Compano Online Software

Manual Classification
COS PIM

File	Manual Classification
COS version	L03
Revision & date	1.3, 31-10-2022

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1 Concepts

COS PIM
Compano Online Software, Product Information Management.

Product
A product is a manufactured and often branded object which can be described in technical terms. Usually, this *product information* is maintained by the manufacturer of the product.

Item
An item is a (collection of) product(s) which are packaged and priced. An item can also be described in logistical terms (stock, delivery time). Usually, this *trade information* is maintained by the supplier of the product.

Assortment
An assortment is a collection of purchase or sales items.

GLN
A *Global Location Number* (GLN) can be used by companies to identify their locations, giving them complete flexibility to identify any type or level of location required, for instance, a factory, store, office or warehouse.

GTIN
The *Global Trade Item Number* (GTIN) is an identifier for trade items, developed by GS1, www.gs1.org. Such identifiers are used to look up product information in a database (often by entering the number through a barcode scanner pointed at an actual product) which may belong to a retailer, manufacturer, collector, researcher, or other entity. The uniqueness and universality of the identifier is useful in establishing which product in one database corresponds to which product in another database, especially across organizational boundaries.

Classification System
A classification system identifies (technical) products, sorting them into *product classes* and describing them using standardized *product features* and *feature values*. Examples of classification systems are: ETIM, EZ-base, GPC, Q-model, etc.

ETIM
ETIM is an international classification standard for technical products of the installation sector, the construction sector and the maritime sector. *ETIM Dynamic* is the current development version of ETIM, which is updated weekly. Previous, fixed version of ETIM include ETIM 7, ETIM 6, etc.

BIM
Building Information Modelling (BIM) is an intelligent 3D model-based process that gives architecture, engineering, and construction (AEC) professionals the insight and tools to more efficiently plan, design, construct, and manage buildings and infrastructure.

ETIM MC
ETIM Modelling Classes (ETIM MC) is an extension to the basic ETIM classification model, specifying parameters for representation of products as 3D geometric objects. As such, ETIM MC enables uniform exchange of 3D product data among users and CAD software.

2   Introduction

This document describes how to classify products within the COS PIM software using a *standard classification system*. For practical purposes, all examples demonstrate this classification process using *ETIM Dynamic standard* as the classification system[1].

Classification within the ETIM system is based on identifying an unique *ETIM product class* for each product. Once this class has been assigned to the product, the corresponding *product class features* can be filled in.

Example
- A product is assigned the class *Convector radiator* with EC-code *EC010152*.
- Some of the corresponding class features are: *Material housing, Material heat exchanger, Height, Length, Depth, Heat emission according to EN 442 20 °C - 75/65, Colour*, etc.
- For *Material housing*, the following values can be filled in: *Steel, Plastic, Wood, Other*.

3   Classification process

The best practice for classifying (new) products, is to work with a *set of similar products.* These products should all share the *same product class* and preferably *many of the same class feature values*.

Example
A good example of a set of products would be all radiators of the Series *EcoLine*, Type *Convector Radiator Free-standing*, which are all made of *RVS* (`Material housing`), and are all *White* (`Color`). These products then would only differ in their *Dimensions* (`Height, Length, Depth`).

Basically, two classification scenario's exist:

3.1.1   Classification of new products

When classifying a new product:

1. Find a set of products of a *single* class using Filter and Search,
2. Assign a product class (ETIM) to all products in the set,
3. Enter *common values* to class features which are the *same* for all products in the set,
4. Enter *unique values* to class features which are *different* for each product in the set,
5. Set classification status to '*classified*'.

3.1.2   Updating classification

When updating existing classification, products already have a class assigned and part of the class features might be filled out.

To update classification:

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[1] Should you wish to use another classification system, simply substitute ETIM for the system of your choice. Note that you will need to contact Compano Sales (sales@compano.com) as using other classification systems is not a standard feature of the Compano (Basic) PIM system.

1. Find a set of products of a single or multiple classes[2], using Filter and Search,
2. Update classification data by entering values for class features which are missing data,
3. Set classification status to *'classified'*.

3.2 Deleted ETIM features

As ETIM Dynamic receives a weekly update, the ETIM classification system may change. This means that sometimes ETIM class features or values are *deleted*.

By default, deleted ETIM features will still show when classifying products with the Compano software. This can lead to the confusing situation where a product feature shows twice, or where an already deleted feature is filled out instead of the correct active feature.

In the COS interface, deleted ETIM features are marked with an Archive icon:

In Excel exports, deleted features added as data columns *after* the active ETIM features. Also, any filled out values for deleted features are shown on a red background:


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[2] Note: As of Compano Software version L03, it is possible to update the classification of products of *multiple, different classes* in one update session. For a detailed explanation, see chapter 8. Update classification.

3.2.1 Hide deleted ETIM features

Deleted ETIM features can be hidden in the user interface. This setting is available under *My details > My settings*, however as additional action is required which is not available to a user, please contact your Compano consultant if you need to hide deleted ETIM features.
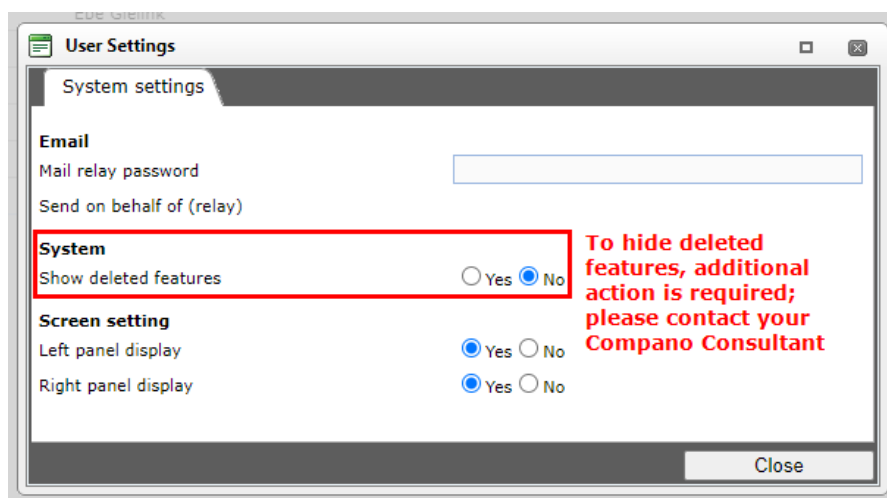

4 Find a set of products

The Filter and Search options in COS allow for a quick selection of a set of (similar) products. COS offers two kinds of filter techniques: a Quick Filter and a Comprehensive Filter. Note that both filters can be combined and that results can be further narrowed down by using an additional Search term.

4.1 Quick filter

The *Quick Filter* is available in the upper right corner of the right side panel:
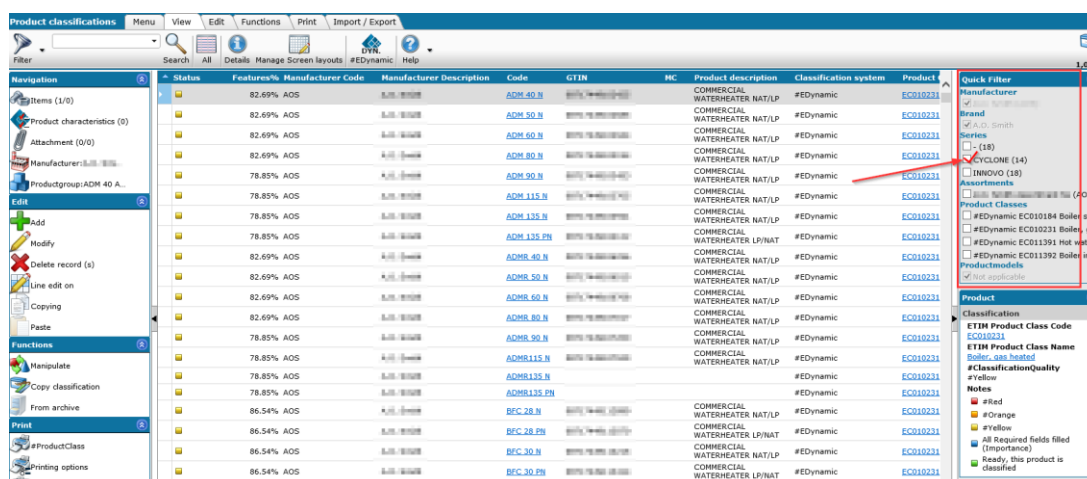
The Quick Filter allows for a fast selection of products based on *Manufacturer, Brand, Series, Type, Assortment*, etc. The **Quick Filter is an 'intelligent' filter**; depending on your selection, it will only list filter options that can be further applied to your data.

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4.2 Comprehensive filter

The Comprehensive Filter can be used to make a more refined selection of products for classification. The Filter offers several tabs with data fields which can be used in combination to filter out a set of products.

Note: Complex filters can be saved for easy future use. For more information on Filtering, see the *Compano Basic Manual*.
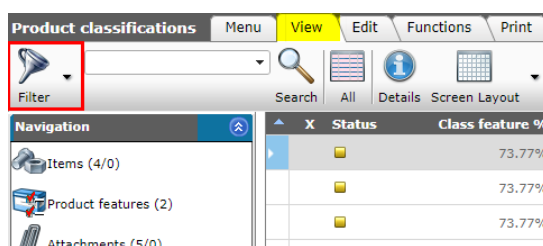
Example
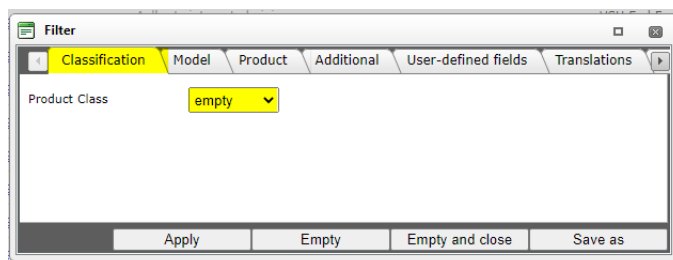To filter a set of *similar, new products*:

1. Through the Menu go to *Products > Product Classifications*:
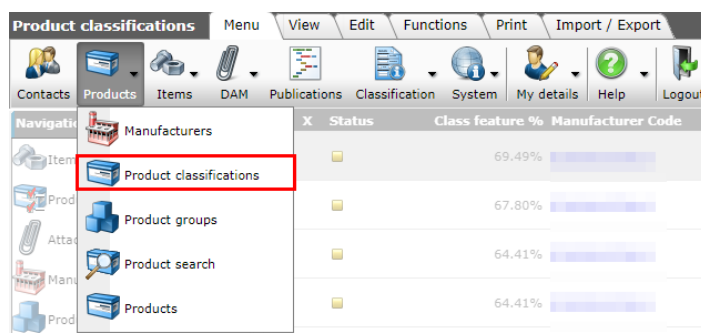
2. On the View tab, click the *Filter* button

3. In the pop-up window, enter the filter criteria on either of the following Filter tabs:
   a. Classification tab: Set *Product Class* to *Empty* to filter out all new products which do not yet have class assigned:

   b. Product tab: Optionally set additional Filter criteria to further narrow down the set of filtered products. For instance, *Series, Type, Product Group*, or a range of *Product Codes*.

c. Additional tab: This tab contains additional Filter options, which can also be used to refine the filter results. Most practical would be such options as *Time Created* or *Modification Time*: to quickly find newly added or changed products:

d. User-defined fields tab (optional): This tab is only available with the *User defined fields* module (sold separately). When available use the options on this tab to filter on user defined fields values.

e. Translations tab (optional): This tab is only available with the *Multi-language module* (sold separately). When available use the options on this tab to filter on translation values.

4.3 Search

Another way to find a set of product or narrow down your filter result, is to use additional *Search* terms. Enter one or more search terms into the *Search* box, for instance text from the description of the product, or part of a product code:

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Note: Search will try to match the search term with data in *any* data field. Depending on your search term this might result in a very specific result or too many results.

Example
The search term 'valve' could result in the following matching products:

- Ball valve
- Ball valve handle
- Ball valve sealing ring
- Etc.

5 Assign a product class (new product)

New products must first be assigned the correct product class.

While there are other classification systems, this manual will take the ETIM Dynamic classification system as its point of departure. For the most part, the instructions in this manual can also be followed when using a different classification system.

To assign a product class, either:

- Add the product class on import
- Assign the product in PIM COS

Please also see chapter

## 5.1 Add the product class on import

Compano recommends adding the ETIM product class of a product *on import*. Simply add a **column to your import file which will contain the product's ETIM class**, for instance:

|	S	T	U	V	W	X	Y	Z
1	Brand	Series	Type	Product code	Short product decription	Product description	Product group code	ETIM EC class
2	VX Sanitair	Elegant	Washbasin	EW-002348	Washbasin, single, with taphole	Washbasin, single, with taphole	00023	EC011550

5.2 Assign the product class in PIM COS

Alternatively, you can use the function *Manipulate* within COS PIM to assign a product class to a set of *similar products* which should all be assigned the same class:

1. At the *Product classifications* screen, use the Filter and Search options to find a set of similar products.
2. Select[3] all products in the set, either using *CTRL-A* or the *Select All* button on the View tab:
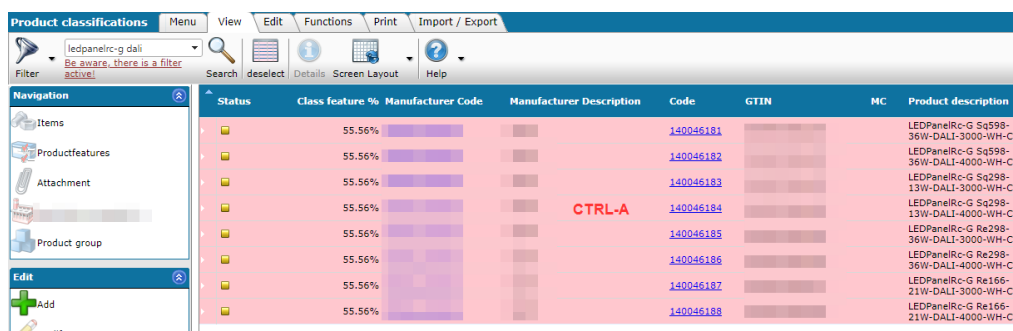

3. Next, under Functions, click on *Manipulate* to assign an ETIM product class:
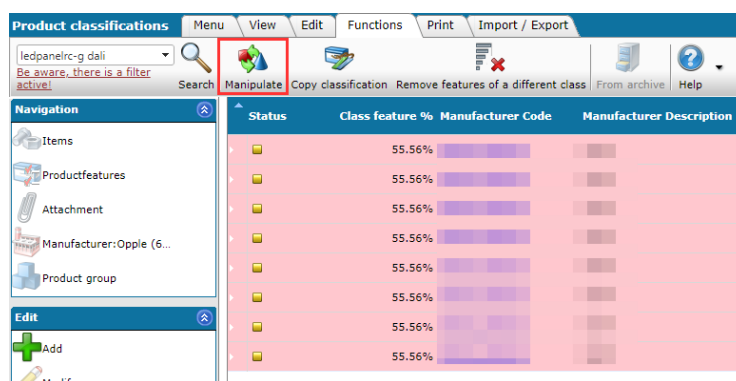
4. In the pop-up window, on the tab *Manipulating product*, set the *Product Class* to *Grant* and fill in an ETIM product class code.

Tip: If you copied the *EC-code* to your clipboard (see instructions in Appendix A: How to find the correct ETIM product class), you can now use CTRL-V to paste the code into the Product Class field:

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[3] A manual selection can also be made, using `SHFT-click` and/or `CTRL-click`.
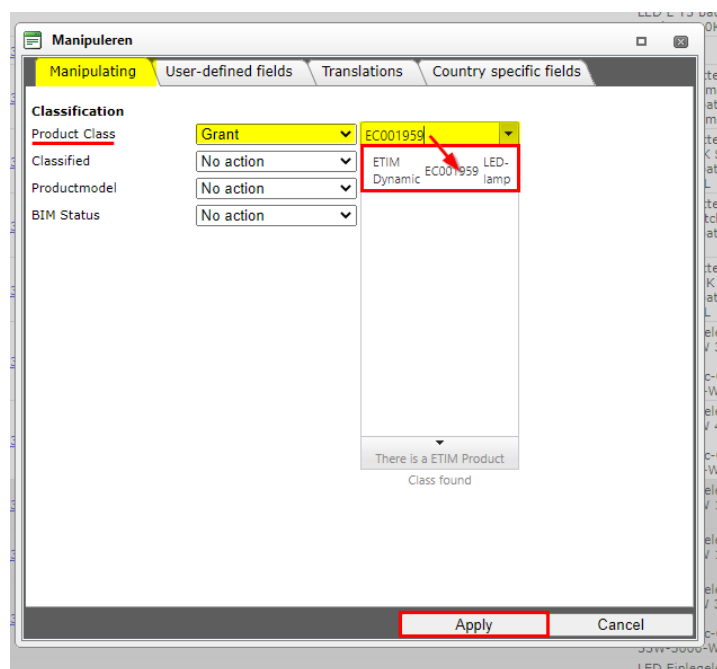
5. Make sure to click on the class in the drop-down window to properly select the class (!)
6. Click on *Apply* to assign the class to all selected products.

6 Enter common class feature values

Once a product class has been assigned, the *Product Class Features* need to be filled out. Depending on the status of the classification of the product(s), one of two methods is recommended:

Classification quality status:
- Fill ETIM features (■): preferably use the *Manipulate* method
- Complete ETIM features (■): use the *ExcelForImport* method

6.1 Method 1: Manipulate

For new products with the *Fill ETIM features* -tatus, you can easily manipulate common class feature values, provided you set the Filter to products of a *single ETIM class*.

To manipulate the values of class features:

1. Through the menu, go to *Products > Product Classifications*.
2. Use the Comprehensive Filter to select products of a *single ETIM class* with *classification quality status:* Fill ETIM features (■)

Classification tab

- Product class: Select a single ETIM class

Additional tab

- Classification quality: Select the *Fill ETIM features* status.

3.   Optionally, refine your filter results using the Quick Filter of Search options.

When classifying products, never use the Quick Filter to select products of a single assigned class!
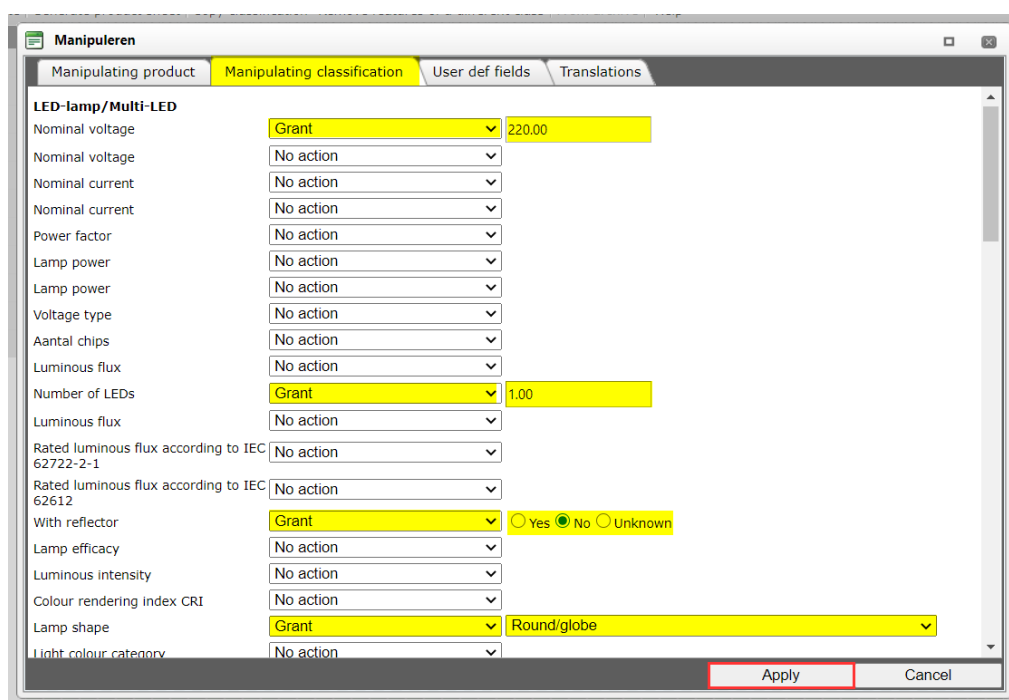
4.   Select all the products in your set, using *CTRL-A,* the *Select All* button, or make a manual selection:
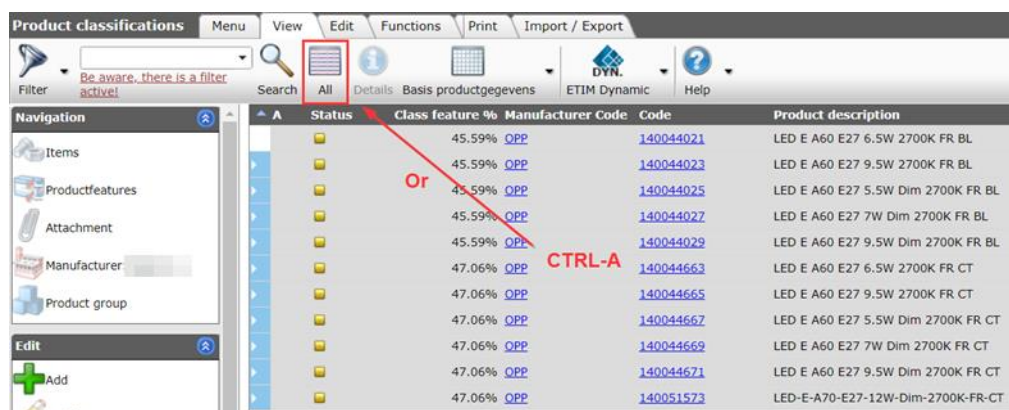
5. Next, use the *Manipulate* function:
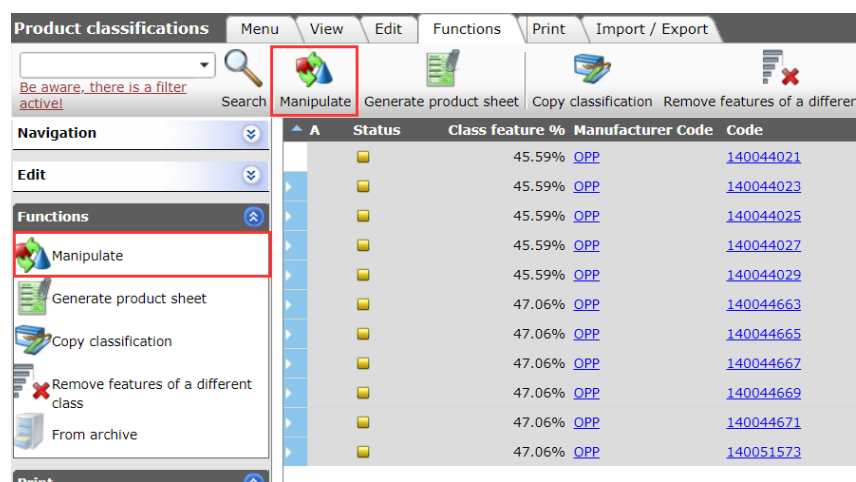
6. In the pop-up window, go to the *Manipulating classification* tab:

For each class feature that is common to all products in your set:

a. Action drop-downs: Select *Grant* in the drop-down menu. <u>*Important*</u>: Leave the setting for any *unique* features on *No action*.
b. Value fields: Fill out the feature value, either by selecting the (alphanumeric) value from the drop-down menu, entering a number, or selecting Yes/No/Unknown.

7. To save all changes, click on *Apply*.

6.2   Method 2: ExcelForImport

Another method to assign values to common Product Class Features makes use of the *ExcelForImport* option. This method is explained in chapter <u>8. Update classification</u>.

7   Enter unique class feature values

After completing common class features, you will be left with *unique class features* for each product, which also need to be filled out. This can be done using the *ExcelForImport* option This method is explained in in chapter <u>8. Update classification</u>.

8   Update classification (ExcelForImport)

The ExcelForImport-method handles all scenarios for updating classification data:

- Enter common class feature values
- Enter unique class feature values
- Change or correct existing classification data
- Complete classification data

Updating of product classification data can be done through dedicated export layouts for product and model classes. These layouts are available on the Product and Product Classification overviews.

For convenience sake, a `Standaard productclassificatie export in Excel - L03` *layout has been prepared for COS PIM applications.*

<u>Note</u>: Only (ETIM) classification *feature values* and Model Class features can be updated this way. (ETIM) Product and Model c*lasses* need to be assigned to products via Import, Editing or Manipulation.

To update classification data:

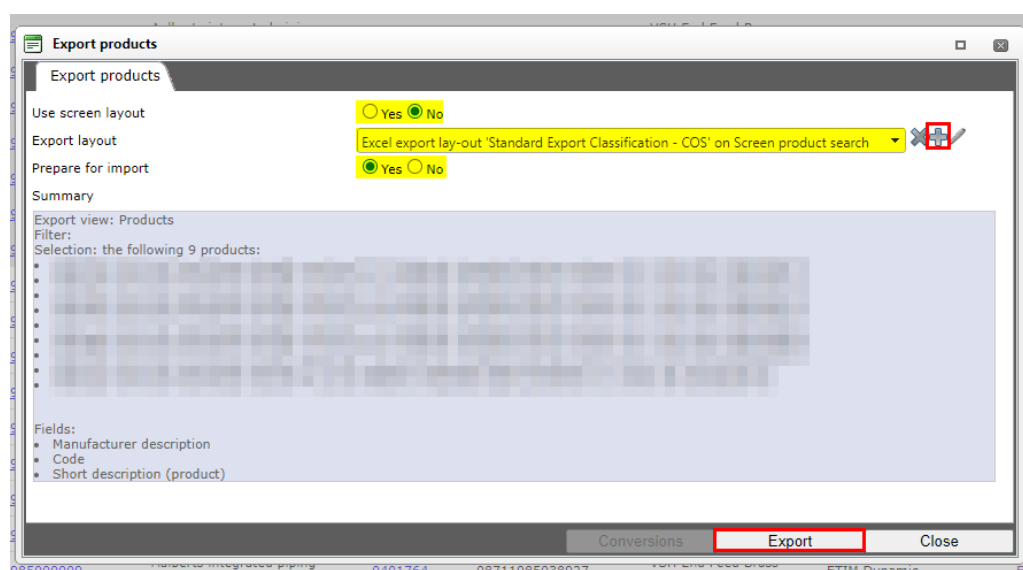1. Through the Menu go to Products > Product Classifications:
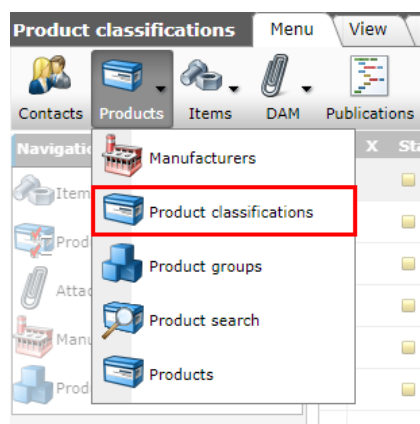
2. Use Filter and Search to select a set of products.

Note: The new update method also allows for editing products of *multiple, different classes*.

3. Go to the Import / Export tab and click on Export products.
4. In the pop-up window:

5. Use screen layout: Set to *No*.
   a. Use screen layout: Set to *No*.
   b. Export layout: Either select the *Standaard productclassificatie export in Excel - L03* layout, or click on the +-icon create a new Classification Export layout.
   c. Prepare for import: Make sure to set this to *Yes* (!)
6. Click on the *Export* button.

The classification data will be exported to an ExcelForImport file, which can be identified by the date and time in the file name, for example `COS-ExcelForImport-Products-20210607-112956.xlsx`.

The ExcelForImport file can be renamed, however make sure that the filename always starts with `COS-ExcelForImport`*, as otherwise the import will fail!*

8.1 Adding / updating classification data

How to create an Export Classification layout on-the-fly

I. In the second pop-up window, on the *Layout* tab, enter a *Name* for the new layout:

II. Next, on the Properties tab, select the *Export type*: `Include product classes`

III. Optional: Next, on the Fields tab, add any other data fields you need in your layout:

IV. Click on *Save record* to save the layout.

The `ExcelForImport`-file can be used to add or update any classification data.

The following data types can be changed:

- C: The Classified status can be set to **Yes** if all known and applicable ETIM features have been filled out. Also see paragraph 8.2 Set classification status on import.
- Alphanumeric features: Alphanumeric values can be selected from a drop-down list. Note: The drop-down list will contain all ETIM-certified values for the feature:
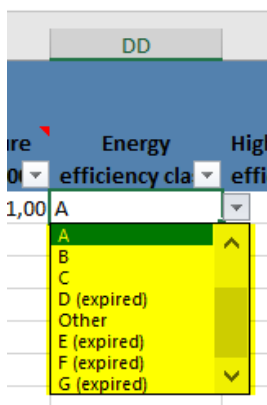

- Numeric features: Numeric values can be filled out by hand, copy-pasted from another source, or can be calculated using standard Excel formulas.
- Range features: Features where a numeric range must be specified have been split into a *minimum* and *maximum* value; both need to be filled out:

- Logical features: Correct values for a logical feature are *Yes*, *No* or *<empty>*. An empty value is exported in DICO/SALES/INSBOU as *Unknown*. Alternative values are: *Ja, Nee, J, N, Y, 1, 0, True, False, T, F.*

Note: Exporting classification data of *multiple classes* will result in an Excel file with *multiple tabs*; one for each ETIM class. Select each tab in turn to edit the data of products in that class:
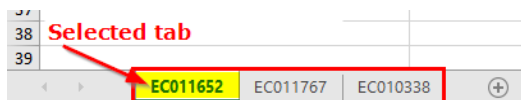
8.2 Set classification status on import

The *Classification status* (`Yes/No`) can be used to indicate whether all known and applicable ETIM features have been filled out. See also chapter 9 Classification status for a more detailed explanation.

To set the *Classification status* on import, change the value in *column C* of the ExcelForImport-file:

- Set status to **Yes**: All known and applicable ETIM features of the product have been filled out
- Set/leave status to **No**: Some ETIM-features still need to be filled out, but the correct information is currently unavailable.

An alternative method is to 9.2.1 Set classification status manually.

8.3 Importing updated classification data

Once the update ExcelForImport-file has been saved, the file can be imported into COS:
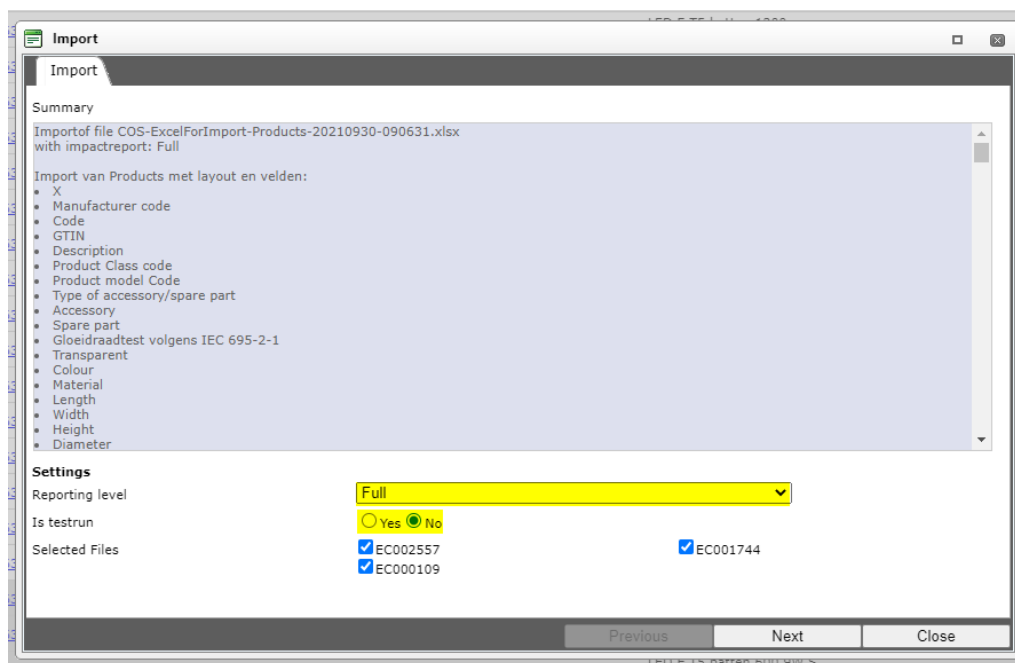
1. On the Product classification overview, to the *Import/Export* tab and click on the *Import* button:
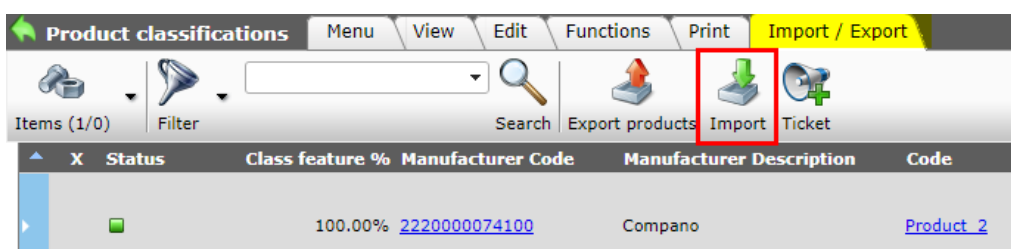
2. In the Import dialog, select the COS-ExcelForImport-file that holds your updated data and click on *Next*:
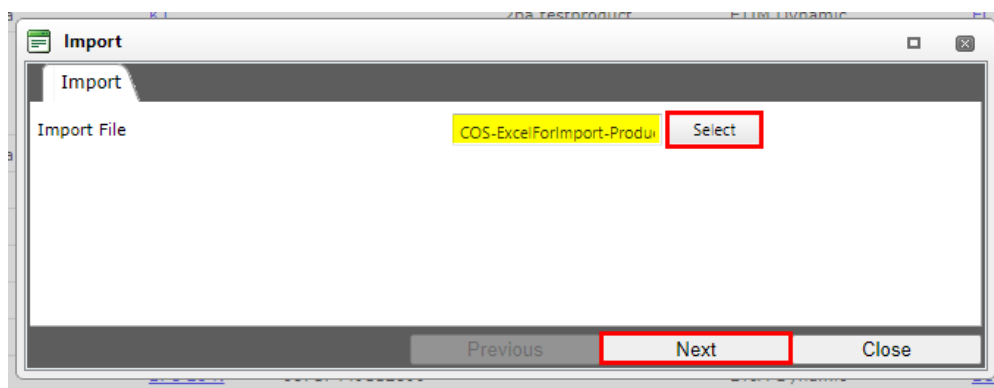
3. In the next dialog window:

a. Reporting level: Select the reporting level for the import report:
    i. None: Do <u>not</u> generate an import report. This will result in the fastest import.
    ii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
    iii. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
b. Is testrun: Set to *Yes* to simulate an import; this will only generate an import report listing any potential error and/or warnings. No data will be imported!
c. Selected files: When multiple classes were changed, the import Excel file will **contain multiple tabs with data; these tabs are considered separate 'data files'.** <u>Important</u>: Leave all boxes checked to import all the (changed) data of all classes.
4. Click on *Next* to start the import and check your e-mail or *System > Logs* for the Import analysis report. For more information on this report, see paragraph <u>Fout! Verwijzingsbron niet gevonden. Fout! Verwijzingsbron niet gevonden.</u>.

9 Classification status

Once you have completed assigning or updating your classification data, you might be left with one or more features that cannot be filled out, either because:

- The correct ETIM *value* is *missing*
- The class feature is *not applicable* to your product
- You do *not know* the correct feature value

Missing values are best handled by sending a change request to ETIM. Unknown values and not applicable features can be communicated to data pools 2BA and InstallData, using the DICO/SALES005 exchange format by setting the *Classification status* to **Yes** even if not all ETIM features have been filled out. See the next paragraphs for a detailed explanation.

9.1 Missing Value (MV)

Missing Value only applies to alphanumeric ETIM features where a correct ETIM value is missing for your product.

- Alphanumeric value: When the feature does apply to your product, but the correct value is missing, select the option *Other* in the drop-down menu:
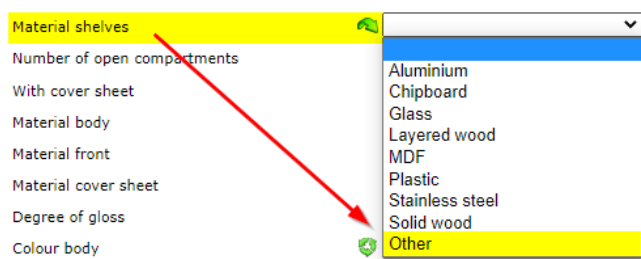
Note: A *Missing Value* code will not be sent to data pools 2BA and InstallData. You can use the ETIM Classification Management Tool (CMT) to submit a change request and ask ETIM to add a missing value.

9.2 Not Applicable (NA)

Not Applicable means the ETIM Feature does NOT apply to your product and you therefore cannot fill out a value:

- Alphanumerical value: **Select the 'empty' option:**

- Numerical or Range value: Leave the field blank:

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Number of doors (total)	**Leave blank**
Number of doors, left-opening	
Number of doors, right-opening	

- Logical value: Choose the option *Unknown*.

| With cover sheet | ○ Yes ○ No ◉ Unknown |
| Material body | |

9.2.1 Set classification status manually

Once you have filled out all ETIM features it is important to set the Classification status of the product **Yes**. Only this way the code NA will be sent to data pools 2BA and InstallData.

The Classification status can be set on import (see paragraph 8.2) or manually:

1. Through the Menu go to *Products > Product Classification*.
2. Use Filter and/or Search to find the product.
3. Under *Edit*, click on *Modify*.
4. In the pop-up window, go to the *Product* tab:

5. Scroll down to the *Status* section and set *Classified* to *Yes*.
6. Click on *Save*.

Alternatively, you can set the *Classified* status of multiple products using the function *Manipulate*:

1. Through the Menu go to *Products > Product Classification*.
2. Use Filter and/or Search to find the set of products that you need to manipulate.
3. Use *CTRL-A* or the *Select All* button to select all products in the set:
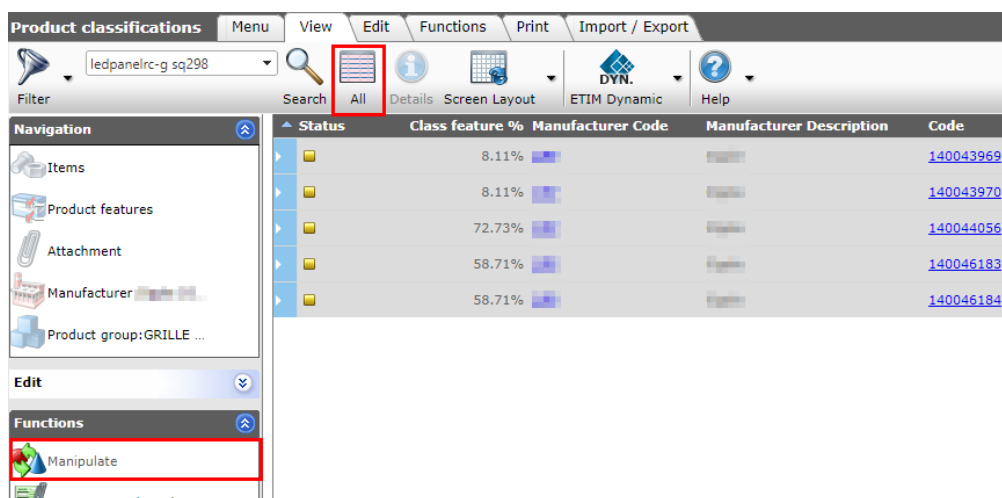
4. Under *Functions*, click on *Manipulate*.
5. In the pop-up window, on the *Manipulating product* tab, set *Classified* to *Grant* and select *Yes*.
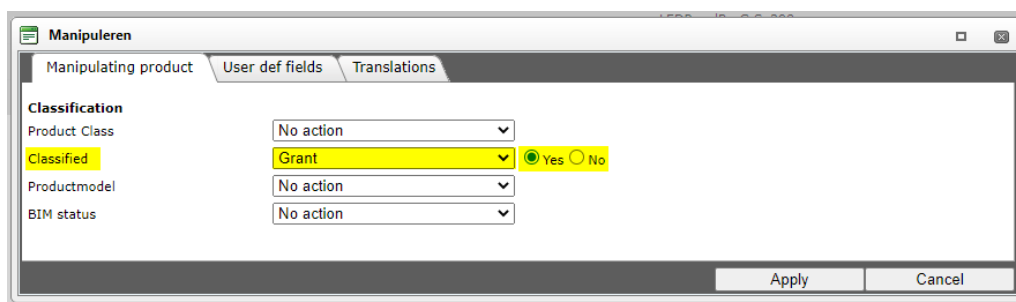
6. Click on *Save*.

Note: Should you make use of ETIM Dynamic and should any changes be made by ETIM to this class, the Compano Software will *automatically* set the *Classified* status back to *No*. Note: You will receive *no notification* about this status change, however any mutations of ETIM class should be apparent from an ETIM mutation report. Compano recommends to generate this report weekly; see *14.3 ETIM Mutation report*.

9.3 Unknown (UN)

Unknown means the ETIM Feature does apply to your product, however you do not know its value (yet) and therefore cannot fill out the feature:

- Alphanumerical value: **Select the 'empty' option:**
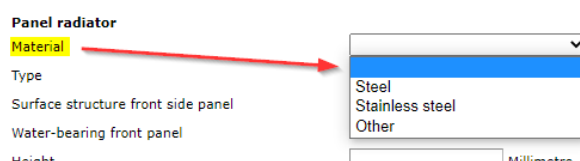
- Numerical value: Leave the field empty:

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- Logical value: Choose the option *Unknown*.

Unknown (UN) is the default code that is sent with empty fields. However, should you export your data using the SALES005 exchange standard, then any empty fields of products with the status Classified will get the Not Applicable (NA) code

10 Special class features

Some ETIM class features are treated differently; these include *Local features* and *Conditional features*.

10.1 Local features

With *Local Features* it is possible to specify *country-specific characteristics* in ETIM, for example, the Dutch quality mark KIWA for drinking water related products.

The old ETIM Feature code indicated that a feature had to start with `EF` or `EFI` and then resp. 6 or 5 digits. The new Local Features have a different format, namely `EF` + 2 letters + 4 numbers. The 2 letters are used to indicate the country, so for example `EFNL0001` stands for the Dutch KIWA label.

Local ETIM features can be filled out just like ordinary ETIM features, and can be exported as of Compano version L03.

10.2 Linked features (UDF)

With the user-defined fields (UDF) license, you have to option to map UFDs to ETIM class features and values; these features are thus linked to the value a UDF and cannot be updated directly. For more information on linked features, please see our manual on *Mapping User-defined Fields*.

11 Quick corrections: Line Edit

Alternatively, values of Class Features can be changed directly using the *Line Edit* function:

1. At the *Product Classification* screen, with your selection of products ready, under *Functions* click on *Line Edit On*:
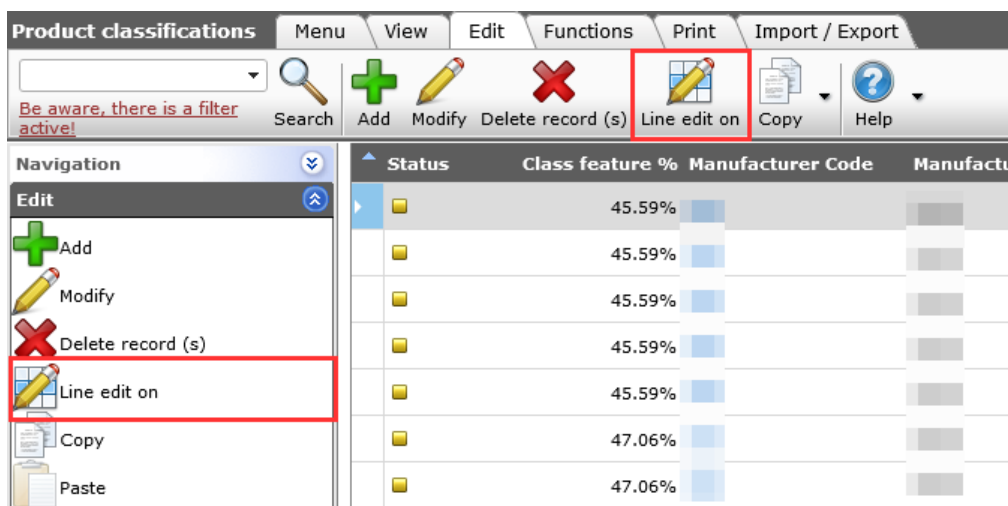
2. The screen will reload, changing alphanumeric values to drop-down boxes and changing numerical values to on-screen editable fields. Note: Depending on the number of products in your selection, it can take a while to reload the screen:

3. Change any alphanumerical or numerical values directly on-screen. Any changes you make are immediately written into the Compano database. Notes:
   a. Click on any numerical value to edit it.
   b. Range values are NOT editable.
   c. Since INSBOU004/SALES005 checkboxes can indicate one of THREE values: *Yes, No* or *Unknown*; these 'logical' values are best changed using the *Edit* function to avoid confusion.
4. Important: Do not forget to click on *Line Edit Off* to switch line editing off.

12 Using alternate classification systems

ETIM is not the only classification system available; besides fixed ETIM versions (ETIM 7, ETIM 6), alternate systems include GS1, EZ-base, GPC, Q-model, etc.

12.1 Fixed ETIM version (ETIM 7, ETIM 6, etc.)

ETIM is a *dynamic* classification system with weekly updates to classes, features and values. However, should you wish to forego regular updates and concentrate on a fixed set of classes, features and values, you can do so by using any of the fixed ETIM versions.
To this end, Compano offers the *ETIM 7* fixed standard, next to *ETIM Dynamic*. Should you need to make use of an even earlier fixed ETIM version, please contact Compano Support, support@compano.com.

12.1.1 Classification using ETIM 7

By default, the Compano PIM software is set to ETIM Dynamic. To use ETIM 7 instead:

1. Through the Menu go to Products > Product Classifications:
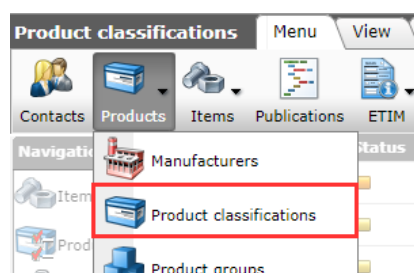
2. Next, on the *Product Classifications* screen, at the *View* tab, select *ETIM 7*:
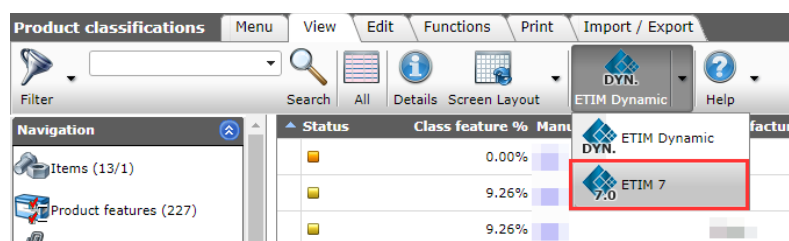
3. To classify your products using this system, please follow step 1 to 4 from this manual, substituting any instructions for *ETIM Dynamic* with *ETIM 7* instead.

12.1.2 Copy ETIM classification

When using multiple ETIM classification systems, you have the option to *copy classification* from one system to the other.

To copy classification:

1. Through the Menu, go to Products > Product classifications.
2. Switch to the Functions tab and click on Copy classification:

3. In the pop-up window:

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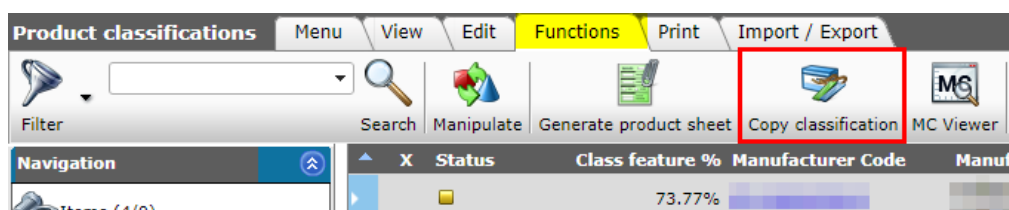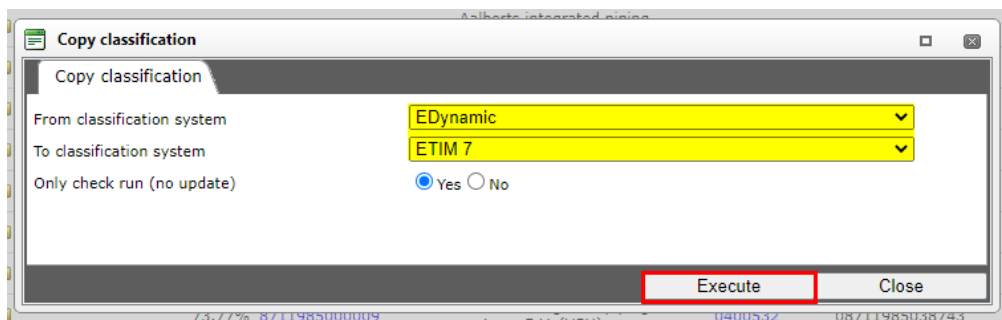
a. From classification system: Select the classification system from which the data is to be copied (SOURCE).
b. To classification system: Select the classification system to which the data is to be copied (TARGET).
c. Only check run (no update): Set to *Yes*, if you need to run a simulation of the copying process; a report is generated but no actual data is copied.
4. Click on *Execute* to start the copying process.

Some things to take note of:

Source	Target	Action
Feature value filled	Feature value empty	Target value overwritten with source value
Feature value filled	Feature value filled, but different value	Target value overwritten with source value
Feature value empty	Feature value filled	Target value *not* overwritten

- Features that are present in the source-side ETIM system, but not in the target-side ETIM system are *not* copied
- Features that are present in the target-side ETIM system, but not in the source-side ETIM system are left untouched (whether empty or filled) -

12.2 Multi-model classification

With multi-model classification you can classify your products in multiple, different classification systems, such as EZ-base, GPC, Q-model, eCl@ss and EMCS. Multi-model classification is available as an additional software module, which will add a classification system selector button to the View tab of your Product classification screen:
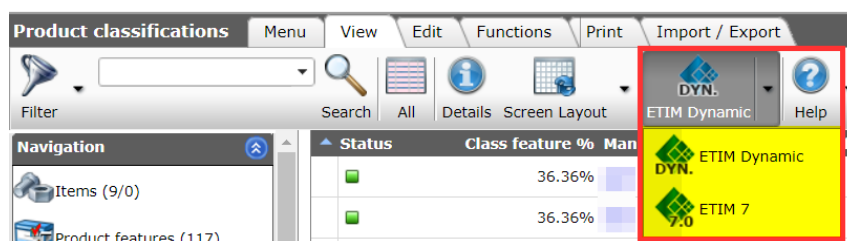
Note: *ETIM Dynamic* is available as the *default* classification system. Should you wish to use any other classification system, please contact sales@compano.com.

13 ETIM MC (BIM)

ETIM MC classification process (BIM) is similar to the standard classification process as discussed in this manual. For ETIM MC classification follow the steps described in chapters 3 to 7. Any exceptions are discussed in the paragraphs below.

<u>Important</u>: Product Models are linked to Product Classes. Therefore, *first* assign a Product Class to your product, before attempting to assign a Product Model.

13.1 Assign Product Model

Assigning a Product Model is similar to assigning a Product Class:

1. At the Product Classifications screen, select the product and, under Edit, click on *Modify*.
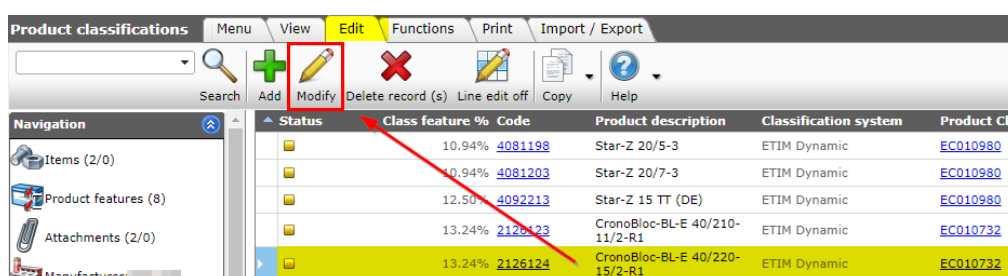
2. In the pop-up window, on the tab *Model*, select the *Product Model*
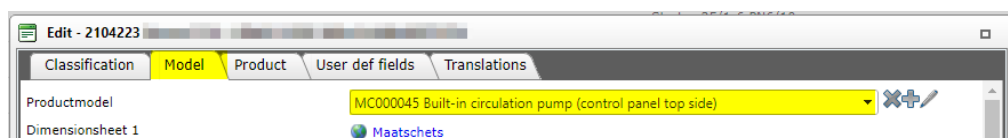
3. Selection of the Model will retrieve Product Model Features:
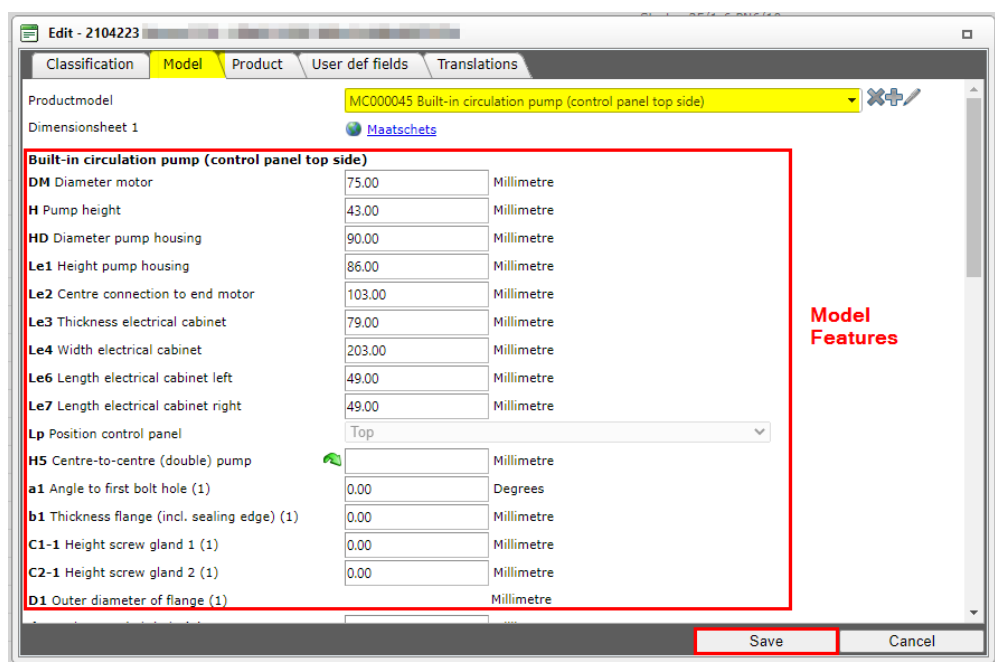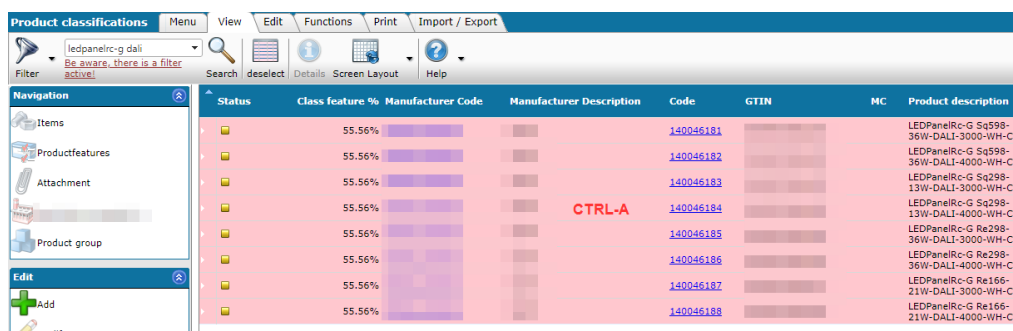
4. Either, click on *Save* to assign the Product Model to the product, or proceed with assigning values to the Model Features (see next paragraph).

13.1.1 Assign to multiple products
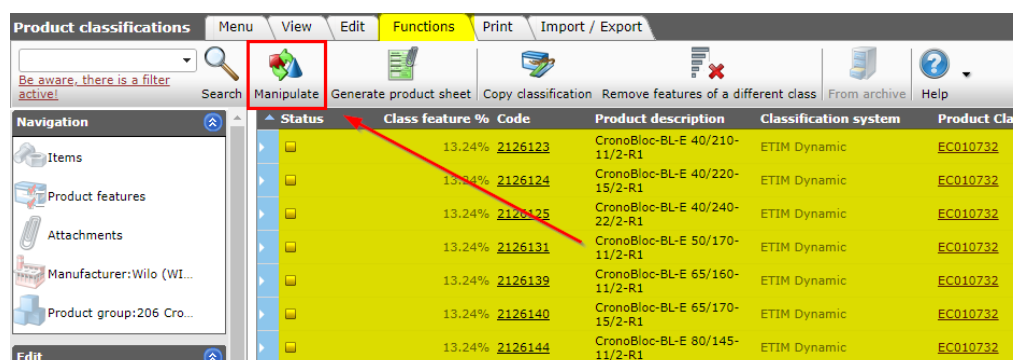
To assign the same Product Model to multiple products:

1. At the Product classifications screen, select all the products you filtered out using *SHIFT-click, CTRL-A* or the *Select All* button:
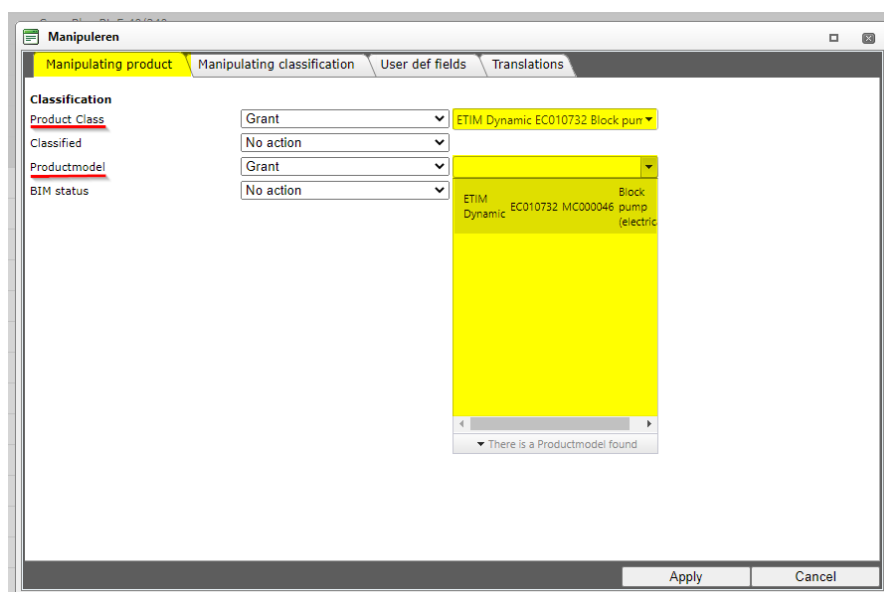
2. Next, under Functions, click on *Manipulate* to assign a Product Class:

3. In the pop-up window, on the tab *Manipulating product*:

a. Product class: First, set this option to *Grant* and enter the ETIM product class of the product (EC-code). <u>Note</u>: As the Product Class and Model are linked, this is a *mandatory* step, even if the product has already been assigned a Product Class (!)
b. Product Model: Next, select the linked Product Model from the drop-down list.
c. BIM status (optional): Optionally, set the BIM status to *Under construction*.
4. Click on *Apply*.

13.2 Assign Model Feature values

To assign values to the Product Model Features:

1. At the Product Classifications screen, select the product and, under Edit, click on *Modify*.
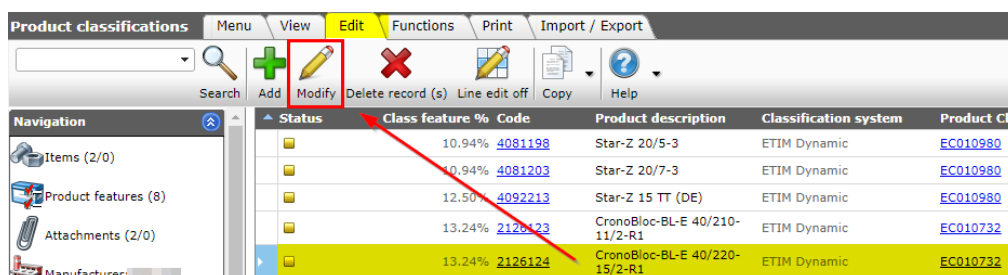
2. In the pop-up window, on the tab *Model*, fill in the Product Model Features:
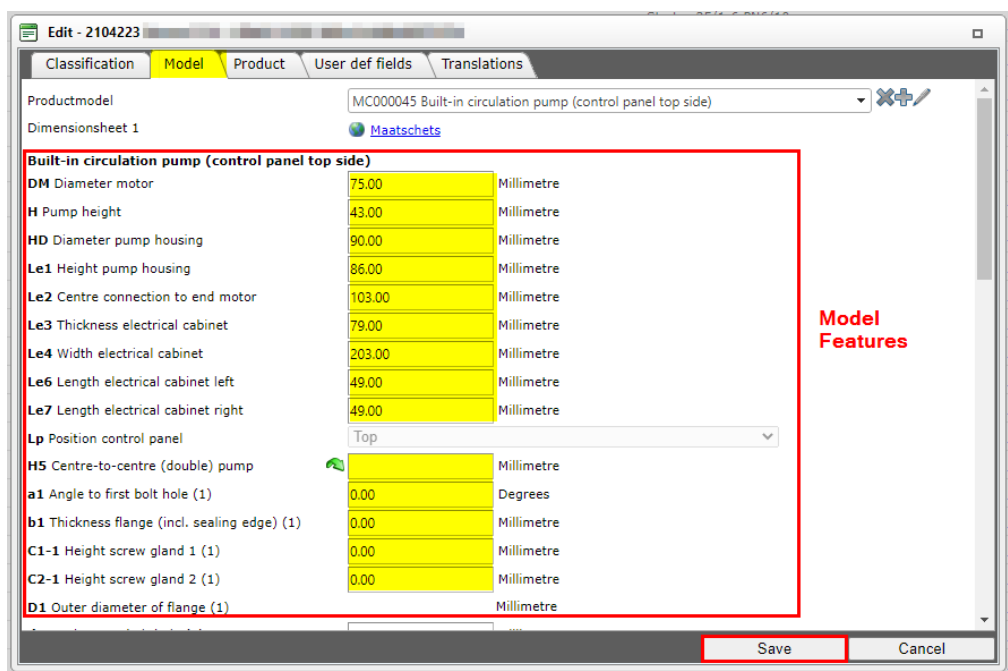
3. Next, click on *Save*.

13.2.1 Assign to multiple products

To assign values to Model Features of multiple products:

1. At the Product classifications screen, first set a Filter to select the products of which you need to manipulate the Model Features:
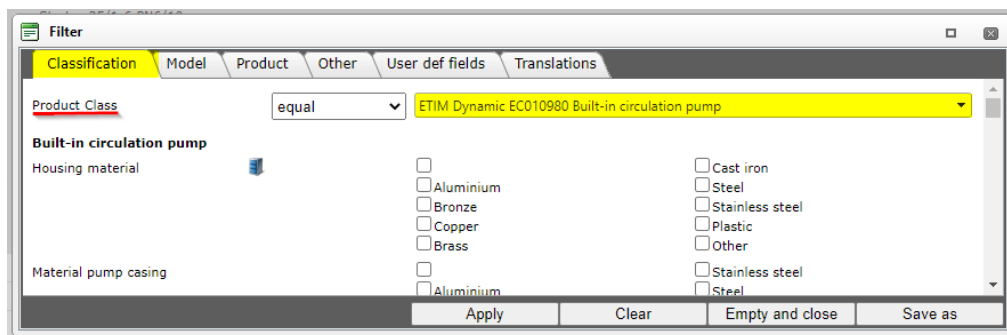
    a.   Classification tab > Product Class: Set this option equal to the ETIM Product Class of the product.
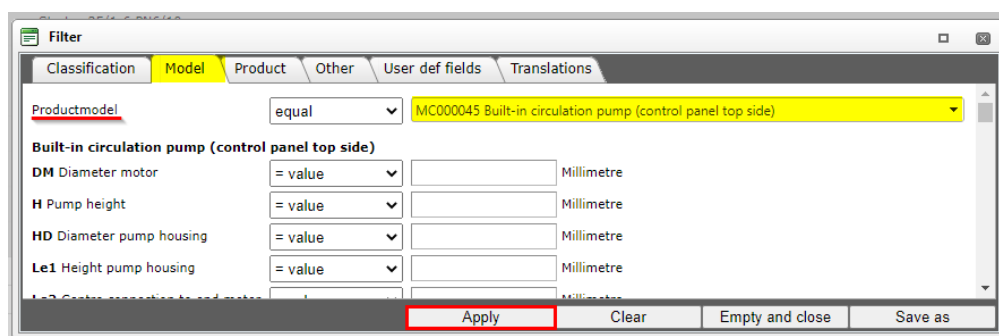
    b.   Model tab > Product Model: Set this option equal to the ETIM Product Model of the product:

    c.   Click on *Apply*.

2.   Once your product have been filtered, under Functions, click on *Manipulate:*
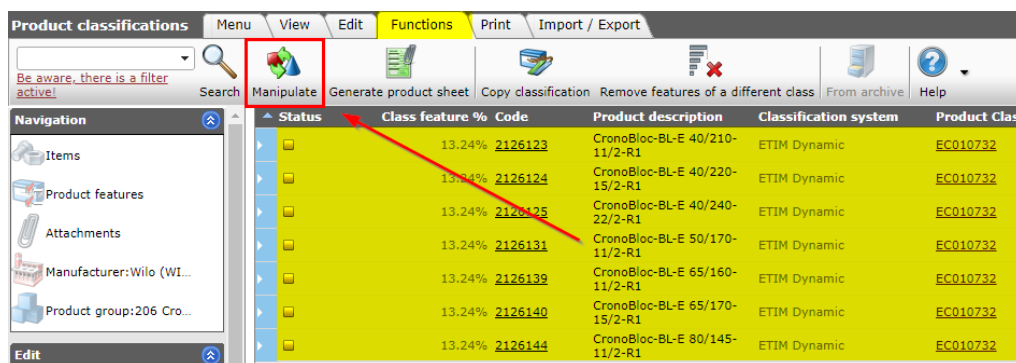
3.   In the pop-up window, on the tab *Manipulating model*, set the action to *Grant* for any features that are shared by the products in your selection and fill in the values*:*
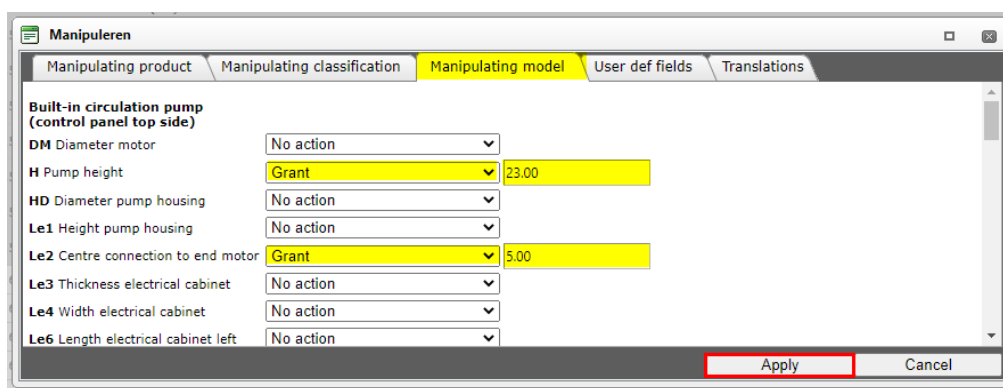
4. Click on *Apply*.

13.3 BIM status and export

The *BIM status* field is used to facilitate the ETIM MC classification process. The following statuses are available:

- None: ETIM MC values will *not* be exported; this status is useful to indicate that ETIM MC (BIM) classification is not ready.
- Under construction: ETIM MC values will not be exported; this status is useful to indicate that ETIM MC (BIM) classification is in progress.
- Test: ETIM MC values will be exported when using the SALES005 export format; this format is useful for uploading to a data pool (2BA/InstallData).
- Ready: ETIM MC values will be exported when using the SALES005 export format; this format is useful to indicate that ETIM MC (BIM) classification is ready.

To set the BIM status of a product:

1. At the Product Classifications screen, select the product and, under Edit, click on *Modify*.
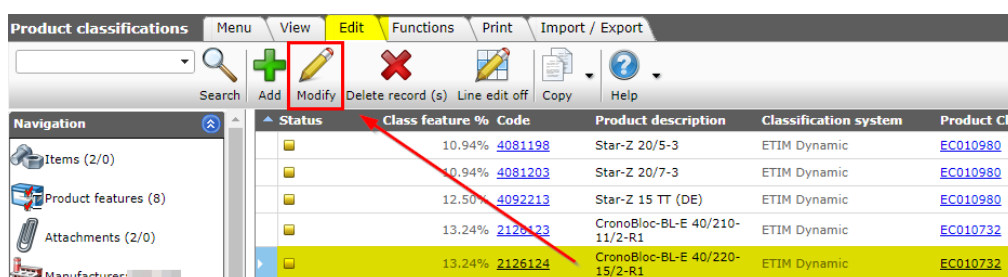
2. In the pop-up window, on the tab *Product*, scroll to *BIM status* to set the status:

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3. Click on *Save*.

Note: To set the BIM status for multiple products, select multiple product and use the function *Manipulate*.

13.4 ETIM MC Viewer

An alternative way to viewing and editing ETIM MC data, is to use the *MC Viewer* which is provided by 2BA and has been integrated into Compano PIM.

13.4.1 Viewing MC-data

To view Modelling Class data:

1. Through the Menu go to *Products > Product Classifications*.
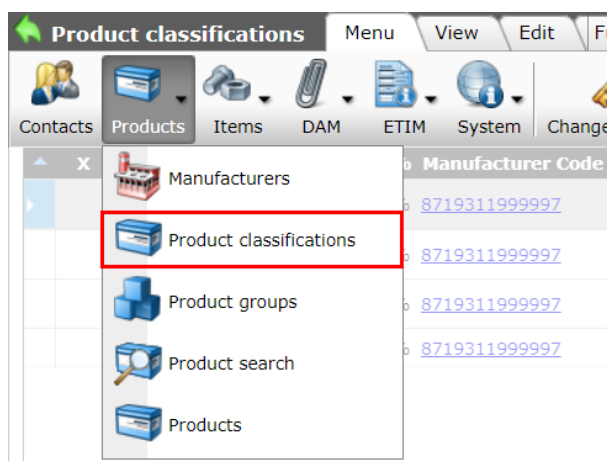
2. Switch to the *Functions* tab, select a product[4], and click on *MC Viewer* button:

3. The MC Viewer will open in a new browser window, where you will be presented with a login dialog. Use your personal 2BA account to login:
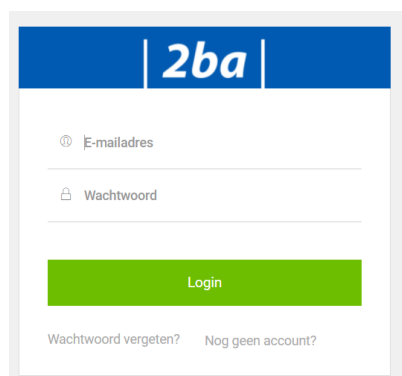
4. After login, you will have access to the MC Viewer application:
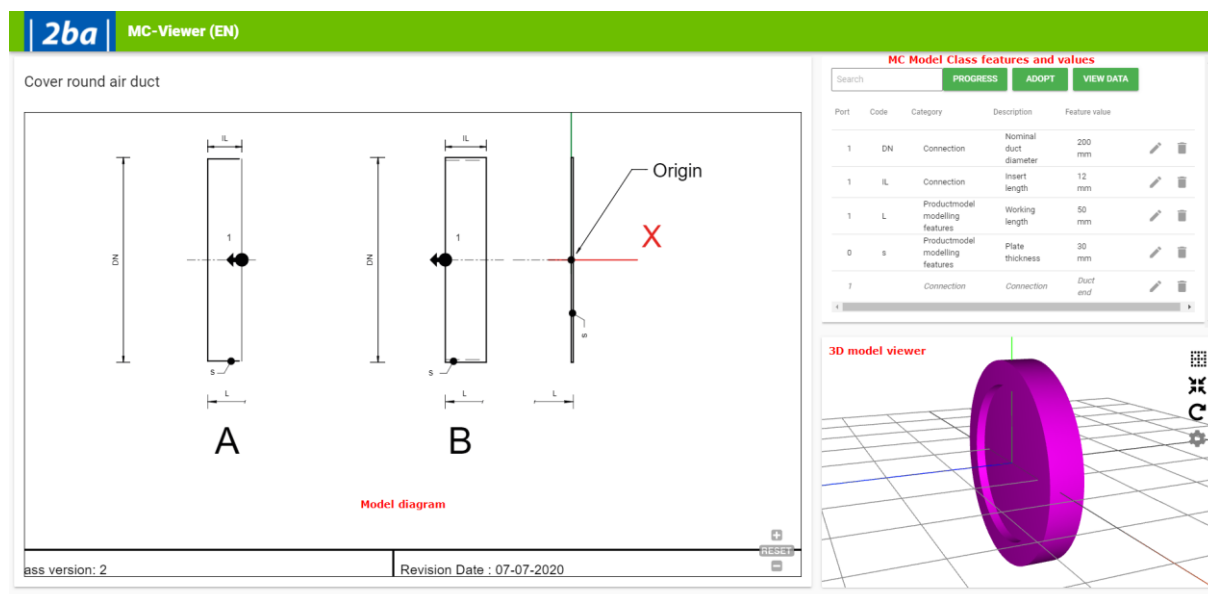
5. <u>Note</u>: MC Class features will be highlighted in the drawing (left column) if you hover your mouse over there values (right column):

---

[4] <u>Note</u>: Only products with a valid *ETIM Model Class* (MC######) can be viewed and edited with the MC Viewer.

Important: Should you wish to leave the MC Viewer *without editing any data*, use the *Back* button of your browser.

13.4.2 Editing MC-data

MC-data ca be edited direct within the MC viewer and subsequently be adopted into COS:

1. Within the right column of the MC Viewer, select a class feature and click on the pencil icon:

2. In the pop-up window, you will be presented with information on the feature and the value can be edited:

3. Once changed, the data can be sent to COS by clicking on the *Adopt* button:

4. On adopting, the MC Viewer will be closed and you will return to the COS-application.

13.4.3   Clearing MC-data

MC-data for a feature can be cleared by using the *garbage can* icon:

1. Within the right column of the MC Viewer, select a class feature and click on the garbage can icon:

2. The value for this feature will be cleared:

13.4.4 Measuring progress

When entering values for class features, you can easily measure your progress by using the *Progress* button. Any features that have not been filled out yet will be highlighted in purple:

13.4.5 Zooming in/out

When you click on any of the features, the MC Viewer will automatically zoom in. Using the buttons in the lower righthand corner of the viewer you can reset the zoom level, or zoom in or out manually:

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Cover round air duct

A B

sion: 2 | Revision Date : 07-07-2020 | US

Zoom level
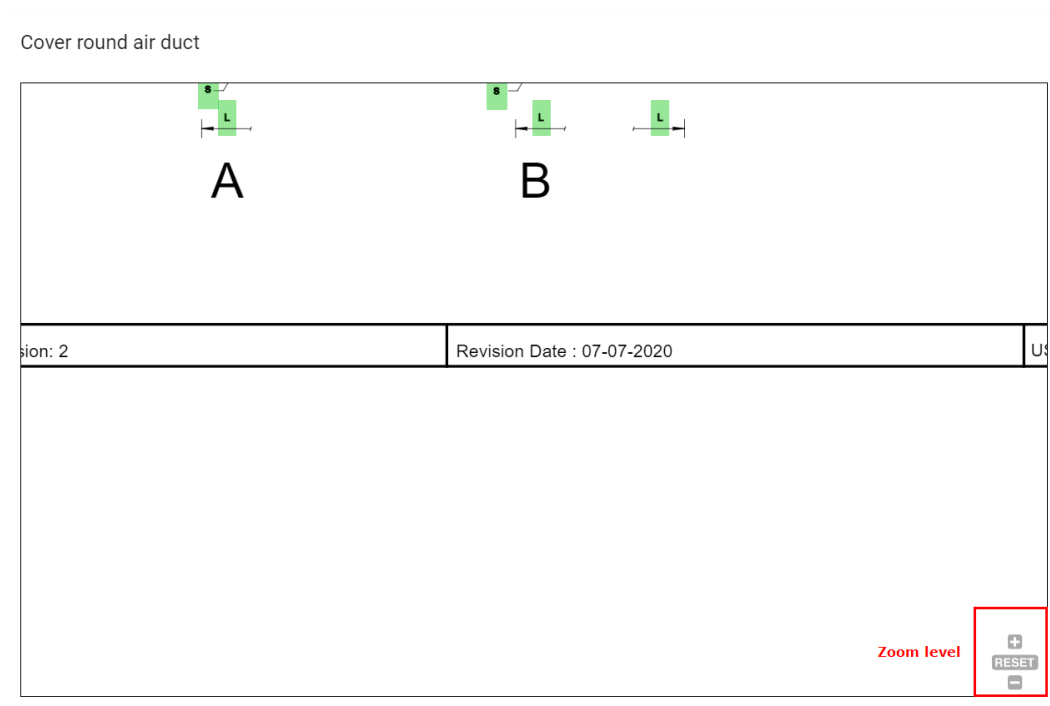
13.4.6 Viewing / downloading / uploading JSON data

Using the *View* button, you can view the data in a JSON format:

1. In the MC Viewer, click on the View button:
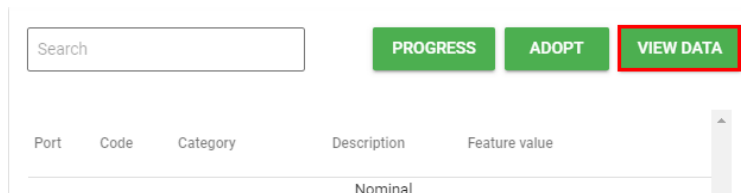
2. In the pop-up window, the MC-data will be shown in a JSON-format:

Data (json)

UPLOAD JSON FILE... DOWNLOAD CLOSE

```
{
  ClassId: "MC000090",
  Features: [
    {
      FeatureId: "EF006112",
      Portcode: 0,
      NumericValue: 30,
      LogicalValue: null,
      RangeLowerValue: null,
      RangeUpperValue: null,
      AlphaNumericValue: null
      _FeatureTemplate: {
        ID: "EF006112",
        Type: "N",
        Description: "Plate thickness",
        UnitOfMeasureID: "EU570448",
        UnitOfMeasureDescription: "Millimetre",
        UnitOfMeasureEpistle: "mm",
        UsageCount: -1,
        UsageMinValue: -1,
        UsageMaxValue: -1,
        Portcode: 0,
        DimensionalDrawingCode: "s",
        UnitCodeVariableAxis: null,
        Values: null,
        Category: {
          Code: "CA000007",
          Description: "Productmodel modelling features",
          OrderNumber: 70
        },
        HashCode: -1632160438,
        irrelevant: false,
        hasdata: true,
```

3. Use the *Download* button to download the JSON-data.
4. Use the *Upload JSON File* button to upload class feature values. <u>Note:</u> Your JSON upload file will need to conform to the JSON standard for MC Classes.
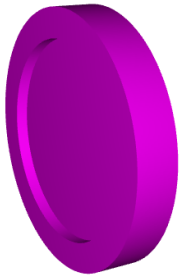
13.4.7 3D Viewer

The 3D viewer presents a 3D representation of the Model Class. Class feature values determine the shape and dimensions of this representation and any changes in these values will be reflected in **the 3D model 'on the fly'.**

For instance:
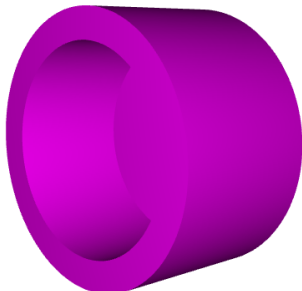
Insert length 12 mm:

Port	Code	Category	Description	Feature value		
1	DN	Connection	Nominal duct diameter	200 mm	✏	🗑
1	IL	Connection	Insert length	12 mm	✏	🗑
1	L	Productmodel modelling features	Working length	50 mm	✏	🗑
0	s	Productmodel modelling features	Plate thickness	30 mm	✏	🗑
1		Connection	Connection	Duct end	✏	🗑

Insert length 120 mm

Port	Code	Category	Description	Feature value		
1	DN	Connection	Nominal duct diameter	200 mm	✏	🗑
1	IL	Connection	Insert length	120 mm	✏	🗑
1	L	Productmodel modelling features	Working length	50 mm	✏	🗑
0	s	Productmodel modelling features	Plate thickness	30 mm	✏	🗑
1		Connection	Connection	Duct end	✏	🗑

13.4.8 Viewer controls

Rotate
Click and hold the left mouse button and then drag your mouse to rotate the 3D model.

Grid
Use the *Grid*-button to display a grid. The grid will rotate with the model:
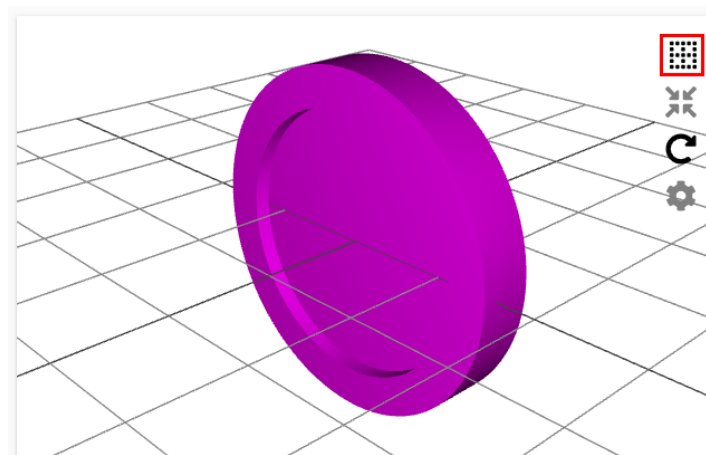
Axis

Use the *Axis*-button to display a X-, Y-, and Z-axis in the viewer:
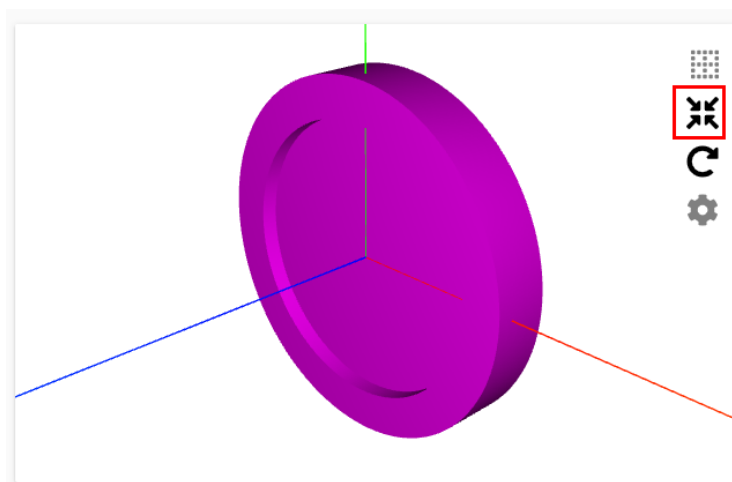
Reset orientation
Use the *Reset orientation*-button to reset the viewer to its original orientation:
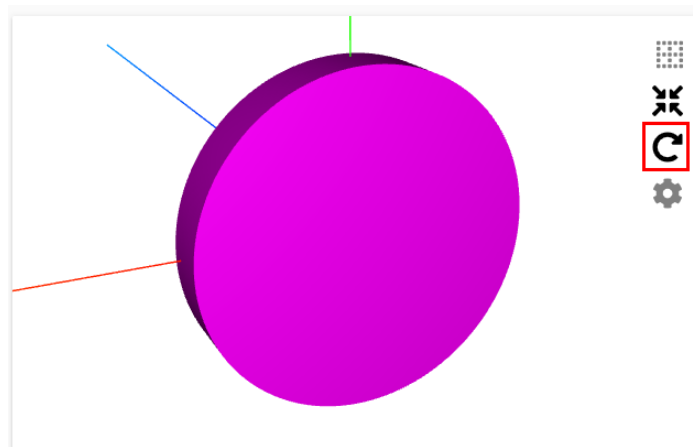
Settings
Use the *Settings*-button to change the *Object quality* of the viewer:

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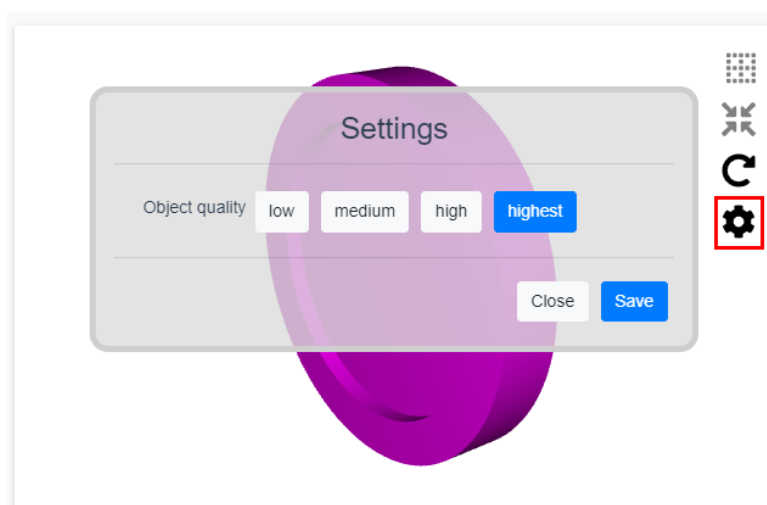
14 Quality of data

Data pools (for instance 2BA or InstallData), wholesalers, fitters, mechanics, or a purchasing consortium all demand up-to-date and complete information. To this end, Compano software offers the option to check the quality of your data.

Important: Should you classify your products using the ETIM Dynamic system, please remember that this is a dynamic system which is updated weekly. Compano will notify you via e-mail in case of any changes in ETIM which affect your data. For more information, see paragraph: _14.3 ETIM Mutation report._

14.1 Data requirements 2BA and InstallData

Data requirements for data pools 2BA and InstallData can be found here:

2BA
https://www.2ba.nl/documentatie/stappenplan/databehoefte > Data requirements (PDF)

InstallData
https://www.installdata.be/en/documentation/steps-for-data-delivery/data-requirements

These requirements indicate which data is deemed mandatory, highly desirable, desirable or nice-to-have.

14.2 Quality check classification data

Compano PIM software offers several options to check your classification data:

14.2.1 Classification status

The classification status of your products is indicated with a color code on the _Product Classifications_ screen:

1. Through the Menu go to _Products > Product Classifications_:
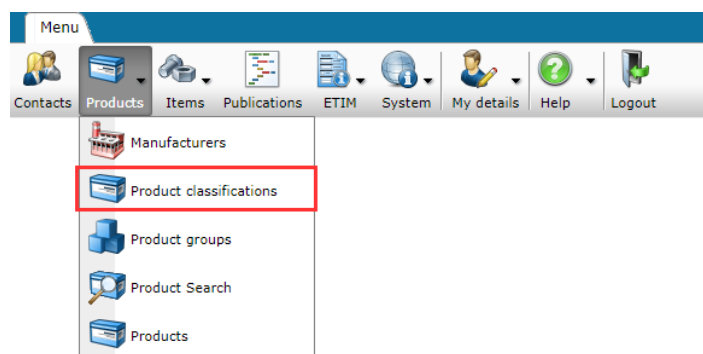
2. On the View tab, check the classification status of your products:

Red: An ETIM product class has *not* been assigned to the product.

Orange: An ETIM product class has been assigned to the product, however no product class features have been filled out.

Yellow: Product class features have been filled out, however the classification is not complete yet. The *class feature percentage* will give an indication as to how much work still needs to be done.

Green: A product with the status *Classified*. The classification feature percentage is either 100%, which means all features have been filled out, ór the product has been *manually* set to this status; see paragraph: *9.2.1 Set classification status*.

Blue: All mandatory product class features have been filled out. Note: By default, *no* ETIM features are mandatory This status is only possible if you manually set mandatory features. Should you wish to make use of mandatory ETIM features, please contact sales@compano.com.

14.2.2   Export classification data

To gain insight into the quality of your classification data, Compano PIM offers the option to export a classification report, per manufacturer, per ETIM product class, or per manufacturer for *all* ETIM product classes in use:
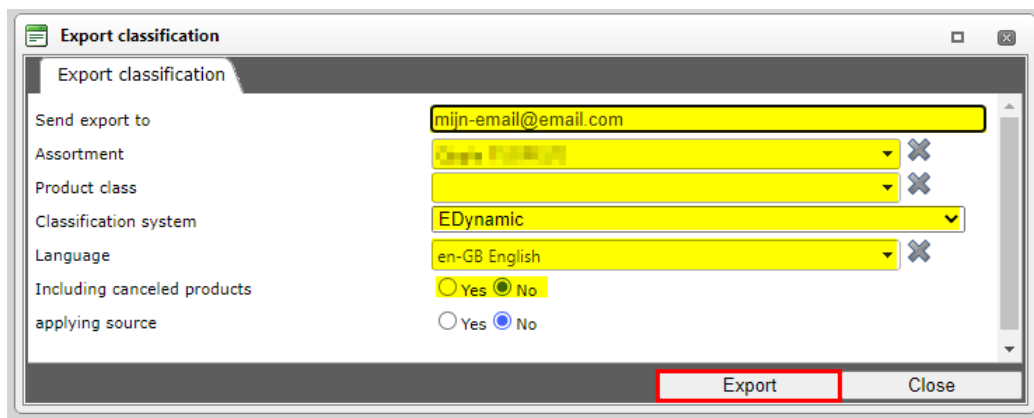
1. Through the Menu go to *Products > Manufacturers*.
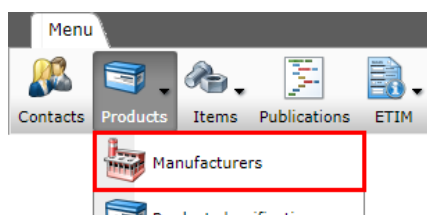
2. Next, select a manufacturer and go to the *Import/Export* tab
3. Click on the *Export classification* button:
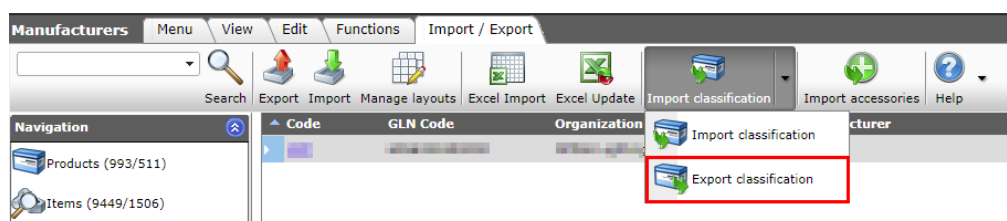
4. In the pop-up window, set the specifications for the classification export:

a. Send export to: Enter an email address.
b. Assortment: Select the assortment on which you want to run the export
c. Product class (optional): Select one product class, or leave empty if you need a classification report of *all* classes in use.
d. Classification system: Select the classification system for which you need the report. Default options are: ETIM Dynamic (EDynamic), ETIM 6, ETIM 7 and OKO. <u>NB</u>: should you use the multi-classification module, other classification systems might be available.
e. Language (optional): Should you use the multi-language module, you will have the option to export the classification data in several languages. <u>NB</u>: Without this option, you will only be able to export in the default language of your application.
f. Including canceled products: Set this option to *Yes* if you need to report on the classification including *cancelled (archived)* products.
g. Applying source: Set this option to *Yes* if you need to export (extra) classification features which have been added to the standard system. You will be presented with three options:
    i. User: Choose this option if you have added your own custom product class features.
    ii. Publicist: Choose this option if you have added custom product class features, but need to *only* export classification data as defined by the original standard.
    iii. Third party: Choose this option if extra product classes or features have been added to your classification system by a third party.
5. Click on *Export*. The classification export will now be generated. Depending on the number of classes that are in use within your data, this can take a while. The export report will be sent as a compressed file (ZIP) to the email address that you provided.

14.2.3 Classification report

The report resulting from the *Export classification* function will contain multiple Excel worksheets:

Product Classes worksheet
The worksheet named *Product Classes* will show a summary of your classification data, including *Number of product classes in use* and *Expired values*.

	A	B	C	D	E	F	G
1	Number of product classes: 17	Total products	Completely classified products	Filled values	To be filled values	Expired values	Total number of fields
2	EDynamic-EC000062 - Luminaire for streets and places	11	0	522	545	0	1067
3	EDynamic-EC000109 - Batten luminaire	1	0	48	48	2	98
4	EDynamic-EC000293 - Support profile light-line system	4	4	60	28	0	88
5	EDynamic-EC000412 - Lux meter	2	2	10	2	0	12
6	EDynamic-EC000533 - Lighting control system component	5	0	17	13	0	30
7	EDynamic-EC000986 - Electrical unit for light-line system	18	0	885	735	0	1620
8	EDynamic-EC001273 - Soldering bath	1	0	0	9	0	9
9	EDynamic-EC001716 - High bay luminaire	80	0	4245	3535	780	8560
10	EDynamic-EC001743 - Pendant luminaire	4	0	236	114	94	444
11	EDynamic-EC001744 - Downlight/spot/floodlight	242	0	11608	19018	3012	33638
12	EDynamic-EC001959 - LED-lamp/Multi-LED	57	0	1061	1724	293	3078
13	EDynamic-EC002556 - Electrical accessories for luminaires	11	11	24	31	0	55
14	EDynamic-EC002557 - Mechanical accessories/spare parts for luminaires	77	72	471	376	0	847
15	EDynamic-EC002892 - Ceiling-/wall luminaire	255	6	12665	15120	1285	29070
16	EDynamic-EC010013 - Bathroom vanity	5	0	17	153	0	170
17	EDynamic-EC011022 - Panel radiator	5	0	25	265	0	290
18	EDynamic-EC011285 - Heat recovery unit for residential construction	7	0	1	300	0	301
19							
20	Total	785	95	31895	42016	5466	79377
21	% of total		12,1%	40,2%	52,9%	6,9%	

Important: Check the column *Expired values* to see if for any classes your data contains expired values. You *will* need to address these classes and correct your data!

Tip: Check any classes with expired values on the ETIM website by comparing the current and previous versions of the class:

Subsequent worksheets
All subsequent worksheets each list the classification data of *one* product class:

Optionally check the worksheet for any missing data.

14.3 ETIM Mutation report

As mentioned earlier, the ETIM classification system is a *dynamic* system, which means it will be updated weekly. Updates include new product classes as well as changes in Class Features and Values.

To keep up-to-date with changes in the ETIM Dynamic standard, Compano *strongly recommends* to *weekly* generate an ETIM Mutation Report.

Note: This reports needs to be generated manually. For instructions, see paragraph <u>*14.3.2 Manually generating a mutation report*</u>.

14.3.1 Set e-mail address

For PIM Basic and other shared PIM-applications, you will need to set the e-mail address for the ETIM mutation report:

1. Through the Menu, go to My *Details > Company settings*:
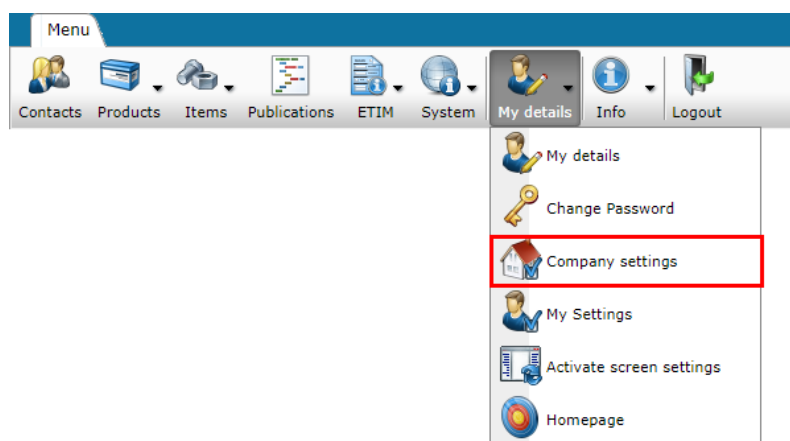
2. On the Item Manager tab:
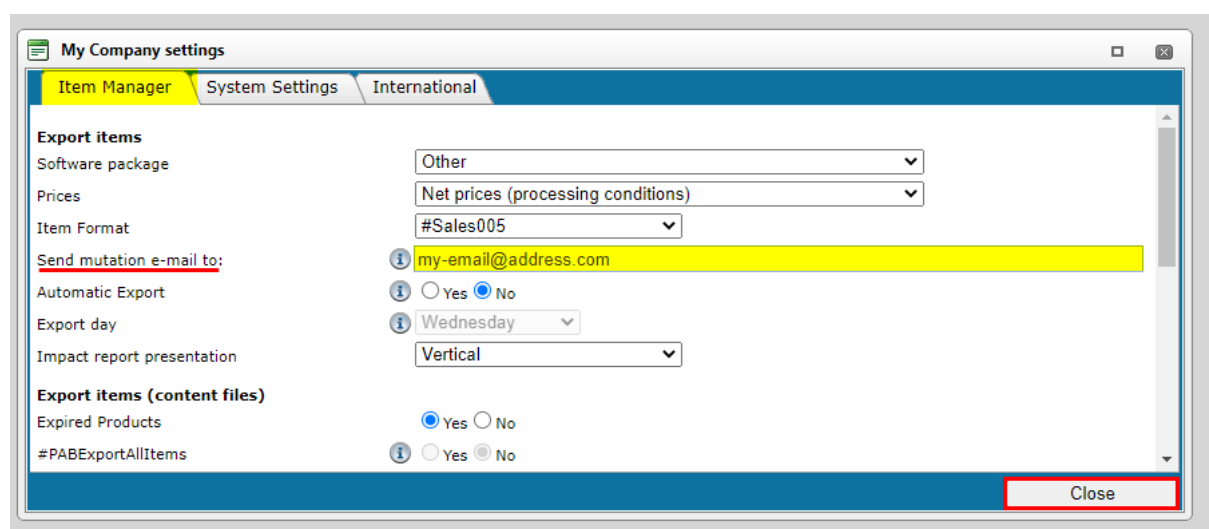
a. Send mutation e-mail to: Enter your e-mail address; the ETIM mutation report will be send to this address. Note: **Should you use Outlook's focused mail settings, the** e-mail will likely be in the *Other* inbox.

3. Click on the *Close* button.

14.3.2 Manually generating a mutation report

An ETIM mutation report needs to be *manually* generated:

To manually generate a mutation report:

1. Through the Menu go to *ETIM > Product Classes*:
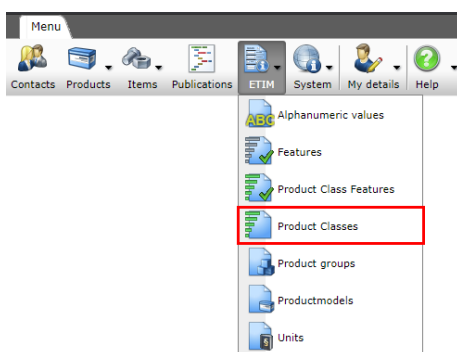
2. Under *Functions*, click on *ICS mail impact analysis*:
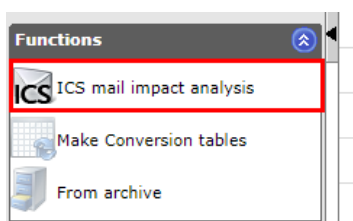
3. In the pop-up screen, select a past date for *Changes since*. <u>Note:</u> Always select a Sunday, as ETIM changes are being made on a Sunday.
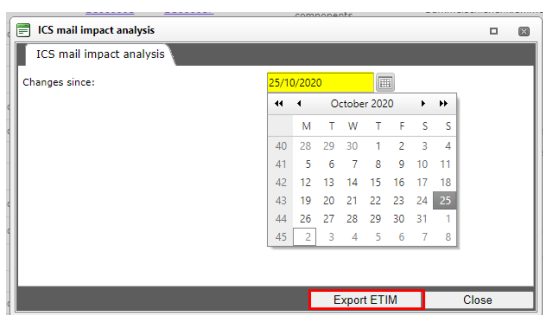
4. De mutation report will be sent to the *main user*'s email address, however other users can download the report from the log files.

14.3.3 Reading a mutation report

A mutation report is sent as an Excel file, containing multiple worksheets[5]:

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[5] The ETIM Mutation report is only available in Dutch.

1. Summary worksheet

1. Summary (Samenvatting): Overview of all mutations, including all new product classes.

2. New Product Classes worksheet

2. New (Nieuw): An overview of *all* new product classes. Check this overview to see if any new classes are relevant to your products.

3. ETIM mutations for Product Classes in use

3. Mutations (Mutations): An overview of all mutations pertaining to product classes that *are in use* in your application. This means only changes in product classes that have been assigned to your products will be listed. Note: Changes must be read hierarchically, from top to bottom:

Example (see figure 3 above)
- Row 3: There are changes in class EC000109 Batten luminaire
- Row 4: Within class EC000109, the class feature EF000018 Dimmable has been changed
- Rows 5-8: To class feature CF000018, four class values have been added: EV000053 On-Off, EV000054 DALI, EV000074 Triac and EV000076 BLE.

Tip: Use the ETIM website to check any changed classes to better understand which changes have been made by comparing the current and previous versions of the class.

14.3.4 Downloading a mutation report

All users can download mutation reports from the log files :

1. Through the Menu go to *System > Logs*:
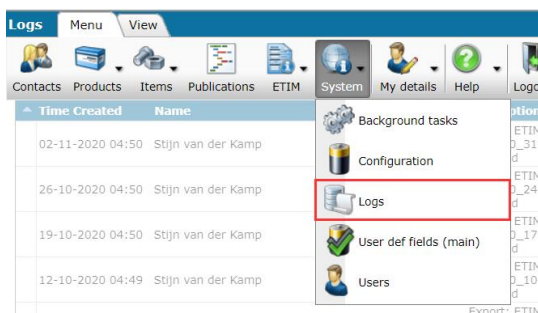
2. Optional: In the Search Box use the term 'mutatie' to find al ETIM mutation reports:

3. Click on the link to download the mutation report (Excel).

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15 Appendix A: How to find the correct ETIM product class

There are several methods for finding the correct product class:

- Search for ETIM Product Classes, using the Compano software
- Lookup the ETIM Product Class and features, using the ETIM International website
- Check for alternate classes in the ETIM Product Group
- Check the ETIM Product Class of a similar product of a competitor, using the 2BA website

> Tip: When you find the correct ETIM class, copy the EC-code of the class to your computer's clipboard, using **CTRL-C**.

15.1 Search product classes (Compano)

To search for ETIM product classes using the Compano software, first open up a new browser tab. The easiest way to do this, is to *duplicate* your current browser tab:

1. Open **your browser's** context menu by alt-clicking (usually your right mouse button) on the active browser tab:
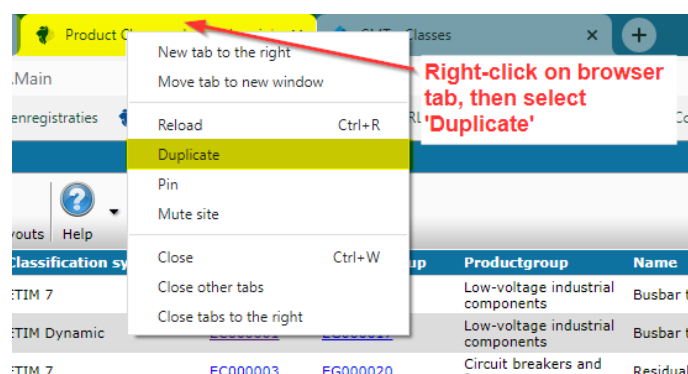
2. Next, select the option *Duplicate* from the context menu. This will open a new browser tab, while keeping you logged in to the Compano application.

In the new browser tab, use the *Classification* button to look for (ETIM) product classes:

1. Through the menu, go to *Classification > Product Classes*:
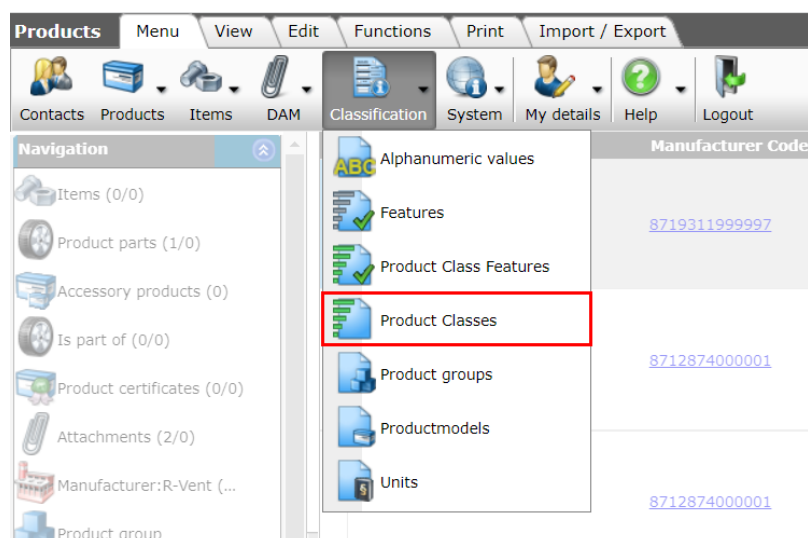
2. In the next screen, you will be presented with a list of all ETIM Product Classes:

Note: Depending on the type of application, the overview will show *ETIM Dynamic* and/or *ETIM 8* and/or *ETIM 7* classes. Use the Filter button, to filter out the classification system that you will be using:

3. Next, type search terms into the Search Box to start looking for the correct class for your product. Use keywords from the description of the product, or general terms[6] that describe

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[6] For some classes, commonly used alternative or synonymous keywords will also find classes.

your product, such as *Boiler, Bolt, Air-conditioning*, etc. Note that you might have to try several options before you will find the right class:
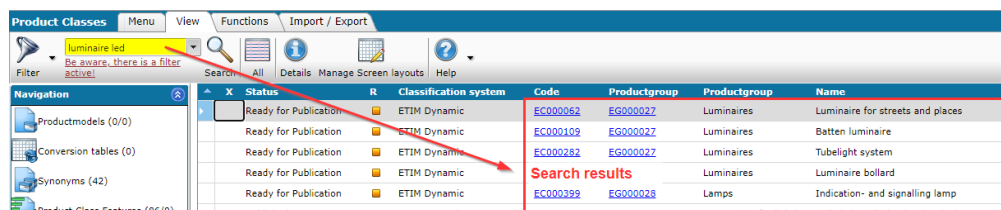
4. You can always check a class by clicking on its *EC-code* as this will redirect you to *the ETIM International* website, where you can look up the corresponding class features (see next paragraph).

15.2 Lookup product class and features (ETIM International)

Any ETIM product class and its features can be looked up, using the *ETIM International* website. Click on any *EC-code* in the Compano software, or go to the ETIM International website:
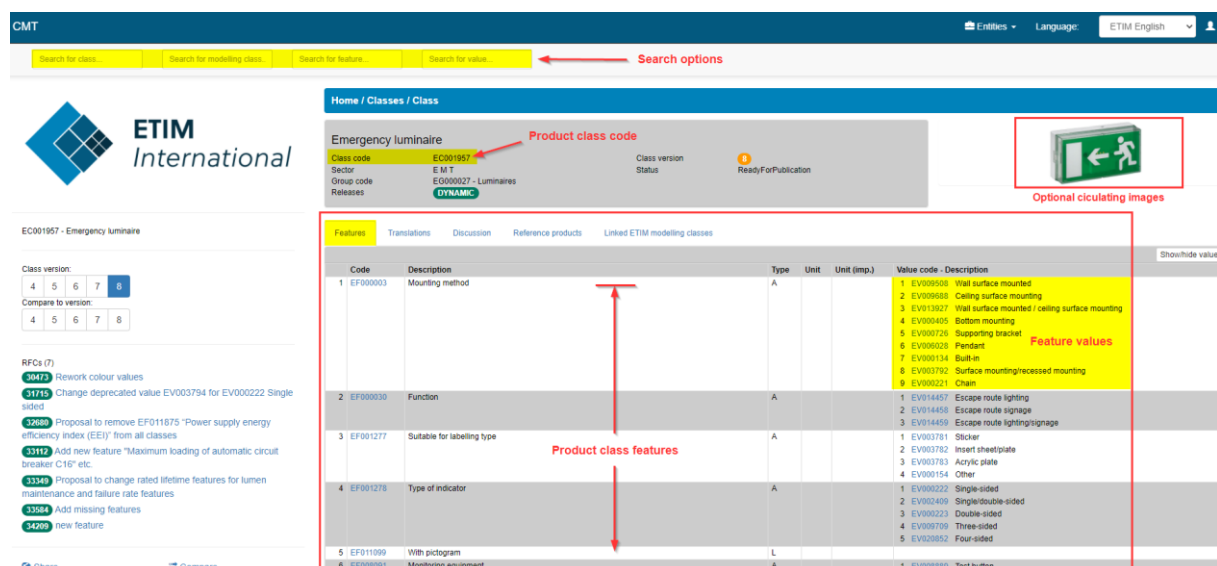
To find the correct class, compare *Product Class Features* and *Feature Values* against the technical specifications of your product. Also check any optional circulating images (top right) against the appearance of your product.

> *Tip*: When you find the correct ETIM class, *copy the EC-code* of the class to your computer's clipboard, using **CTRL-C**.

<u>Note</u>: Names of product classes, features and values can be translated using the *language selector* in the top-right corner of the ETIM website:
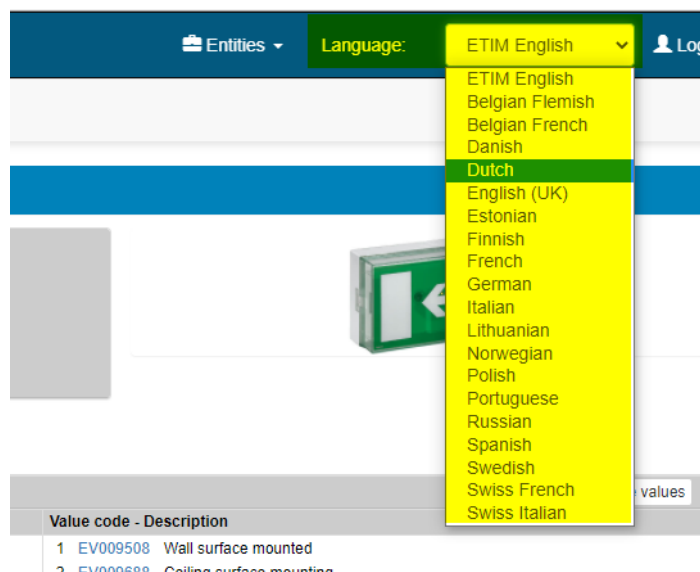
15.3 Check for alternate product classes

ETIM Product Classes are grouped together with similar classes. If you have trouble finding the correct class, try finding any alternatives by checking available classes in the same *Product Group*:

1. From the Product Classes screen, click on the *Product Group code* of the class you found but which not correct:
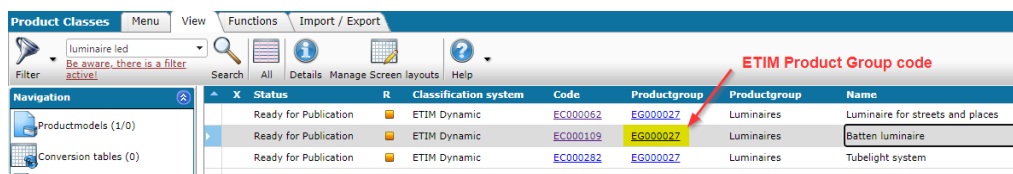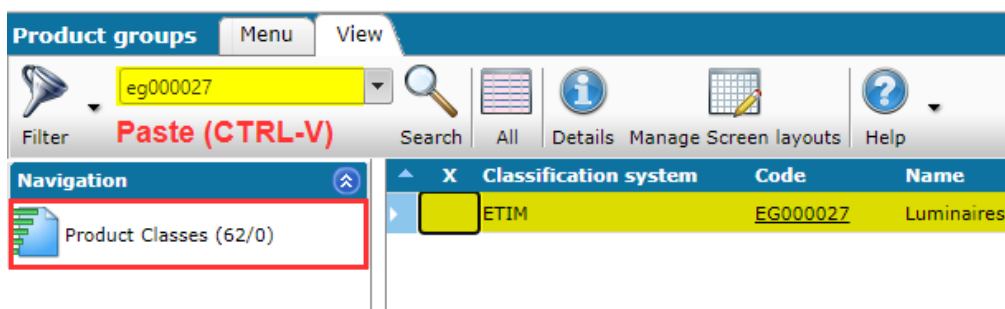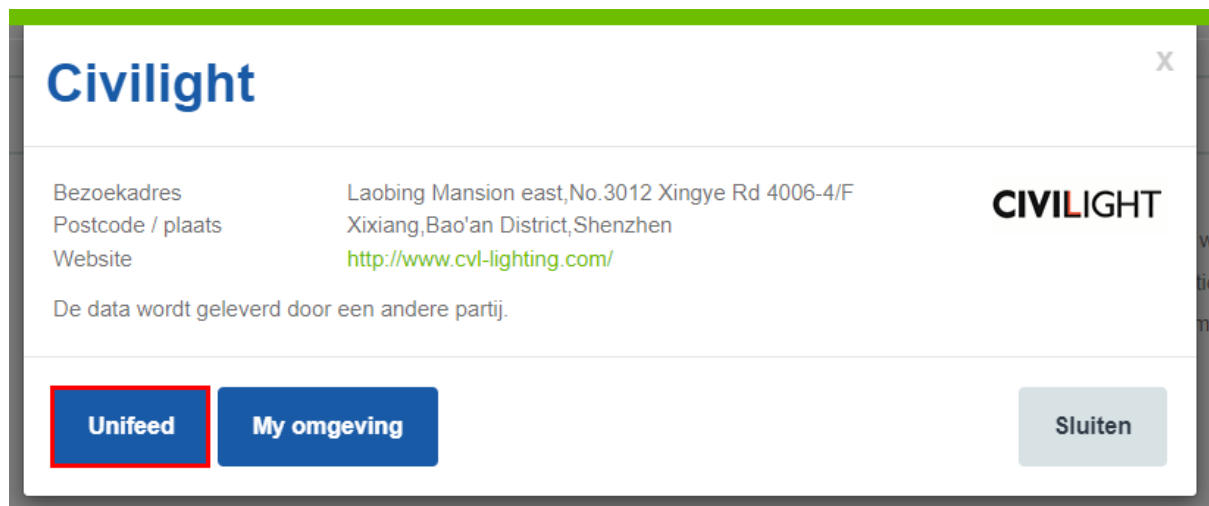

2. In the pop-up window, double-click the *EG-code* and copy (**CTRL – C**):
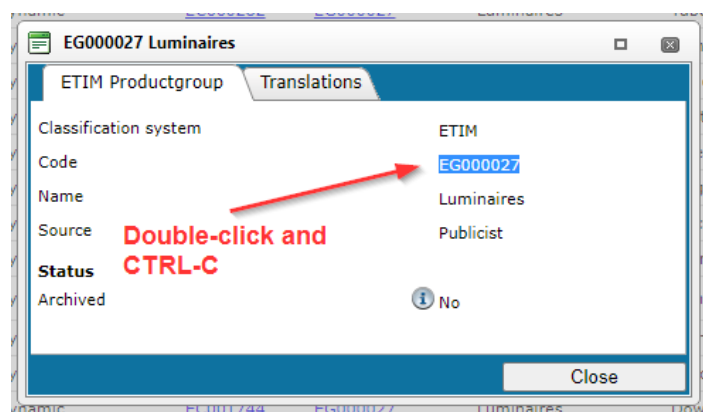
3. Through the Menu, go to *ETIM > Product Groups*.
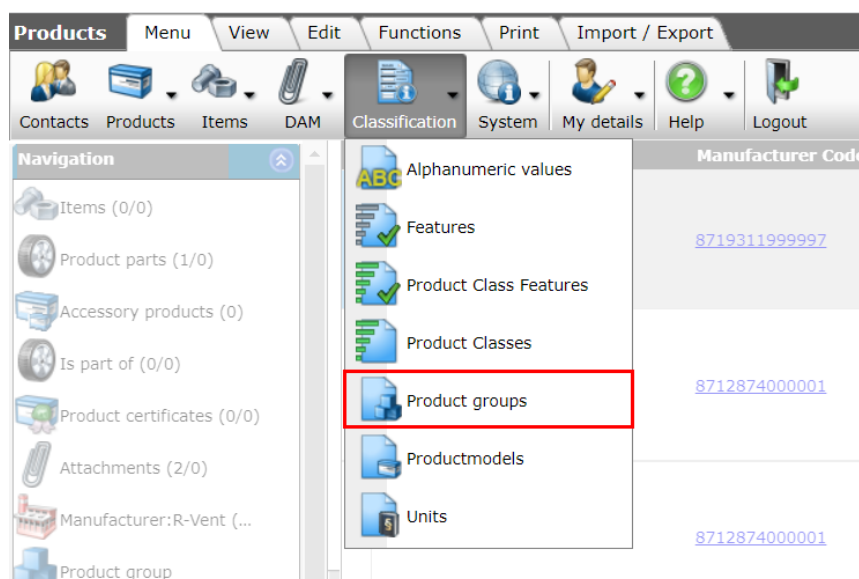
4. Paste (**CTRL-V**) the *EG-code* into the Search Box to find the *Product Group*:

5. From the results, select the product group and under *Navigation* click on *Product Classes*. This will show a list of *all alternative classes* in the product group:

6. Check each likely Product Class to see if it better fits your product.

> Tip: When you find the correct ETIM class, copy the EC-code of the class to your computer's clipboard, using **CTRL-C**.

15.4 Check competitive product (2BA)

An alternative option for finding the correct Product Class, is to check a *similar product of a competitor*. The product class of the competitive product can be found using the 2BA website:

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1. Go to www.2ba.nl and select the page *Deelnemers > Fabrikanten* and search for a competitor, for instance:

2. Click on the logo of your competitor and, in the pop-up window, click on *Unifeed*:

3. Search for the competitive product:
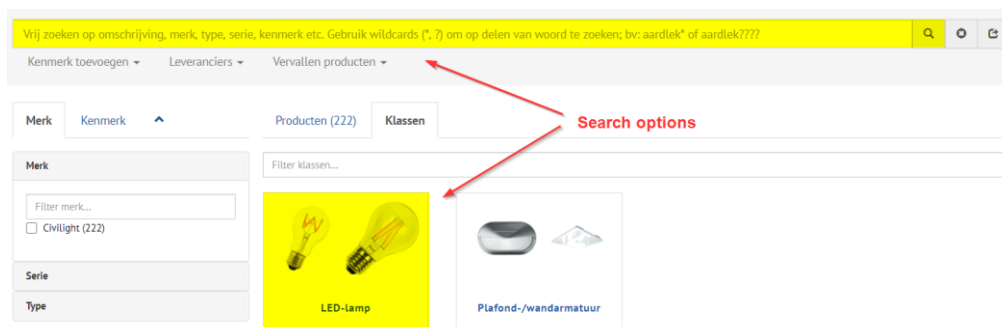
4. Select the competitive product by clicking on it:
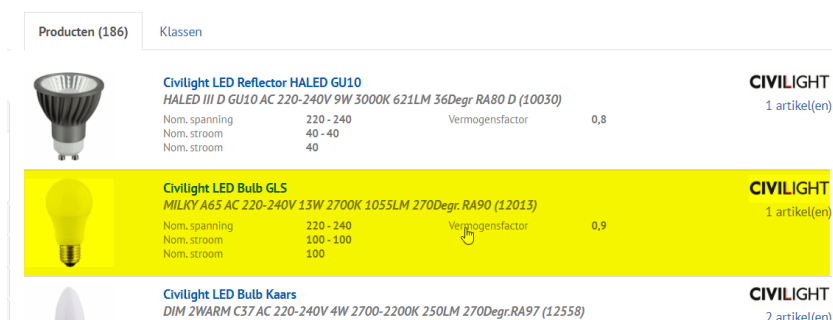
5. In the left-hand column, click on the product class description of the product:

6. This will take you to the corresponding Product Class on the ETIM website, where you can check if this is the correct class for your product.

Tip: When you find the correct ETIM class, copy the EC-code of the class to your computer's clipboard, using CTRL‑C.