

# Mapping User-defined Fields COS PIM

File	COS_PIM_Mapping_User_Defined_Fields.docx
COS-version	L03
Revision & date	1.0, 02-09-2022

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# 1 Introduction

This manual describes how to implement the option to map user-defined fields to features and values of a classification system, within Compano Online Software.

The values of user-defined fields can be mapped to ETIM values. This is a good solution for scenarios where you need to add more technical product information to COS than the current ETIM-standard can handle, or when you prefer to import technical data directly from your ERP and map this to corresponding ETIM-feature Values.

#### Example

A product is available in the colours *Light Grey* and *Dark Grey*, however for the corresponding ETIM-feature *Material Colour* only the option *Grey* is available.

#### Solution

A user-defined field *Colour* is created with both colour values *Light Grey* and *Dark Grey*. Both values are then mapped to the ETIM-feature *Material Colour* value *Grey*.

Both colours are now 'correctly' mapped to ETIM and will be uploaded as *Grey* to a data pool, while a data feed to your product website can still distinguish between *Light Grey* and *Dark Grey* products.

### 1.1 Concepts

COS PIM	Compano Online Software Product Information Management system
ERP	Enterprise Resource Planning software, often also used for storing and managing product information. Examples of ERP software are, for instance, SAP, Infor M3, Microsoft Dynamics
Classification system	System of standards used for classification of product data, for instance <i>ETIM, Q-model, EZ-base</i> .
ETIM	International standard for classification of product data for the construction and engineering sector
Dedicated application	A dedicated COS application (i.e. not shared with others) on a shared or dedicated server
User-defined field (UDF)	Extra, non-standard data field which can be defined and implemented by users of COS. Sometimes also called: <i>free field</i>
Entity	Data object in COS. For instance: Product, Item, Relation, Manufacturer, etc.

# 1.2 Requirements

User-defined fields are only available in a *dedicated COS application*. For more information, please contact <u>sales@compano.com</u>.

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# 2 Creating and mapping user-defined fields

This section describes how values in user-defined fields can be *mapped* to ETIM-feature values.

<u>Note</u>: User-defined fields can be mapped to *more than one* ETIM-feature. This way various ETIM-features can share one and the same value of a user-defined field.

# 2.1 Step 1: Creating a user-defined field

This step briefly describes how to create relevant types of user-defined fields. Of course, you could also map user-defined fields already present in your application.

Note: Detailed information on creating user-defined fields can be found in the Manual Userdefined Fields on the <u>Compano Help website</u>.

To create a user defined field for mapping:

1. Through the main *Menu* go to *System > User-defined fields (main)*.



2. On the next screen, click on Products.

<u>Important</u>: For mapping of technical product data to ETIM-features, the user-defined field needs to be created at the *Product* level:

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3. In the next screen, under *Edit*, click on +*Add* to add a new user-defined field:

🔦 User def fields (sub) 📔	Menu View Edit Functions I	mport / Export > User def f	ields type:Products
⋟.	- 🔍 📃 🕕 💭 . 🤇	3.	
Filter	Search All Details OPPLE H	elp	
Navigation	😮 🔺 V Name	т	Label
	- institute	Terror Ba	The factor of the
Edit	۵	100	100 B 100
Add	1	10.0	
	2 Mounting/installation	Multiple choice	Mounting/installation

4. In the pop-up screen, you can now select which *Type* of user-defined field you wish to create:

Edit - Length of connection 1 (I1)		
User def field Tooltip Memo Trans	slations	
Name	UDF_LengthOfConnection1	<b>^</b>
Normalized name	LengthOfConnection1	
Sequence	105	
Туре	Decimal	
Label	Length of connection 1 (I1)	
Header	I1 Quite Automatic	
Field chapter	05. dimensional properties	· ×
Style		
Number notation	Standard 🗸	
Unit	MMT Millimeter	• ×
Imperial	INH Inch	• ×
Special		
Default value		
Required	⊖ Yes ● No	
In quick filter	🔾 Yes 🖲 No	
Calculated	🔿 Yes 💿 No	
Summable	○ Yes   No	
Is copy allowed	● Yes ○ No	_
An bile intereform		· · · ·
Edit the pre	evious on the lext one Check expression Save record	Cancel

Fill out the following fields:

a. Name: Type a name for the user-defined field. It is good practise to add the prefix *UDF*\_ to the name of the field. This way user-defined fields are easily recognized and not confused with other, standard data fields.

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- b. Sequence (optional): User-defined fields will be shown on a separate tab with each product (or other entity). The order in which the fields are shown can be controlled by typing a sequence number.
- c. Type: Select the *Type* of user-defined field you wish to create.

<u>Important</u>: Should you need to map the user-defined field to an ETIM -feature, then *both should have corresponding data types*:

ETIM-feature type <sup>1</sup>	Typical UDF type to use	Other mapping options
A – alphanumeric = list of possible	Single choice	Multiple choice (needs to be
values (e.g. red, green, long, short,		mapped to exactly 1 choice)
)		
L – logic = yes or no questions (also	Yes or No	Multiple choice (needs to be
known as Boolean; "true" or "false")		mapped to exactly 1 choice) <sup>2</sup>
N – numeric = one numeric value	Decimal	<ul> <li>Integer (read-only)</li> </ul>
		Single choice (double
		value)
		Multiple choice (double
		value)
		Standards table
R – range = two numeric values that	Range	None
limit a range of values		
C - coordinate = (x, y, z)	Note: not available in Compano	-
coordinates of a position or of a	software.	
direction (Modelling class)		
M – matrix = table ('if X then Y'),	Matrix	None
which serves to exchange multiple		
pairs of related values, for example		
to build a graph		

- d. Label: Type a Label name for the field; this label will be shown as a description of the user-defined field on, for instance, the user-defined fields tab.
- e. Head: Type a Header name for the field; this header will be shown as a description of the user-defined field in data overviews.
- f. Other fields: Other field options are depended on the type of user-defined field created; in principle you can ignore these fields when creating UFDs for mapping.

	Code	Description	Туре	Unit
1	EF001391	Number of poles	N	
2	EF000228	Rated voltage	N	V
3	EF000227	Rated current	Ν	А

<sup>2</sup> In some cases a list of Logic Fields, for instance a set of Quality Marks, could be mapped to only *one* Multiple Choice UDF; each of the Quality Marks are then linked to one of the UDF options.

<sup>&</sup>lt;sup>1</sup> The *Type* of an ETIM-feature can be found through the ETIM website. Simply search for the ETIM class that contains the feature, then consult the feature table for the correct type:

### 2.1.1 UDF Type: Special options

Some user-defined field Types have special options:

- Single / Multiple choice: For a UDF of the type *Single / Multiple Choice*, the different *Field Options* need to be added. For more information, see <u>2.3 Step 3: Create Field Options</u>.
- Decimal and Range: UDFs of the type *Decimal* or *Range* can contain both a *Metrical* and *Imperial Unit<sup>3</sup>*. Please, specify which unit of measurement is used, for instance millimeter (MMT):

📄 Wijzigen				
User def field Tooltip Translations				
Name	Length			
Sequence				
Туре	Decimal 🔹			
Label				
Head				
Format				
Number Notation	Standard	•		
Unit	Meter		- 🗶	
Imperal	Foot		- 🗶	
Special				
Default value				
Required	🔍 Yes 🖲 No			
In quick filter	O Yes 🖲 No			-
		Save	Cancel	

- Non-default unit: If the UDF concerns unit that is not present in COS by default, for instance *Watt / m<sup>2</sup> Kelvin*, then this unit needs to be added manually:
  - 1. Go to Menu > System > Configuration > Units
  - 2. Under *Edit*, click on +Add.
  - 3. In the pop-up window:

📄 Add - New unit			
Unit Translations			
Туре	Other	~	
System	Metric	✓	
Code	🕕 WM2K		
Abbreviation			
Description	Watt per square n	neters Kelvin	
Plural description	Watts per square	meters Kelvin	
ICS Unit	Watt per vierkante	meter Kelvin	- 🗶
Factors			
Factor	1.0000000000000000000000000000000000000	00	
	Add next record	Save record	Cancel

- a. Type: Select the type of unit
- b. System: Select either the Metric or Imperial system
- c. Description: Enter a description for the unit
- d. Plural description: Enter a plural description for the unit

<sup>&</sup>lt;sup>3</sup> If not relevant, simply leave the Imperial Unit field empty.

e. ICS Unit: Select the appropriate ICS Unit.

4. Click on *Save*.

# 2.2 Step 2: Mapping ETIM-features to user-defined fields

Now that the user-defined field has been created, it can be mapped to one (or more) ETIM-features.

#### Example

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The mapping will be explained using the following example:

Map ETIM-feature **EF020151** to user-defined field **LengthOfConnection1** To map an ETIM-feature to a user-defined field:

1. Through the Menu, go to *Classification > Product Classes:* 



- 2. As you will only want to map to Product Class Features that *are in use for your products*, set a Filter to:
  - a. Classification system: Set this to the relevant Classification system. Usually, this will be *ETIM Dynamic*, however you will have the option to map to other classification systems if these have been implemented in your COS, for instance: *ETIM 8, Qmodel, EZ-base*, etc.
  - b. Product classes: Set this to has product classes.

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Classification system       = value	ETIM Product Class Tr	anslations			_
Sroup <ul> <li>= value</li> <li>start</li> <li>start</li> <li>start</li> <li>start</li> <li>start</li> <li>= value</li> <li>Building</li> <li>HVAC &amp; Sanitary</li> <li>Electric</li> <li>Shipbuilding</li> <li>HVAC &amp; Sanitary</li> <li>Electric</li> <li>Shipbuilding</li> <li>Publication</li> <li>Ready for publication</li> <li>Pending</li> <li>Published</li> </ul> Release status <ul> <li>None</li> <li>Running out</li> <li>Run in</li> <li>Modified</li> </ul> Source <ul> <li>value</li> <li>User</li> <li>Third party</li> </ul> Product classes              has product classes <ul> <li>does not have product classes             <li>all</li> </li></ul>	lassification system	= value		□ EZ-base □ GPC □ Q Model □ Not specified □ ŎKO □ EPREL	
Code       start         Name       start         Sector       = value         = value       Defined         Belactric       Shipbuilding         Status       = value         Defined       Ready for publication         Pending       Published         Running out       Running out         Cource       = value         Product classes       has product classes         does not have product classes       all	Group	i = value	~		
tame       start       Image: start         ector       = value       Building       HVAC & Sanitary         Electric       Shipbuilding         tatus       = value       Defined       Ready for publication         Pending       Published       Published         elease status       = value       None       Running out         @Run in       @ Modified         ource       = value       User       Third party         Publicist       Has product classes       does not have product classes       all	ode	start	✓		
ector       = value       Building       HVAC & Sanitary         Electric       Shipbuilding         tatus       = value       Defined       Ready for publication         Pending       Published       Published         elease status       = value       None       Running out         ource       = value       User       Third party         roduct classes       has product classes       does not have product classes         all       all       all	ame	start	<b>v</b>		
tatus = value   Pending Published   Pending Published   Publication Published   Publication Published   Publication Publication   Image: State of the state o	ector	= value	✓ Building Electric	HVAC & Sanitary	
elease status = value     None     Image: Constraint of the state of the s	tatus	= value	✓ □ Defined □ Pending	Ready for publication	
ource     = value     User     Third party       roduct classes     has product class     Third party       rchive moment     has product classes     does not have product classes	elease status	= value	✓ None	Running out     B Modified	
roduct classes has product clas ✓ rchive moment does not have product classes all	ource	= value	✓ User □Publicist	Third party	
rchive moment has product classes does not have product classes all	roduct classes	has product	clas: 🗸		
	rchive moment	has product does not hav all	classes ve product classes		

3. Next, in the resulting list, search for the class that contains the feature to which you wish to map your user-defined field, for instance *Fitting with 6 connections*.



- 4. Under *Navigation* in the left side panel, click on *Product Class Features*.
- 5. On the Product Class Features screen, *Search* for the ETIM-feature to which you need to map the user-defined field, for example **EF020151**:, and click under Edit click on *Modify*.

🔦 Product Class Features	Menu	View	Edit Functions	Import / Export	> Produc	t Class:ETIM Dynamic	EC010	
Filter ef020151 <u>Be aware, there is a filter</u> <u>active!</u>	✓ Q Searce	ch All	Details UDF screen	lay-out Help	,			
Navigation 📀	<u> </u>	K R	Product Class	Sequence no	) Feature	Feature	Entity	
Attribute Values (0/0)			ETIM Dynamic EC010367 Fitting with 6 connections	h 🥕	5 <u>EF020151</u>	Length of connect	ion 1	
Products with value (0/0)								
Products without value (4/0)								
Product Class:ETIM Dy								
Edit 🛞								
Add								
Modify								
Delete record (s)	II I							

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<u>Note</u>: Optionally, set a Filter on the Product Class Features screen to only show features that have not yet been mapped:

31 FF010680 Wall thicknes	S,			Nu	merically	Mi	llii
🗐 Filter							
ETIM Product class feature							
		ETIM 7 #ETIM8 EClass EMCS		Q Model Not specified JÖKO		<b>^</b>	
Product Class	equal 🗸	ETIM Dynamic EC0103	57 Fitting with 6 connecti	ons	-		
Feature	equal 🗸	•			•	]	llii
Unit	equal 🗸	•			-		
Product Classes	alle 🗸	·					
Source		User Publicist		Third party		i	llii
Release Status		None		Running out		i	llii
		□ <a>Run in</a>		) 📕 Modified			
Archive moment	empty 🗸	·				i	llii
Importance		🗌 🗮 Required		Undetermined			
		🗌 🗖 Optional		🛛 🔲 Unimportant			
Products with value	alle 🗸	·				i	llii
Used by	equal 🗸	Add on selector     DES Converter		User def fields			
User defined field	empty 🗸	·					
User def fields option	equal 🗸	•			•	) 📜 i	lli
		Apply	Clear	Empty and close	Save as		llio

- a. User defined field: Set to *Empty* to only show features that have not yet been mapped.
- 6. In the pop-up window, under User def field, search for the user-defined field to be mapped and select it:

Edit - Fitting with 6 connections Lengt	n of connection 1 (mm)				
ETIM Product class feature					
Product Class	ETIM Dynamic EC010367 Fitting	with 6 connections		- 💥	
Feature	Length of connection 1			- *+/	
Unit	Millimetre			- 💥	
Sequence number	36				
Release status	None	⊂  Rur	n in		
	O 🧖 Running out		dified		
Importance	O	O = Ont	ional		
	<ul> <li>Undetermined</li> </ul>	Undetermined			
licer def field	(an estil				
		Decimal	10		
	LengthOfConnection1	Decimal	Length of connection 1 ((1)		
	LengthOfConnection2	Decimal	Length of connection 2 (I2)		
	LengthOfConnection3	Decimal	Length of connection 3 (I3)		
	LengthOfConnection4	Decimal	Length of connection 4 (I4)		
				Cancel	

<u>Important</u>: If the desired user-defined field does not show in the drop-down menu, but you know it exists, please see the paragraph on  $\underline{0}$ 

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Troubleshooting a 'missing' user-defined field.

7. Click on Save record.

The resulting mapping will now show on the Product Class Features screen:



<u>Note</u>: Repeat this procedure for all *other* features within this ETIM Class to which you need to map user-defined fields.



#### 2.2.1 Troubleshooting a 'missing' user-defined field

If the desired user-defined field does not show in the drop-down menu, but you know it exists, check these two scenarios:

#### Scenario 1: Unit mismatch

For each ETIM-feature a unit of measurement (millimeter, kilogram, etc.) is defined. The userdefined field should make use of the same unit, i.e. you cannot map millimeters to meters or kilograms.

Scenario 2: Standards tables

When mapping user-defined fields of the type *table value* (standards tables), sometimes these values do not show in the drop-down list because of a unit mismatch. This situation can be remedied as follows:

- 1. Modify the ETIM product class feature by erasing the *Unit* (for instance, millimeter) of the feature
- 2. Save
- 3. Again, modify the ETIM product class feature:
  - User defined field: The missing user-defined field of the type *Table value* should now show in the drop-down list; select it.
  - Unit: Reset the Unit field to the unit of measurement that you previously erase
- 4. Save

reduct Class eature Init equence no also elease Status Init Init Init Init Init Init Init Init	ETIM Product class feature				
Feature   Length of connection 1   Unit   Sequence no   Release Status   Importance   Required   Undetermined   Undetermined   Undetermined   Importance   Importan	Product Class	ETIM Dynamic EC010367 Fitting	with 6 connections		- 🗙
Unit Sequence no Release Status Importance Percent Required Required Required Percent Required Percent Required	Feature	Length of connection 1			- <b>*+</b> /
35         Release Status         Importance         Required         Undetermined         Undetermined         Importance	Unit				- 🗙
Release Status     Importance	Sequence no	35			
Importance   Importance <td>Release Status</td> <td>None</td> <td>⊖⁄¶Run i</td> <td>in</td> <td></td>	Release Status	None	⊖⁄¶Run i	in	
Importance  Required  Undetermined  C Undeterm		O Running out	🔾 🗖 Modi	fied	
User defined field  User defined fields found  User defined fields  User defined	Importance	O Bequired	O 🗖 Ontic	nal	
User defined field          a       Decimal       a         a1 calculated       Table value       a1 (calculated)         AngleOfBow       Single choice       Angle of bow         AngleToFirstBoltHole1       Decimal       Angle to first bolt hole 1 (a1)         AngleToFirstBoltHole2       Decimal       Angle to first bolt hole 2 (a2)         Applications       Multiple choice       Applications         Anorewals       Multiple choice       Applications		<ul> <li>Undetermined</li> </ul>	○ = 0ptt ○ = Unim	portant	
a       Decimal       a         a1 calculated       Table value       a1 (calculated)         AngleOfBow       Single choice       Angle of bow         AngleToFirstBoltHole1       Decimal       first bolt hole 1 (a1)         AngleToFirstBoltHole2       Decimal       first bolt hole 2 (a2)         Applications       Multiple choice       Applications         Anorovals       Multiple choice       Applications		1			
a1 calculated     Table value     a1 (calculated)       AngleOfBow     Single choice     Angle of bow       AngleToFirstBoitHole1     Decimal     Angle to first boit hole 1 (a1)       AngleToFirstBoitHole2     Decimal     Angle to first boit hole 2 (a2)       Applications     Multiple choice     Applications       Annovals     Multiple choice     Applications	User defined field		Decimal		• •• •
AngleOfBow     Single choice     Angle of bow       AngleToFirstBoltHole1     Decimal     Angle to first bolt hole 1 (a1)       AngleToFirstBoltHole2     Decimal     Angle to first bolt hole 2 (a2)       Applications     Multiple choice     Applications       Anorovals     Multiple choice     Applications       Anorovals     Multiple choice     Approvals		a1 calculated	Table value	a1 (calculated)	1
AngleToFirstBoltHole1     Decimal     Angle to first bolt hole 1 (a1)       AngleToFirstBoltHole2     Decimal     Angle to first bolt hole 2 (a2)       Applications     Multiple choice     Applications       Anorovals     Multiple choice     Approvals <ul> <li>There are 266 User def fields found</li> <li> </li></ul>		AngleOfBow	Single choice	Angle of bow	1
AngleToFirstBoltHole2     Decimal     Angle to first bolt hole 2 (a2)       Applications     Multiple choice     Applications       Approvals     Multiple choice     Approvals       ▼ There are 266 User def fields found     ▼		AngleToFirstBoltHole1	Decimal	Angle to first bolt hole 1 (a1)	
Applications     Multiple choice     Applications       ▲norovals     Multiple choice     ▲norovals       ▼ There are 266 User def fields found		AngleToFirstBoltHole2	Decimal	Angle to first bolt hole 2 (a2)	
Δnnrovals Multiple choice Δnorovals ▼ There are 266 User def fields found		Applications	Multiple choice	Applications	
		_∆nnrnvals ▼ Th	Multiple choice ere are 266 User def fields found	Annrovals	•

# 2.3 Step 3: Create Field Options (Single Choice fields only)

For user-defined fields of the *Single Choice* type, you will need to create *Field Options* and map these to the corresponding ETIM Values.

In this example the user-defined field **UDF\_EF010777\_Capacity\_Profile** will be mapped to the corresponding ETIM-feature **EF010777 Capacity Profile**:



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<u>Important</u>: If the values of your user-defined field *exactly* correspond to the values of the ETIM-feature, add the Field Options in the order in which they appear at the ETIM-feature. In this example: start with the option that will be mapped to xxxs, next the option xxs, etc. This procedure will save you time later on.

- 1. Go to *Menu > System > User def fields (main)* and click on *Products*
- 2. Search and select the user-defined field of the *Single choice* type for which you need to add field options and, under *Navigation*, click on *Field Options*.

쵟 User def fields (sub)	Menu View Edit Functions I	mport / Export	» User def fields type:Products
Filter	Search All Details Screen Layout	• 🕜 • <sub>Help</sub>	
Navigation	💫 🔺 Name	т	Label
Field Values (0/0)	UDF_EF010777_Capacity_Profile	Single choice	UDF_EF010777_Capacity_Profile

3. In the next screen, click on +Add to add a new Field Option.

Add - New option field to user def field UDF	Add - New option field to user def field UDF_EF010777_Capacity_Profile								
Option field Tooltip Linked feature	value per option Translations								
Index	1		<b>^</b>						
Sorting	1								
Label	tiny (xxxs)								
Value	EV011136								
Numeric value									
Image									
External Code									
Links									
Site URL									
Video URL									
			*						
		Save	Cancel						

- a. Index: This field will be filled out automatically, in order.
- b. Sorting: Enter a number for the sorting order. <u>Note</u>: preferably add the field options in the same order as they appear with the ETIM-feature.
- c. Label: Enter a label for the field option. <u>Note</u>: For easy reference, this should correspond to the value that will be imported from your ERP. In this example: the value tiny (xxxs) will be mapped to the corresponding ETIM Value
- d. Value: Enter a value for the field option. <u>Tip</u>: Should the values of your user-defined field correspond to the values of the ETIM-feature, then consider to enter the EV-codes (for example, EV011136) of the corresponding ETIM Values. This procedure will facilitate *automatic mapping*, which will save you considerable time later on.
- e. Other fields: Leave the other fields in this popup window blank.
- 4. Save the newly created Field Option.
- 5. The result should look something like this:

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🔦 Field Options 丨	Menu	Vie	w \	Edit	Functions	Print	Import /	Export	»User d	lef fields	type:Proc	iucts » User	r def field∶∪i	DF_EF01077	7_Capa
	• Q Sea	rch	Export	rt Impo	rt Manage lay	outs Ex	xel Import	Excel U	pdate	🕜 🛛					
Navigation	(	٢	•	х	Index Labe	1									Value
Field Values (0/0)			۶.		1 tiny (;	xxs)									EV011136
Field Values (0/0)					2 very s	mall (xx	s)								EV021036
Attribute Values (1	/0)				3 extra	small (x	s)								EV010494
User def field:UDF_	_EF				4 small	(s)									EV002065
Iser def fields type	Products				5 mediu	m (m)									EV003295
Edit					6 large	(I)									EV000141
		≥			7 extra	large (xl	)								EV003296
Modify					8 very l	arge (xx	1)								EV003297

# 2.4 Step 4: Mapping Field Options to ETIM Values (Single Choice fields only)

Now that the field options have been created, they can be mapped to ETIM values. This can be done:

- Manually: Each Single Choice option will be mapped to a corresponding Field Option.
- Automatically: Field Option can be mapped automatically if the Field Option values exactly match the values of the Single Choice ETIM-feature.
- Multiple: Optionally, multiple Field Options can be mapped to one ETIM value.

#### 2.4.1 Mapping an ETIM value to a Field Option

To map an ETIM value to a Field Option:

1. Through the *Menu* go to *ETIM > Product Class Features*.



2. As you will only want to map to ETIM-features that are used for your products, set a Filter to:

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Filter					
ETIM Product class featur	e				
Classification system	= value	~	ETIM Dynamic     ETIM Dynamic     ETIM 6     ETIM 8     EClass     EMCS	□ EZ-base □ GPC □ Q Model □ Not specified □ ŎKO □ EPDEL	
Product Class	= value	~			
Feature	= value	~			
Туре	= value	~	Alphanumeric Logical Numerically	□Range □Coordinate □Matrix	
Unit	= value	~			
Product classes	has product o	las: 🗸			
Source	= value	~	User Dublicist	□ Third party	
Release status	= value	~	None	Running out	
Archive moment	empty	~		🗀 🗕 Moainea	
Importance	= value	~	🗆 🗏 Required	Undetermined	
			🗆 🗖 Optional	🗌 💻 Unimportant	
Products with value	all	~	]		
Used by	= value	~	Accessories selection	User-defined fields	
User def field	filled	~	]		
User def fields option	= value	~	j		
	_		Analy Eng	to Fronte and along	

- a. Classification system: Set this to the relevant *Classification system*. Usually, this will be *ETIM Dynamic*, however you the option map to other features of other classification systems (*ETIM 7, Qmodel, EZ-base*, etc.).
- b. Product class: Set this to: has product class product classes.
- c. User def field: Set this to: *filled*.
- 3. Next, in the resulting list, search for the ETIM-feature to which you need to map the userdefined field. For instance, EF010777, and click on *Attribute Values*.

Product Class Features Menu	View Edit Functions Import	t / Export
Filter Filter	Search All Details Aalberts - @	•
Navigation 🛞	X R Product Class	Sequence no Feature Feature
Attribute Values (8/0)	ETIM Dynamic EC010231 Boiler, gas heated	51 <u>EF010777</u> Capacity profile
Products with value (0/0)		

4. In the next screen, select an Attribute Values and click on Modify.

Attribute Values Menu	Vie	w T	Edit	Functions Impo	ort / Export » Pro	duct class feature:Boil	er, ga	
▶.		2		1	. 🕜 .			
Filter	Se	earch	All	Details Aalberts met	EV Help			
Navigation 😞		х	R	Product Class	Productmodel	Feature	Alphanumeric value	Alphanumeric value
Product class feature				ETIM Dynamic EC010231 Boiler, gas heated		Capacity profile	EV011136	XXXS
Edit 🛞	•			ETIM Dynamic EC010231 Boiler, gas heated		Capacity profile	EV021036	XXS
Add				ETIM Dynamic EC010231 Beiler, gas heated		Capacity profile	EV010494	XS
Delete record (s)				ETIM Dynamic EC010231 Boiler, gas heated		Capacity profile	EV002065	S

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5. In the pop-up window, go to the *Field Options* tab and, from the *Available field options* select and transport the user-defined Field Option you wish to map:

Edit - XXS				
ETIM Attribute Value Field Options				
-Available field options	- r	<ul> <li>Selected field opti</li> </ul>	ons	]
01 - tiny (xxxs)		02 - very small (x)	(s)	A
03 - extra small (xs) 04 - small (s) 05 - medium (m) 06 - large (l) 07 - extra large (xl) 08 - very large (xxl)	> <			
	,		Sava accord	Cancel
			Save record	Cancel

- 6. Click on Save.
- 7. Repeat this procedure for *all other values* that need to be mapped.

#### 2.4.2 Automatically mapping Field Options

Often, the Field Options of a user-defined field closely match the values of an ETIM-feature. If this is true for your user-defined field, you can attempt an *automatic mapping* of the Field Options:

- 1. Through the Menu, go to System > User-defined fields (main).
- 2. On the overview, click on Products.
- 3. Search and select the user-defined field of type Single Choice where you want to attempt an automatic mapping and, under Navigation, click on *Field Options*.

🔦 User-defined fields (sub) 🚺	Menu View	Edi	t VFunctions	Import / Export	» User def fields type:Produc
▶		1		. 🕜 .	
Filter	Search All	Details	Screen Layout	Help	
Navigation	(		Archived	Name	т
🖉 — Field Options (6)		1	I	LengthOfConnection7	Decimal
			I	LengthOfConnection8	Decimal
Field Values (15815)				LengthOperatingElemer	nt (Lb) Decimal
Product Class Features (3)				LVI	Text
User def fields type:				Make/Buy	Single choice
				Materialball	Single choice

4. On the *Field Options* screen, *select all* Field Options and, under Functions, click on *Link class feature values*.

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<b>Field Options</b> Menu Vie	w Ed	lit Fund	tions	Impo	ort / Exp	ort »Use	er def fie	lds type:
· ·			•				?	-
Filter	Search	deselect	Details	Aalber	ts + tran	slations	Help	
Navigation 😵	▲ A	rchived	Ind	ех	Sorting	Value		
E-dia	•			1	1	Aluminium		
	Se	lect all Fi	eld	2	2	Bronze		
Add	> T	Options		3	3	Cast iron		
Modify	•			4	4	Brass		
	۶.				5	Stainless s	teel	
Delete record(s)	۶.			6	6	Steel		
Сору		/						
Paste								
Functions								
Link class feature values								
From archive								

5. In the pop-up window you have the option to first execute a check run only (set to Yes); this is recommended.

	modium (m)	modium (m)	modium (m)	modium (m)	modium (m)		modiu	ŝ
	#LinkClassFeatureValues						$\times$	-
	#LinkClassFeatureValues							а
	Only check run	🖲 Yes 🔘 No						ar
IL								
				Exec	ute	Close		
C								2

6. Once you have clicked on *Execute*, you will receive a link to a (test) report:

📄 Resultaat van koppelen classificatie	×
Koppelen van 7 kenmerk-optie(s) De details van deze koppel-actie vindt u <mark>hier.</mark>	
Click to receive the check-run report	
ОК	

7. Check the test report for errors and correct them, then click on *#LinkedClassFeatureValues* again, set *Only check run* to *No* and *Execute*.

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<u>Note</u>: Any Field options that could not be matched and were not automatically mapped, can be mapped manually.

#### 2.4.3 Mapping multiple Field Options to one ETIM value

A product is available in the colours *Light Grey* and *Dark Grey*, however for the corresponding ETIM-feature *Colour* only the option *Grey* is available. A user-defined field *Colour* was created with both colour values *Light Grey* and *Dark Grey*.

🔦 Field Options 🛛 Menu 🛛 Vie	iew Edit Functions Print Import / Export »User def fields type:Products* User def field:UDF	EF000007_Colo
Filter	Search All Details Screen Layout Help	
Navigation 😣	<ul> <li>X Index Label</li> </ul>	Value
	1 Light grey	EV000270
	2 Dark grey	EV000270

Both values can now be mapped to the ETIM-feature *Colour* value *Grey*.

Follow the procedure in paragraph <u>2.4.1 Mapping an ETIM value to a Field Option</u> to map both the Field Options, *Light Grey* and *Dark Grey* to the ETIM value *Grey*. Simply select both option from the *Available field options* list, transport to *Selected field options* and click *Save*.



# 3 Filling out mapped (ETIM) features

# 3.1 Greyed-out fields

Important: Once user-defined fields have been mapped to ETIM, some types<sup>4</sup> of mapped ETIMfeatures can *no longer* be filled out from the Product Classifications screen. To indicate this, the fields are greyed-out. Values for these mapped ETIM-features need to be entered by filling out by the linked user-defined field.

<sup>&</sup>lt;sup>4</sup> A numerical type mapped to an Integer, or an alphanumerical type mapped to single or multiple choice, or a logical value cannot be filled out from the ETIM-feature edit screen.

**>>** ....

Product Class	ETIM Dynamic EC011343 Ball valve	- *
Ball valve		7
Diameter bolt hole	'areved-out' fields	
Housing material	Brass	
Material quality	Dezincification resistant brass (DZR)	
Material ball seal	Ethylene-propylene diene monomer rubber (EPDM)	
Material ball	Brass	
Material spindle	Brass	
Material primary spindle seal	Ethylene-propylene diene monomer rubber (EPDM)	
Material secondary spindle seal	•	
Nominal inner diameter, connection 1	DN 25	

<u>Note</u>: Usually, greyed-out fields concern ETIM-features which have alphanumeric values. However, should you encounter greyed-out ETIM fields of the logical type, then it could be the case that a user-defined *integer* field has been mapped to an ETIM-feature of the *numerical* type. See also paragraph <u>5.2. Mapping list values to a single ETIM value</u>.

#### 3.1.1 Filling out features mapped to calculated fields

(ETIM) features which are mapped to calculated fields of the decimal type are an exception; they can *only* be filled out by entering (or changing) the value of the (user-defined) field(s) on which they possibly depend<sup>5</sup>. See also paragraph <u>5.1. Calculated user-defined fields</u>.

# 3.2 Collection tab

When using large numbers of user-defined fields, one or more custom tabs can collect fields that belong together. A collection tab can save considerable time when filling out user-defined fields:

Hydronic Flow Control Classification	n 🔪 Model 🔷 Product 🔍 User def fields 🔪 Tr	ranslations
Show fields	Hydronic Flow Control	▼
Code	1 45150400-225002	
Product description	DN20R,G1,G1	
	Automatic	
Material connection 1	I Brass	
Material quality connection 1	<ol> <li>DZR (Dezincification resistant)</li> </ol>	▼
ETIM shape	<ol> <li>Straight</li> </ol>	¥
Finishing	🚺 🗹 Chromed	Matt chrome
	Nickel-plated	Polished chrome
	Galvanised	None
Custom tab with UDFs for	Galvanized (electrolytically zincplated)	Primer/paint
Hydronic Flow Control	Hot dip Galvanized	Sendzimir galvanised
Hydronic Flow Control	U Tinned	Varnished
	With plastic coating	Zinc-Nickel plated
	Powder	Plastic coating
Newinel internel discustor 1 (DN1)	DN25	

Should you wish to use a collection tab for your user-defined fields, please consult the *Manual User-defined Fields*, which is available on the <u>Compano Help website</u>.

<sup>&</sup>lt;sup>5</sup> <u>Note</u>: Calculated user-defined fields need not depend on other user-defined fields; the expression could also depend on regular system fields or contain no fields at all.

# 4 Multi-model mapping

User-defined features can be mapped to multiple, different classification systems<sup>6</sup>. Other classification systems include, amongst others, GPC, eCl@ss, EZ-Base, EMCS and Q-model.

Examples

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A user-defined field could be mapped to:

- Both an ETIM Dynamic feature and an EZ-base feature,
- Or, within the ETIM-system, to both ETIM Dynamic and ETIM 7 features.

### 4.1 Example: Mapping to both ETIM Dynamic and ETIM7

One example of multi-model mapping would be to map to both ETIM Dynamic and ETIM 7 classes. To map to both versions of the ETIM classification system, simply follow the steps 1 through 4, first mapping for one system then the other.

### 4.2 Mapping to a new ETIM iteration

To save on time, the *ETIM UP conversion tool* can be used to copy classes, features and value information for your products to a fixed ETIM iteration such as ETIM 7 or ETIM 8. This copy-action can include any values derived from mapped user-defined fields, however this will depend on if and how the mapping of user-defined fields has been set-up for the ETIM iteration to which values are pasted. Please consult Compano should you consider such a mapping action.

The ETIM UP conversion tool is available from the ETIM website: <u>https://etimup.ketenstandaard.nl/</u>

<u>Note</u>: It is recommended to use the ETIM UP conversion tool *as soon as* a new iteration of ETIM is fixed, for instance ETIM 8.

### 4.3 Mapping to other classification systems

User-defined fields can also be mapped to classification systems other than ETIM. Please consult Compano should you need to map user-defined fields to another system.

# 5 Special use cases

User-defined fields allow for special use cases, such as:

- Calculate values using mathematical expressions or standards tables
- Map list values to a single ETIM value
- Map both metric and imperial values

### 5.1 Calculated user-defined fields

Calculated user-defined fields contain a expression which calculates a value. The expression can be a purely mathematical expression and/or make use of the values of other user-defined or regular data fields, such as in the example below.

<sup>&</sup>lt;sup>6</sup> To be able to map to multiple classification systems, you will need a *Multi-model* license. Please contact <u>sales@compano.com</u>.

#### Example

The MaxMediumTemp\_F is calculated in degrees *Fahrenheit* based upon the user-defined field MaxMediumTemp with a value in degrees *Celcius*.

v	Name	Label	Head	т
25	MaxMediumTemp	Max medium temperature (°C)	Max medium temperature	
26	MaxMediumTemp_F	Max medium temperature (°F)	Max medium temperature (°F)	Decimal

Edit - Max medium temperature (°F)		
User def field Expression Tooltip Translations		
🔁 💝 Ω - 🐇 🖹 🗳 - 🔍 - 🥞 🥞 😭		
B I U abe   臣 吾 君 重 麗   x <sup>2</sup> ×₂   /	ne 🔻 Real 🖣 🗛 🔻 🤇	≫ ▼ Apply CSS Cl ▼
📓 💣 📓 🥥 💿 💌 Insert field 📲 💷 🔹 🚆 🚟 📲 📳 👔 📰 📳 🐩 💅 🗹		
(32+(1.8*[ProductRecord.MaxMediumTemp/]))		
	Save	Cancel

#### 5.1.1 Mapping calculated user-defined fields

Calculated user-defined fields of the *Decimal type* can be mapped to ETIM using the normal mapping process as described in steps 1 through 4. Of this manual.

#### 5.1.2 Mapping standards tables

A standards table represents a fixed number of product specifications, for instance *dimensions*, which all relate to one specific aspect of the product, for instance *size*. By entering the size ('in'value) the related dimensions ('out'-value) are known.

#### Example

A fitting is available in the following sizes:

Size (DN1)	j1	t1	P1	s1
12	0	6,2	17	1,5
15	0	7	20	1,5
18	0	7	20	1,5
22	0	8	21	1,5
28	0	8,2	23	1,5
35	0	8,2	26	1,5
42	0	9,8	30	1,5
54	0	9,7	35	1,5
66,7	0	13,6	50	1,8
76,1	0	14,8	55	2
88,9	0	17	63	2
108	0	20,2	77	2



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From this table follows, given the size DN1=28, the dimension of the product are: j1 = 0, t1 = 8,2, P1 = 23, etc.

Both in- and out-values need to be created as user-defined fields and can be mapped to classification (ETIM) features.

For more information on standards tables and mapping to (ETIM) features please consult Compano Support.

# 5.2 Mapping list values to a single ETIM value

A single ETIM value can be mapped to a multiple choice list value or a calculated user-defined field. For instance, certificates are usually entered in ETIM as a logical *yes/no* feature. However, these certificates can be mapped to a user-defined multiple choice list, listing all available certificates:

10	EF021905	FM quality mark	L
11	EF021906	VdS quality mark	L
12	EF021907	UL quality mark	L
13	EF021908	ULC quality mark	L
14	EF021909	LPCB quality mark	L

Field Options Menu Vie	ew Edit	Functions Print	Import / Export >	User def fields type:Products » User def field:Quality man	rk
».	• 🔍 🔲		. 0.		
Filter	Search All	Details Aalberts wit	th image Help		
Navigation 🛞	Index	Sorting Label	Value	External Code	Field Values Img. Tooltip
Field Values (0/0)	• 1	1 FM	FM		
Attribute values (0/0)					AITIOVED
User def field: Qualit	2	2 VdS	vds		
User def fields type:Products					VUS
Edit 🛞					
Add					(U)
Modify	3	3 UL	UL		CERTIFIED
Delete record (s)					$\frown$
Сору	4	4 ULC	ULC		• ( UıC )
Paste					
Functions 🛞					SON CERTIFIC
From archive	5	5 LPCB	LPCB		
Print 🛞					Non and
Print					

# 5.3 Mapping to metric/imperial features

Metric and imperial fields in Compano are linked. This means that once you fill out metric field, the imperial field value is calculated and vice versa.

Mapping metric/imperial features to ETIM-features complicates things. To prevent problems with mapping, the Compano **software generates the imperial field 'on the fly' as soon as the metrical** field is mapped. This generated imperial field is then *automatically mapped* to the corresponding ETIM imperial field.



<u>Important</u>: Between metric and imperial fields a *computed relation* exists. For instance, millimeters are computed to inches and vice-versa. Thus, once one field is filled out, both the metric and imperial field will be set to *read-only*. The same is true for mapping user-defined fields to an imperial field; both the metric and the imperial field will be set to *read-only* once mapped. This means that their values can only be changed by changing the value of user-defined field.