

MODELING STEPS

Steps are used for the benefit of the user as well as the modeler. Steps can provide a logical grouping of attributes, which improves the user experience and can reduce modeling time. Logical grouping is especially helpful in long configurations. Steps can also provide the user with quick access to such things as accessories, options and/or related products and services.

Here is an example of where steps would be used. The product is complex and has 150 attributes. In order to have a reasonable number of attributes (such as 10) presented to the user at one time, there would need to be 15 Tabs. As an alternate Steps can be used in conjunction with Tabs to provide an improved user experience.

First the attributes need to be divided into what would be major differentiating factors or groups. For this example it is assumed that there are 3 major groups with an equal number of attributes. The factors could be such things as hardware, software and accessories, or required, optional and related items or features or add-ons. The three groups in this example would become the 3 Tabs which would have 50 attributes in each.

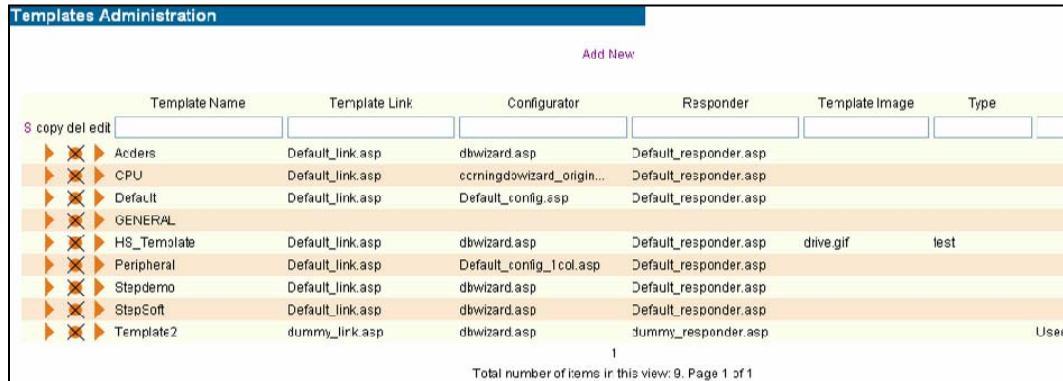
Now each of these major factors (Tabs) needs to be broken down into smaller more precise logical groups. Assuming the ability to logically divide the Tabs into five equal parts, each Tab would then have 5 Steps with 10 attributes within each Step. Equal distribution of attributes into the Steps is not required. Some could have 5, others 12 and others 15. The important thing is to sub-divide the Tabs so that the attributes are presented in a logical manner to the user.

PRINCIPLES OF MODELING STEPS

In order to set up Steps, modeling must be done in three areas. A **Configurator Template** that is designed for steps must be set up if none exist. This Template must then be selected for the Tab where Steps will be used. A different Template should be used with each Tab where there are multiple Tabs. Second, under Product Definition, the Tabs to be used must be selected. Finally, the attributes need to be assigned to the appropriate Steps within each Tab.

SETUP GLOBAL TEMPLATES FOR STEPS

Detailed explanations of these actions can be found in the corresponding chapters. First, a Template needs to be created (Chapter 6). From the Global Parameters drop down, select the Templates link. A screen such as shown in Figure 20-1 will open. A new template can be added, existing ones can be changed, copied or deleted.

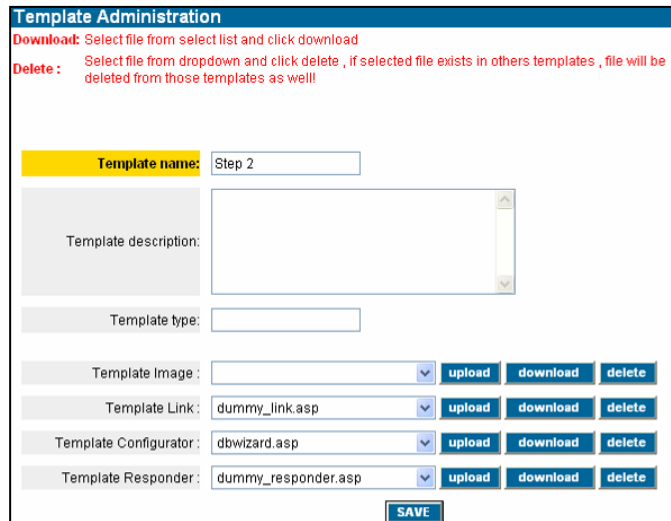


	Template Name	Template Link	Configurator	Responder	Template Image	Type
8 copy del edit						
▶ ✕	Acders	Default_link.asp	dbwizard.asp	Default_responder.asp		
▶ ✕	CPU	Default_link.asp	ccrningdowizard_origin...	Default_responder.asp		
▶ ✕	Default	Default_link.asp	Default_config.asp	Default_responder.asp		
▶ ✕	GENERAL					
▶ ✕	HS_Template	Default_link.asp	dbwizard.asp	Default_responder.asp	drive.gif	test
▶ ✕	Peripheral	Default_link.asp	Default_config_1.col.asp	Default_responder.asp		
▶ ✕	Stepdemo	Default_link.asp	dbwizard.asp	Default_responder.asp		
▶ ✕	StepSoft	Default_link.asp	dbwizard.asp	Default_responder.asp		
▶ ✕	Template2	dummy_link.asp	dbwizard.asp	dummy_responder.asp		Used

1
Total number of items in this view: 9, Page 1 of 1

Figure 20-1 – Template Administration

One of the keys for setting up Steps is to associate the proper **.asp** file with the Templates that will be used. The **.asp** file **dbwizard.asp** is the standard file which must be associated with the Configurator if Steps are to be used. Selection of this file is shown in Figure 20-2. Once Steps are setup for a template, the configurator file can be changed. If Steps need to be changed or added dbwizard.asp needs to be selected again before Steps can be modified.



Template Administration

Download: Select file from select list and click download

Delete: Select file from dropdown and click delete, if selected file exists in others templates, file will be deleted from those templates as well!

Template name: Step 2

Template description:

Template type:

Template Image: [dropdown] [upload] [download] [delete]

Template Link: dummy_link.asp [dropdown] [upload] [download] [delete]

Template Configurator: dbwizard.asp [dropdown] [upload] [download] [delete]

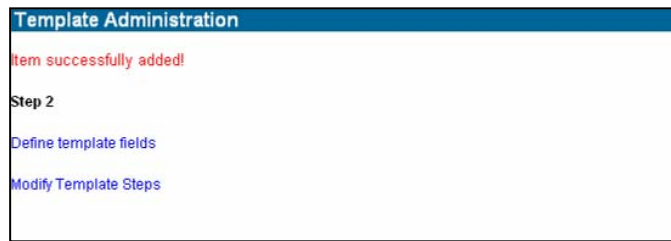
Template Responder: dummy_responder.asp [dropdown] [upload] [download] [delete]

[SAVE]

Figure 20-2 – Configurator “.asp” File for Steps

The dbwizard.asp” file is not the only .asp file that can be used for Steps. Custom Configurator display .asp files are usually created during application development. These pre-loaded file names would be provided to the modeler by the developer.

Once the proper Configurator .asp file is selected for the Tab, select **Save**. A page such as shown in Figure 20-3 will open.



Template Administration

Item successfully added!

Step 2

[Define template fields](#)

[Modify Template Steps](#)

Figure 20-3 – Modify Step Data

The two choices that are available are: **Define Template Fields** and **Modify Template Steps**. Select **Modify Template Steps**. A screen like Figure 20-4 will open.

Enter a numerical attribute rank next to the step you want to add/keep.
 All steps with non-numeric ranks will be deleted automatically

Attribute rank	Step name	Step image	
1	Processor Memory Ha	<input type="text"/>	upload
2	CD/DVD Drive 1 and 2	<input type="text"/>	upload
3	Operating System	<input type="text"/>	upload
4	Miscellaneous Items	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload
<input type="text"/>	<input type="text"/>	<input type="text"/>	upload

Save Add more values Cancel

Figure 20-4 – Step Setup

In **Attribute Rank** field input rank. In **Step name** input desired step name. **Step Image** select from drop down or to load an image click the **Upload** button. When finished, click the **Save** button.

The Attribute Rank indicates the order within the Step that it will be displayed to the user. Step Name will be the name which is seen and can be selected by the user. An image can be used in place of the name. This is accomplished by selecting **Upload**. The user will see the image in the link (left hand) column of the page. When the image is selected the step associated with that image is activated and the image also appears at the top of the configurator (center of the page).

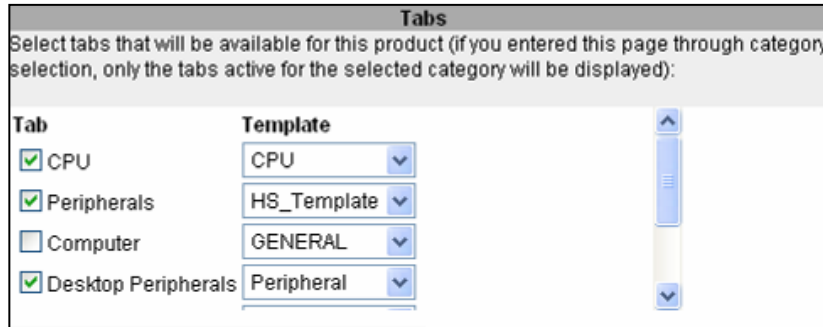
If more than (10) Steps are needed select the **Add more values** button. After completing the Attribute Rank, Step Name and/or Step Image, select the **Save** button. The **Cancel** button will reset the Step Data to the previously saved state.

Setting the value of Attribute Rank should allow for future changes and/or additions. For example, the ranks numbering could be divided into 3 digits, such as **231**. The first digit **2** indicates the second Tab. The second digit **1** through **5** indicates the top level rank of the Tab in the Link column. The last digit **1** represents the secondary rank of attributes in the Link column. This allows for the addition of 9 additional secondary ranks to be added if necessary, such as 232, 233, 234....etc.

It is not necessary to use the numbering scheme example described here, but to remember to leave numbers open in between the Step ranks to allow for possible future expansion.

SELECT TABS AND TEMPLATES

On the Product Definition page the Tabs which will be displayed to the users and Templates associated with those Tabs must be selected (Chapter 13). An example is shown in Figure 20-5



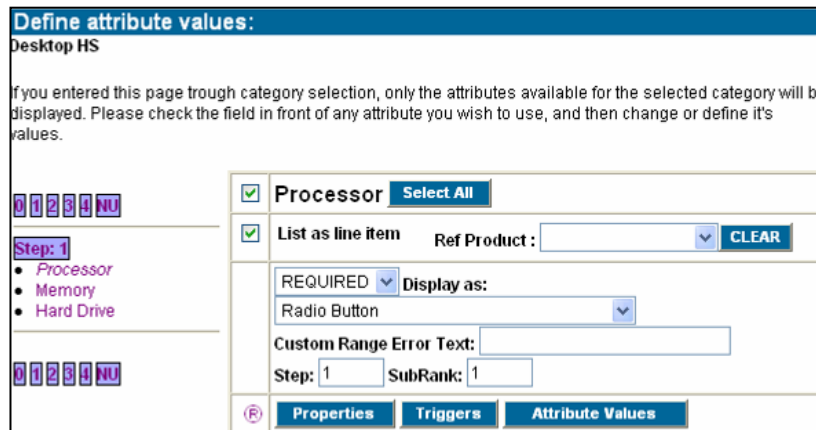
Tab	Template
<input checked="" type="checkbox"/> CPU	CPU
<input checked="" type="checkbox"/> Peripherals	HS_Template
<input type="checkbox"/> Computer	GENERAL
<input checked="" type="checkbox"/> Desktop Peripherals	Peripheral

Figure 20-5 – Select Tabs and Templates

The Templates chosen here were set up for Steps. Make sure the **Approved** check box is selected before pressing the **Modify/Approve** button.

Now the attribute must be placed into their proper steps and setup. Selecting **Product Attributes** under **Current Product**, opens the **Define Attributes** page shown in Figure 20-6 (Chapter 15).

Just to the left of the attribute setup form, the example shows the attributes that have been associated with Steps. This is accomplished by inserting the proper Step and Rank number in the available field in the setup form. For Processor the example shows **Step: 1** and **Rank: 1**.



Define attribute values:
 Desktop HS

If you entered this page through category selection, only the attributes available for the selected category will be displayed. Please check the field in front of any attribute you wish to use, and then change or define its values.

0 1 2 3 4 NU

Step: 1

- Processor
- Memory
- Hard Drive

0 1 2 3 4 NU

Processor **Select All**

List as line item Ref Product: [dropdown] **CLEAR**

REQUIRED Display as: [dropdown]

Radio Button [dropdown]

Custom Range Error Text: [text box]

Step: 1 SubRank: 1

Properties Triggers Attribute Values

Figure 20-6 – Assign Steps and Rank

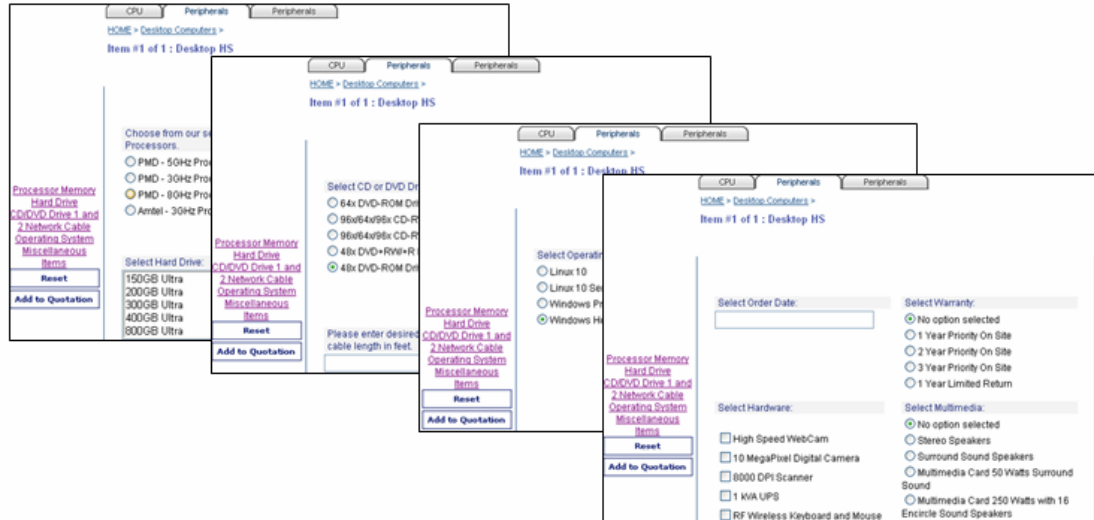


Figure 20-7 – User Screen Steps

Figure 20-7 shows what the Step Rank from Figure 20-4 might look like to the user. The first screen is the **Processor Memory Hard Drive** step and the closest screen is the **Miscellaneous Items** screen. Clicking the Steps in the Link Column brings up each next screen, as shown.