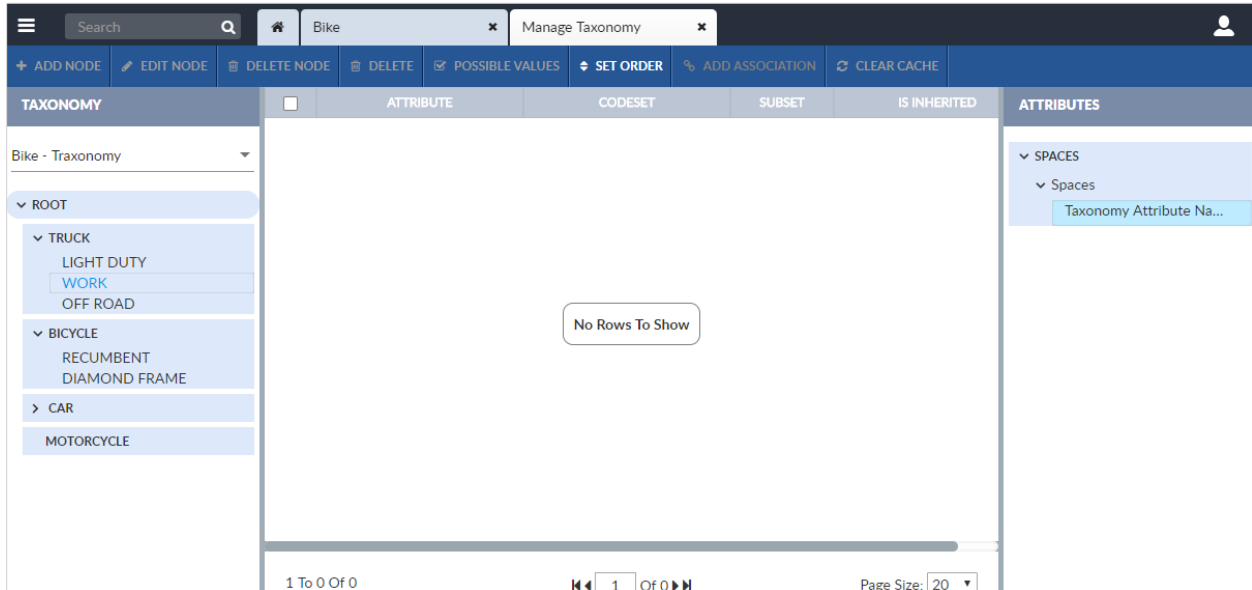
Drill down the **Taxonomy Node Tree** to find and select the desired taxonomy node. Category Attributes assigned to the node will be listed in the center of the screen, in the **Assigned Category Attributes** pane.

18.2.8.2 Assign a Category Attribute to a Taxonomy Node

Only attributes designated as Category Attributes can be assigned to a taxonomy node. A list of the available Category Attributes are displayed in the **Attributes** pane in the **Taxonomy Editor** (the **Attributes** pane is on the far right side). If the desired attribute is not shown in the **Attributes** pane, contact the system administrator to ensure it has been designated as a Category Attribute, or if the user has sufficient permissions, designate the attribute as a Category Attribute as described in [Add/Edit an Attribute](#).

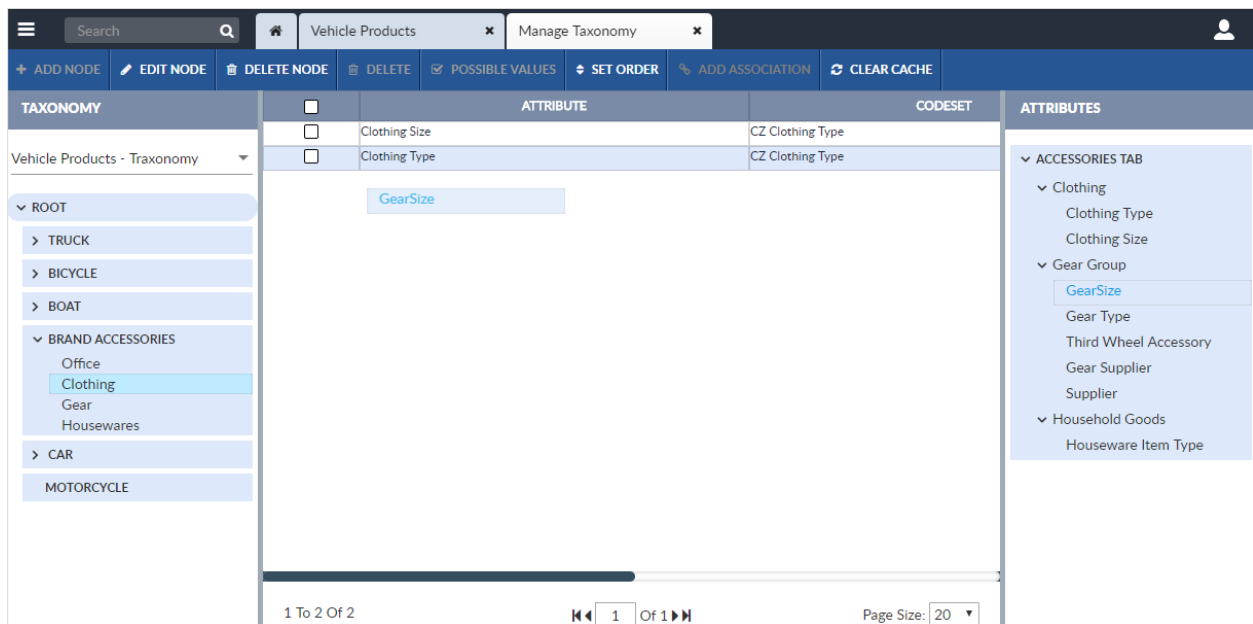
Depending on the configuration of the assigned Association Object, Category Attributes assigned to a node may be inherited by children nodes.

To assign a Category Attribute to a taxonomy node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Drill down the **Taxonomy Tree** to find and select the desired taxonomy node and drill down the **Category Attribute** tree to find the desired Category Attribute. Then click and drag the Category Attribute from the **Category Attribute** tree to the **Assigned Category Attributes** pane in the center of the screen.



Taxonomy Editor: Assign a Category Attribute

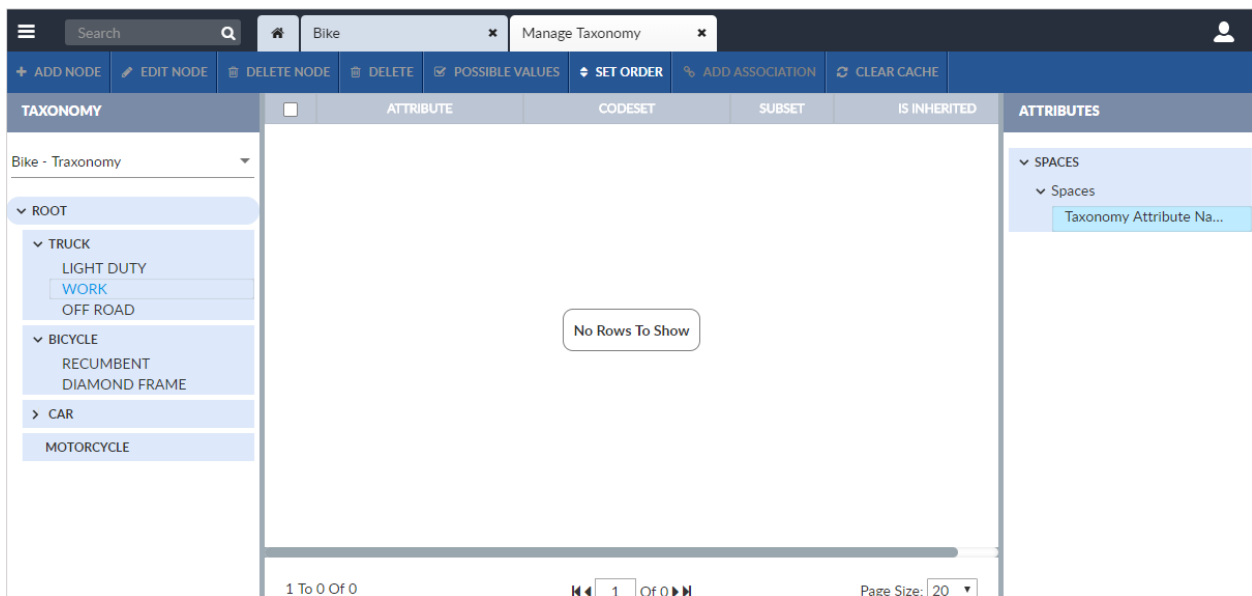
The attribute will be assigned to the selected taxonomy node as a Category Attribute. The Category Attribute will appear in the **Assigned Category Attributes** pane in the center of the **Taxonomy Editor** screen.

After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.8.3 Remove Category Attribute from a Taxonomy Node

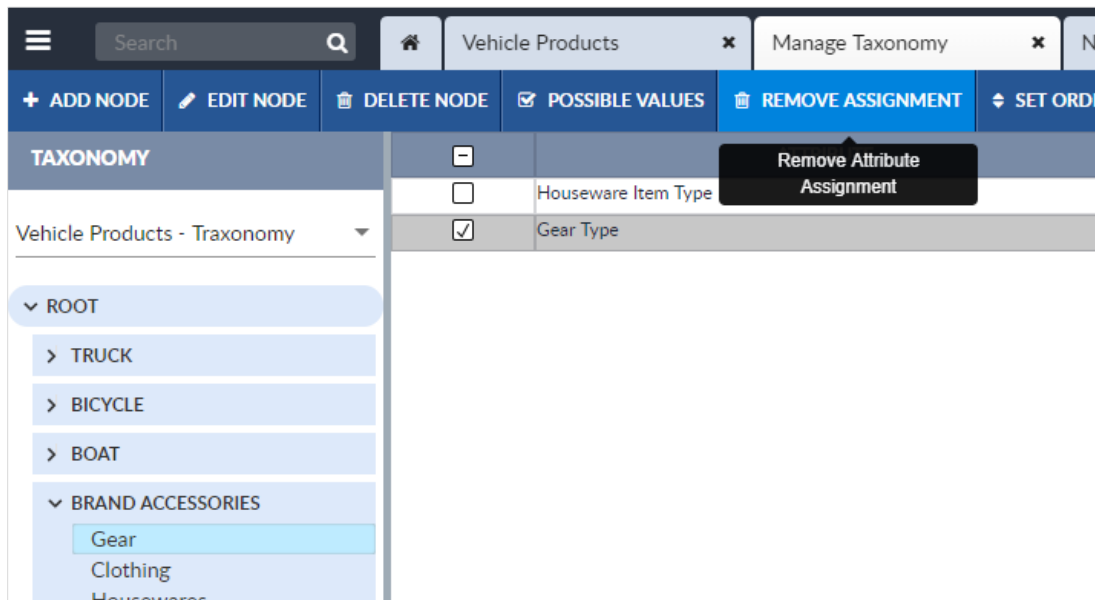
WARNING: Removing a Category Attribute from a node will result in the loss of that attribute's value in any records assigned to that node or any of its children nodes.

To remove a Category Attribute's assignment to a node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Drill down the Taxonomy Node Tree to find and select the desired taxonomy node. Its Category Attributes will be displayed in the center of the screen in the Assigned Category Attributes pane. In the Assigned Category Attributes pane, select the Category Attribute to be unassigned from the node. Click the **Remove Assignment** button.



Manage Taxonomy: Remove Record Assignment

The Category Attribute will be removed from the node. The next time any records assigned to that node are validated, any value in that attribute will be erased. Multiple Category Attributes can be removed from a taxonomy node at once by checking the checkbox for each one before clicking the **Remove Assignment** button.

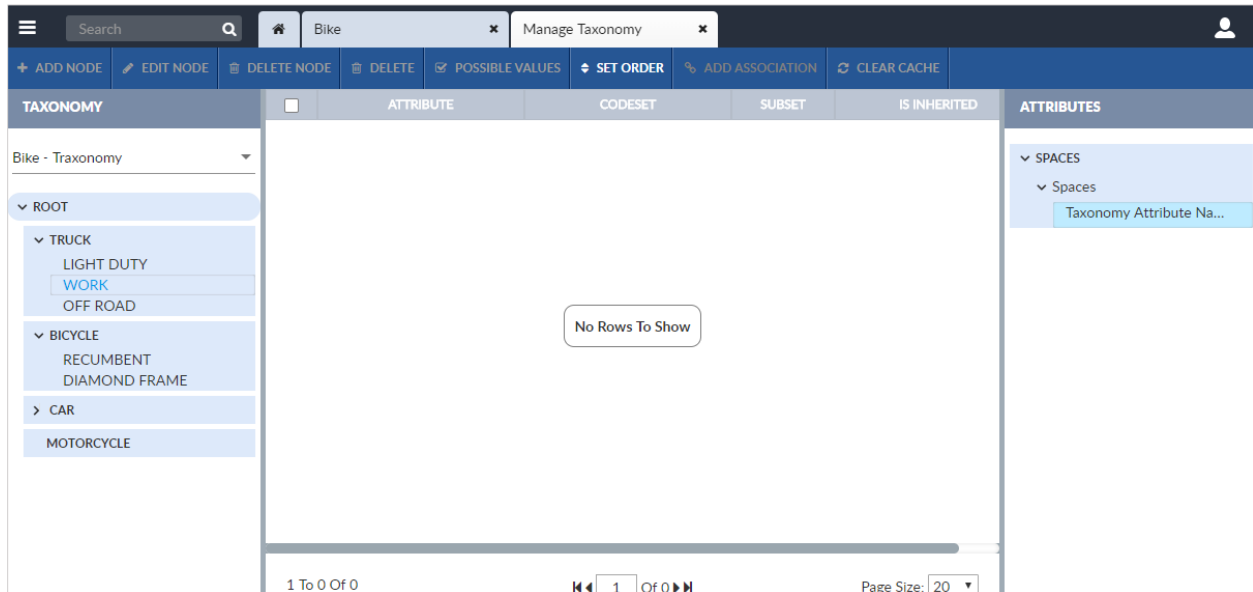
After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.8.4 Possible Values

The user can restrict the set of possible values for an assigned Category Attribute associated with a Code Set to a subset of values in that Code Set. Possible values are the list of values the user may select from when entering a value for the Category Attribute.

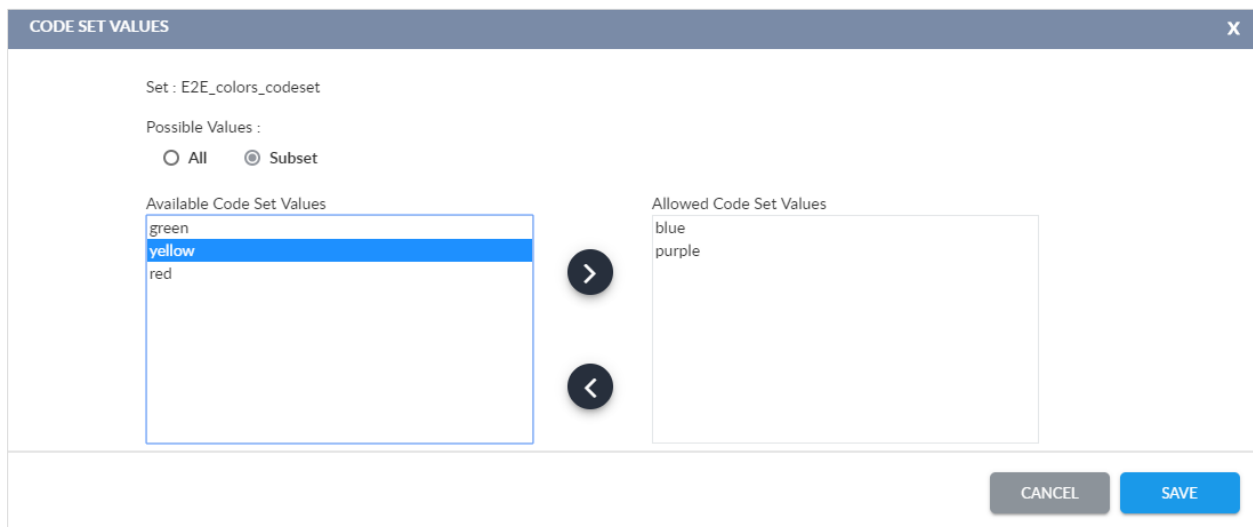
The possible values can only be defined on the taxonomy node to which the Category Attribute is assigned. If it is inherited, the **Possible Values** button is disabled.

To do so, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Select the desired taxonomy node to display its assigned Category Attributes. Select the desired Category Attribute. Click the **Possible Values** button. A **Code Set Values** window will appear.



Taxonomy Editor: Set Possible Attribute Values from Code Set


Edit the Code Set Value options as desired:


Possible Values:

- **All:** Select to make all the Code Set values available for use by the Category Attribute.
- **Subset:** Select to make only some of the Code Set values available for use by the Category Attribute.

If **Subset** is selected, choose the Code Set values the Category Attribute may use.

- **Available Code Set Values:** This is a list of all the values in the Code Set that have not already been added to the list of **Allowed Code Set Values**.
- **Allowed Code Set Values:** This is a list of the values allowed to the Category Attribute. They determine the list of values the user may select from when entering a value for the Category Attribute.

To add a Code Set value to the **Allowed Code Set Values** list, select the desired Code Set value in the **Available Code Set Values** list and click the right arrow icon . The Code Set value will be moved to the **Allowed Code Set Values** list.

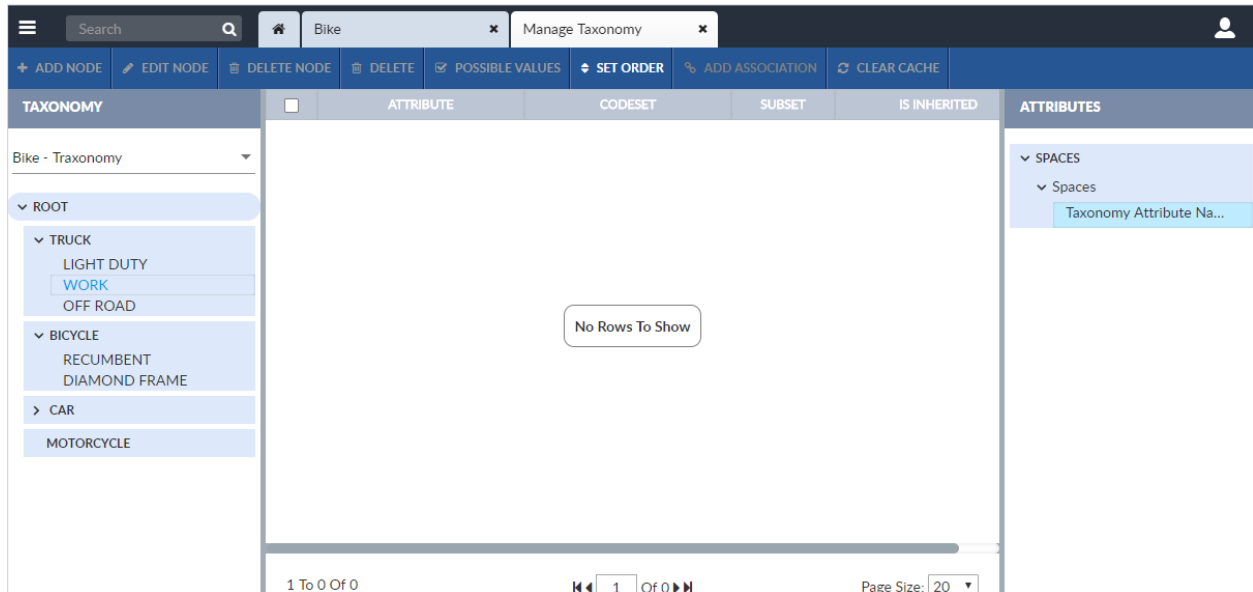
To remove a Code Set value from the **Allowed Code Set Values** list, select the desired Code Set value and click the left arrow icon . The Code Set value will be moved to the **Available Code Set Values** list and will no longer be in the allowable list of values for the attribute.

To save any changes to the **Allowed Code Set Values** list and exit to the **Taxonomy Editor**, click the **Save** button. To exit to the **Taxonomy Editor** without saving changes, click the **Cancel** button.

After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.2.8.5 Set Category Attribute Display Order

To change the display order of Category Attributes assigned to a Taxonomy Node, first open the taxonomy in the **Taxonomy Editor**. See [Manage a Taxonomy](#) for instructions on opening a taxonomy in the **Taxonomy Editor**.



Taxonomy Editor

Click and drag the attributes up or down the list of **Assigned Category Attributes**. Clicking the **Set Order** button will cause an informational window to appear that tells the user to drag and drop the attributes into the desired order.

After any change to the taxonomy, clear the cache and refresh displays to ensure the change has been propagated throughout the system and displays are accurately reflecting system status.

18.3 Manage a Hierarchy

The **Hierarchy/Taxonomy Sidebar** provides the means for the user to manage a repository's taxonomy and hierarchies. From the **Hierarchy/Taxonomy Sidebar**, a user may add a hierarchy, delete a hierarchy, or edit a hierarchy in the **Hierarchy Editor**.

To manage a hierarchy, it must first be opened in the **Hierarchy/Taxonomy Sidebar**. To do so, first open the repository by opening the **Feature Sidebar**, selecting the desired folder, and selecting the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see [Repositories](#).

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watso
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson,
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Click the **Hierarchy** button on the **Repository View's Activity Bar**. A **Hierarchy/Taxonomy Sidebar** will appear.

ERROR	SE...	BRAND	NAME	TAXONOMY
	1	Ducati	Monster	Car
	2	Ducati	Monster2	BMW
	100	Bianchi	Specialissima	BICYCLE.DIAMOND FRAME
		Bianchi	Impuloso	BICYCLE.DIAMOND FRAME
		Bianchi	Infinito	BICYCLE.DIAMOND FRAME
		Trek	Roscoe	BICYCLE.DIAMOND FRAME
		Trek	Powerfly	BICYCLE.DIAMOND FRAME
		Linear	Roadster	BICYCLE.RECUMBENT
		Linear	Limo	BICYCLE.RECUMBENT
		Bike Friday	Bantam	BICYCLE.RECUMBENT
		Bike Friday	Llama	BICYCLE.RECUMBENT
		Bike Friday	Super Pro	BICYCLE.RECUMBENT

Hierarchy/Taxonomy Sidebar

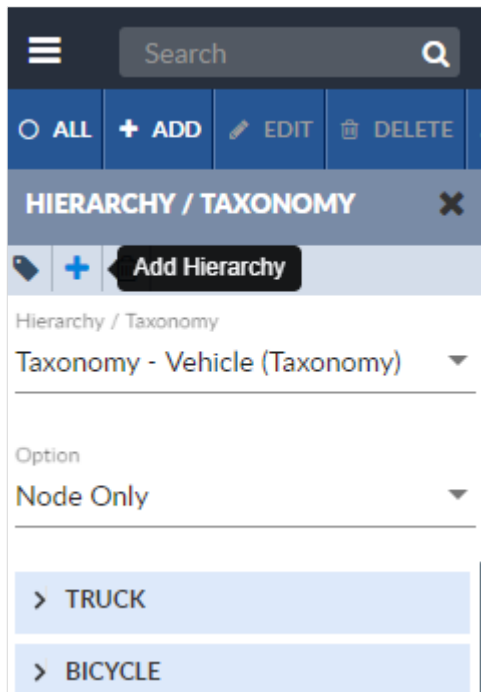
At the top of the **Hierarchy/Taxonomy Sidebar** is a **Hierarchy/Taxonomy** dropdown list that allows the user to select a hierarchy.

Select the desired hierarchy. The **Hierarchy/Taxonomy Sidebar** will now display the nodes of the selected hierarchy.

18.3.1 Add a Hierarchy

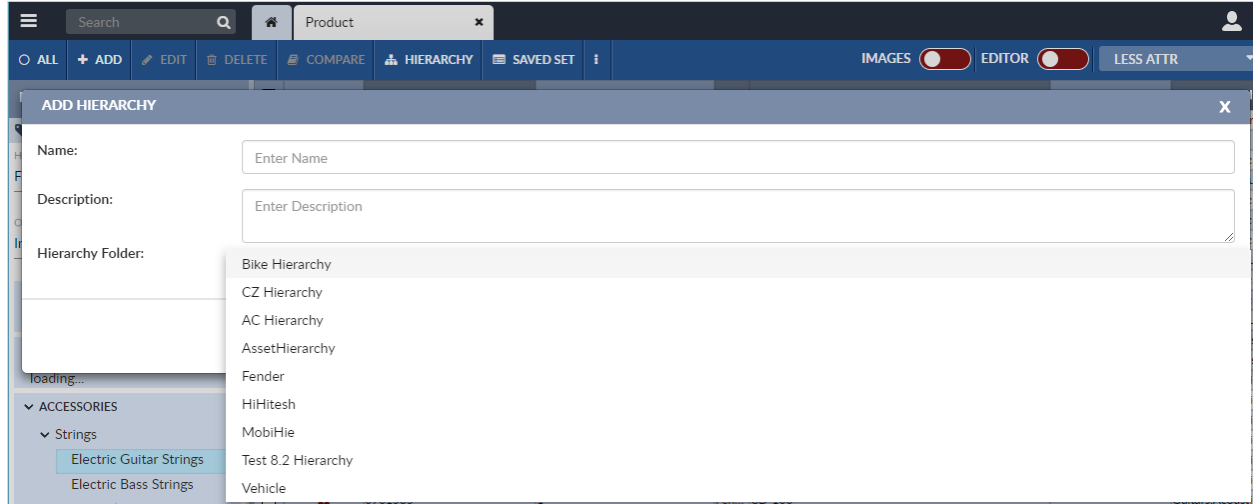
To create a new hierarchy for a repository, first open the repository’s **Hierarchy/Taxonomy Sidebar**. For instructions on opening the repository’s **Hierarchy/Taxonomy Sidebar**, see [Manage a Hierarchy](#).

Click the **Add Hierarchy** button **+** on the left side of the **Hierarchy/Taxonomy Sidebar’s Activity Bar**.



Hierarchy/Taxonomy Sidebar: Add Hierarchy Button

An **Add Hierarchy** window will appear.



Add Hierarchy Window

Edit the values of the **Add Hierarchy** window as desired:

- **Name:** Enter the name of the new hierarchy.
- **Description:** Enter a description of the hierarchy.
- **Hierarchy Folder:** Enter the name of the folder where the new hierarchy is to be stored.

Click the **Okay** button to create the new hierarchy and exit. Click the **Close** button to exit without creating the new hierarchy.

To see and access the new hierarchy, select it from the **Hierarchy/Taxonomy** dropdown list. The new hierarchy may be at the bottom of the list.

The new hierarchy does not yet have nodes defined. Selecting the new hierarchy will not change the display of records until nodes have been defined and records assigned to those nodes.

For instructions on adding nodes to a hierarchy, see [Add Hierarchy Node](#).

18.3.2 Delete a Hierarchy

To delete a hierarchy for a repository, the user must open the repository's **Hierarchy/Taxonomy Sidebar**. To do so, first open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see [Repositories](#).

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
<input type="checkbox"/>		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
<input type="checkbox"/>		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
<input type="checkbox"/>		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
<input type="checkbox"/>		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
<input type="checkbox"/>		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
<input type="checkbox"/>		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
<input type="checkbox"/>		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg


Repository View Grid View

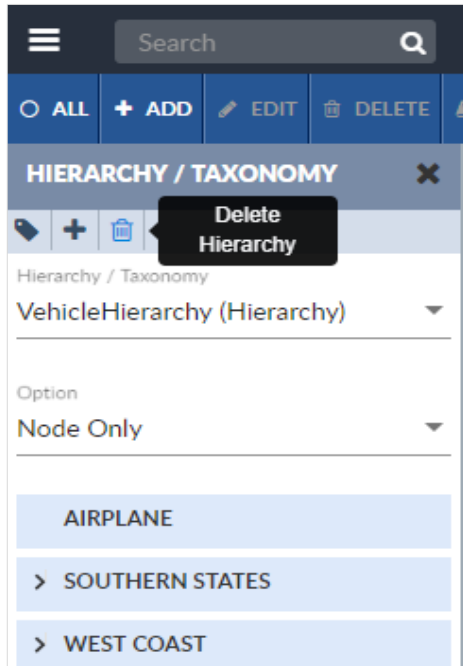
Click the **Hierarchy** button on the **Repository View's Activity Bar**. The **Hierarchy/Taxonomy Sidebar** will appear. All the functionality of the **Repository View** is retained.

HIERARCHY / TAXONOMY	ERROR	SE...	BRAND	NAME	TAXONOMY
<input type="checkbox"/>		1	Ducati	Monster	Car
<input type="checkbox"/>		2	Ducati	Monster2	BMW
<input type="checkbox"/>		100	Bianchi	Specialissima	BICYCLE.DIAMOND FRAME
<input type="checkbox"/>			Bianchi	Impuloso	BICYCLE.DIAMOND FRAME
<input type="checkbox"/>			Bianchi	Infinito	BICYCLE.DIAMOND FRAME
<input type="checkbox"/>			Trek	Roscoe	BICYCLE.DIAMOND FRAME
<input type="checkbox"/>			Trek	Powerfly	BICYCLE.DIAMOND FRAME
<input type="checkbox"/>			Linear	Roadster	BICYCLE.RECUMBENT
<input type="checkbox"/>			Linear	Limo	BICYCLE.RECUMBENT
<input type="checkbox"/>			Bike Friday	Bantam	BICYCLE.RECUMBENT
<input type="checkbox"/>			Bike Friday	Llama	BICYCLE.RECUMBENT
<input type="checkbox"/>			Bike Friday	Super Pro	BICYCLE.RECUMBENT

Hierarchy/Taxonomy Sidebar

Use the **Hierarchy/Taxonomy** dropdown list to select the Hierarchy to be deleted. The repository’s node tree will be displayed.

Click the **Delete Hierarchy** icon  on the left side of the **Hierarchy/Taxonomy Sidebar’s Activity Bar**.




Hierarchy/Taxonomy Sidebar: Delete a Hierarchy

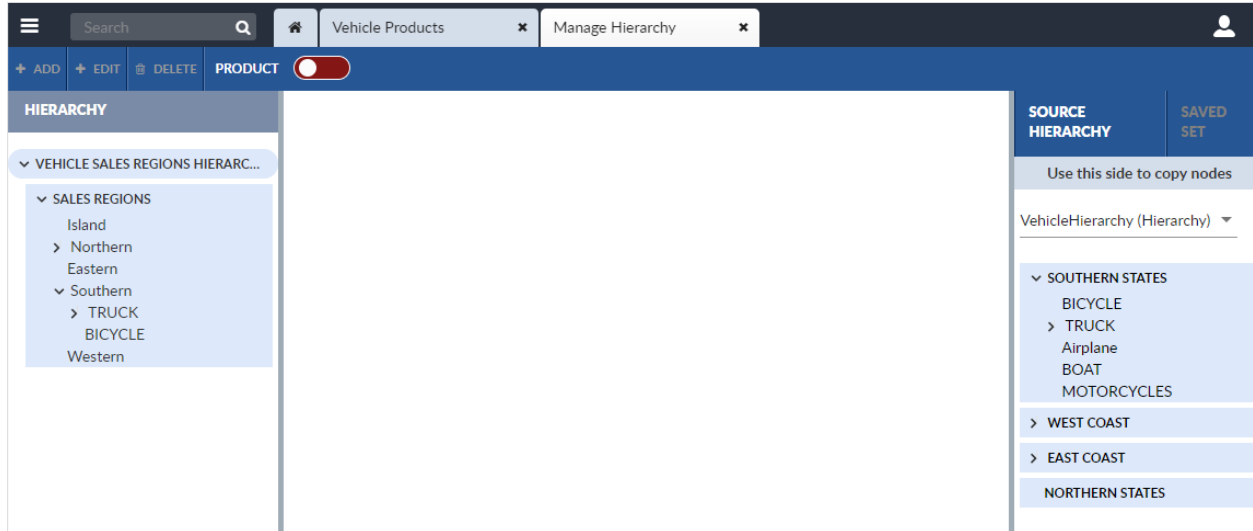
A **Confirm** window will appear. Click **Yes** to delete the hierarchy and exit the window. Click **No** to exit without deleting the hierarchy.

18.3.3 Manage Hierarchy Nodes

The **Hierarchy Editor** allows a user to add nodes, delete nodes, copy nodes, and assign/reassign records to nodes. Detailed instructions are provided in the following sections.

To edit a hierarchy, it must first be opened in the **Hierarchy/Taxonomy Sidebar**. For information on opening a hierarchy in the **Hierarchy/Taxonomy Sidebar**, see [Manage a Hierarchy](#).

To edit a hierarchy, select the **Manage** icon  on the left of the **Hierarchy/Taxonomy Sidebar’s Activity Bar**. The hierarchy will be opened in the **Hierarchy Editor**.



Hierarchy Editor: Manage Hierarchy Nodes

(For a detailed labeled reference guide image, see [Hierarchy Editor Reference Guide](#).)

The left pane of the **Hierarchy Editor** displays the hierarchy in the **Current Hierarchy Node Tree**. Nodes preceded by a > have children nodes. Click on the > to expand a node and display its children nodes.

If the **Product** toggle is switched to On (it will be green), records assigned to nodes in the **Current Hierarchy Node Tree** will be displayed. Selecting a record will cause it to be opened in the **Center Pane** in a **Quick Editor**.

The central pane of the **Hierarchy Editor** is the **Center Pane**:

- If the **Saved Set** tab on the **Source Pane** (on the right of the display) is selected, the **Center Pane** acts as a **Repository View** and has a **Repository View's** functionality. (For more information on **Repository Views**, see [Repositories](#).) Selecting a Saved Set in the **Source Pane** will cause its records to be displayed in the **Repository View**.
- If the **Source Hierarchy** tab in the **Source Pane** is selected, the **Center Pane** acts as a **Quick Editor**. For more information on the Quick Editor, see [Quick Editor](#).
 - Clicking a record assigned to a node in the **Current Hierarchy's Node Tree** will cause the record to be displayed in the Quick Editor. Note that records only appear in the **Current Hierarchy's Node Tree** if the **Product** toggle on the **Hierarchy Editor's Activity Bar** is set to ON (it is green).

The right pane of the **Hierarchy Editor** is the **Source Pane**. It has two tabs:

- **Source Hierarchy:** Use the **Select Hierarchy** dropdown to display the selected hierarchy in the **Source Hierarchy Node Tree**. Nodes can be added to the **Current Hierarchy Node Tree** by dragging and dropping them from the **Source Hierarchy Node Tree** to the **Current Hierarchy Node Tree**.
- Select **Saved Set** to open the **Saved Set Sidebar**. (For more information on the Saved Set Sidebar, see [Saved Sets](#).) Initially, all the records in the repository will be displayed in the **Center Pane** in a **Repository View**. The **Repository View's** functionality is fully intact – all the functions available in a **Repository View** are available. Selecting a Saved Set will cause only its records to be displayed.

Records can be assigned to a node in the **Current Hierarchy Node Tree** by dragging and dropping them (singly or as a group) from the **Center Pane** to the node, or by dragging and dropping an entire Saved Set from the **Source Pane** to the node. (When dragging and dropping records, wait for the node name to be highlighted in green before dropping the records. For more information, see: [Assign Records via Hierarchy Editor](#).)

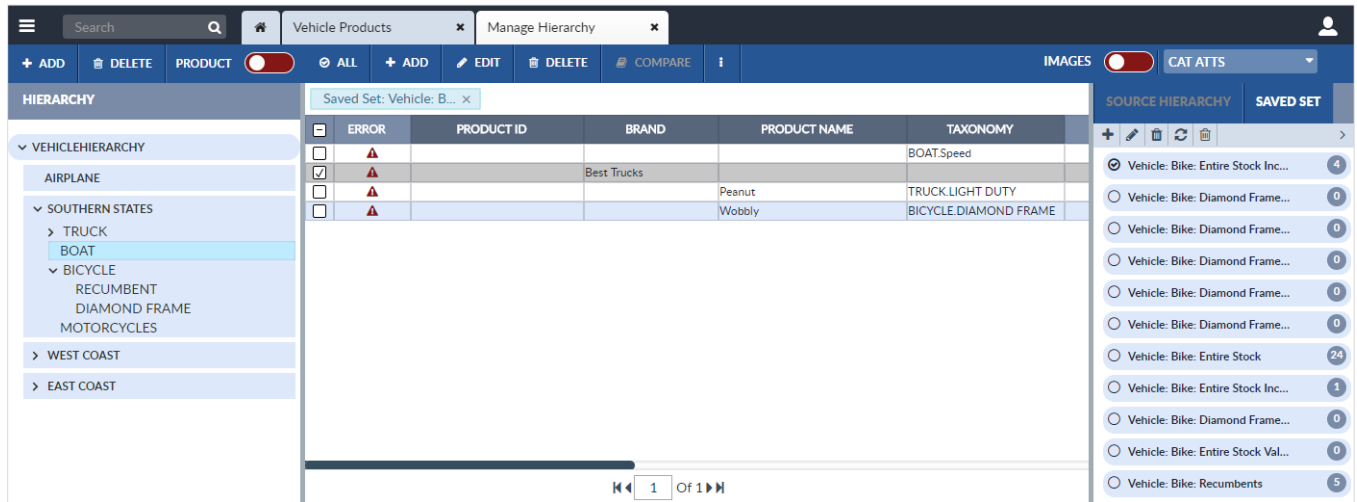
The actions on the **Hierarchy Editor's Activity Bar** are:

- **Add:** to add a node to the Current Hierarchy.
- **Edit:** to edit the node selected in the Current Hierarchy.
- **Delete:** to delete a node from the Current Hierarchy.
- **Product toggle:** If turned on, the **Current Hierarchy Node Tree** will display the records assigned to the Current Hierarchy's nodes.

If the **Saved Set** tab is selected, the **Center Pane** will contain a **Repository View**, therefore the center of the **Hierarchy Editor's Activity Bar** will include the activities available to a **Repository View**. For more information, see [Viewing a Repository](#).

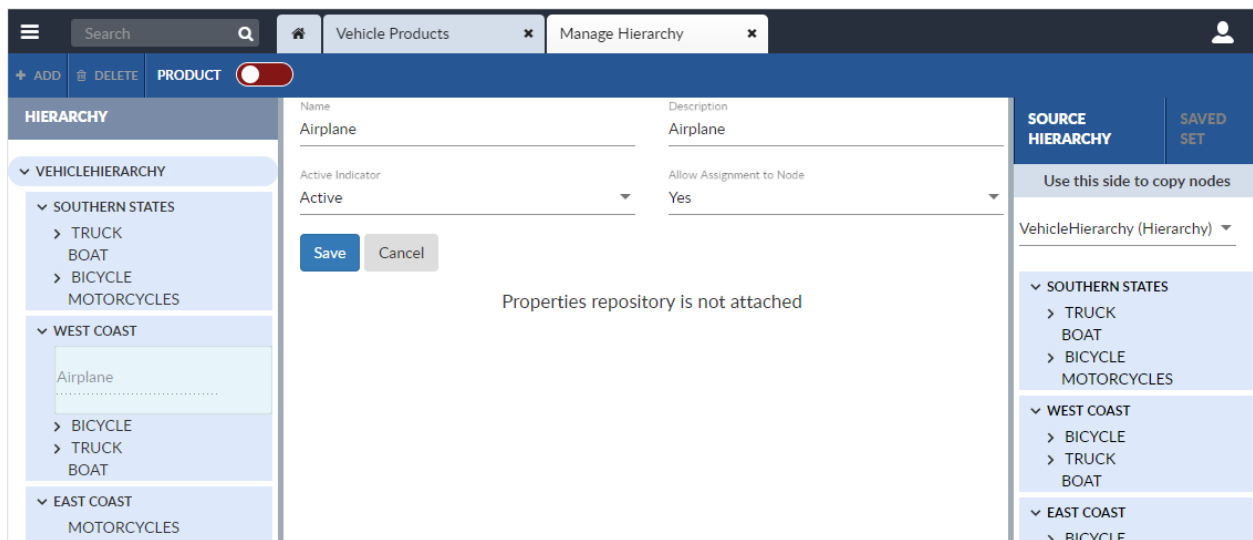
18.3.3.1 Add Hierarchy Node

To add a node to a hierarchy, first open the hierarchy in the **Hierarchy Editor**. See [Edit a Hierarchy](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.



Hierarchy Editor

When a new node is added, it is added as a child of an existing node. Select the parent node. Select the **Add Node** button **+** on the **Hierarchy Editor's Activity Bar**. The **Node Editor** will appear in the **Center Pane** of the window. An empty node will appear in the **Current Hierarchy Tree** in the **Current Hierarchy** pane on the left side of the display.



Hierarchy Editor: Add a Node to a Hierarchy

Edit the fields in the **Node Editor** as desired:

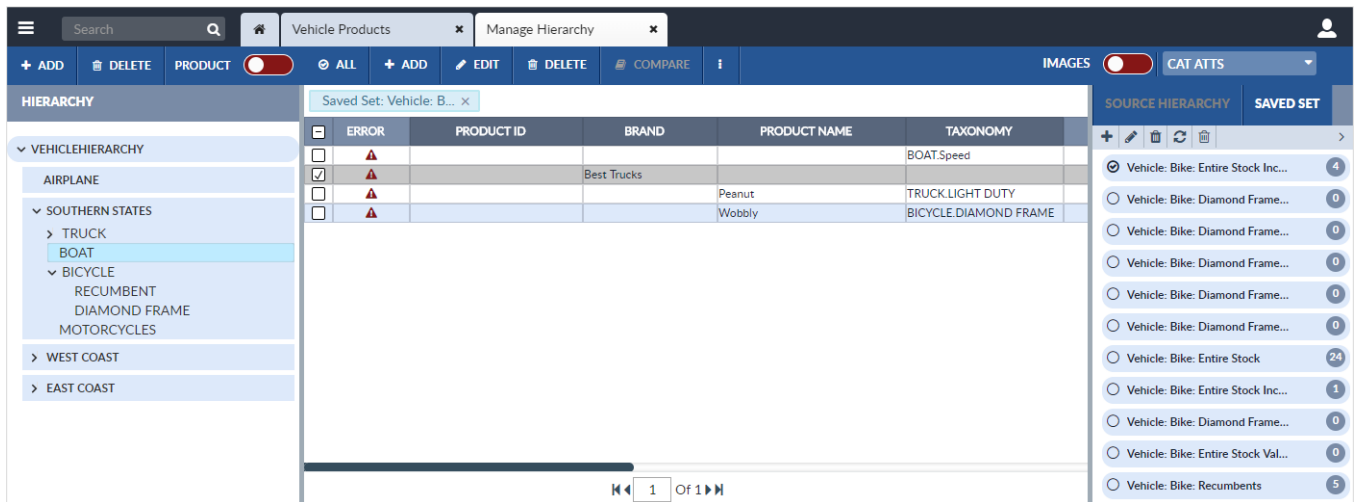
- **Name:** The name of the new node.

- **Description:** Enter a description if desired.
- **Active Indicator:** The node’s status: **Active**, **Inactive**, or **Pending**.
- **Allow Assignment to Node:** If **Yes** is selected, the user will be able to assigned records to this node.

To save the new node and exit the **Node Editor**, select the **Save** button. To exit without saving the changes to the node, click the **Cancel** button.

18.3.3.2 Copy Hierarchy Node from Source Hierarchy

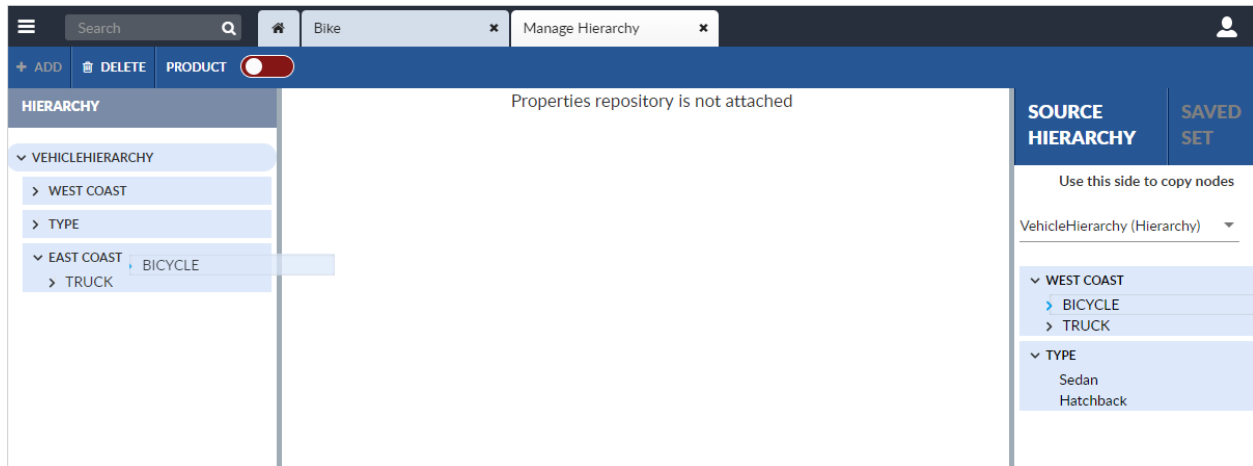
To copy a node from the **Source Hierarchy Node Tree** to the **Current Hierarchy Node Tree**, first open the hierarchy in the **Hierarchy Editor**. See [Edit a Hierarchy](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.



Hierarchy Editor

Select the **Source Hierarchy** tab in the **Source Pane** (on the far right), then select the desired hierarchy or the taxonomy from the **Hierarchy** dropdown list. The selected hierarchy will be displayed as the **Source Hierarchy Node Tree**. Note that the **Source Hierarchy Node Tree** may be the same hierarchy that is loaded as the **Current Hierarchy Node Tree**. This allows the user to replicate node structures in a hierarchy.

Expand the **Source Hierarchy Node Tree** as necessary to find the desired node. Expand the **Current Hierarchy Node Tree** as necessary to find the desired parent node. Drag and drop the node in the **Source Hierarchy Node Tree** to the node in the **Current Hierarchy Node Tree** that will be its parent node. The node and any descendants will be copied and made a child of the parent node; any records assigned to the node and its descendants will be assigned to the new nodes as well.



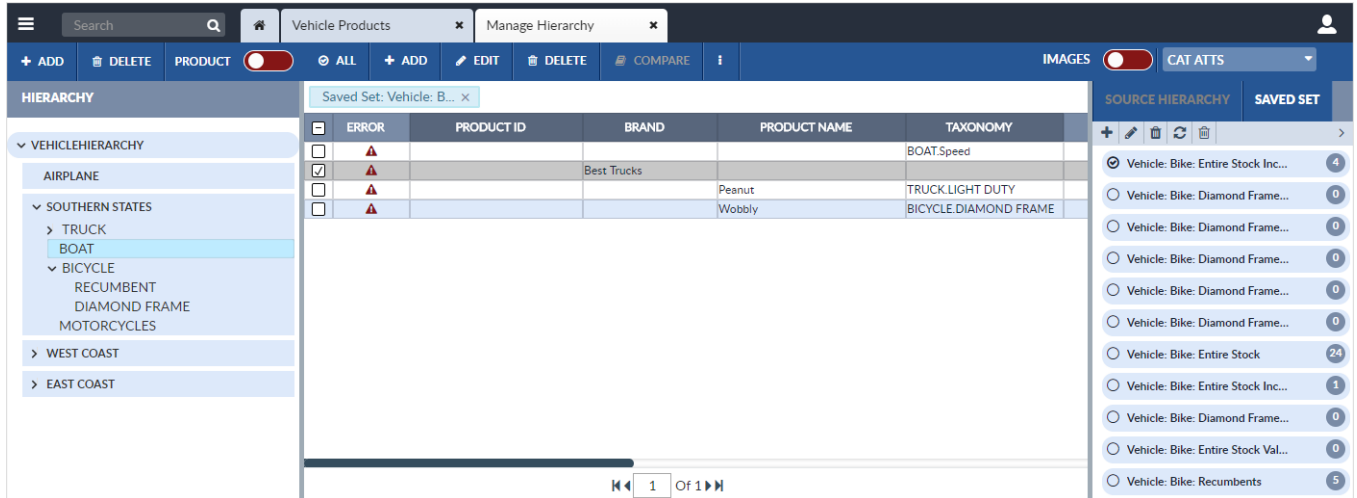
Hierarchy Editor: Copy Node from Source Hierarchy Node Tree to Current Hierarchy Node Tree

After the node is copied, the parent node may need to be expanded to make the new node visible.

18.3.3.3 Move/Reorder a Node

Hierarchy nodes can be moved from one parent node to another. When a hierarchy node is moved, it becomes the first node in the parent node’s list of descendent nodes. Reordering a parent node’s list of descendants can be accomplished by moving different nodes to the first position until the desired list order is achieved.

To move hierarchy nodes, first open the hierarchy in the **Hierarchy Editor**. See [Edit a Hierarchy](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.

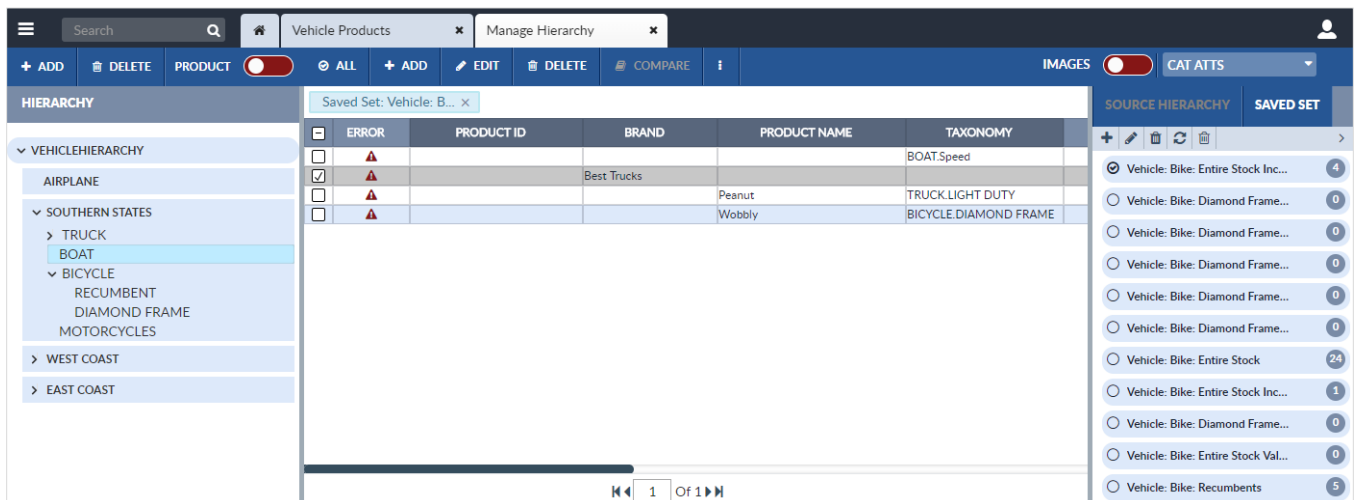


Hierarchy Editor


Drag and drop the hierarchy node to its new parent node (or to the same parent node). The node will be moved to the first position in the list of the parent node’s descendent nodes. Clear the cache and refresh displays to ensure the change to the hierarchy has been propagated throughout the system and displays are accurately reflecting system status.

18.3.3.4 Delete Hierarchy Node

To delete a node from a hierarchy, first open the hierarchy in the **Hierarchy Editor**. See [Edit a Hierarchy](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.



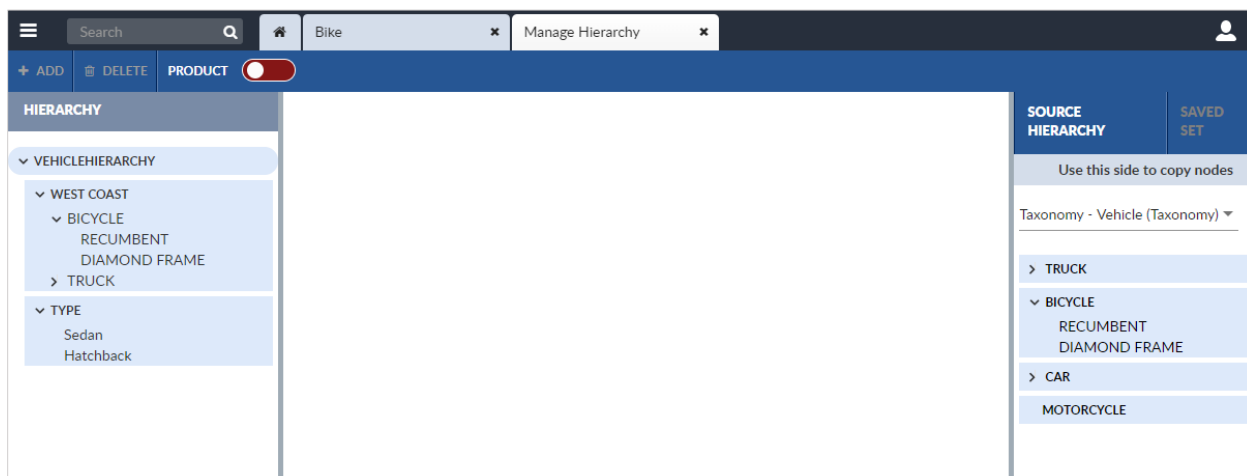
Hierarchy Editor

Select the node to be deleted. Select the **Delete Node** button  on the **Hierarchy Editor's Activity Bar**. A **Confirm** window will appear. Select **Yes** to delete the node. Select **No** to exit the **Confirm** window without deleting the node.

18.3.3.5 Assign Records via Hierarchy Editor

Note: this functionality may not yet be implemented. If it is not yet implemented, assign records to nodes via the [Hierarchy/Taxonomy Sidebar](#).

To assign records to a hierarchy node via the **Hierarchy Editor**, first open the hierarchy in the **Hierarchy Editor**. See [Managing Nodes](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.



Hierarchy Editor

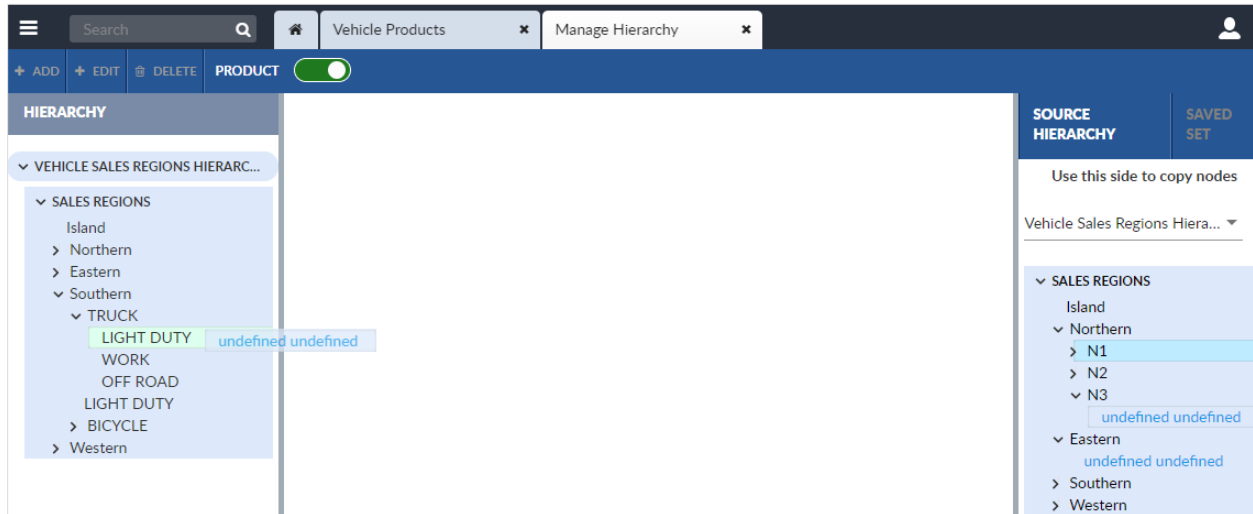
Expand the **Current Hierarchy Node Tree** as necessary to find the desired node. Toggle the **Product** toggle to On (it will be green). The **Current Hierarchy Node Tree** will display the records assigned to nodes.

Select the **Source Hierarchy** tab in the **Source Pane** (on the far right), then select the desired hierarchy or the taxonomy from the **Hierarchy** dropdown list. The selected hierarchy will be displayed as the **Source Hierarchy Node Tree**. Note that the **Source Hierarchy Node Tree** may be the same hierarchy that is loaded as the **Current Hierarchy Node Tree**. This allows the user to replicate node structures in a hierarchy.

Expand the **Source Hierarchy Node Tree** as necessary to find the desired node and its assigned records. Expand the **Current Hierarchy Node Tree** as necessary to find the node the records will be assigned to. Drag and drop selected records from the **Source Hierarchy Node Tree** to

the node in the **Current Hierarchy Node Tree**. When dragging and dropping records, drag them over the desired node and wait for the node name to be highlighted with a green box before releasing the records. It might take a second or two. When the records are successfully added, a green status pop-up window will briefly appear at the bottom of the screen indicating that the records have been successfully added.

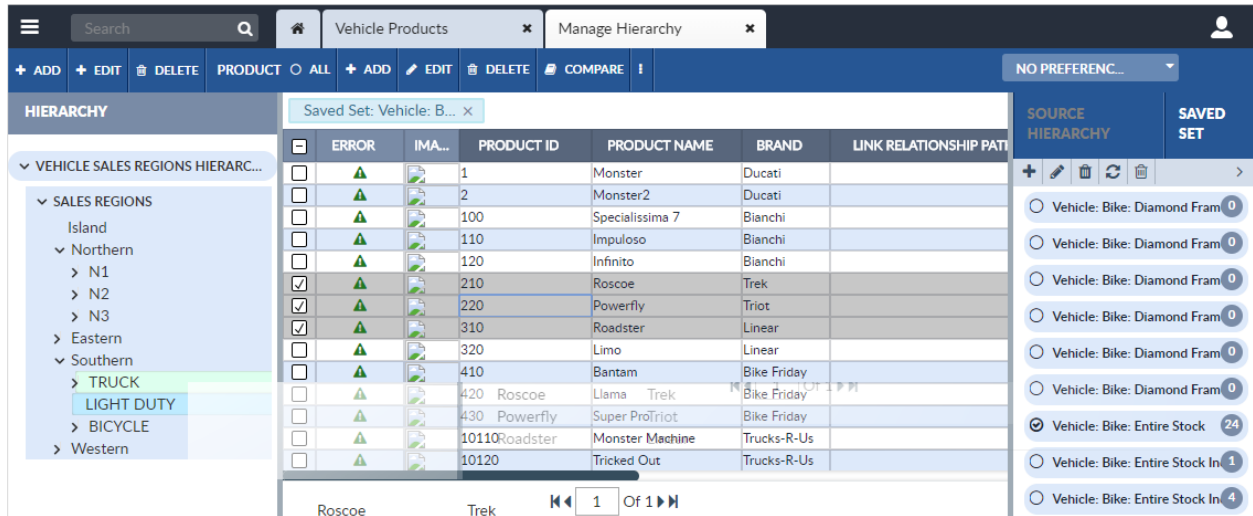
The records will now be assigned to the node in the **Current Hierarchy Node Tree**.



Hierarchy Editor: Assign Records from Source Hierarchy

Alternatively, select the **Saved Set** tab in the **Source Pane** (on the far right). All the records in the repository will be displayed in the **Center Pane** in a **Repository View** and the **Saved Set Sidebar** will be opened on the right. Selecting a Saved Set will cause its records to be displayed in the **Center Pane**. A **Filter Term** box will appear in the **Center Pane's Activity Bar**, indicating the records displayed are from the selected Saved Set.

Select records from the **Center Pane**, then drag and drop them to the node in the **Current Hierarchy Node Tree** to which they will be assigned.



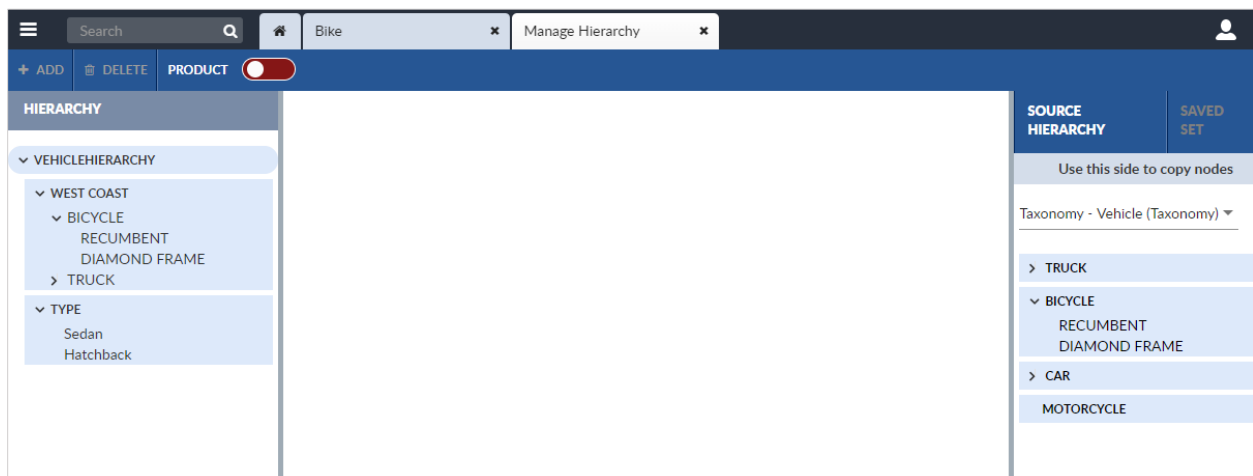
Hierarchy Editor: Assign Records from Saved Set to a Hierarchy Node

The records will now be assigned to the node in the **Current Hierarchy Node Tree**.

To unassign records from a hierarchy node, see the system administrator.

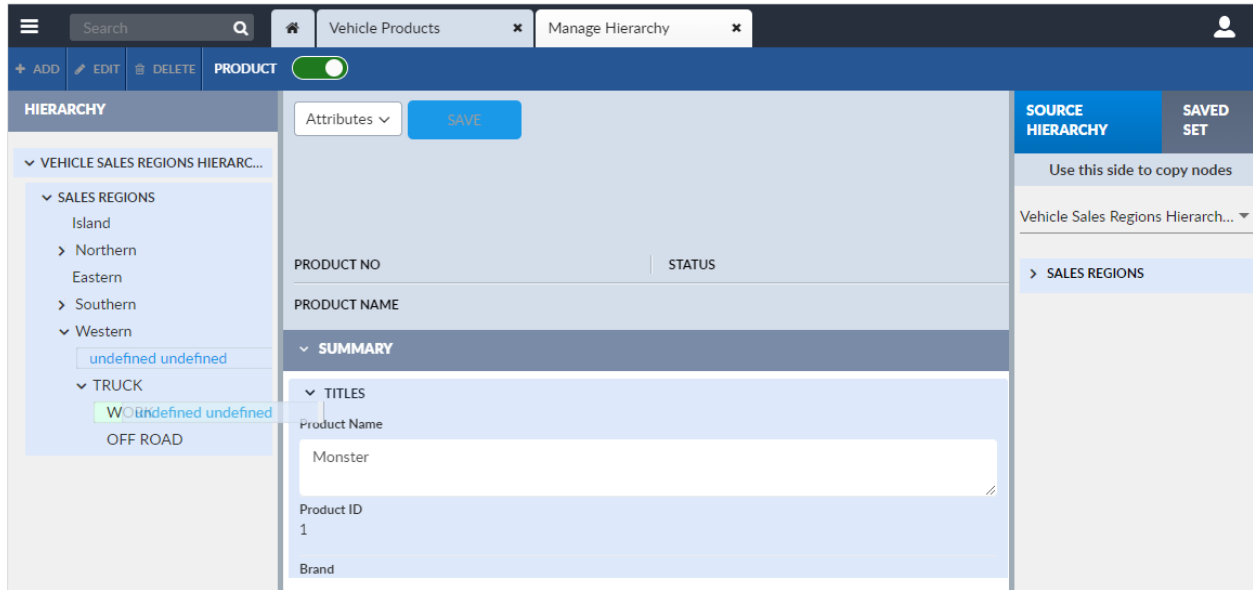
18.3.3.6 Move/Reassign Records via Hierarchy Editor

To move or reassign records from one hierarchy node to another via the **Hierarchy Editor**, first open the desired hierarchy in the **Hierarchy Editor**. See [Managing Nodes](#) for instructions on opening a hierarchy in the **Hierarchy Editor**.



Hierarchy Editor

Expand the **Current Hierarchy Node Tree** as necessary to find the desired source node. Toggle the **Product** toggle to On (it will be green). The **Current Hierarchy Node Tree** will display the records assigned to nodes.



Move/Reassign Records via Hierarchy Editor

Drag and drop the desired record from the source node to the destination node. The record is now associated with the destination node.

18.3.3.7 Assign Records using Hierarchy/Taxonomy Sidebar

To assign records to a hierarchy node, the user must open the repository’s **Hierarchy/Taxonomy Sidebar**. To do so, first open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see [Repositories](#).

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Click the **Hierarchy** button on the **Repository View's Activity Bar**. The **Hierarchy/Taxonomy Sidebar** will appear. All the functionality of the **Repository View** is retained.


ERROR	SE...	BRAND	NAME	TAXONOMY
	1	Ducati	Monster	Car
	2	Ducati	Monster2	BMW
	100	Bianchi	Specialissima	BICYCLE.DIAMOND FRAME
		Bianchi	Impuloso	BICYCLE.DIAMOND FRAME
		Bianchi	Infinito	BICYCLE.DIAMOND FRAME
		Trek	Roscoe	BICYCLE.DIAMOND FRAME
		Trek	Powerfly	BICYCLE.DIAMOND FRAME
		Linear	Roadster	BICYCLE.RECUMBENT
		Linear	Limo	BICYCLE.RECUMBENT
		Bike Friday	Bantam	BICYCLE.RECUMBENT
		Bike Friday	Llama	BICYCLE.RECUMBENT
		Bike Friday	Super Pro	BICYCLE.RECUMBENT

Hierarchy/Taxonomy Sidebar

Use the **Hierarchy/Taxonomy** dropdown list to select the Hierarchy to be deleted. The repository's node tree will be displayed.

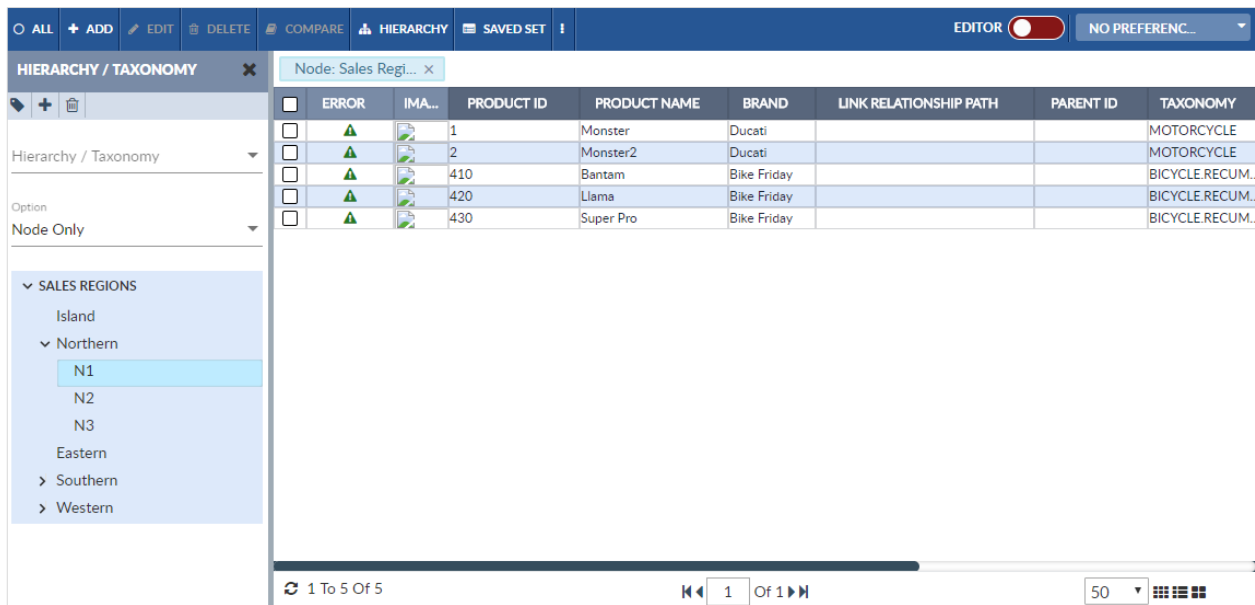
Selecting a hierarchy node will cause the **Repository View** to display only the records assigned to that node. If the selected node has no records assigned to it, no records will be displayed.

A filter box will be added to the **Repository View's Filter Bar** that indicates which nodes' records are currently being displayed. Hovering over the filter term shows the node's hierarchy.


The records shown in the Repository View can also be filtered through using the **Filter** button on the **Repository View's Activity Bar's More**  dropdown list. For more information about Filters, see [Filters](#).

The **Hierarchy/Taxonomy Sidebar's Display Option** dropdown list allows the user to choose if only the records attached to the node are displayed, or if the records attached to the children or parent nodes are also displayed.

To assign records to a node, select one or more records, then drag and drop them onto the desired hierarchy node. The records will be assigned to that node. Select the node to cause the Repository View to only display the records assigned to the node. Note that a **Filter Term** box in the **Repository View's Active Filter's Bar** indicates that only the records assigned to that node are being displayed.



Hierarchy/Taxonomy Sidebar: View Node Record Assignment

To return to viewing all the records in the repository, close the **Filter Term** box by clicking its Close icon  .

Records cannot be unassigned from a hierarchy node in the Hierarchy/Taxonomy Sidebar. See the system administrator to unassign records from hierarchy nodes.

19 Record Validation

For a detailed description of the record validation process or an overview of the terms relating to record validation, see the [Enable Basics: Record Validation](#) section of this document.

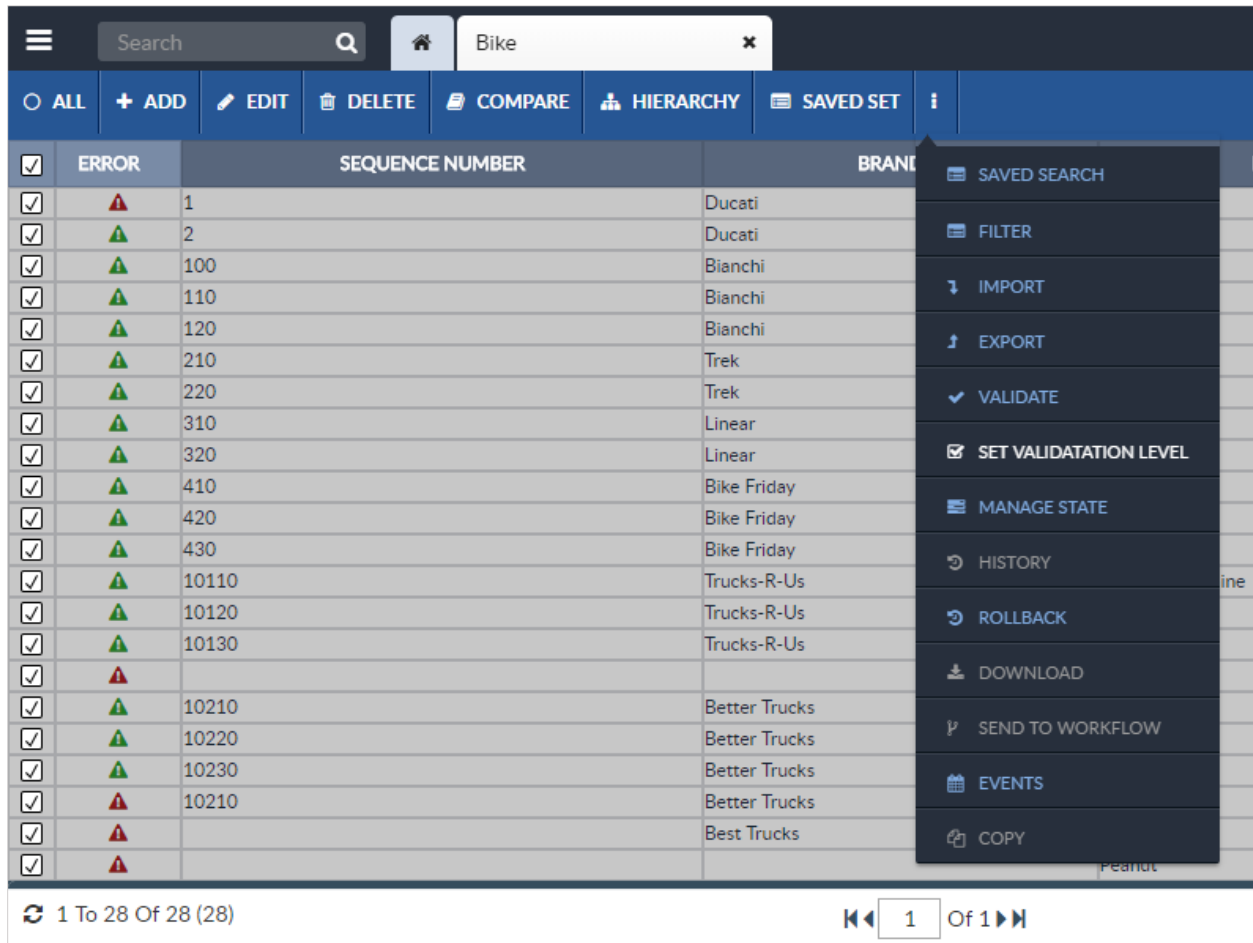
19.1 Set Record Validation Level

To set the required level of validation for one or more records, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumet
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

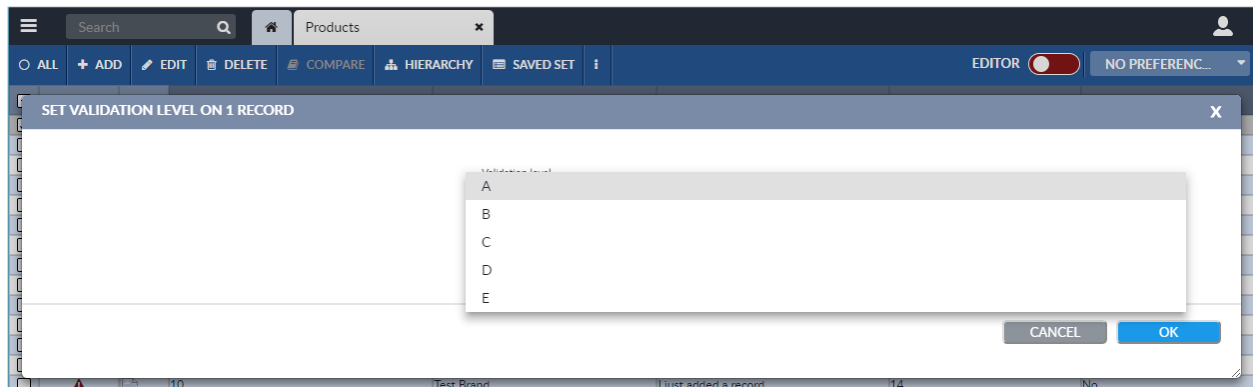
Repository View Grid View

Select the desired record or records in the **Repository View**. Open the **More Actions** dropdown by clicking the **⋮** on the **Repository View's Activity Bar**. Select the **Set Validation Level** option.



More Actions: Set Record Validation Level

The **Set Validation Level** window will appear. The title of the window will indicate how many records will be affected by the change in required validation level.



Set Record Validation Level

Select the desired required validation level.

Select **Okay** to save the new validation level. Click **Cancel** to exit without saving any change to the validation level.

19.2 Setting an Export’s Validation Level

When defining a Syndication Template to use for an export or syndication, the default validation level is set to “A”. This validation level can be changed for the template during setup or modification.

For detailed information about setting a the validation level for a Syndication Template to use for an export or syndication, see the [Exporting Records](#) section of this document.

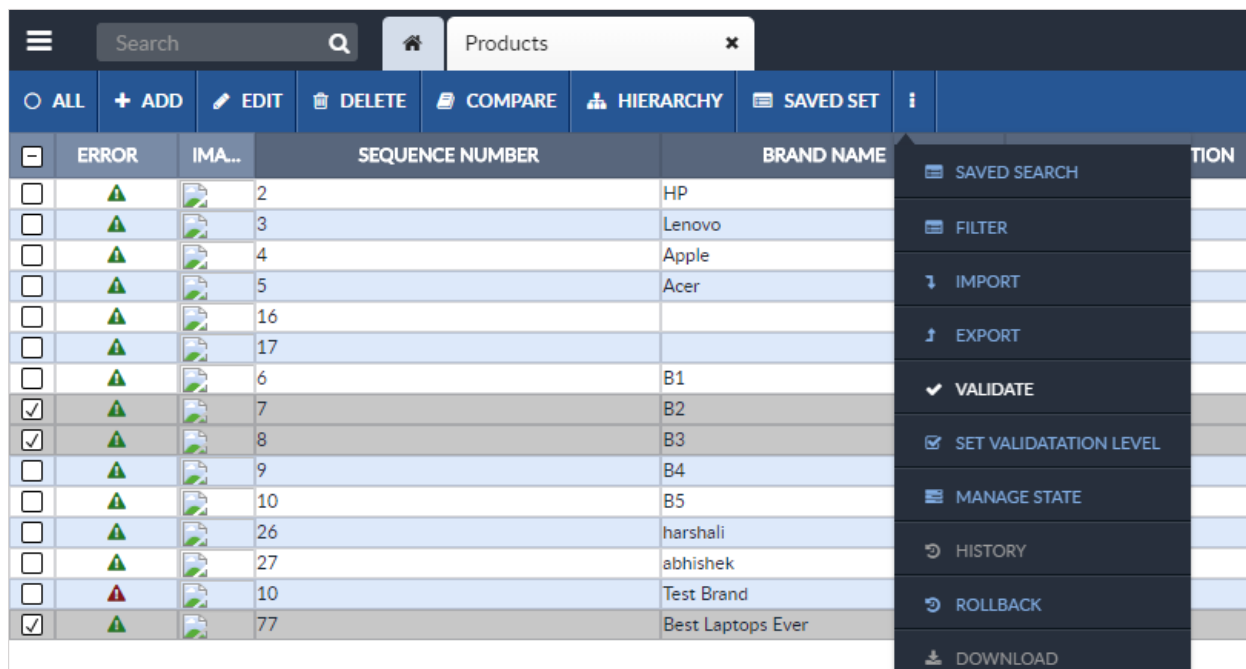
19.3 Validating Selected Records

To validate one or more records, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record or records in the **Repository View**. The user may use a Saved Set or a Search to find the desired records. Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Validate** option.



More Actions: Validate Records

A **Confirmation** window will appear that indicates the number of records being sent for validation.

Select **Yes** to save run validation on the records. Click **No** to exit without validating the records.

19.4 Validating a Repository or a Saved Set

All the records in a repository can also be validated as a group, as can the records in a Saved Set. This is especially useful after creating a Saved Set from an import and then validating the imported records.

To validate the records in a repository or a Saved Set individually, select the records and proceed as described in [Validating Selected Records](#).


To validate the records in a repository or a Saved Set as a group, do not select the records and proceed as follows.

Open the desired repository by opening the **Feature Sidebar**, selecting the desired folder, and selecting the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
	1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
	2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
	3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
	4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
	5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
	6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
	7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
	8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schume
	9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
	10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
	11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
	12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
	13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
	14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
	15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
	16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
	17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
	18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
	19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
	20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

To validate a Saved Set of records, click the **Saved Set** button in the **Activity Bar**. The **Saved Set Sidebar** will appear in the **Repository View**. It displays a list of the Saved Sets for the repository. If there are more Saved Sets than will fit in the window, use the vertical scroll bar on the right side of the **Saved Set Sidebar** to scroll through the list. Select a Saved Set.

To validate the records in the entire repository or Saved Set as a group, do not select the records. Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Validate** option.

		SEARCH	Products				
ALL	ADD	EDIT	DELETE	COMPARE	HIERARCHY	SAVED SET	
	ERROR	IMA...	SEQUENCE NUMBER	BRAND NAME			TON
<input type="checkbox"/>			2	HP			
<input type="checkbox"/>			3	Lenovo			
<input type="checkbox"/>			4	Apple			
<input type="checkbox"/>			5	Acer			
<input type="checkbox"/>			16				
<input type="checkbox"/>			17				
<input type="checkbox"/>			6	B1			
<input checked="" type="checkbox"/>			7	B2			
<input checked="" type="checkbox"/>			8	B3			
<input type="checkbox"/>			9	B4			
<input type="checkbox"/>			10	B5			
<input type="checkbox"/>			26	harshali			
<input type="checkbox"/>			27	abhishek			
<input type="checkbox"/>			10	Test Brand			
<input checked="" type="checkbox"/>			77	Best Laptops Ever			

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD

More Actions: Validate Records

A **Validate** window will appear.

VALIDATE X

Records

All records

Saved Set

Saved Set ▼

Record Type

Records that have not yet been processed

Records that have errors or have not yet been processed

All records

Perform category attribute verification

Generate correction files

Validation level ▼

Validate an Entire Repository or a Saved Set of Records

The set the options in the **Validate** window as desired:

- **Records:** Selects the records to validate.
All records: Validate all the records in the repository.
Saved Set: Select the desired Saved Set.
- **Record Type:** Select to validate records that have not been already validated, records that have not already been validated and records that have errors, or all the records.
- **Perform Category Attribute validation:** Select if the record's Category Attribute values should be verified against the taxonomy node's Category Attributes. Note that when validation is performed, if a value is found in an attribute that is not a Category Attribute for that taxonomy node (or no longer a Category Attribute for that taxonomy node), the value will be removed. See [Taxonomies and Hierarchies](#) for more detailed information.
- **Generate correction files:** Select if a correction file should be generated for each attribute. This can be used for fixing the data in the correction file and then using the files to update the records.
- **Validation Level dropdown:** Select the desired required validation level to check the records against. The record validation status will be generated based on if the all validation rules for this validation level.

Select **Validate** to validate the selected records. Select **Cancel** to exit without validating the records.

To access any generated correction files, open a **Job Monitor Widget** in the **Dashboard**. See [Job Monitor Widget](#) for further details.

20 Workflow

This section will cover how to use a workflow and how to track a work item's progress through a workflow. For more information on workflows, see [Enable Basics: Workflow](#). For details on how to define and configure a workflow, see the "Enable 9 Product Information Management (PIM) Administrator's Manual".


20.1 Send Records to Workflow

To send one or more records from a repository to a workflow, first open the repository. Open the **Feature Sidebar**, select the desired folder, and select the desired repository. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
<input type="checkbox"/>		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
<input type="checkbox"/>		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Sten
<input type="checkbox"/>		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
<input type="checkbox"/>		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
<input type="checkbox"/>		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
<input type="checkbox"/>		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
<input type="checkbox"/>		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
<input type="checkbox"/>		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
<input type="checkbox"/>		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record, records or records in a Saved Set in the **Repository View**. Note that additional records cannot be added to a multi-record work item once it has been created.

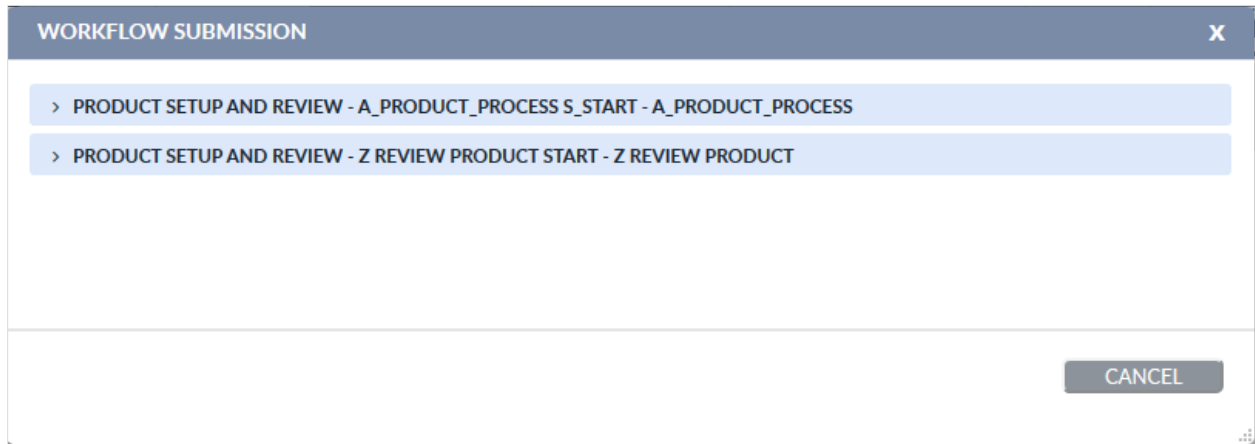
Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Send to Workflow** option.

The screenshot shows the 'Item Staging Workflow' interface. At the top, there is a search bar and a title 'Item Staging Workflow'. Below this is a toolbar with buttons for 'ALL', 'ADD', 'EDIT', 'DELETE', 'COMPARE', 'HIERARCHY', and 'SAVED SET'. The main area is a table with columns: 'ERROR', 'ITEM NUMBER', 'ST...', and 'ITEM CATEGORY'. The table contains 20 rows of data, with some rows having error icons (green triangles for success, red triangles for error). A context menu is open over the table, listing actions such as 'SAVED SEARCH', 'FILTER', 'IMPORT', 'EXPORT', 'VALIDATE', 'SET VALIDATION LEVEL', 'MANAGE STATE', 'HISTORY', 'ROLLBACK', 'DOWNLOAD', 'SEND TO WORKFLOW', 'EVENTS', and 'COPY'. At the bottom of the table, there is a pagination control showing '1 To 20 Of 26 (3)' and a page number '1'.

	ERROR	ITEM NUMBER	ST...	ITEM CATEGORY	
<input type="checkbox"/>	▲	AB178	a	GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	ZAU200117	f	WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	ZTU201221		asdf	02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU561287			02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU583492			02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU575387			02-22-2018 02:4
<input type="checkbox"/>	▲	ZU2561287			02-22-2018 02:4
<input type="checkbox"/>	▲	AH224P		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	EG305		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	00A7205		HARD	02-22-2018 02:4
<input type="checkbox"/>	▲	05GCE		GIFT	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0101		WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0102	asdf	WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0103		WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	test			02-22-2018 02:4
<input type="checkbox"/>	▲	DEB178			02-22-2018 02:4
<input type="checkbox"/>	▲	GB370		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	AB201		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	GB323	O	GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	101010	D		02-22-2018 02:4

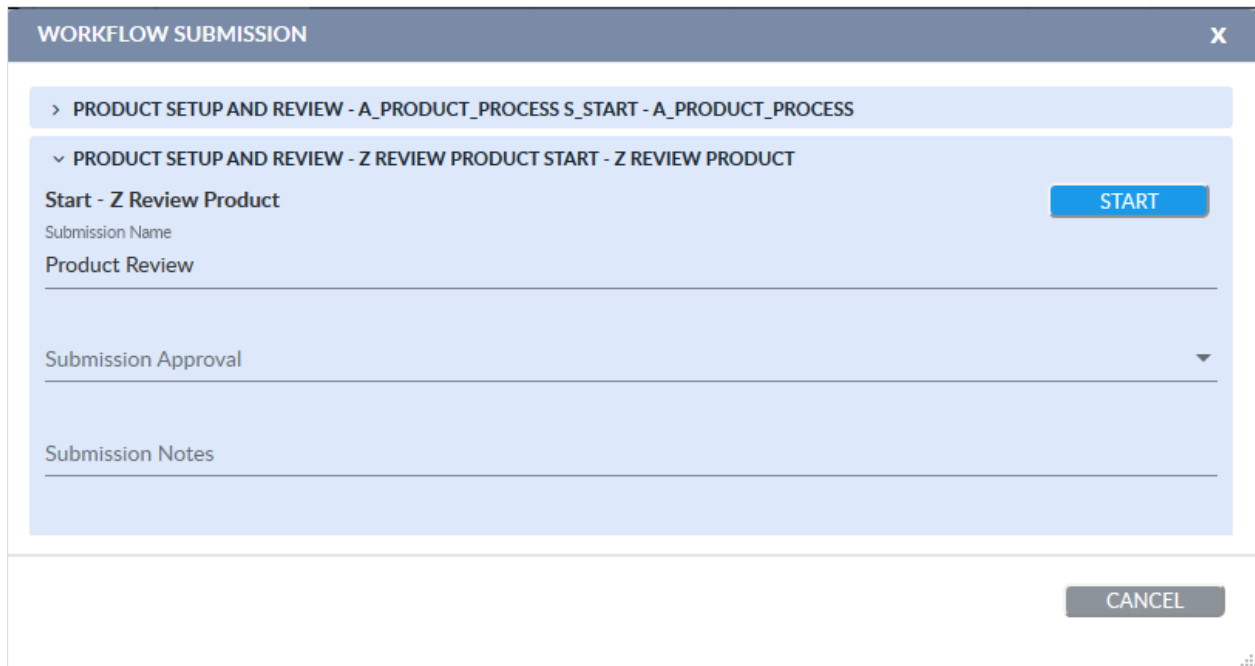
More Actions: *Send to Workflow*

A **Workflow Submission** window will appear. It lists one or more workflows the record(s) may enter.



Workflow Submission


Select a workflow to expand it. The workflow may request the user enter required or optional data.

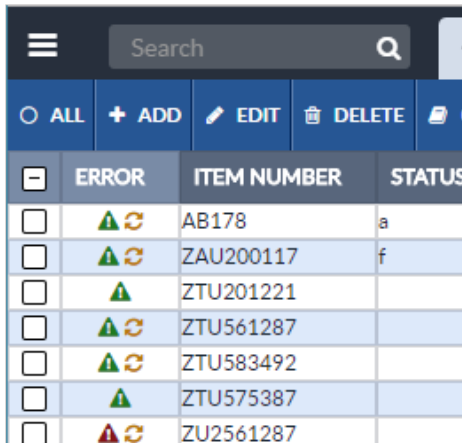














Expanded Workflow Submission

Edit the contents of the **Workflow Submission** window as desired. Select **Start** to create a work item(s) and send it to the workflow(s). To exit the **Workflow Submission** window without

creating a work item and sending it to workflow, click **Cancel** or close the **Workflow Submission** window.

The **Workflow Submission** window will close. Refresh the **Repository View** to show that the record(s) are being processed in a workflow. The **Locked In Workflow** indicator  will appear next to the **Status** indicator of records that are in workflow.



	ERROR	ITEM NUMBER	STATUS
<input type="checkbox"/>	 	AB178	a
<input type="checkbox"/>	 	ZAU200117	f
<input type="checkbox"/>		ZTU201221	
<input type="checkbox"/>	 	ZTU561287	
<input type="checkbox"/>	 	ZTU583492	
<input type="checkbox"/>		ZTU575387	
<input type="checkbox"/>	 	ZU2561287	

Records in Workflow

Work item tasks can be viewed or acted upon in the [Workflow Task Manager](#) and while editing a record in the work item in the **Record Editor** (see [Manage Work Items From Record Editor](#)).

NOTE: If a record is already active in a workflow (as denoted by the **Locked in Workflow** icon), a new work item cannot be launched for the record – only the existing work item(s) can be advanced (providing the user is a designated participant).

20.2 View or Advance Work Item in Record Editor

Work item tasks can be viewed or advanced from the **Workflow Task Manager** and from the **Record Editor**. For information regarding the Workflow Task Manager, see [Workflow Task Manager](#).

To view or advance a work item from the **Record Editor**, first open a record associated with the work item in the **Record Editor**. To do so, open the record’s repository, open the **Feature Sidebar**, select the desired folder, and select the desired repository. The repository will be opened in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schume
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

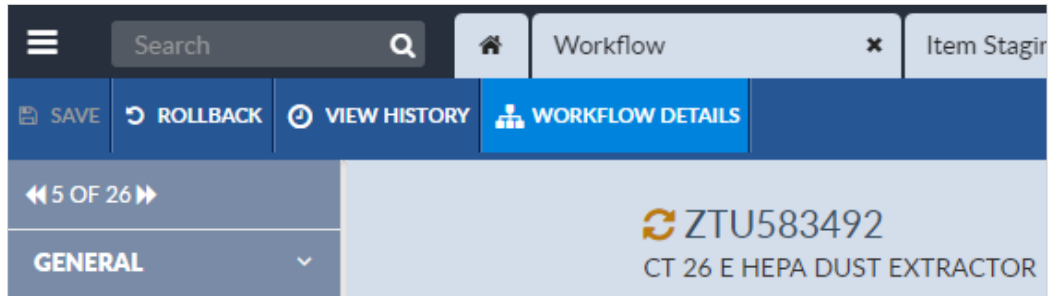
The **In Workflow** indicator will appear next to the **Status** indicator of records that are in workflow.

ERROR	ITEM NUMBER	STATUS
	AB178	a
	ZAU200117	f
	ZTU201221	
	ZTU561287	
	ZTU583492	
	ZTU575387	
	ZU2561287	

Records in Workflow

Select the desired record and click the **Edit** button in the **Repository View's Activity Bar**. The record will be opened in the **Record Editor**. An **In Workflow** indicator will appear next to the record's summary information.

To see the record's work item information, select the **Workflow Details** button on the **Record Editor's Activity Bar**.



Workflow Details Button

A **Work Item Details** window will appear. The **Work Item Details** window will display all the user's work items that are associated with the record. Expand a work item to see its details.

The screenshot shows a 'Work Item Details' window with a light blue background. At the top, there is a list of work items:

- > APP ENGINEER REVIEW - JAVIER TEST FLOW
- > APP ENGINEER REVIEW - JAVIER SPLIT WORKFLOW
- ▼ PRODUCT LINE REVIEW - JAVIER SPLIT WORKFLOW

The selected item, 'Product Line Review - Javier Split Workflow', is expanded to show the following details:

- Task:** Product Line Review - Javier Split Workflow
- Description:** Product Line Review Changes to existing record
- Role:** Product Line
- Status:** %taskStatus
- Workflow Comment:**
 - Approval: Approve (with a dropdown arrow)
 - Comment: (empty text area)

At the bottom left of the window is a 'CANCEL' button, and at the top right of the expanded item is a 'SEND' button.

Work Item Details

To advance a work item, select the work item to expand it. Edit the work item as necessary, entering any required or optional data as desired. When the work item is complete, click the **Send** button. The work item will be submitted back to the workflow and will be removed from the record's **Work Item Details** window.

20.3 Workflow Task Manager

The **Workflow Task Manager** allows a user to manage work items assigned to them. Depending on their permissions, a user may view work items, advance work items, view records associated with work items, clear work item errors, and purge workflows.

The **Workflow Task Manager** is available in the **Administration Tab** of the **Features Sidebar** and also as the **Workflow Task Manager Widget**.

#	TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM	PRIORITY	ACTIVITY	SENDER	SENT DATE	STATUS	WORK ITEM ID
1	Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03	None	Product Line Review	ProcessPro...	06/21/2018 16:03	Enroute	2671964
2	App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03	None	App Engineer Review	ProcessPro...	06/21/2018 16:03	Enroute	2671963
3	Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01	None	Product Line Review	ProcessPro...	06/12/2018 18:01	Enroute	2602383
4	App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01	None	App Engineer Review	ProcessPro...	06/12/2018 18:01	Enroute	2602382

Workflow Task Manager

Select Work Item List

Select Work Item View Profile

Activity Bar

Open Record /Repository

Send to Workflow

#	TASK	TASK ITEM	TASK STATUS	TASK ROLE
1	Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line
2	App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer
3	Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line
4	App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer

Workflow Task Manager Map (Left Side)






Activity Bar

TASK ROLE	WORK ITEM	PRIORITY	ACTIVITY	SENDER	SENT DATE	STATUS	WORK ITEM ID
Product Line	Review Products_06_21_2018_16_03	None	Product Line Review	ProcessPro...	06/21/2018 16:03	Enroute	2671964
App Engineer	Review Products_06_21_2018_16_03	None	App Engineer Review	ProcessPro...	06/21/2018 16:03	Enroute	2671963
Product Line	Review Products_06_12_2018_18_01	None	Product Line Review	ProcessPro...	06/12/2018 18:01	Enroute	2602383
App Engineer	Review Products_06_12_2018_18_01	None	App Engineer Review	ProcessPro...	06/12/2018 18:01	Enroute	2602382

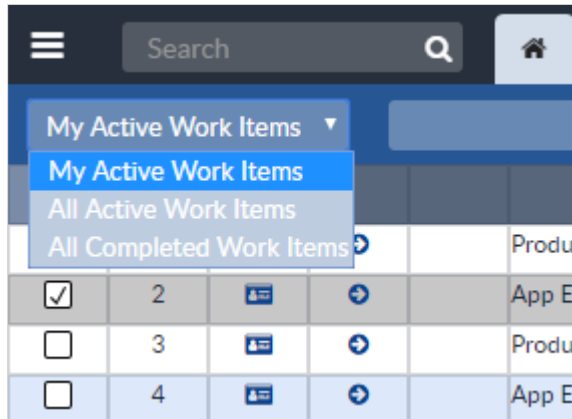
Workflow Task Manager Map (Right Side)

The purpose of the columns of the **Workflow Task Manager** are as follows:

- **Selection box:** Click to select the work item.
- **#:** An index for displaying work items.

- **[Unlabeled #1]:**
 - : Select the icon to open the work item's record or repository.
 - : Select the icon to view the Properties and System Attributes of the work item. For details on the Properties and System Attributes of work items, see [View Work Items](#).
- **[Unlabeled #2]:** If the system is configured to allow advancing work items through the **Workflow Task Manager**, a **Submit Work Item** icon  will appear. Click it to send the work item to the next activity in the workflow. If a **Submit Work Item** icon  is not displayed, to advance the work item the user must click the **Open Record/Repository** icon  to open the record or repository and advance the work item from there. For more information, see [View or Advance Work Item in Record Editor](#).
- **[Unlabeled #3]:** For details regarding this column, contact EnterWorks.
- **Task:** The name of the task as defined in the workflow.
- **Task Item:** The name of the work item for the workflow. Usually the name is the same for all work items in a workflow, but in some workflows each work item is uniquely named (such as including the date and time it was created).
- **Task Status:** Indicates whether the work item is **Completed** (i.e., reached an end activity), **En Route** (in the middle of a workflow) or **In Error** (stuck at an automatic activity with a processing error). Work items with a status of **Completed** only appear if **All Completed Work Items** has been selected in the **Work Item List**. Work items with a status of **En Route** or **Error** only appear if **My Active Work Items** or **All Active Work Items** have been selected in the **Work Item List**.
- **Task Role:** Optional role that can be set in the workflow. This typically identifies either an individual or the role of the person who needs to act on the task. This is not necessarily an Enable group or workflow role.
- **Work Item:** Same as the **Task Item**.
- **Priority:** An optional field in work items to allow higher priority work items to be displayed first in the list of work items. Most work flows do not use this feature
- **Activity:** The name of the workflow activity in which the work item is currently sitting.
- **Sender:** The name of the workflow activity from which the work item was sent.
- **Sent Date:** The date and time the work item was sent to the current activity
- **Status:** Same as **Task Status**.

At the far left of the **Workflow Task Manager's Activity Bar** is the **Select Work Item List** dropdown.

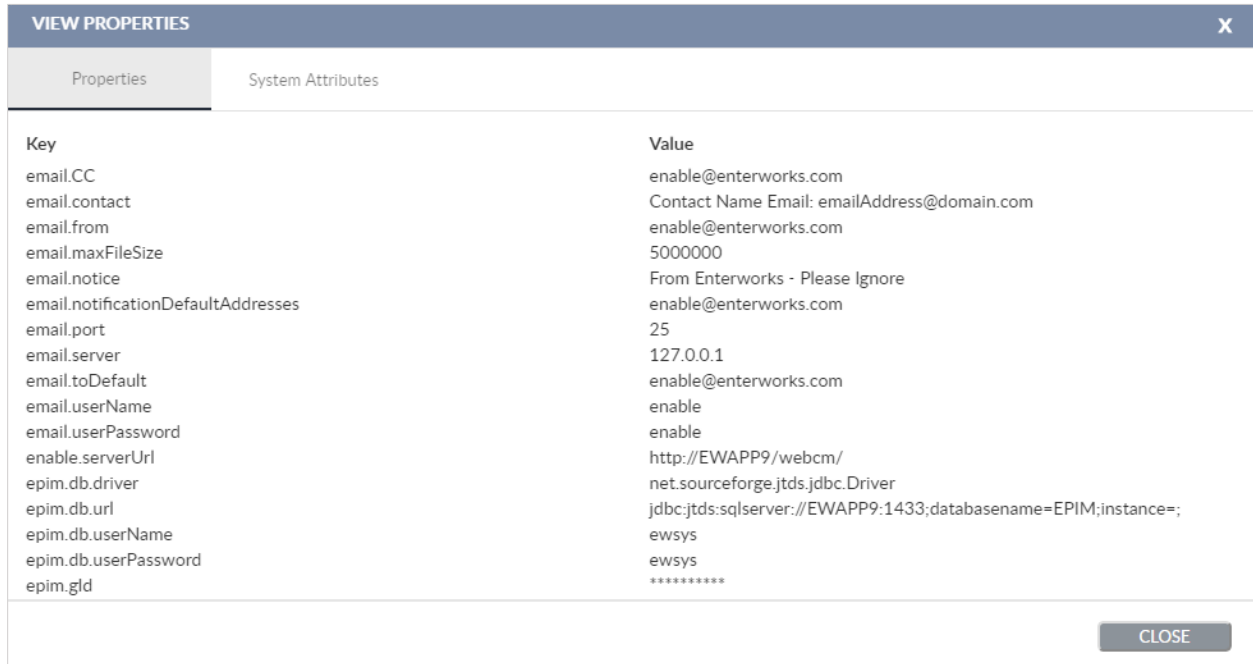


Select Work Item List

Select the desired list of work items to view:

- **My Active Work Items:** A list of the user's work items the user can perform.
- **All Active Work Items:** Permitted users will see all the active work items in the system.
- **All Completed Work Items:** Permitted users will see all the completed work items in the system.



To view a work item's properties, select the work item and select the **View Properties** button on the **Workflow Task Manager's Activity Bar**. A **View Properties** window will appear, showing all of the properties and their values in the work item.




Workflow View Properties and System Attributes

The **View Properties** window has two tabs. The **Properties** tab displays work item specific properties. The **System Attributes** tab displays values that are common to all workflows.

20.3.1 Advance a Work Item via Workflow Task Manager

Depending on system configuration, the user may be able to advance a work item through the **Workflow Task Manager**. If the system is configured to allow it, for eligible work items the **Workflow Task Manager** will display a **Submit Work Item** button  in the 2nd unlabeled column. Otherwise, to advance the work item the user must click the **Open Record/Repository** icon  to open the record or repository and advance the work item from there. For more information, see [View or Advance Work Item in Record Editor](#).

To advance a work item via **Workflow Task Manager**, first open the **Workflow Task Manager**. This can be done either by opening a **Workflow Task Manager Widget** (see [Configuring Workflow Task Manager Widget](#)) or by opening the **Workflow Task Manager** in a new tab. To open it in a tab, open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**, select the **Administration** tab, then select **Workflow Tasks**. The **Workflow Task Manager** tab will appear.

	#			TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM
<input type="checkbox"/>	1			Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03
<input type="checkbox"/>	2			App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03
<input type="checkbox"/>	3			Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01
<input type="checkbox"/>	4			App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01

1 To 1 Of 1

1 Of 1

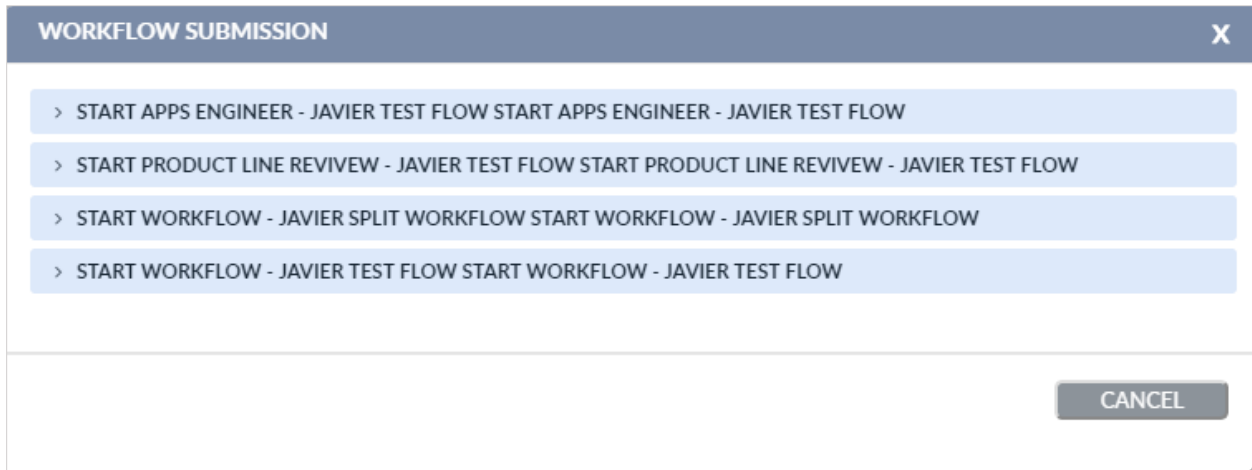
Workflow Task Manager Detail

Select the work item to advance by clicking the record's **Submit Work Item** button

	#			TASK	TA
<input type="checkbox"/>	1			Product Line Review	Review Products,
<input type="checkbox"/>	2			Submit Work Item Engineer Review	Review Products,
<input type="checkbox"/>	3			Product Line Review	Review Products,
<input type="checkbox"/>	4			App Engineer Review	Review Products,

Submit Work Item

A **Workflow Submission** window will appear. It lists one or more options for advancing the work item. Select an option to expand it.




Workflow Submission Window

Edit the contents of the **Workflow Submission** window as desired. Select **Send** to save the changes to the work item and advance the work item (send it back to the workflow). To exit the **Workflow Submission** window without advancing the work item, select **Cancel**.

20.3.2 Open Work Item Records Repository

The repository record(s) associated with a work item can be accessed through the **Workflow Task Manager**.

To access the record(s), first open the **Workflow Task Manager**. This can be done either by opening a **Workflow Task Manager Widget** (see [Configuring Workflow Task Manager Widget](#)) or by opening the **Workflow Task Manager** in a new tab. To open it in a tab, open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**, select the **Administration** tab, then select **Workflow Task Manager**. The **Workflow Task Manager** tab will appear.

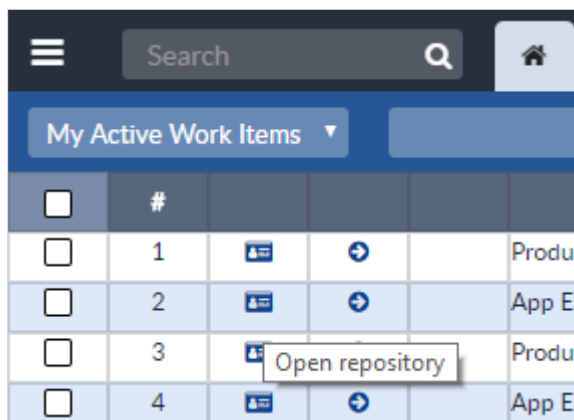
The screenshot shows the Workflow Task Manager interface. At the top, there is a search bar and a "Workflow" tab. Below the search bar are several action buttons: "My Active Work Items", "VIEW PROPERTIES", "CLEAR ERROR", "PURGE", and "PURGE ALL COMPLETED WORK ITEMS". The main area contains a table with the following columns: #, TASK, TASK ITEM, TASK STATUS, TASK ROLE, and WORK ITEM.

#	TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM
1	Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03
2	App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03
3	Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01
4	App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01

At the bottom of the table, there is a pagination control showing "1 To 1 Of 1" and "1 Of 1".

Workflow Task Manager Detail

The user’s active work items will be listed in the **Workflow Task Manager**. Select the **Open Repository** icon for the desired work item.



Workflow Task Manager: Open a Repository

If the work item is associated with more than one record, the repository holding those records will be opened in a **Repository View**. It will show only the associated records.

If the work item is associated with only one record, depending on system configuration, either the record’s repository will be opened in a **Repository View** and it will only list the associated record, or the record will be opened in the **Record Editor**.

20.3.3 Clear Work Item Error

If an automatic process returns an error when triggered by a work item, the work item is halted in the workflow. The work item error can be cleared and the automated process triggered to attempt to advance the work item again.

To clear a work item error, first open the **Workflow Task Manager**. This can be done either by opening a **Workflow Task Manager Widget** (see [Configuring Workflow Task Manager Widget](#)) or by opening the **Workflow Task Manager** in a new tab. To open it in a tab, open the **Features Sidebar** by selecting the **Features Sidebar** icon on the **Tab Bar**, select the **Administration** tab, then select **Workflow Task Manager**. The **Workflow Task Manager** tab will appear.

	#			TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM
<input type="checkbox"/>	1			Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03
<input type="checkbox"/>	2			App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03
<input type="checkbox"/>	3			Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01
<input type="checkbox"/>	4			App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01

1 To 1 Of 1

1 Of 1

Workflow Task Manager Detail

The user’s active work items will be listed in the **Workflow Task Manager**. Select the work item with an error that is to be cleared. Click the **Clear Error** button on the **Workflow Task Manager’s Activity Bar**.

The work item’s error will be cleared and the work item will be resubmitted to the workflow process it had previously failed. If the failure was due to environmental conditions that have been resolved, it will successfully process the activity and continue on in the workflow. If the error conditions are still present, the work item will again be flagged as being In Error.

20.3.4 Purge a Workflow – **DO NOT USE**

WARNING: Purging a workflow will delete all work items (active and completed) from the workflow, even those not visible to the user. **DO NOT USE THIS FUNCTION.**

Purging a workflow also clears the **Locked in Workflow** state for all records associated with the work items.

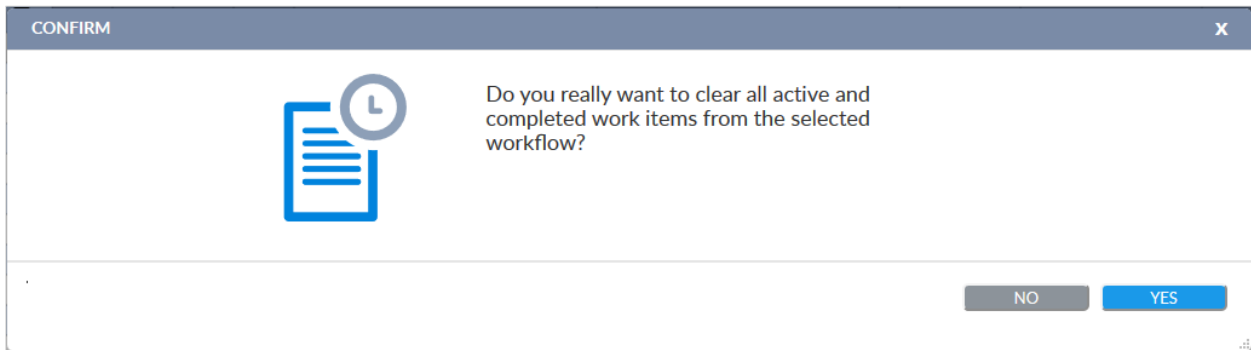
To purge a workflow, first open the **Workflow Task Manager**. This can be done either by opening a **Workflow Task Manager Widget** (see [Configuring Workflow Task Manager Widget](#)) or by opening the **Workflow Task Manager** in a new tab. To open it in a tab, open the **Features Sidebar** by selecting the **Features Sidebar** icon on the **Tab Bar**, select the **Administration** tab, then select **Workflow Tasks**. The **Workflow Task Manager** tab will appear.

		Workflow							
My Active Work Items		VIEW PROPERTIES		CLEAR ERROR		PURGE		PURGE ALL COMPLETED WORK ITEMS	
	#			TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM	
<input type="checkbox"/>	1			Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03	
<input type="checkbox"/>	2			App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03	
<input type="checkbox"/>	3			Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01	
<input type="checkbox"/>	4			App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01	

1 To 1 Of 1 1 Of 1

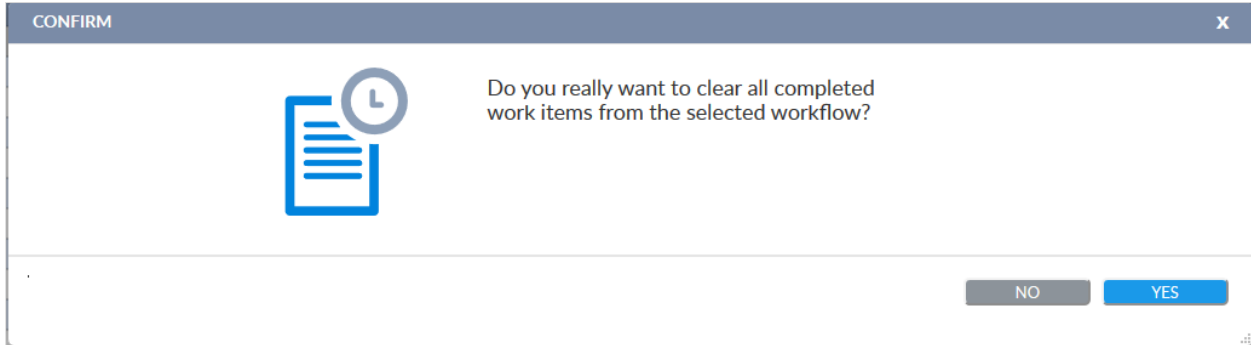
Workflow Task Manager Detail

To purge all work items (active and completed) from a workflow, select one item in the workflow and click the **Purge** button on the **Workflow Task Manager’s Activity Bar**. A confirmation window will appear:



Purge Workflow: Confirm the Purge of All Work Items from a Workflow


To purge all completed work items in a workflow, select one item in the workflow and click the **Purge All Completed Work Items** button on the **Workflow Task Manager’s Activity Bar**. A confirmation window will appear:



Purge Workflow: Confirm the Purge of All Completed Work Items from a Workflow

20.3.5 Work Item View Profile

The Work Item View Profile capability allows users to select work item list formats that have been defined by system administrators. Depending on system configuration, specific Work Item View Profiles may not be available.

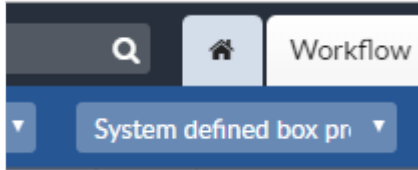
To select a Work Item View Profile, first open the **Workflow Task Manager**. This can be done either by opening a **Workflow Task Manager Widget** (see [Configuring Workflow Task Manager Widget](#)) or by opening the **Workflow Task Manager** in a new tab. To open it in a tab, open the **Features Sidebar** by selecting the **Features Sidebar** icon  on the **Tab Bar**, select the **Administration** tab, then select **Workflow Tasks**. The **Workflow Task Manager** tab will appear.

	#			TASK	TASK ITEM	TASK STATUS	TASK ROLE	WORK ITEM
<input type="checkbox"/>	1			Product Line Review	Review Products_06_21_2018_16_03	%taskStatus	Product Line	Review Products_06_21_2018_16_03
<input type="checkbox"/>	2			App Engineer Review	Review Products_06_21_2018_16_03	Review	App Engineer	Review Products_06_21_2018_16_03
<input type="checkbox"/>	3			Product Line Review	Review Products_06_12_2018_18_01	%taskStatus	Product Line	Review Products_06_12_2018_18_01
<input type="checkbox"/>	4			App Engineer Review	Review Products_06_12_2018_18_01	Review	App Engineer	Review Products_06_12_2018_18_01

1 To 1 Of 1 1 Of 1

Workflow Task Manager Detail

Select a Work Item View Profile from the **Select Work Item View Profile** dropdown list on the left side of the **Workflow Task Manager's Activity Bar**. The workflow task list will be displayed according to the selected profile.



Workflow Task Manager: Select Profile Dropdown List

21 Package Promotions

Package Promotions are defined and configured by the system administrator.

For a detailed look at Package Promotions, see [Enable Basics: Package Promotions](#).


21.1 Initiating Package Promotions

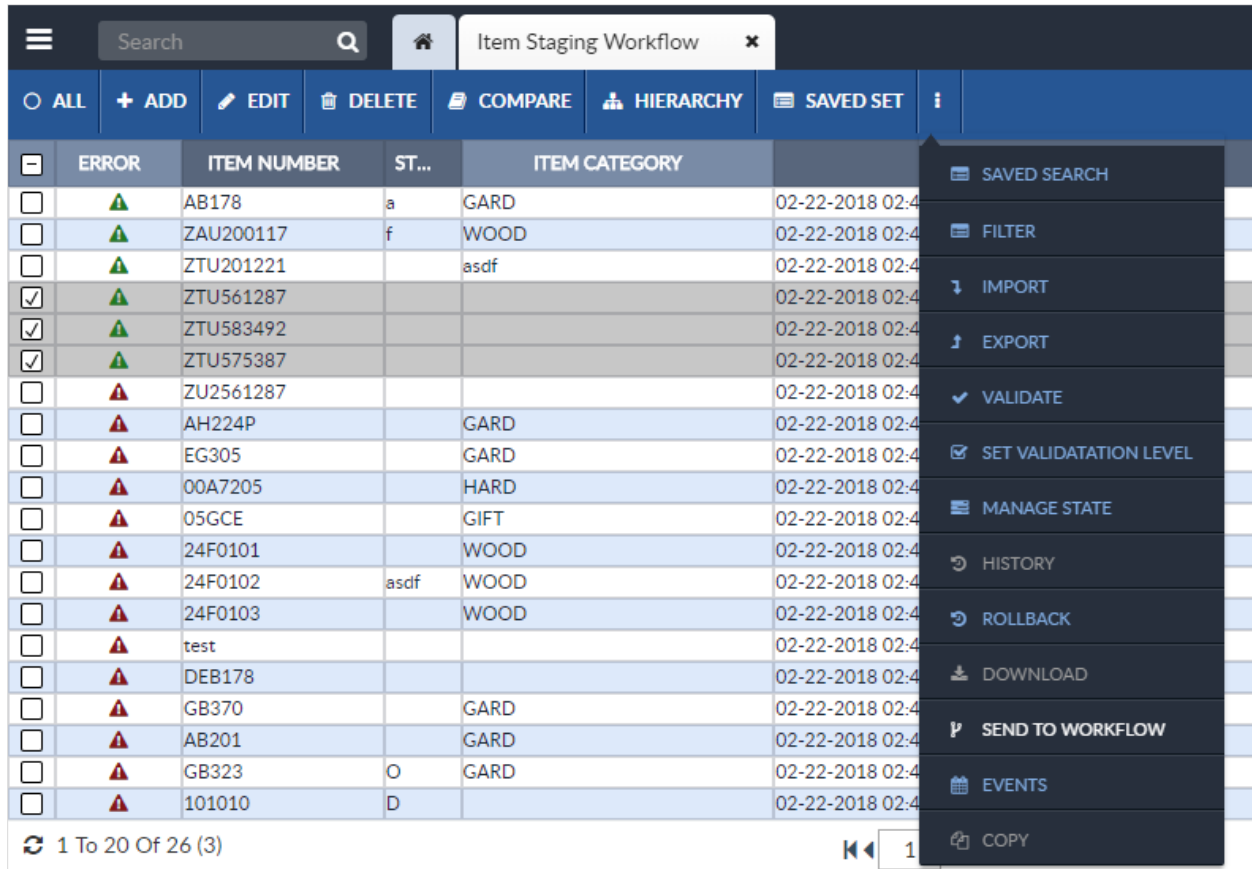
To promote selected Packages, first open the root repository for the defined Package Promotion. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the desired repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasst
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amandla Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumet
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

Select the desired record, records or Saved Set in the **Repository View**. Note that additional records cannot be added to a multi-record work item once it has been created.

Open the **More Actions** dropdown by clicking the  on the **Repository View's Activity Bar**. Select the **Send to Workflow** option.

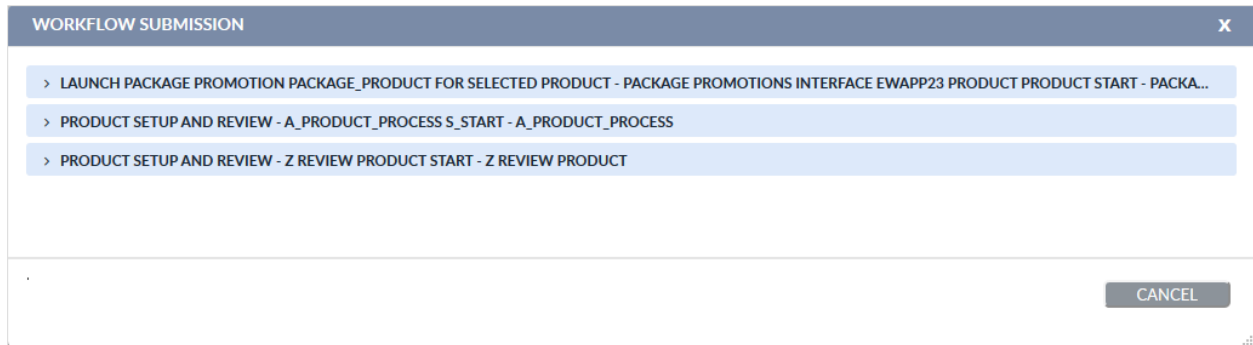


The screenshot shows the 'Item Staging Workflow' interface. At the top, there is a search bar and a title 'Item Staging Workflow'. Below this is a toolbar with buttons for 'ALL', '+ ADD', 'EDIT', 'DELETE', 'COMPARE', 'HIERARCHY', and 'SAVED SET'. The main area is a table with columns: 'ERROR', 'ITEM NUMBER', 'ST...', and 'ITEM CATEGORY'. The table contains 20 rows of data, with the first three rows having green error icons and the last three rows having red error icons. A 'More Actions' dropdown menu is open on the right side of the table, listing various actions: 'SAVED SEARCH', 'FILTER', 'IMPORT', 'EXPORT', 'VALIDATE', 'SET VALIDATION LEVEL', 'MANAGE STATE', 'HISTORY', 'ROLLBACK', 'DOWNLOAD', 'SEND TO WORKFLOW', 'EVENTS', and 'COPY'. The 'SEND TO WORKFLOW' option is highlighted.

	ERROR	ITEM NUMBER	ST...	ITEM CATEGORY	
<input type="checkbox"/>	▲	AB178	a	GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	ZAU200117	f	WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	ZTU201221		asdf	02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU561287			02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU583492			02-22-2018 02:4
<input checked="" type="checkbox"/>	▲	ZTU575387			02-22-2018 02:4
<input type="checkbox"/>	▲	ZU2561287			02-22-2018 02:4
<input type="checkbox"/>	▲	AH224P		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	EG305		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	00A7205		HARD	02-22-2018 02:4
<input type="checkbox"/>	▲	05GCE		GIFT	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0101		WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0102	asdf	WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	24F0103		WOOD	02-22-2018 02:4
<input type="checkbox"/>	▲	test			02-22-2018 02:4
<input type="checkbox"/>	▲	DEB178			02-22-2018 02:4
<input type="checkbox"/>	▲	GB370		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	AB201		GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	GB323	O	GARD	02-22-2018 02:4
<input type="checkbox"/>	▲	101010	D		02-22-2018 02:4

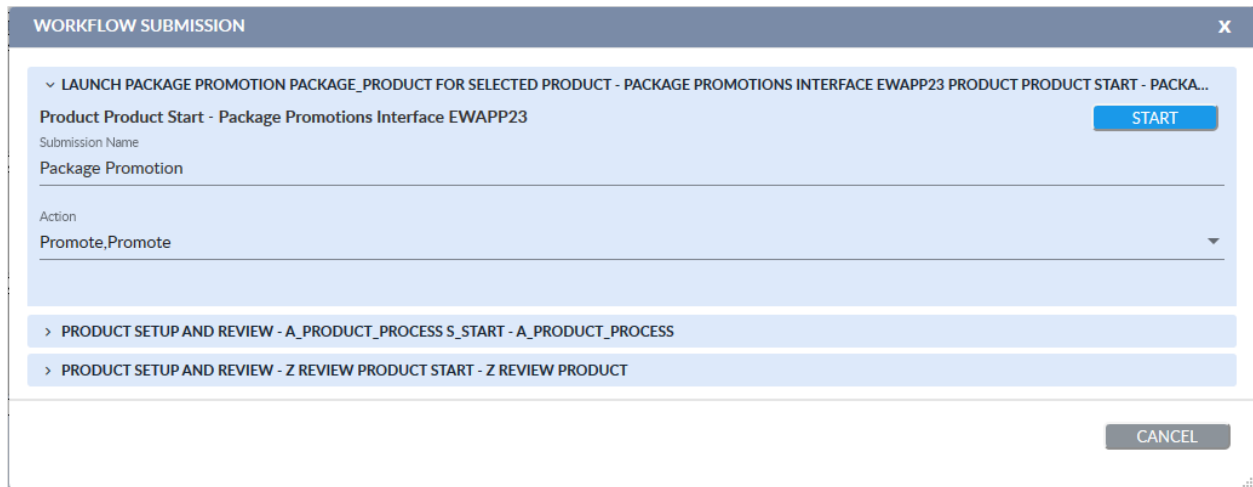
Repository View More Dropdown List: Send to Workflow

A **Workflow Submission** window will appear.



Workflow Submission Window

Expand the desired Package Promotion workflow.



Workflow Submission Window: Expanded Package Promotion Workflow

Set the **Action** to **Promote** to promote the records. If the system is configured to allow it, the user may select **Validate** to validate the records and generate the Package Promotion report without promoting the records to Production.

Click **Start** to create a work item on the Package Promotions workflow. To exit the **Workflow Submission** window without creating a work item and sending it to workflow, click **Cancel** or close the **Workflow Submission** window.

The **Workflow Submission** window will close. Refresh the **Repository View** to show that the record(s) are being processed in a workflow. The **Locked In Workflow** indicator will appear next to the **Status** indicator of records that are in workflow.

	ERROR	ITEM NUMBER	STATUS
<input type="checkbox"/>		AB178	a
<input type="checkbox"/>		ZAU200117	f
<input type="checkbox"/>		ZTU201221	
<input type="checkbox"/>		ZTU561287	
<input type="checkbox"/>		ZTU583492	
<input type="checkbox"/>		ZTU575387	
<input type="checkbox"/>		ZU2561287	

Repository View: Records in Workflow

The records are only in workflow briefly, so the **Repository View** will indicate they are in workflow for only a few seconds, even though the Package Promotion process may still be in progress.

The user can view the progress of the Package Promotion in the [Job Monitor](#) (either the tab or the Widget) or in the Scheduled Import Jobs repository. See [View Package Promotion Progress via Scheduled Import Jobs Repository](#) or [View Package Promotion Progress via Job Monitor](#).

21.2 View Package Promotion Progress via Scheduled Import Jobs Repository

To view the progress of the Package Promotion via the Scheduled Import Jobs repository, first select the **Features Sidebar** icon on the **Tab Bar** to open the list of repository folders. Open the folder labeled **Scheduled Activities**, then select the Scheduled Import Jobs repository.

The Scheduled Import Jobs repository will be opened in a **Repository View**. The state of the Package Promotion job will be indicated by the value in the Import Status column, either **Validate**, **Promote**, or **Completed**.

	ERROR	IMPORT NAME	IMPORT JOB	IMPORT STATUS	# CREATED	# U
<input type="checkbox"/>		Promote Package Package_Product_1532490301037	102082	Validate S_Item	0	0
<input type="checkbox"/>		Promote Package Package_Product_1532489648049	102081	Completed	0	0

Scheduled Import Jobs Repository: Package Promotion During Validation

ERROR	IMPORT NAME	IMPORT JOB	IMPORT STATUS	# CREATED	# U
	Promote Package Package_Product_1532490301037	102082	Promote S_Item	0	0
	Promote Package Package_Product_1532489648049	102081	Completed	0	0

Scheduled Import Jobs Repository: Package Promotion During Promotion

ERROR	IMPORT NAME	IMPORT JOB	IMPORT STATUS	# CREATED	# U
	Promote Package Package_Product_1532490301037	102082	Completed	0	0
	Promote Package Package_Product_1532489648049	102081	Completed	0	0

Scheduled Import Jobs Repository: Completed Package Promotion

21.3 View Package Promotion Progress via Job Monitor

For instructions on opening or using the Job Monitor, see [Job Monitor](#).

The validation and Promotion operations are visible in the **Job Monitor** as individual jobs: Validation and Promotion. The state of the jobs will be indicated by the value in the Status column: **Queued**, **Pending**, **Error**, or **Completed**.


JOB TYPE	STATUS	REPOSITORY	DATE	USER	PUBLISH NAME	SERVER
Promote	Completed	Product Production	07-24-2018	system		EWAPP23:8134
Promote	Completed	Item Production	07-24-2018	system		EWAPP23:8134
Validation	Completed	Product	07-24-2018	system		EWAPP23:8134
Validation	Completed	Item	07-24-2018	system		EWAPP23:8134

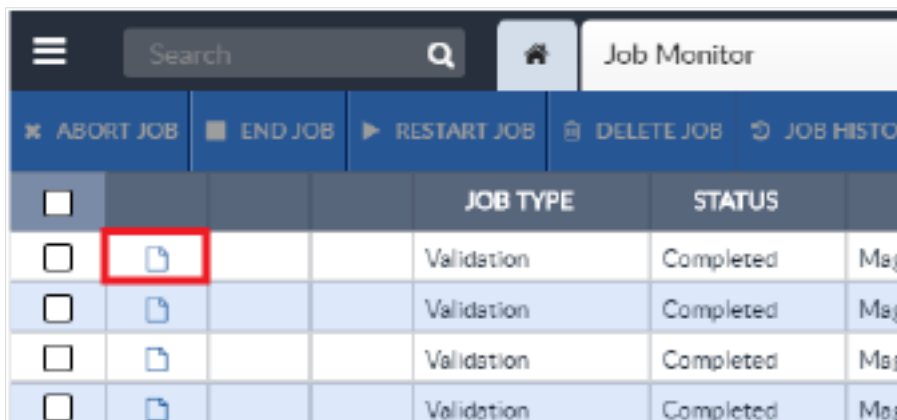
Job Monitor: Package Promotion Validation and Promotion Jobs





21.4 Package Promotion Report

Once the Package Promotion process has completed, the Package Promotion report can be used to find and fix records with validation errors. (For details regarding the Package Promotion Report, see [Enable Basics: Package Promotion Report](#).) Once any errors within a package have been corrected, the package can be re-submitted for Package Promotion

To access the Package Promotion Report after a Package Promotion has completed, open the **Job Monitor Widget** or tab. For instructions on opening or using the Job Monitor, see [Job Monitor](#).

The validation and Promotion operations are visible in the **Job Monitor** as individual jobs, labeled: Validation and Promotion. Each job will have its own Package Promotion Report. To download the reports, click the **Report** icon  in the first unlabeled column in the Job Monitor.



		ABORT JOB		END JOB		RESTART JOB		DELETE JOB		JOB HISTO	
<input type="checkbox"/>											
						JOB TYPE		STATUS			
<input type="checkbox"/>						Validation		Completed			Mag
<input type="checkbox"/>						Validation		Completed			Mag
<input type="checkbox"/>						Validation		Completed			Mag
<input type="checkbox"/>						Validation		Completed			Mag

Job Monitor: To Access the Package Promotion Report

22 Digital Asset Management

The **DAM** is the set of folders, repositories, and processes used to store digital assets and make them accessible to the rest of Enable.

An organization’s digital assets may include digital images, audio files, video files, PDF documents, Microsoft Office documents, and other file types.

The records in the DamMaster repository hold the metadata for the digital assets. Each digital asset has one record in DamMaster. The metadata includes filepath, fileextension, and any other metadata that can be extracted from the image such as width, height, etc.

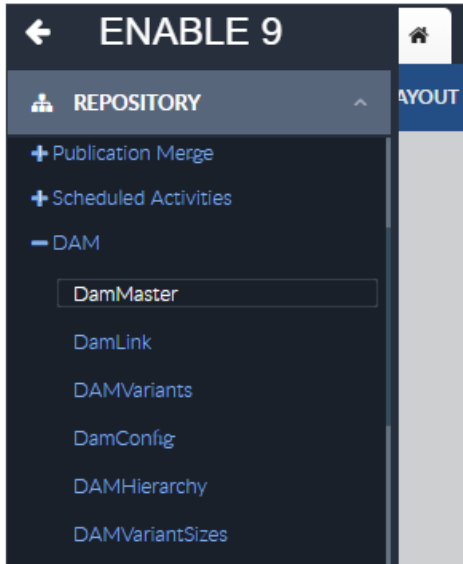
Digital assets can be associated with any repository records, depending on system configuration.

22.1 View Digital Assets

There are two ways to view digital assets.

For information on viewing digital assets from the records that link to them, see the [Linked Records](#) section of this document.

To view the digital assets stored in Enable from the DamMaster repository, first open DamMaster. Open the **Feature Sidebar**, select the DAM folder, and select the DamMaster repository. For more detailed information on repositories, see the [Repositories](#) section in this document.



Open the DamMaster Repository

The repository will open in a **Repository View**.

The screenshot displays the 'DamMaster Repository View' in a table format. The table has a header row with the following columns: 'ERROR', 'SKU ID', 'CAPTION', 'BRAND', 'IMAGE TYPE/FORMAT', 'IMAGE STATUS', 'TAXONOMY NODE', 'HI RES IMAGE URL', and 'FILE NAME'. Below the header, there are several rows of data, each representing a digital asset. The 'IMAGE STATUS' column for all visible rows is 'PIM Use Only'. The 'FILE NAME' column shows various image files like 'blonde.png', 'blue-ice...', 'blue-paisley...', 'brown...', 'brown-wheat.png', and 'brown.png'. At the bottom of the table, there is a pagination bar showing '1 To 20 Of 33491' and a page number '1' out of '1675'.

ERROR	SKU ID	CAPTION	BRAND	IMAGE TYPE/FORMAT	IMAGE STATUS	TAXONOMY NODE	HI RES IMAGE URL	FILE NAME
		Blonde/Oxbloo...		Swatch	PIM Use Only			blonde-...
		Blonde Guitar...		Swatch	PIM Use Only			blonde.png
		Blue Ice Metall...		Swatch	PIM Use Only			blue-ice-...
		Blue Paisley...		Swatch	PIM Use Only			blue-paisley-...
		Brown Sunburst...		Swatch	PIM Use Only			brown-...
		Brown/Wheat...		Swatch	PIM Use Only			brown-wheat.png
		Brown Leather...		Swatch	PIM Use Only			brown.png

DamMaster Repository View

To turn on the Cover Flow functionality, click the **Images** toggle on the right end of the Repository View's Activity Bar. The **Images** toggle will turn green.



Activate Cover Flow

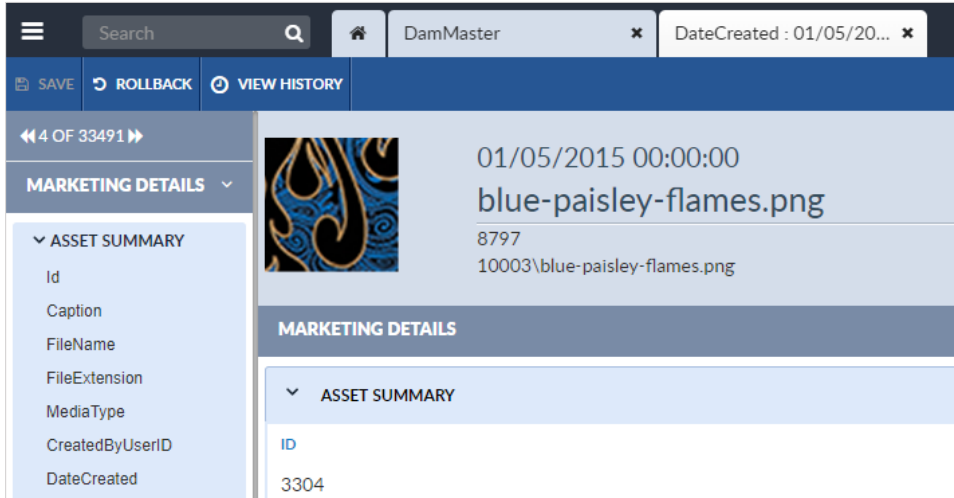
Cover Flow displays the records' main images on that page in a series, with the last selected record as the primary image. A slider on the bottom of the Cover Flow determines the size of the displayed images. The arrows on the left and right sides of the cover flow allow the user to move to the previous or next page of records.



Repository View with Cover Flow Images

To view the metadata for a particular digital asset, double-click its record. The record will be opened in the **Record Editor**.

If the digital asset is an image, a thumbnail of the image will show in the **Repository View**. A larger view of the thumbnail will be shown in the **Record Editor**.

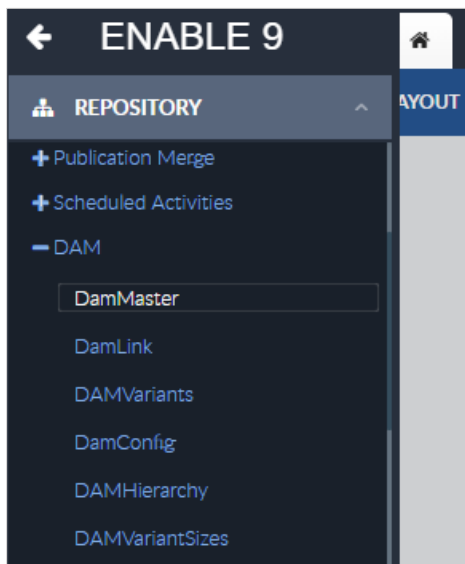


Digital Asset in the Record Editor

22.2 Search for Digital Assets

The [Search](#), [Filters](#), [Hierarchy](#), and [Saved Sets](#) functionalities can be used in the DamMaster repository to find digital assets, in the same manner as they are used in any other repository.

To search for digital assets, first open the DamMaster repository. Open the **Feature Sidebar**, select the DAM folder, and select the DamMaster repository.



Open the DamMaster Repository

The repository will open in a **Repository View**. For more detailed information on repositories, see the [Repositories](#) section in this document.

ERROR	SKU ID	CAPTION	BRAND	IMAGE TYPE/FORMAT	IMAGE STATUS	TAXONOMY NODE	HI RES IMAGE URL	FILE NAME
		Blonde/Oxbloo...		Swatch	PIM Use Only			blonde-...
		Blonde Guitar...		Swatch	PIM Use Only			blonde.png
		Blue Ice Metalli...		Swatch	PIM Use Only			blue-ice-...
		Blue Paisley...		Swatch	PIM Use Only			blue-paisley-...
		Brown Sunburst...		Swatch	PIM Use Only			brown-...
		Brown/Wheat...		Swatch	PIM Use Only			brown-wheat.png
		Brown Leather...		Swatch	PIM Use Only			brown.png

DamMaster Repository View

22.3 Link Records to Digital Assets

Linking a digital asset to a record is performed in the same manner as linking any other record. For detailed instructions, see the [Linked Records](#) section of this document.

22.4 Edit Digital Asset Metadata

The most common reasons to update a digital asset’s metadata are adding keywords to facilitate searches or changing the location of the asset in the DamHierarchy. DamHierarchy is the hierarchy for DamMaster.

Editing a digital asset’s metadata is performed in the same manner as editing any other record. For detailed instructions, see the [Edit a Record](#) section of this document.

22.5 Delete Digital Asset Metadata

NOTE: Deleting a digital asset’s metadata record from DamMaster only deletes the metadata record and any links from other repositories. Deleting the metadata does not delete the actual digital asset file stored on the server.

Deleting a digital asset’s metadata record is performed in the same manner as deleting any other record. For detailed instructions, see the [Delete a Record](#) section of this document.

22.6 Managing Links to Digital Assets

The links between a repository record and a digital asset can only be viewed, added or deleted by editing the repository record, not by editing the digital asset's metadata record. The links are managed like any other link relationship.

For detailed instructions on managing links to digital assets, see the [Manage Link Relationships](#) section of this document.

22.7 Importing Digit Asset Files

When one or more digital assets are imported to Enable, the files are uploaded, then new metadata records are created in DamMaster for new digital assets and metadata records for existing digital assets are updated.

The user can upload digital assets three different ways.

While editing a record, the user can upload digital assets and link them to the record while editing the record's linked relationships. For details, see the [Add New Linked Record](#) section of this document.

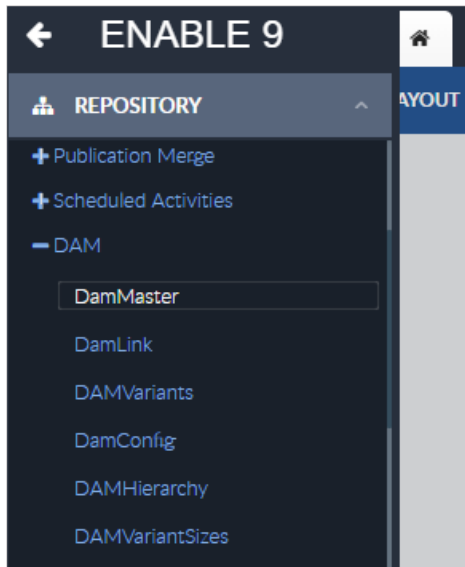
The other method makes use of Enable's Bulk Import functionality, which automatically uploads digital assets. If Enable has been configured to allow Bulk Import, Enable will periodically upload all the files in a designated folder (often labeled DamDrop), store them, and create their metadata records. For more information, see the system administrator.

The third way the user can upload digital assets into Enable is through the Upload Digital Assets Widget. For more information, see the [Upload Digital Assets Widget](#).

22.8 Download Digital Assets

The Download Digital Assets functionality allows a user to create and download a compressed file of the selected digital assets.

To download digital assets stored in Enable, first open the DamMaster repository. Open the **Feature Sidebar**, select the DAM folder, and select the DamMaster repository. For more detailed information on repositories, see the [Repositories](#) section in this document.



Open the DamMaster Repository

The repository will open in a **Repository View**.

ERROR	SKU ID	CAPTION	BRAND	IMAGE TYPE/FORMAT	IMAGE STATUS	TAXONOMY NODE	HI RES IMAGE URL	FILE NAME
		Blonde/Oxbloo...		Swatch	PIM Use Only			blonde-...
		Blonde Guitar...		Swatch	PIM Use Only			blonde.png
		Blue Ice Metall...		Swatch	PIM Use Only			blue-ice-...
		Blue Paisley...		Swatch	PIM Use Only			blue-paisley-...
		Brown Sunburst...		Swatch	PIM Use Only			brown-...
		Brown/Wheat...		Swatch	PIM Use Only			brown-wheat.png
		Brown Leather...		Swatch	PIM Use Only			brown.png

DamMaster Repository View

Select the desired digital assets’ metadata record(s). Open the **More Actions** dropdown list by selecting the on the **Repository View’s Activity Bar**. Click the **Download** button. Alternatively, open a record in the **Record Editor** or the **Quick Editor** and click on the record’s image.

The screenshot shows the 'Media Library' interface. At the top, there is a search bar and navigation icons. Below is a toolbar with options: ALL, ADD, EDIT, DELETE, COMPARE, HIERARCHY, and SAVED SET. The main area is a table with columns: ERROR, IMA..., MOVIE ID, TITLE, STATUS, and AVAILA. A context menu is open over the table, listing actions: SAVED SEARCH, FILTER, IMPORT, EXPORT, VALIDATE, SET VALIDATION LEVEL, MANAGE STATE, HISTORY, ROLLBACK, DOWNLOAD, SEND TO WORKFLOW, EVENTS, and COPY. The 'DOWNLOAD' option is highlighted.

ERROR	IMA...	MOVIE ID	TITLE	STATUS	AVAILA	
<input type="checkbox"/>			1	Baywatch...	Review	09/07/2017
<input type="checkbox"/>			2	Guardians of...	Active	09/01/2017
<input checked="" type="checkbox"/>			3	The Lion King	Active	09/01/2017
<input type="checkbox"/>			4	The Lion Kin...	Active	09/01/2017
<input type="checkbox"/>			5	Star Wars:...	Active	09/01/2017
<input type="checkbox"/>			6	King Arthur...	Active	09/01/2017
<input type="checkbox"/>			7	Everything...	Active	09/01/2017
<input type="checkbox"/>			8	Snatched	Active	09/01/2017
<input type="checkbox"/>			9	The Boss Baby	Active	
<input type="checkbox"/>			10	Kong: Skull...	Active	09/01/2017
<input type="checkbox"/>			11	The Circle	Active	
<input type="checkbox"/>			12	Ghost in the...	Active	09/01/2017
<input type="checkbox"/>			13	Beauty and...	Active	09/15/2017
<input type="checkbox"/>			14	Frantz (VF)	Active	09/01/2017
<input type="checkbox"/>			15	Nelly (VF)	Active	09/01/2017
<input type="checkbox"/>			16	Star Wars:...	Active	09/01/2017
<input type="checkbox"/>			17	Star Wars: T...	Active	09/01/2017
<input type="checkbox"/>			18	Star Wars: T...	Active	09/01/2017
<input type="checkbox"/>			19	Star Wars: A...	Active	09/01/2017
<input type="checkbox"/>			20	Star Wars:...	Active	09/01/2017
<input type="checkbox"/>			21	Star Wars:...	Active	09/01/2017
<input type="checkbox"/>			22	Star Wars: Si...	Active	09/01/2017
<input type="checkbox"/>			23	Star Wars:...	Active	09/01/2017
<input type="checkbox"/>			24	Star Wars:...	Active	09/09/2017

At the bottom of the table, there is a pagination control: "1 To 30 Of 30 (1)" and "1 Of 1".

More Actions: Download File

A Download Files window will appear.

The screenshot shows a dialog box titled 'DOWNLOAD 5 FILES'. It has a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Download Type:** A dropdown menu currently set to 'Select'.
- Compressed File Name:** A text input field containing 'DamMaster_Images'.
- Compressed with zip:** A checked checkbox.
- Buttons:** 'CANCEL' and 'DOWNLOAD' buttons at the bottom right.

Download Files

The **Download Type** dropdown list allows the user to select from options relating to the selected digital assets, such the file format or the size of images.

The **Compressed File Name** field allows the user to enter the name of the file to be downloaded.

Currently the only option for type of downloaded file is .zip.

Select **Download** to create a compressed file and download it to the user's computer. Select **Cancel** to exit without creating a download file.

22.9 Exporting Digital Assets

Digital assets can be exported from Enable. For more information, see the [Exporting Records](#) section of this document.

23 Events

The Events function allows the user to specify changes to a set of records that will occur at a later date and time. Optionally, the user may specify an expiration date for the changes, after which the records will revert to their state before the Event was defined.

Note that to use Events successfully, the user must address the need to ensure data integrity in the case that the contents of the selected records change before the Event occurs. Specifically, the difficulties that may arise are that the changes are overwritten when the Event restores the original state of the records, or that the changes combined with the Event's modifications will invalidate the records.

Note: Do not enter pending transactions directly into production unless the Enable implementation does not utilize a staging environment.

23.1 View Events

To view a list of a repository's Events, first open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the desired repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasse
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

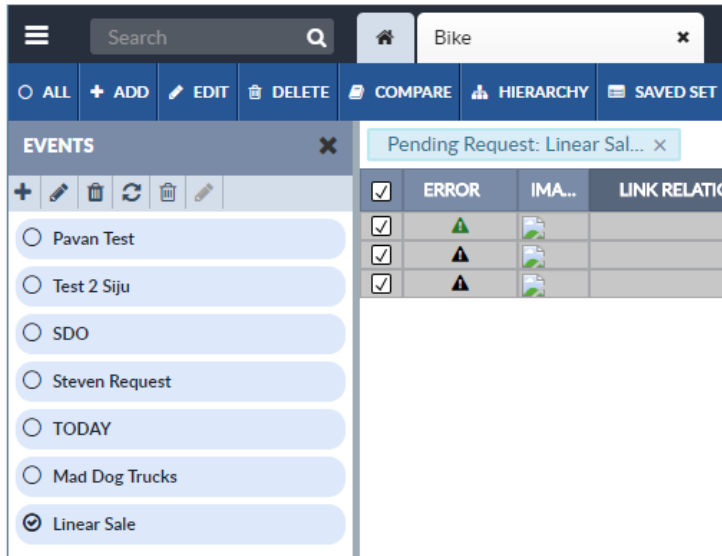
Open the **More Actions** dropdown list by clicking the on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	
	1	Ducati
	2	Ducati
	100	Bianchi
	110	Bianchi
	120	Bianchi
	210	Trek
	220	Trek
	310	Linear
	320	Linear
	410	Bike Friday
	420	Bike Friday
	430	Bike Friday
	10110	Trucks-R-Us
	10120	Trucks-R-Us
	10130	Trucks-R-Us
	10210	Better Trucks
	10220	Better Trucks
	10230	Better Trucks
	10210	Better Trucks
		Best Trucks

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS**
- COPY

More Actions: Events

The **Events Sidebar** will open.



Events Sidebar

(For a detailed labeled reference guide image, see [Events Sidebar Reference Guide](#).)

The **Events Sidebar** displays a list of the Events for the repository. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.

23.2 Create an Event

Note: Do not enter pending transactions directly into production unless the Enable implementation does not utilize a staging environment.

To create an Event, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Myliène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

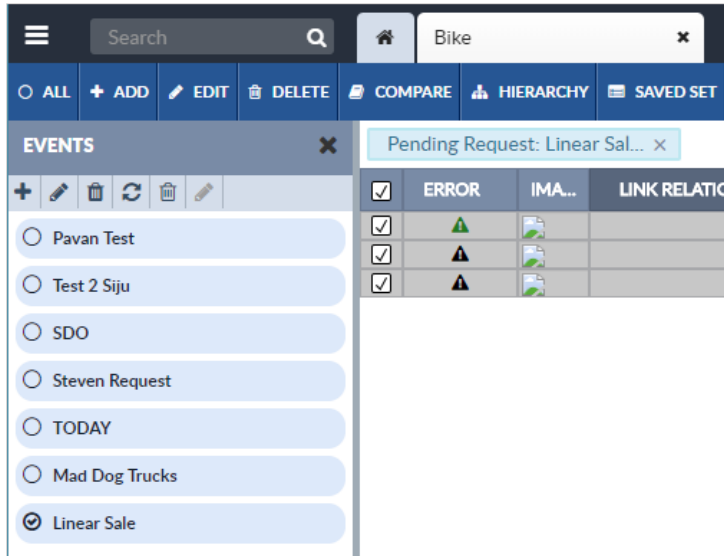
Open the **More Actions** dropdown list by clicking the on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	
	1	Ducati
	2	Ducati
	100	Bianchi
	110	Bianchi
	120	Bianchi
	210	Trek
	220	Trek
	310	Linear
	320	Linear
	410	Bike Friday
	420	Bike Friday
	430	Bike Friday
	10110	Trucks-R-Us
	10120	Trucks-R-Us
	10130	Trucks-R-Us
	10210	Better Trucks
	10220	Better Trucks
	10230	Better Trucks
	10210	Better Trucks
		Best Trucks

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS**
- COPY

More Actions: Events

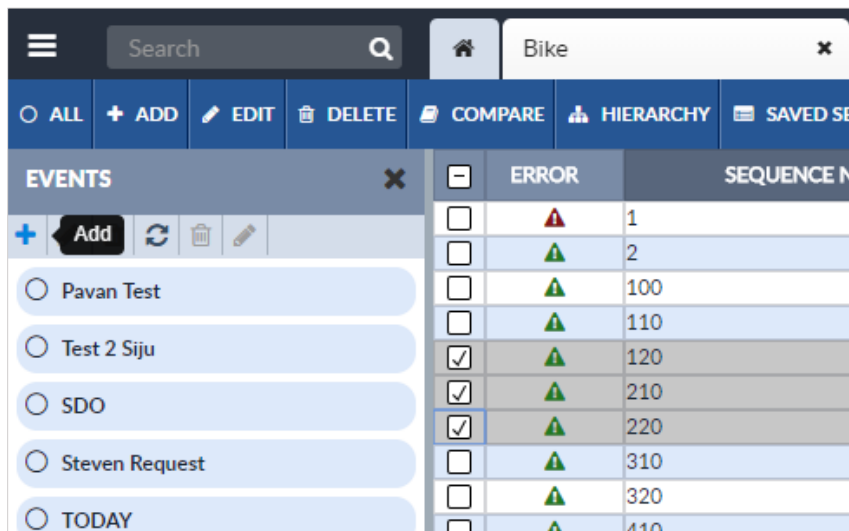
The **Events Sidebar** will open. A list of the Events for that repository will appear in the **Events Sidebar**. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.



Events Sidebar

Select the records to be included in the new Event. This can be done by clicking the **All Records** checkbox at the top of the Repository View to select all the repository’s records, or by using one or more **Searches** to create search filters, and/or by individually selecting records.

After selecting the desired records, click the **Add** button **+** in the **Events Sidebar’s Activity Bar**.



Add an Event

An **Add-Edit Event** window will appear.

Add or Edit an Event

Edit the fields of the **Add-Edit Event** window as desired:

- **Name:** The name of the Event.
- **Description:** (Optional.) A description of the Event.
- **Effective Date:** The date and time when the Event will begin. Make sure to take into account time zones.
- **Expiration Date:** The date and time when the Event will expire. Make sure to take into account time zones.

Click the **Ok** button to save the Event or the **Cancel** button to exit without creating the Event. The new Event will be added to the **Events Sidebar**.

Once the Event has been created, the user can specify changes to the records that will take place when the Event begins. See [Modify Records for an Event](#).


23.3 Modify an Event

Events that have not yet occurred can be modified.

To modify an Event, open the repository the Event is associated with. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
☐	🟢	1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
☐	🟢	2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
☐	🟢	3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	🟢	4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	🟢	5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
☐	🟢	6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
☐	🟢	7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ste
☐	🟢	8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
☐	🟡	9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
☐	🟡	10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
☐	🟡	11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
☐	🟢	12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
☐	🟢	13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
☐	🟢	14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
☐	🟢	15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
☐	🟢	16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
☐	🟢	17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
☐	🟢	18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
☐	🟢	19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
☐	🟢	20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

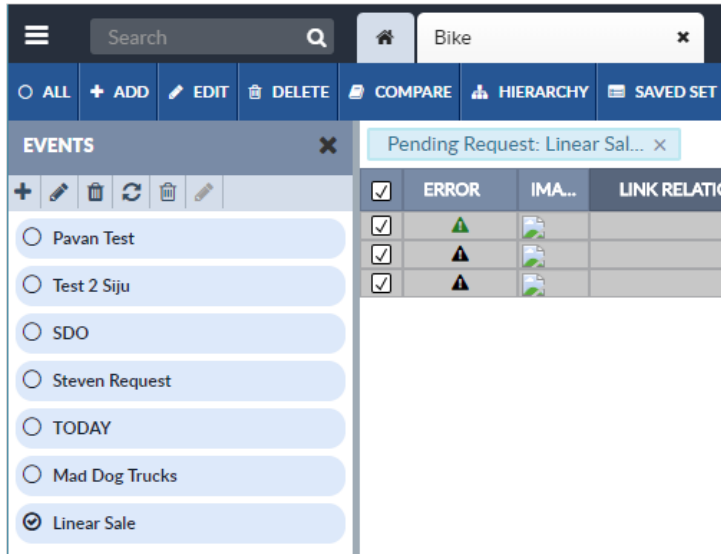
Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	TITLE
☐	1	Ducati
☐	2	Ducati
☐	100	Bianchi
☐	110	Bianchi
☐	120	Bianchi
☐	210	Trek
☐	220	Trek
☐	310	Linear
☐	320	Linear
☐	410	Bike Friday
☐	420	Bike Friday
☐	430	Bike Friday
☐	10110	Trucks-R-Us
☐	10120	Trucks-R-Us
☐	10130	Trucks-R-Us
☐		
☐	10210	Better Trucks
☐	10220	Better Trucks
☐	10230	Better Trucks
☐	10210	Better Trucks
☐		Best Trucks
☐		

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS
- COPY

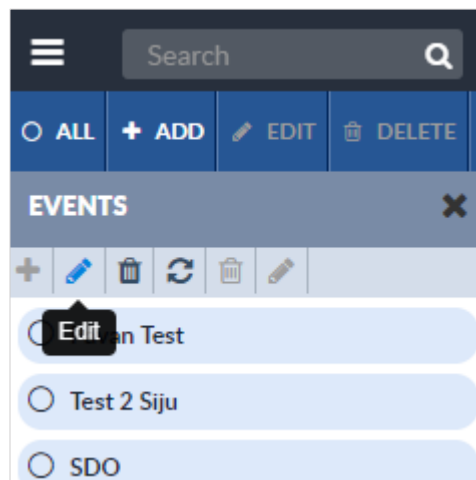
More Actions: Events

The **Events Sidebar** will open. A list of the Events for that repository will appear in the **Events Sidebar**. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.



Events Sidebar

Select the Event to be modified. Click the **Edit Event** button in the **Events Sidebar's Activity Bar**.



Edit an Event

An **Add-Edit Event** window will appear.

ADD-EDIT EVENT
X

Event Name	Effective Date 06/21/2018 15:59
	MM/DD/YYYY HH:mm
Event Description	Expiration Date 06/21/2018 15:59
	MM/DD/YYYY HH:mm

Add or Edit an Event

Edit the fields of the **Add-Edit Event** window as desired:

- **Name:** The name of the Event.
- **Description:** (Optional.) A description of the Event.
- **Effective Date:** The date and time when the Event will begin. Make sure to take into account time zones.
- **Expiration Date:** The date and time when the Event will expire. Make sure to take into account time zones.

Click the **Ok** button to save the Event or the **Cancel** button to exit without creating the Event. The new Event will be added to the **Events Sidebar**.


Once the Event has been created or modified, the user can specify changes to the records that will take place when the Event begins. See [Modify Records for an Event](#)

23.4 Modify Records for an Event

To select changes to a record that will occur when an Event begins, select the Event. To select the Event, first open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the desired repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
		1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
		2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
		3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
		4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
		5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fasse
		6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
		7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Stern
		8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
		9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
		10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
		11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
		12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Johar
		13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
		14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
		15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
		16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill, I
		17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
		18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill, I
		19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill, I
		20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

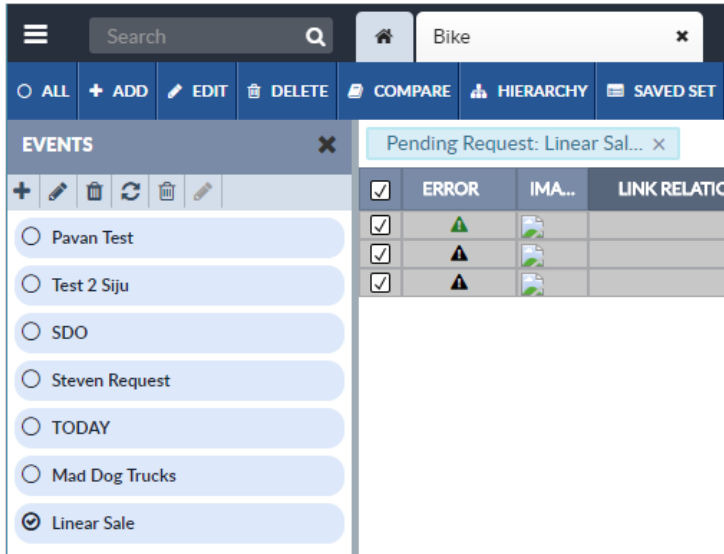
Repository View Grid View

Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Click the **Events** button.


ERROR	SEQUENCE NUMBER	
	1	Ducati
	2	Ducati
	100	Bianchi
	110	Bianchi
	120	Bianchi
	210	Trek
	220	Trek
	310	Linear
	320	Linear
	410	Bike Friday
	420	Bike Friday
	430	Bike Friday
	10110	Trucks-R-Us
	10120	Trucks-R-Us
	10130	Trucks-R-Us
	10210	Better Trucks
	10220	Better Trucks
	10230	Better Trucks
	10210	Better Trucks
		Best Trucks

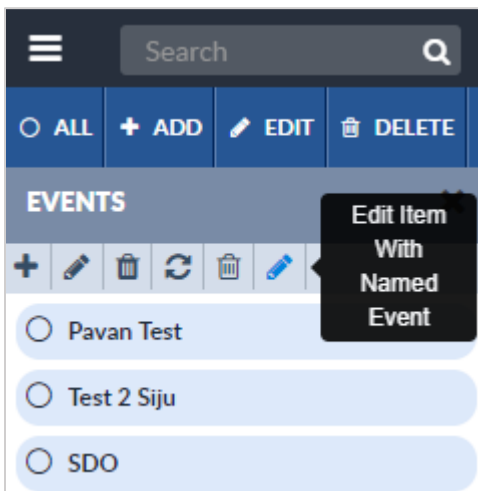
More Actions: Events

The **Events Sidebar** will open. The **Events Sidebar** displays a list of the Events for the repository. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.



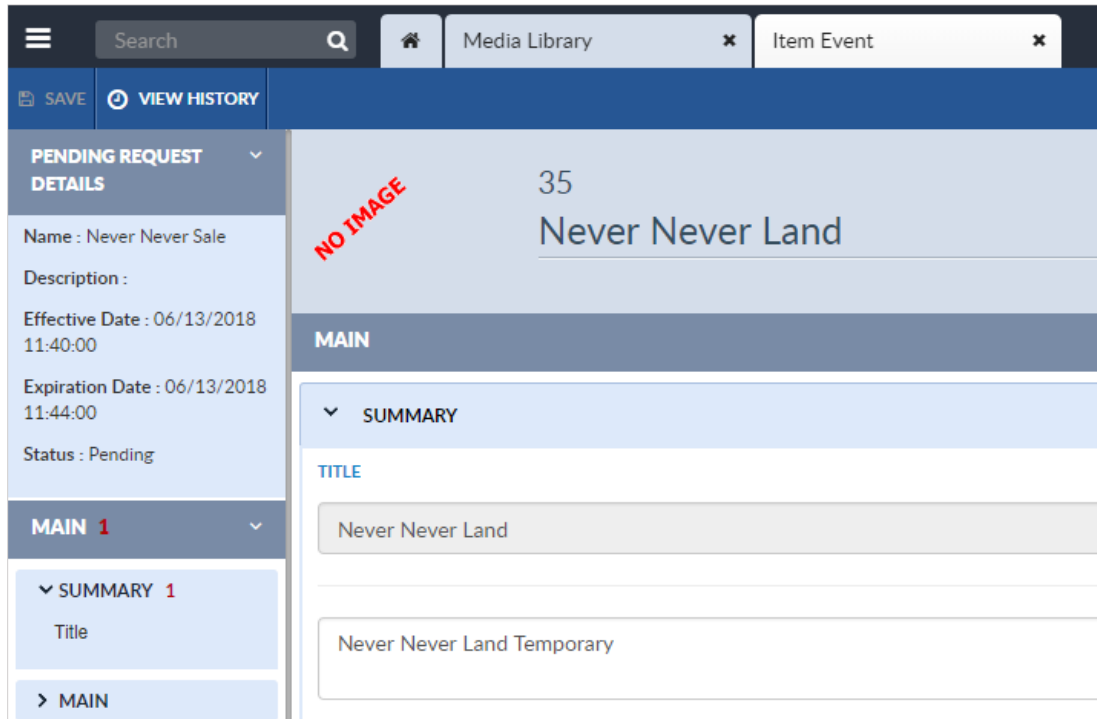
Events Sidebar

Select a record in the Event whose attribute values are to be modified. Select the **Edit Event Record Values** button  on the **Events Sidebar's Activity Bar**.



Edit Records in Selected Event

An **Event Request Details** tab will appear.



Events Request Details

The **Event Request Details** tab allows the user to enter attribute value changes that will occur at the Event start time. If an expiration date has been entered for the Event, after the Event the attribute values will revert to the values they had before the Event.

A duplicate value edit field is displayed for each attribute. Edit the desired attribute value changes.

To save the modified Event attribute values, select the **Save** button on the left end of the **Event Request Details** tab's **Activity Bar**, then close the tab to return to the **Events Sidebar**. To exit the **Event Request Details** tab without saving the Event attribute values, close the tab to return to the **Events Sidebar**.

23.5 Add Records to an Event

To add records to an Event, first open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST	
<input type="checkbox"/>			1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
<input type="checkbox"/>			2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
<input type="checkbox"/>			3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
<input type="checkbox"/>			5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
<input type="checkbox"/>			6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
<input type="checkbox"/>			7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Sten
<input type="checkbox"/>			8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
<input type="checkbox"/>			9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
<input type="checkbox"/>			10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
<input type="checkbox"/>			11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
<input type="checkbox"/>			12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
<input type="checkbox"/>			13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
<input type="checkbox"/>			14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
<input type="checkbox"/>			15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
<input type="checkbox"/>			16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
<input type="checkbox"/>			17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
<input type="checkbox"/>			18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
<input type="checkbox"/>			19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
<input type="checkbox"/>			20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

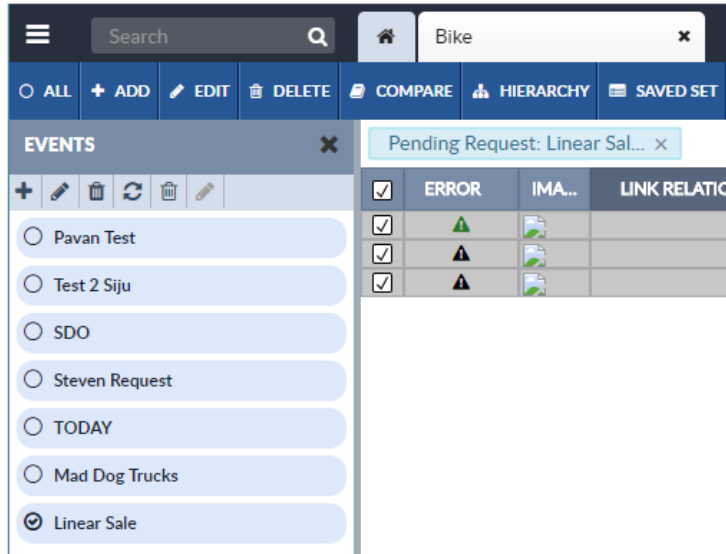
Open the **More Actions** dropdown list by clicking the on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	
<input type="checkbox"/>	1	Ducati
<input type="checkbox"/>	2	Ducati
<input type="checkbox"/>	100	Bianchi
<input type="checkbox"/>	110	Bianchi
<input type="checkbox"/>	120	Bianchi
<input type="checkbox"/>	210	Trek
<input type="checkbox"/>	220	Trek
<input type="checkbox"/>	310	Linear
<input type="checkbox"/>	320	Linear
<input type="checkbox"/>	410	Bike Friday
<input type="checkbox"/>	420	Bike Friday
<input type="checkbox"/>	430	Bike Friday
<input type="checkbox"/>	10110	Trucks-R-U
<input type="checkbox"/>	10120	Trucks-R-U
<input type="checkbox"/>	10130	Trucks-R-U
<input type="checkbox"/>	10210	Better Trucks
<input type="checkbox"/>	10220	Better Trucks
<input type="checkbox"/>	10230	Better Trucks
<input type="checkbox"/>	10210	Better Trucks
<input type="checkbox"/>		Best Trucks

- SAVED SEARCH
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- IMPORT
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- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
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- ROLLBACK
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- SEND TO WORKFLOW
- EVENTS**
- COPY

More Actions: Events

The **Events Sidebar** will open. The **Events Sidebar** displays a list of the Events for the repository. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.



Events Sidebar

Select the records to be included in the Event. This can be done by clicking the **All Records** checkbox at the top of the **Repository View** to select all the repository’s records, or by using one or more Searches to create search filters, and/or by individually selecting records.

After selecting the desired records, click on any data field in a record that is not a digital asset and hold the mouse button, drag the records to the desired Event, and release the mouse button. All the selected records will be added to the Event.

EVENTS	ERROR	SEQUENCE NUMBER
<input type="radio"/>		1
<input type="radio"/>		2
<input type="radio"/>		100
<input type="radio"/>		110
<input type="radio"/>		120
<input type="radio"/>		210
<input type="radio"/>		220
<input type="radio"/>		310
<input type="radio"/>		320
<input checked="" type="radio"/>		410
<input checked="" type="radio"/>		420
<input checked="" type="radio"/>		430
<input type="radio"/>		10110
<input type="radio"/>		10120
<input type="radio"/>		10130
<input type="radio"/>		
<input type="radio"/>		10210


Add Records to an Event

23.6 Remove Records from an Event

To delete records from an Event, open the desired repository. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
☐	🟢	1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
☐	🟢	2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
☐	🟢	3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	🟢	4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	🟢	5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
☐	🟢	6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
☐	🟢	7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
☐	🟢	8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
☐	🟡	9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
☐	🟡	10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
☐	🟡	11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
☐	🟢	12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
☐	🟢	13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
☐	🟢	14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
☐	🟢	15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
☐	🟢	16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
☐	🟢	17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
☐	🟢	18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
☐	🟢	19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
☐	🟢	20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

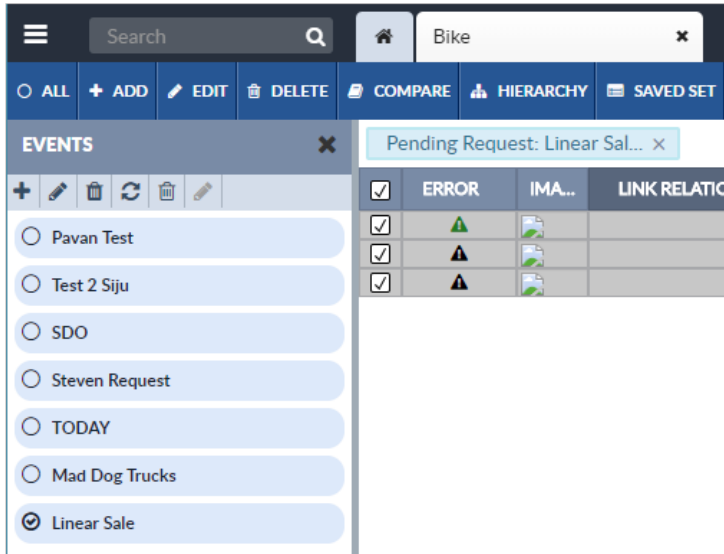
Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	
☐	1	Ducati
☐	2	Ducati
☐	100	Bianchi
☐	110	Bianchi
☐	120	Bianchi
☐	210	Trek
☐	220	Trek
☐	310	Linear
☐	320	Linear
☐	410	Bike Friday
☐	420	Bike Friday
☐	430	Bike Friday
☐	10110	Trucks-R-Us
☐	10120	Trucks-R-Us
☐	10130	Trucks-R-Us
☐	10210	Better Trucks
☐	10220	Better Trucks
☐	10230	Better Trucks
☐	10210	Better Trucks
☐		Best Trucks

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS**
- COPY

More Actions: Events

The **Events Sidebar** will open. The **Events Sidebar** displays a list of the Events for the repository. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.

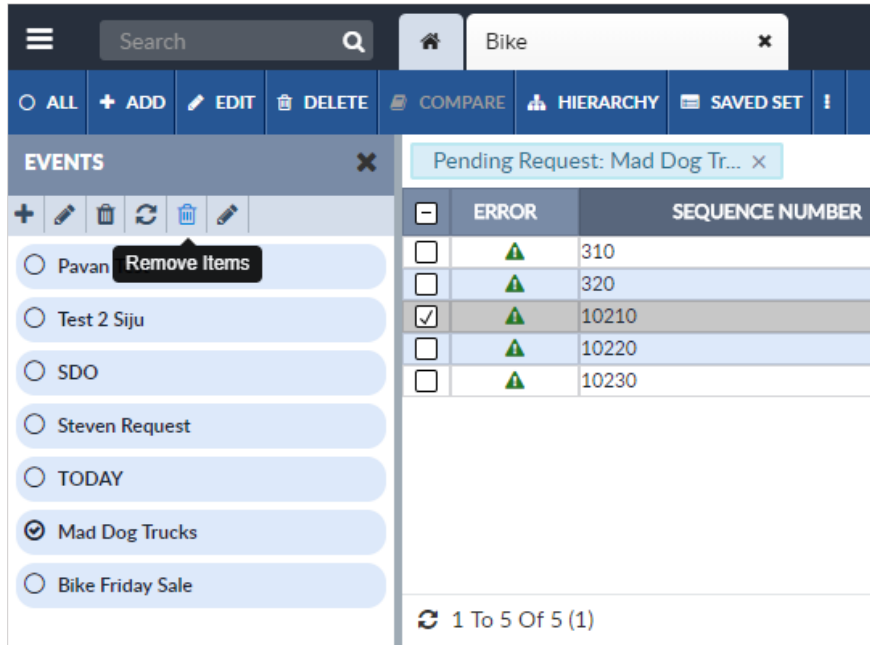


Events Sidebar

Select the desired Event. The **Repository View** will display only the records in the Event.

Select the records to be removed from the Event. This can be done by clicking the **All Records** checkbox at the top of the **Repository View** to select all the Event’s records, or by using one or more Searches to create search filters, and/or by individually selecting records.

Once the records are selected, click the **Remove Items** button (the rightmost trashcan) in the **Events Sidebar’s Activity Bar**. The records will be removed from the Event.




Remove Items from an Event

23.7 Delete an Event

To delete an Event, first open the repository the Event is associated with. Open the **Feature Sidebar**, select **Repository** to open a list of repository folders, and select the desired folder. Choose the repository from the displayed list of repositories. The repository will be opened in a **Repository View**.

ERROR	IMA...	MOVIE ID	TITLE	RATING	GENRE	SYNOPSIS	DIRECTOR	CAST
☐	▲	1	Baywatch (Extended...	R	Comedy,Drama	Follows devoted lifeguard...	Seth Gordon	Dwayne John
☐	▲	2	Guardians of the Galax...	PG 13	Action,Drama,Sci-	Set to the all-new sonic...	James Gunn	Chris Pratt, Z
☐	▲	3	The Lion King	G	Action,Miscellaneous,K...	A heroic coming-of-age stor...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	▲	4	The Lion King (VF)	G	Action,Miscellaneous,K...	Simba est l'héritier du trône...	Roger Allers, Rob Minkoff	Jonathan Tayl
☐	▲	5	Star Wars: Spoofs	R	Drama,Sci-	The crew of the colony ship...	Ridley Scott	Michael Fassb
☐	▲	6	King Arthur: Legend of...	PG 13	Action,Sci-Fi,Drama	When young Arthur's fathe...	Guy Ritchie	Charlie Hunn
☐	▲	7	Everything, Everything	PG 13	Drama	Maddy is a smart, curious...	Stella Meghie	Amanda Ster
☐	▲	8	Snatched	R	Comedy>Action	After her boyfriend dumps...	Jonathan Levine	Amy Schumer
☐	▲	9	The Boss Baby	PG 13	Miscellaneous,Kids &	reamWorks Animation and...	Tom McGrath	Alec Baldwin,
☐	▲	10	Kong: Skull Island	PG 13	Action,Drama	A diverse team of scientists...	Jordan Vogt-Roberts	Tom Hiddlest
☐	▲	11	The Circle	PG 13	Drama,Sci-Fi	A young female tech worke...	James Ponsoldt	Emma Watson
☐	▲	12	Ghost in the Shell	PG 13	Action,Drama,Miscella...	In the near future, Major is...	Rupert Sanders	Scarlett Joha
☐	▲	13	Beauty and the Beast...	PG 13	Sci-Fi,Musical,Kids &	Belle est une jeune femme...	Bill Condon	Emma Watson
☐	▲	14	Frantz (VF)	PG 13	Drama,Miscellaneous	La Première Guerre mondial...	François Ozon	Pierre Niney,
☐	▲	15	Nelly (VF)	Unavailable	Drama,Miscellaneous	Nelly Arcan est une auteure...	Anne Émond	Mylène Mack
☐	▲	16	Star Wars: Return Of...	PG	Action,Sci-	The Empire prepares to cru...	Richard Marquand, David...	Mark Hamill,
☐	▲	17	Star Wars: The Phanto...	PG	Action,Sci-	Jedi Knights Obi-Wan Keno...	George Lucas, Roger...	Liam Neeson,
☐	▲	18	Star Wars: The Empire...	PG	Action,Sci-	The Rebels scatter after the...	Irvin Kershner, Jonathan...	Mark Hamill,
☐	▲	19	Star Wars: A New Hope	PG	Action,Sci-	In a distant galaxy, a long...	Irvin Kershner, Jonathan...	Mark Hamill,
☐	▲	20	Star Wars: Revenge of...	PG	Action,Sci-	Clone Wars rage across the...	George Lucas	Ewan McGreg

Repository View Grid View

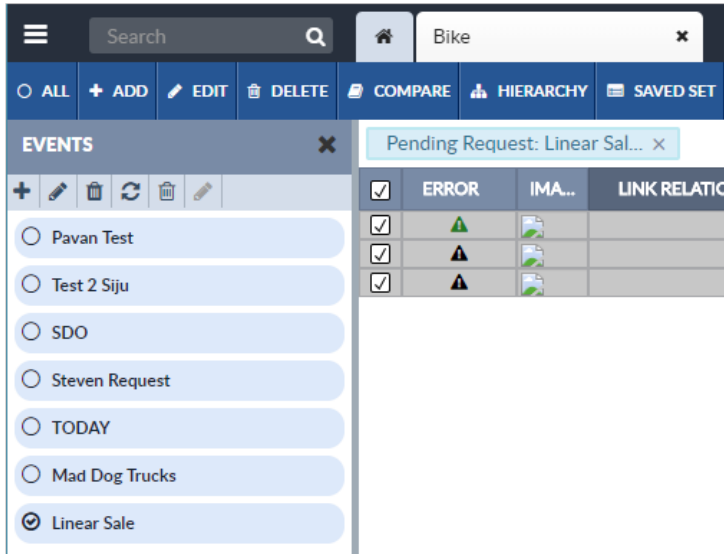
Open the **More Actions** dropdown list by clicking the  on the **Repository View's Activity Bar**. Click the **Events** button.

ERROR	SEQUENCE NUMBER	
☐	1	Ducati
☐	2	Ducati
☐	100	Bianchi
☐	110	Bianchi
☐	120	Bianchi
☐	210	Trek
☐	220	Trek
☐	310	Linear
☐	320	Linear
☐	410	Bike Friday
☐	420	Bike Friday
☐	430	Bike Friday
☐	10110	Trucks-R-Us
☐	10120	Trucks-R-Us
☐	10130	Trucks-R-Us
☐	10210	Better Trucks
☐	10220	Better Trucks
☐	10230	Better Trucks
☐	10210	Better Trucks
☐		Best Trucks

- SAVED SEARCH
- FILTER
- IMPORT
- EXPORT
- VALIDATE
- SET VALIDATION LEVEL
- MANAGE STATE
- HISTORY
- ROLLBACK
- DOWNLOAD
- SEND TO WORKFLOW
- EVENTS**
- COPY

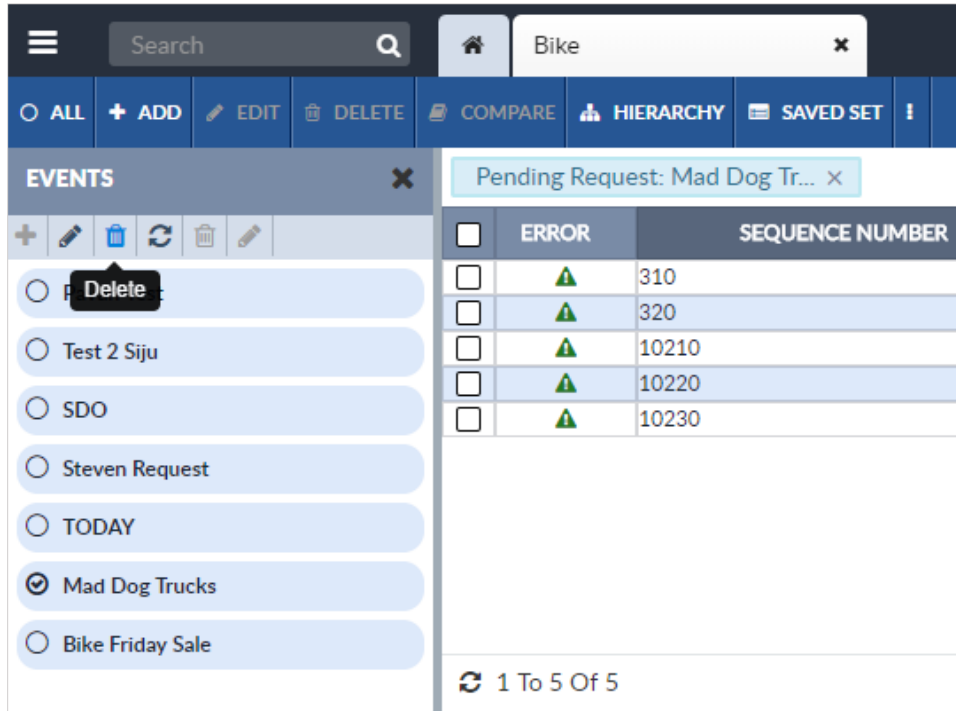
More Actions: Events

The **Events Sidebar** will open. The **Events Sidebar** displays a list of the Events for the repository. If there are more Events than will fit in the window, use the vertical scroll bar on the right side of the **Events Sidebar** to scroll through the list.



Events Sidebar

Select the Event to be deleted. Click the **Delete** button (the leftmost trash can) on the **Events Sidebar's Activity Bar**. A confirmation window will appear that asks if the user wishes to delete the Event. Select **Yes** to delete the Event and return to the **Events Sidebar**. Select **No** to return to the **Events Sidebar** without deleting the Event.

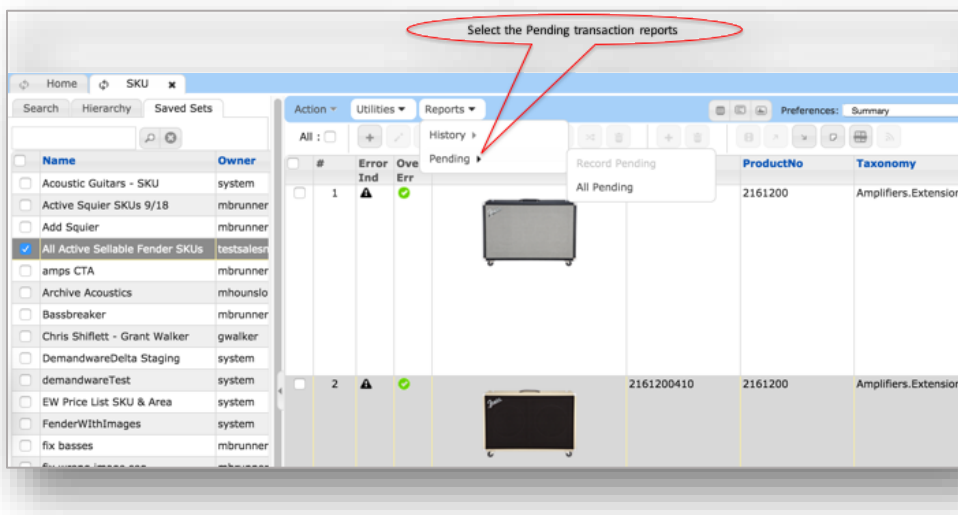


Delete an Event

23.8 To View a Record or Repository's Pending Requests

Currently this function is performed using Enable 8.

1. Open the staging repository that contains pending transactions.
2. Select the record that contains pending transactions.

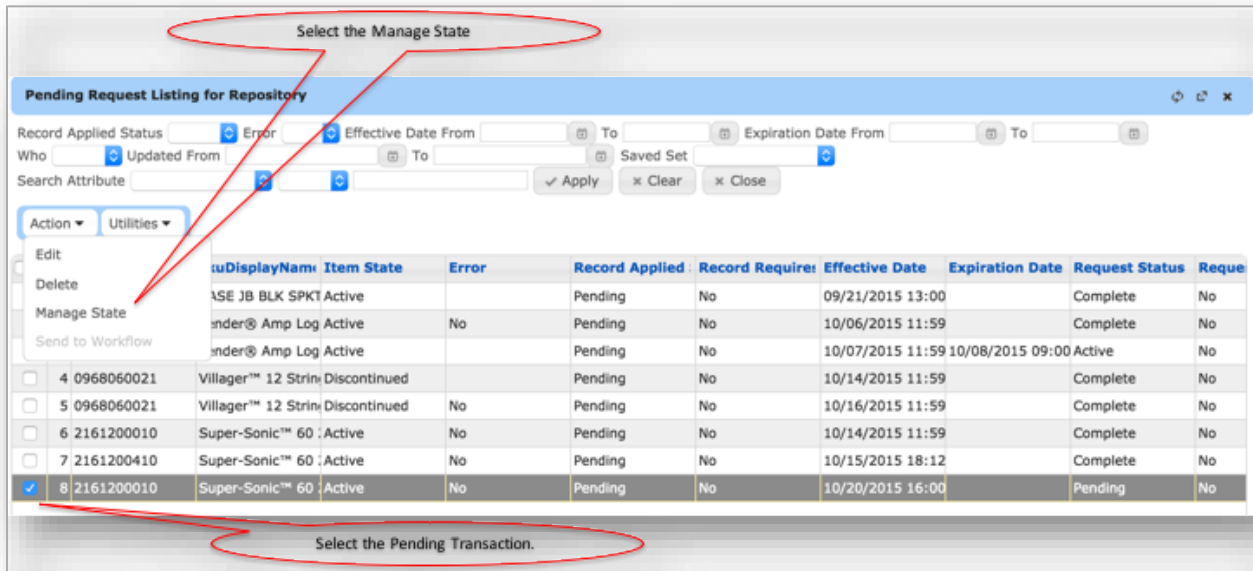


3. To see the pending changes for the record, select the Reports -> Pending -> Record Pending option.
4. To see all pending transactions for the repository, select the Reports -> Pending -> All Pending option.

23.9 Reviewing/Changing Pending Request States

Currently this function is performed using Enable 8.

1. Select the pending transaction.
2. Click on the Action -> Manage State option.



3. The default **Item State** will be **Active**.
4. If a workflow is using the **Record Requires Approval** and **Request Requires Approval** options, the record needs to be in an **Approved** state for the job to execute.
5. The **Record Status** section corresponds to each record associated with the scheduled pending status.
6. The **Request Status** section corresponds to all pending requests that have the same Request Name.

NOTE: There is no provision for creating multiple pending transactions with the same Name (also called a Pending Request) through the UI. This can be done through a batch import only.

7. The following table lists the pending record fields and their valid states.

-

Pending Transaction Fields	Valid States
----------------------------	--------------

Record Applied Status	Pending, Pending Approval, Active, Complete
Record Requires Approval	Approved, Needs Approval
Request Status	Pending, Pending Approval, Active, Complete
Request Requires Approval	Approved, Needs Approval

8. Check the **Request Status** after the scheduled time.
9. **Record Status** refers to the particular record within the scheduled Pending Request.
10. **Request Status** applies to all the records that contain the same **Request Name** as the pending transaction. This lets a user change the status of all pending transactions or approve all pending transactions with the same **Request Name**.

SKU State Management

Record Status

Record Applied Status: Active

Record Requires Approval: Approved

Request Status

Any Changes to request level will apply to all records in request.

Request Status: Active

Request Requires Approval: Approved

Save Cancel

NOTE: From the UI it is not possible to create multiple pending transaction linked to a single Pending request. However, this is possible in the batch mode as shown in the next section.

23.10 Batch Processing of Pending Transactions

Currently this function is performed using Enable 8.

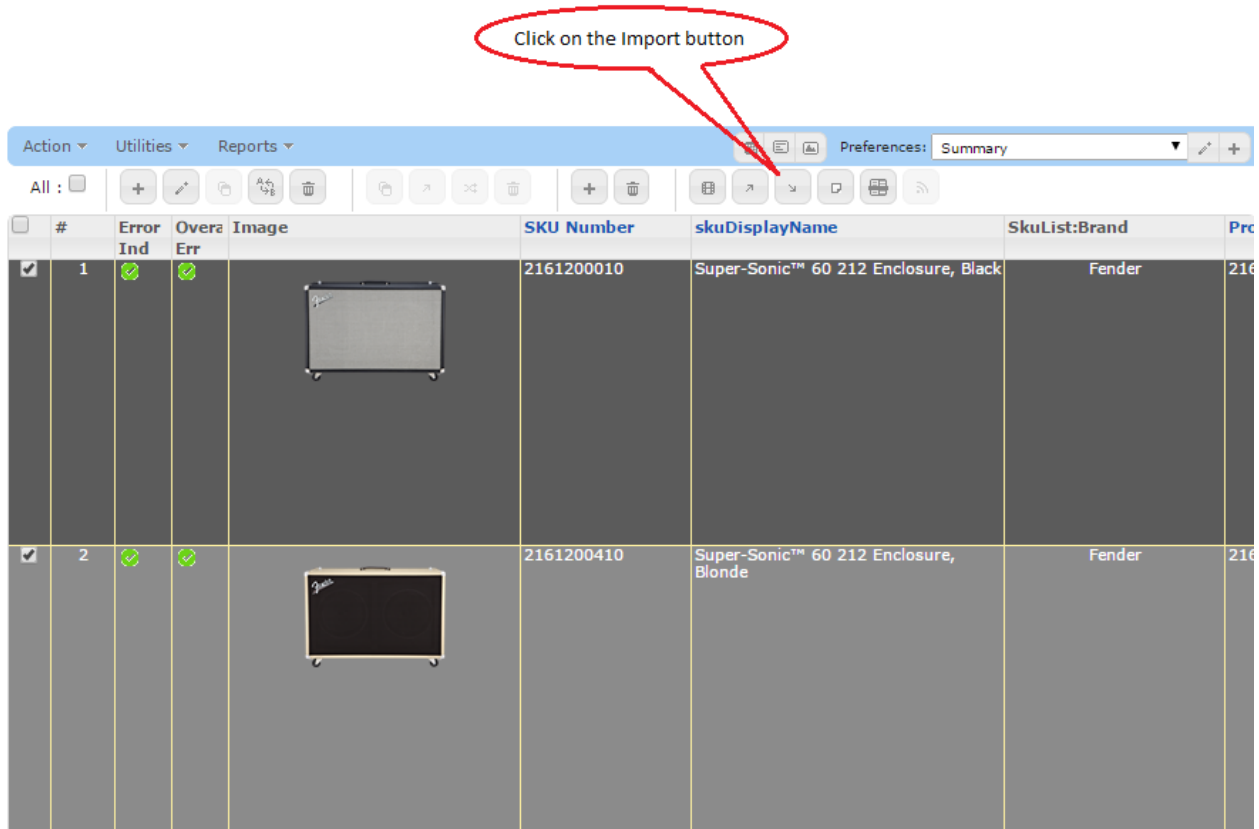
1. Select a pending transaction and use the Utilities -> Export to create a csv file in the correct format.

5. Click the **Next** button.
6. Select the **Comma** checkbox.
7. Click the **Next** button.
8. Select the **EFFECTIVE_DATE** columns and change the **Column Data Format** to **Text**.
9. Select the **EXPIRATION_DATE** columns and change the **Column Data Format** to **Text**.
10. Click the **Finish** button.

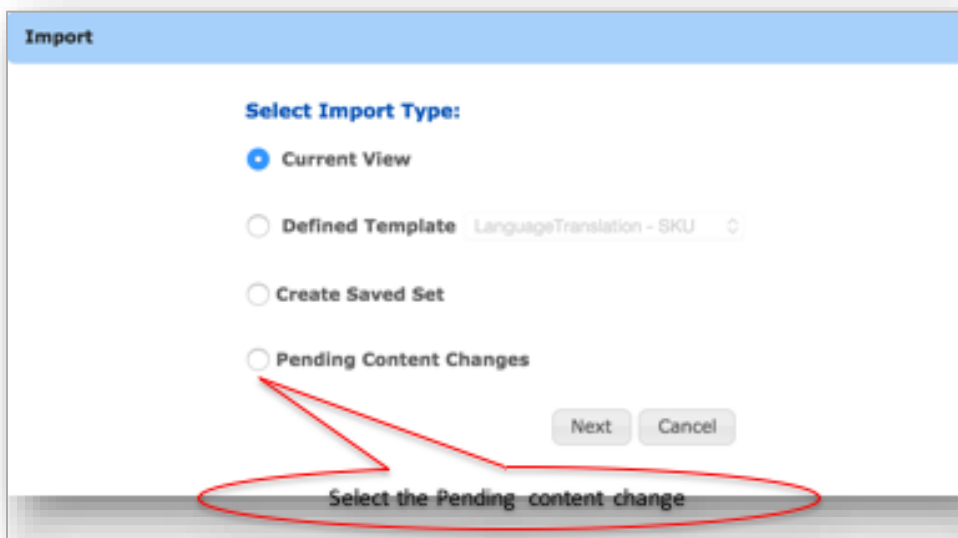
3. Sample CSV file layout:

REPOSITORY_NAME	CHANGE_REQUEST_NAME	CREATED_BY_LOGIN	EFFECTIVE_DATE	EXPIRATION_DATE	SKU Number	ATTR_NAME	ATTR_VALUE	ATTR_REVERT_VALUE	APPLIED_STATUS
SKU_Staging	Test-Shankar	system	2015-09-21 13:00:00		56295000	skuDisplayName	CASE JB BLK SPKT SHIRT BRT ORNG-Test		0
SKU_Staging	PendingRequest_10_06_2015	system	2015-10-06 11:59:59		9190010469	skuDisplayName	Fender* Amp Logo T-Shirt, Charcoal, M - Super Sale Item 10/05		0
SKU_Staging	Shankar-Test02	system	2015-10-08 09:00:00		9190010869	skuDisplayName	Fender* Amp Logo T-Shirt, Charcoal, XXL - 2nd test 10/07 run	Fender* Amp Logo T-Shirt, Charcoal, XXL	0
SKU_Staging	Pend-1	system	2015-10-14 11:59:59		968060021	skuDisplayName	Villager™ 12 String, Natural-test		0
SKU_Staging	Pend-2	system	2015-10-16 11:59:59		968060021	skuDisplayName	Villager™ 12 String, Natural - 1016 changes		0
SKU_Staging	Pending_test1015	system	2015-10-14 11:59:59		2161200010	skuDisplayName	Super-Sonic™ 60 212 Enclosure, Black - On casters - Test1 10/15		0
SKU_Staging	Time_Stamp_test2	system	2015-10-15 18:12:59		2161200410	skuDisplayName	Super-Sonic™ 60 212 Enclosure, Blonde test 2456 - test the time stamp x		0
SKU_Staging	Pending_101	system	2015-10-20 16:00:17		2161200010	skuDisplayName	Super-Sonic™ 60 212 Enclosure, Black - On casters - Test1 10/20		2
SKU_Staging	PendingRequest_10_22_2015	system	2015-10-22 03:30:20	2015-10-22 04:00:00	2161200410	skuDisplayName	Super-Sonic™ 60 212 Enclosure, Blonde test 2456 - sales lasts for only 30 min	Super-Sonic™ 60 212 Enclosure, Blonde test 2456 - test the time stamp x	2
SKU_Staging	New_test_for_status	system	2015-10-26 21:12:22	2015-10-27 00:00:00	2313500000	skuDisplayName	Acoustasonic™ 100 Combo, 120V - test 10/26	Acoustasonic™ 100 Combo, 120V	0

4. Modify/add the pending transactions in the file to load these records in a batch.
5. Open the repository that the pending transactions will be imported into.
6. Click on the **import** button.

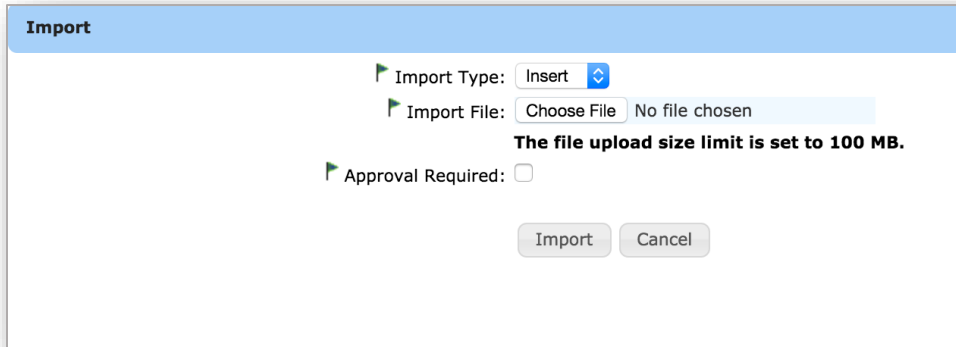


7. Select the **Pending Content Changes** radio button.



8. Select the pending transactions file.

9. Uncheck the **Approval Required** (if applicable).




24 Channel Readiness

For a detailed description of channel readiness and syndication, see [Enable Basics: Channel Readiness](#) and [Enable Basics: Syndication](#).

24.1 Channel Readiness View

The **Channel Readiness View** displays all the current Channels along with statistics for each Channel.

After each update to a Channel, whether the Channel itself was modified or records for the Channel were modified, the Channel Statistics must be updated. ([See Update Channel Statistics.](#))

To open the **Channel Readiness View**, first open the **Feature Sidebar** by clicking the **Features Sidebar** icon  on the far left of the **Tab Bar**. Open the **Administration** tab, open the **Channel Readiness** folder and select **Inbound** or **Outbound**.

The **Channel Readiness View** tab will appear.

Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Staging	100%	50%	50%	1
Vehicles: Bike: Entire Stock	100%	88%	96%	24
Channel: Vehicle: Bike: Recumbents	100%	100%	0%	5

Channel Readiness View

(For a detailed labeled reference guide image, see [Channel Readiness Reference Guide](#) .)

Channel Statistics in the **Channel Readiness View** are presented as circle graphs.

If the **State** toggle (on the far right of the **Channel Readiness View's Activity Bar**) is green, the graphs represent (in green) the percentage of records analyzed that meet the indicated requirement. If the **State** toggle is red, the graphs reflect the percentage of records analyzed that do not meet the indicated requirement.

To see a statistic represented in number form, hover over the statistic's circle graph.

To drill down to the details of the records that make up a statistic, click its circle graph. A **Repository View** will appear that is filtered to only display the indicated records.

The **Channel Readiness View** is comprised of three tabs:

- **Channels:** Displays all the defined Channels and statistics relating to the data quality of their selected attributes, the percentage of required attributes and optional records present, and the number of records analyzed.
- **Attributes:** Displays statistics regarding the selected Channel's global attributes, such as their type, their completeness, and the quality of their data in regards to implicit and business specified validation rules. For more details, see [Attribute Listing](#).
- **Graph:** Graphically displays the change over time of statistics regarding the selected Channel's data completeness, errors found, and the number of records analyzed. For more details, see [Channel History Graph](#).

Permitted users may also be able to access buttons on the **Channel Readiness View's Activity Bar** that are used for configuring Channels. For further information on configuring Channels see the "Enable 9 Product Information Management (PIM) Administrator's Manual" (or see [Channel Configuration](#)).

The **Channels** tab displays Channel Statistics for all defined Channels. These statistics only relate to the attributes selected for the Channel during Channel configuration, not the entire repository.

The statistics are as follows:

- **Valid Content:** The percentage of records that meets all validation rules.

- **Required Attributes:** The percentage of records that have all required attributes.
- **Optional Attributes:** The percentage of records that have all optional attributes.
- **Number of Records:** The number of records analyzed.

24.2 Attributes Tab

The **Channel Readiness View's Attributes** tab displays statistics about the attributes selected for the Channel during Channel configuration.

To view the statistics for Channel's configured attributes, select a Channel on the **Channel Readiness View**. It will be highlighted blue. Click the **Attributes** tab.

Category: Global	Type	Fill Rate	Core Validation	Business Rules
Brand	Required	84%	100%	
name	Required	92%	100%	
Taxonomy	Required	96%	100%	

Channel Readiness Attributes Tab

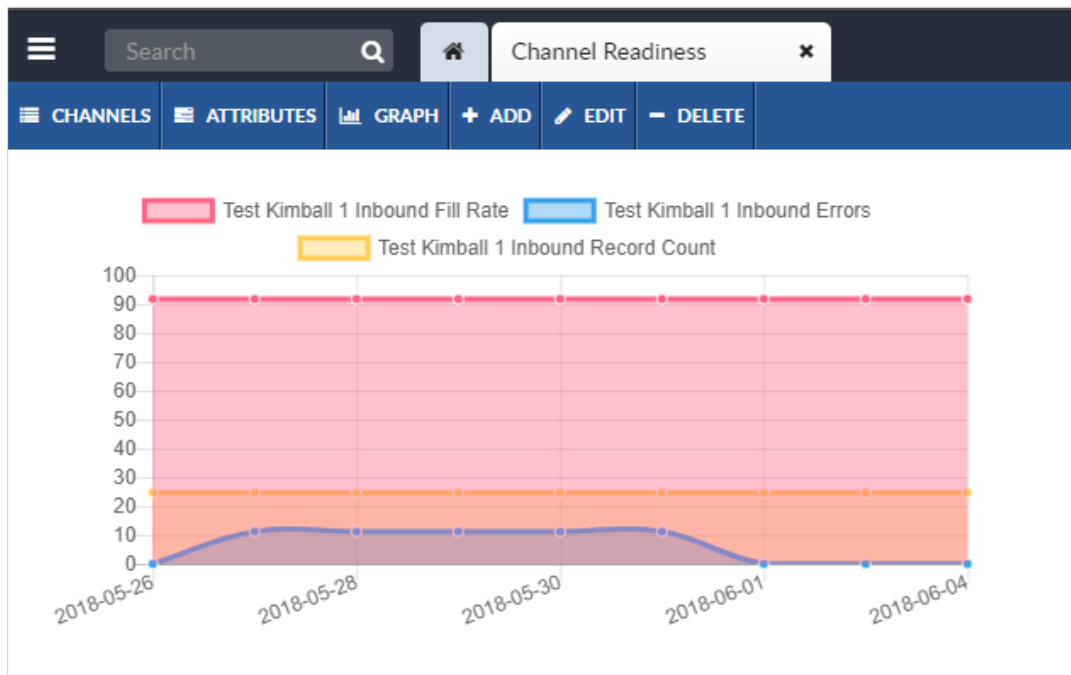
The **Category** dropdown (in the upper left corner) allows the user to select which attributes to display. Selecting a category will display the statistics for the attributes in that category.

The **Attributes** tab displays all the attributes selected from the Channel's Export Template along with each attribute's statistics.

- **Attribute Name**
- **Type:** Required or optional.
- **Fill Rate:** The percentage of records that have the indicated attribute filled.
- **Core Validation:** The percentage of the records whose indicated attribute meets core validation rules, such as valid data for the data type or associated code set value (if applicable).
- **Business Rules:** The percentage of records whose indicated attribute passes the channel's required validation rule(s).

24.3 Channel History Graph

The Channel Statistics shown in the **Graph** tab relate to the Channel selected on the **Channels** tab. The **Graph** tab displays the change in the Channel’s analyzed data’s statistics across time. It allows an organization to determine the rate of improvement in their data.



Channel Readiness Graph Tab

The titles of the statistics displayed in the **Graph** tab are shown in the legend. Click on a statistic to add or remove it from the graph.


The statistics shown on the **Graph** tab are:

- **Fill Rate:** The percentage of records whose required attributes are present.
- **Errors:** The percentage of records with errors.
- **Record Count:** The number of records analyzed.










24.4 Update Channel Statistics

After each update to a Channel, be it modifying the Channel itself or updating records for the channel, the Channel Statistics must be updated.



In order to update a Channel’s statistics, the Channel must first be configured with a Saved Set and an Export Template. Instructions on configuring a channel are in the “Enable 9 Product Information Management (PIM) Administrator’s Manual” (or see [Configure a Channel](#)).

Open the **Channel Readiness** tab. To open the **Channel Readiness** tab, first open the **Feature Sidebar** by clicking the **Features Sidebar** icon  on the far left of the **Tab Bar**. Open the **Administration** tab, open the **Channel Readiness** folder and select **Inbound** or **Outbound**.

The **Channel Readiness View** will appear.

Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Staging				1
Vehicles: Bike: Entire Stock				24
Channel: Vehicle: Bike: Recumbents				5

Channel Readiness View

Update the Channel Statistics by clicking the **Channel Information** icon next to the Channel’s name. If the Channel is inbound, the **Inbound Channel Information** icon  will appear to the left of the new Channel’s name. If the Channel is outbound, the **Outbound Channel Information** icon  will appear to the right of the new Channel’s name. A **Job Specification** window will appear.

VEHICLES: BIKE: ENTIRE STOCK
X

Repository: Bike

Saved Set: Vehicle: Bike: Entire Stock

Export Template: Vehicles - Bike

Transmission Option: DEFAULT

Attributes: 3

Categories: 0

Inbound: false

CANCEL
TRANSMIT
UPDATE STATISTICS

Update Statistics for Syndication Channel

The **Job Specification** window notes the repository affected, the Saved Set of records to be validated, the Export Template to use, and the number of record attributes selected. Click the

Update Statistics button to update the statistics and return to the **Channel Readiness View**. Click the **Cancel** button to return to the **Channel Readiness View** without updating the statistics.


If Update Statistics was selected, a **Confirmation** window will appear that asks if Enable should start the Channel Analysis. Select **Run** to run the Channel Analysis and return to the **Channel Readiness View**. Click the **Cancel** button to return to the **Channel Readiness View** without running the Channel Analysis.

A Channel Analysis job is created and placed in the Job Queue. To view the job’s progress, open the **Job Monitor** from the **Features Sidebar’s System** tab or open a **Job Monitor Widget** in the **Dashboard**. See [Job Monitor](#).

Upon completion of the Channel Analysis, the **Channel Readiness** tab must be refreshed to show the Channel Analysis Statistics. Close the **Channel Readiness** tab and reopen it to display the updated Channel Analysis Statistics.

24.5 Syndicating a Channel

In order to syndicate a Channel, the Channel must be configured for transmission. Once configured, the Channel’s valid data may be syndicated.

To syndicate a Channel, open the **Channel Readiness View**. To open the **Channel Readiness View**, first open the **Feature Sidebar** by clicking the **Features Sidebar** icon  on the far left of the **Tab Bar**. Open the **Administration** tab, open the Channel Readiness folder and select **Inbound** or **Outbound**.

The **Channel Readiness View** tab will appear.

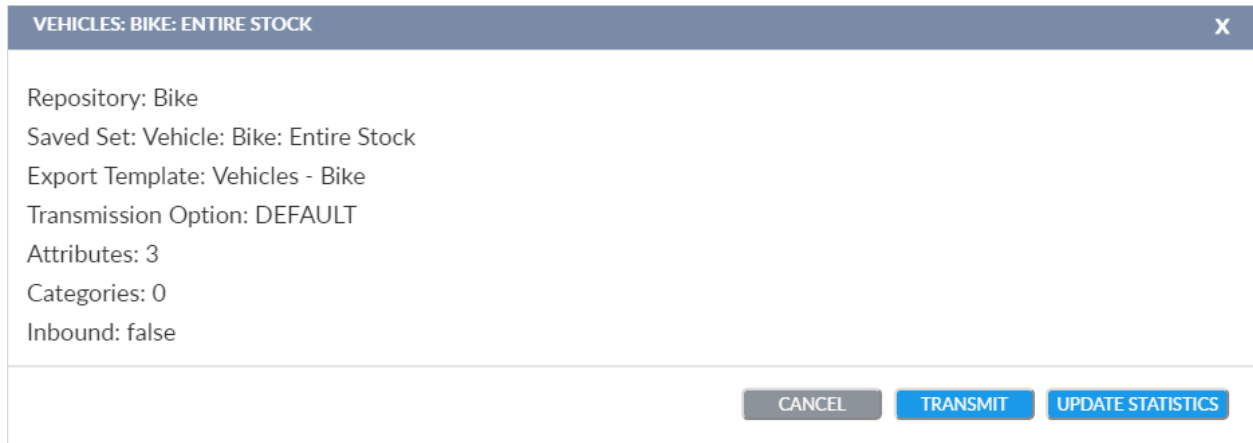
Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Staging				1
Vehicles: Bike: Entire Stock				24
Channel: Vehicle: Bike: Recumbents				5

Channel Readiness View

If any changes have been made to the Channel or any its records, update the Channel Statistics. (See [Update Channel Statistics](#).)

Select the Channel that is to be syndicated. It will be highlighted in blue.

Begin the syndication by clicking the **Update Statistics** button to the right of the Channel’s name (it looks like an index card). A **Job Specification** window will appear.



Start Transmitting to Syndication Channel

The **Job Specification** window notes the repository affected, the Saved Set of records to be validated, the Export Template to use, the transmission option, and the number of attributes and Category Attributes selected. Click the **Transmit** button to begin syndication and return to the **Channel Readiness View**. Click the **Cancel** button to return to the **Channel Readiness View** without syndicating the Channel.

If the **Transmit** button was selected, a **Confirmation** window will appear that asks if Enable should start the syndication. Select **Run** to begin transmission and return to the **Channel Readiness View**. Click the **Cancel** button to return to the **Channel Readiness View** without syndicating the Channel.

A syndication job is created and placed in the Job Queue. To view the job’s progress, open the **Job Monitor** from the **Features Sidebar’s System** tab or open a **Job Monitor Widget** in the **Dashboard**.


24.6 Channel Configuration

Channels are typically configured by system administrators, though they can be built by other permitted users.

Channels can only be built with repositories that have been defined as Pre-Staging, Staging or Production repositories. Check with the system administrator to determine if the desired repository is eligible for use in a Channel.

Create a Saved Set that includes the desired repository records. (See [Saved Sets](#).)

The **Channel Readiness View** displays all the currently configured Channels along with the statistics for each Channel.

To bring up the **Channel Readiness View**, first open the **Feature Sidebar** by clicking the **Features Sidebar** icon  on the far left of the **Tab Bar**. Open the **Administration** tab, open the **Channel Readiness** folder and select **Inbound** or **Outbound**.

The **Channel Readiness View** tab will appear.

Channel	Valid Content	Required Attributes	Optional Attributes	No. of Records
Staging				1
Vehicles: Bike: Entire Stock				24
Channel: Vehicle: Bike: Recumbents				5

Channel Readiness View

Select the **Add** button from the **Channel Readiness View’s Activity Bar**. An **Add Channel** window will appear.

Channel Name
Product Staging

Repository
Product_Staging

Inbound Outbound

SAVE

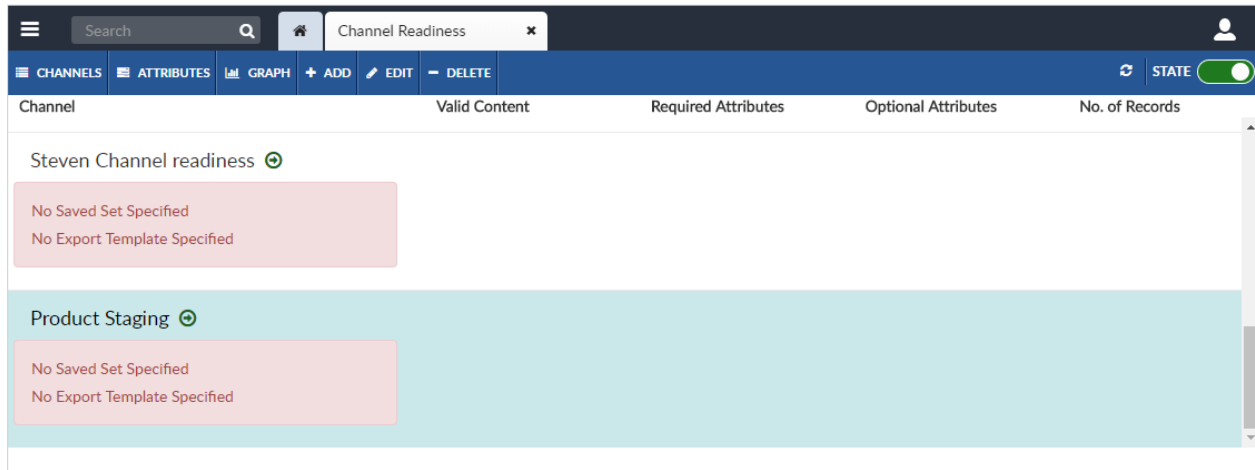
Add Channel Window

Edit the **Add Channel** options as desired:

- **Channel Name:** Enter the name of the Channel to be defined.
- **Repository** dropdown: Select the desired repository.
- **Inbound** toggle: Red (off) = Outbound Channel; Green (on) = Inbound Channel

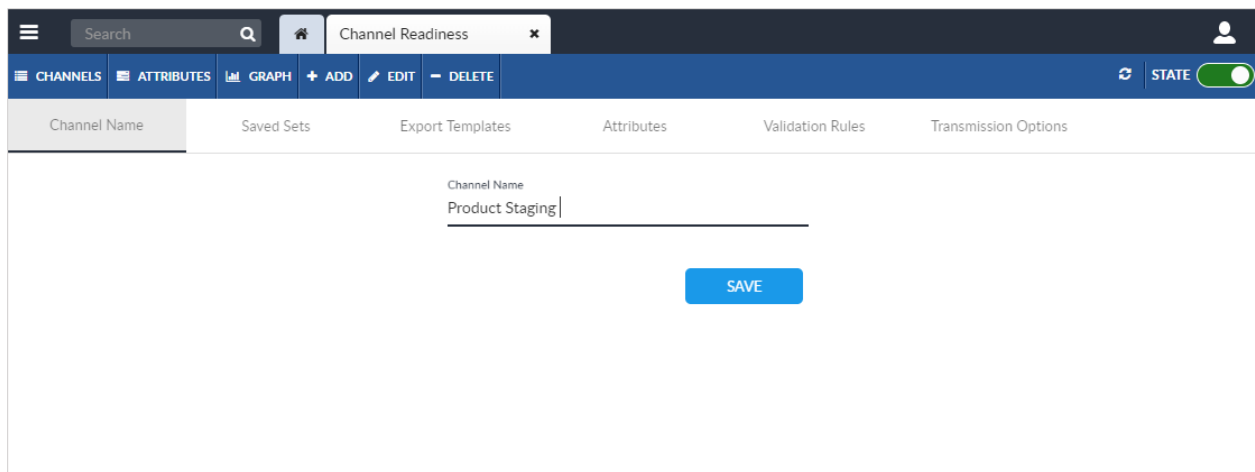
Click **Save** to save the Channel and return to the **Channel Readiness View**. To exit the **Add Channel** window without creating a Channel, select the **Channels** button on the **Channel Readiness View's Activity Bar**.

The **Channel Readiness View** will list the new Channel with errors noting that the Channel has not been completely defined yet.



Channels with Configuration Errors

To finish defining the Channel, first select it (it will be highlighted blue). Click the **Edit** button on the **Channel Readiness View's Activity Bar**. The **Edit Channel** window will appear.



Edit Channel Name

The **Edit Channel** window has several tabs. Select the relevant tabs to edit the Channel options as desired. In order for the contents of a tab to be saved, they must have been edited.

Channel Name tab:

- **Channel Name:** The name of the Channel.

Saved Sets tab:

- **Saved Set** dropdown: Select the name of the Saved set to use.

Export Template tab:

- **Export Template:** The name of the Export Template to use.

Attributes tab:

Select the record attribute values to be validated.


Validation Rules tab:

Select the validation rules to apply to the selected attributes.

Transmission Options tab:

Select a transmission option in order for the Channel to be able to be syndicated.

After saving any changes, select the **Channels** button on the **Channel Readiness Activity Bar** to return to the **Channel Readiness View**.



The new Channel should display with no errors. If not, refresh the **Channel Readiness View** by clicking the **Refresh** button  on the far right of the Channel Readiness View tab's Activity Bar. If the Channel still does not display, make sure that the new Channel was created in the desired direction (Inbound or Outbound) and that the **Channel Readiness View** is looking at the correct direction.

Update the Channel Statistics by clicking the **Update Statistics** button to the right of the new Channel's name (it looks like an index card). For more detailed directions on updating the Channel Statistics, see [Update Channel Statistics](#).

Upon completion of the Channel Analysis, the **Channel Readiness** tab must be refreshed to show the updated Channel Analysis Statistics. Close the **Channel Readiness** tab and reopen it to display the updated Channel Analysis Statistics.

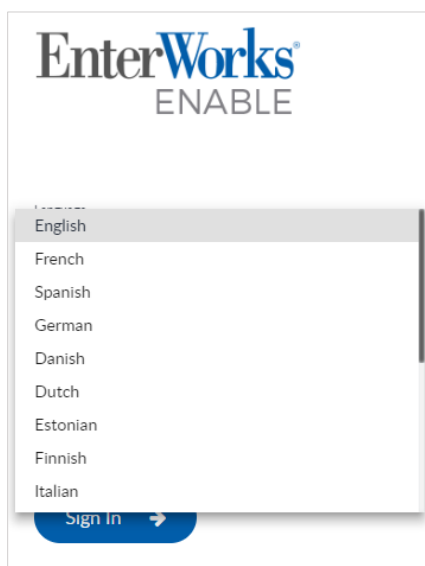
25 Multi-Language Support

Enable can be configured to support multiple languages. For more information about a particular use of the Multi-Language capability, contact the system administrator.

- **User Interface translations** – Screen labels, instructions, tool tips, buttons, drop-down menus, and error/info messages are based on the user’s selection of language at the time of sign-in as long as that language has been properly configured.
- **User-defined data translations** – Record attributes can be configured to support multiple languages via both user entered translations and generated translations. Fields configured to support different languages display a **Multi-Language** icon  next to the input field.
- **System-level data translations** – System-level objects such as View Preference names and descriptions, Code Set descriptions, Import & Export Template names and descriptions, and Hierarchy names and descriptions can also be configured to support multiple languages. Users permitted to maintain translations for system-level objects will see a **Multi-Language** icon  next modifiable text fields.


25.1 User Interface Language


During login, the user can select the language that Enable’s user interface will use by choosing the desired language from the **Language** dropdown list in the **Login** window. The languages supported depend on system configuration. Contact the system administrator for more information.

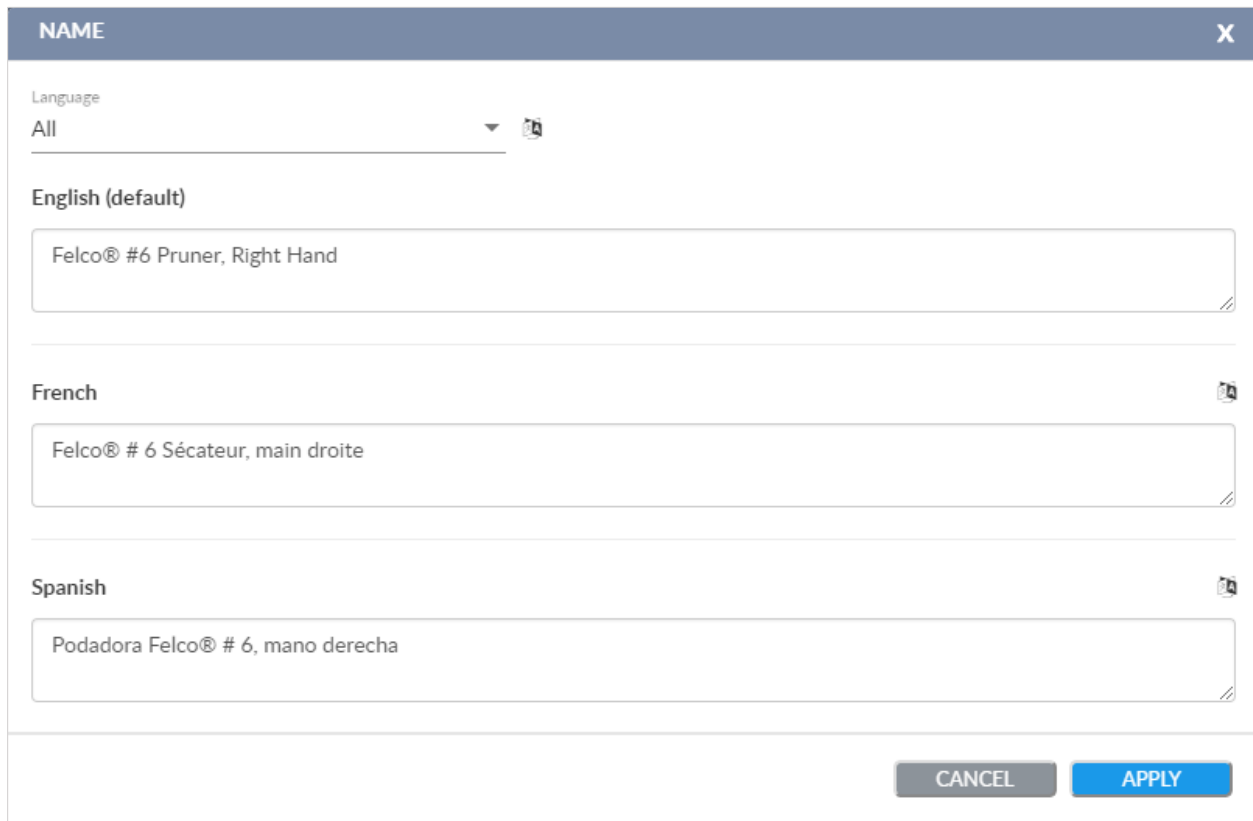


Select User Interface Language at Login

25.2 Language Translation Fields

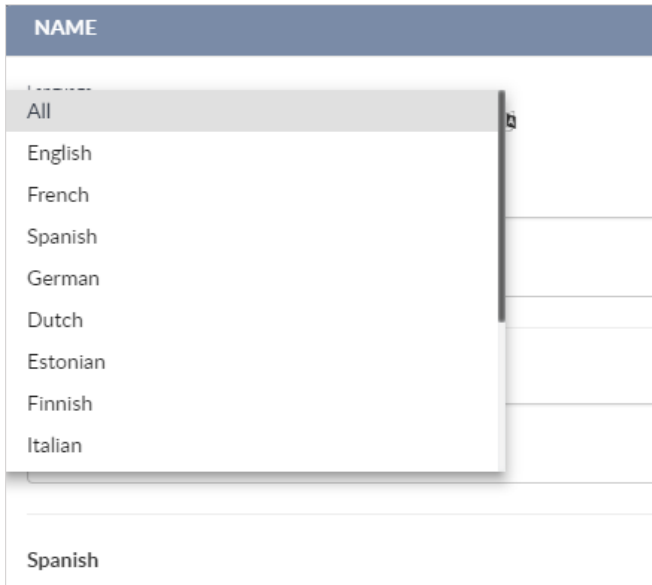
Depending on system configuration and the user’s permissions, the user can enter translations for attribute values and system-level objects. Fields that support the Multi-Language capability are marked with a **Multi-Language** icon .

To enter a language translation into a Multi-Language field, click the **Multi-Language** icon  appearing on the far right of its text edit box. An **Edit Multi-Language** pop-up window will appear.




Edit Multi-Language Fields


The **Language** dropdown list at the top of the **Edit Multi-Language** window allows the user to elect to see the text edit boxes for all the supported languages or to see only one. If a desired language is not supported, contact the system administrator.



Edit Multi-Language Window: Select Language(s) to View


The user can enter their own translation into a text edit box or if the **Multi-Language** icon  appears at the far right of the text edit box, click the icon and a translation of the default language's text edit box will be generated and entered into the box.

NAME
X


Language
All ▼ 

English (default)

Felco® #6 Pruner, Right Hand

French **Translate** 


Felco® # 6 Sécateur, main droite

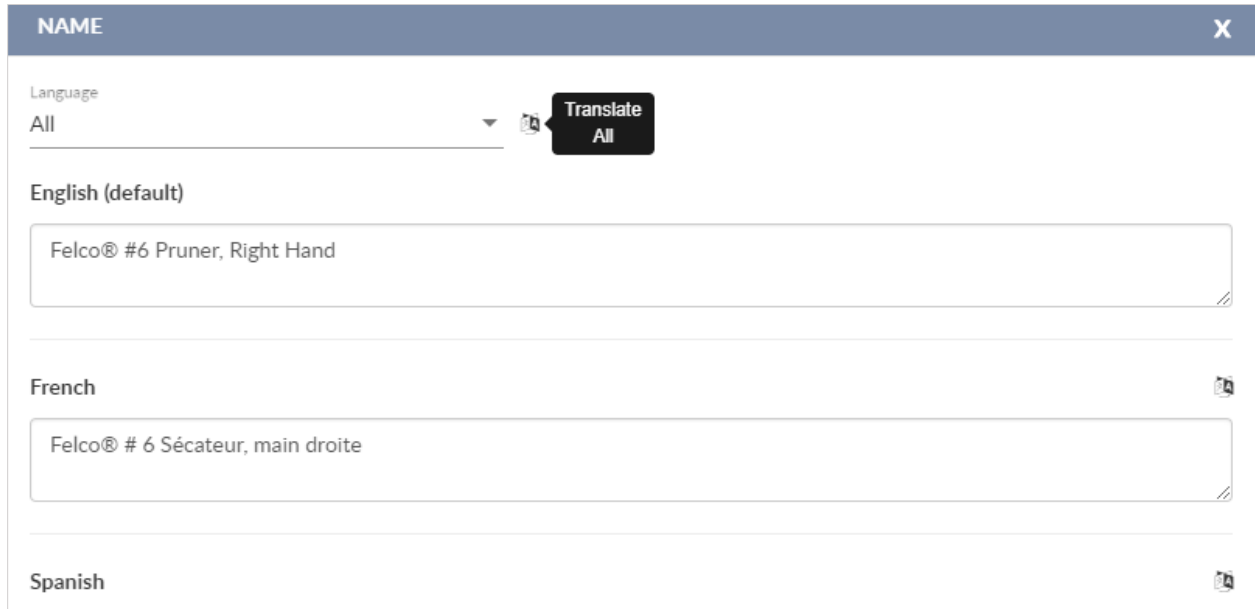
Spanish 

Podadora Felco® # 6, mano derecha

CANCEL
APPLY

Automatically Generate Translation of Default Language Text Field for a Language Text Field

To have Enable generate translations of the text in the default language’s text box for all the supported languages, click the **Multi-Language** icon  at the far right of the **Language** dropdown list.



Automatically Generate Translation of Default Language Text Field for All Language Text Fields

To save the changes to the Multi-Language field and exit the **Edit Multi-Language** window, select **Apply**. To exit without saving the changes, select **Cancel**.