



Manual Publications

COS PIM

Version 5.1

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1 Introduction

This manual explains how to use Compano Online Software for setting up different types of *Publication Structures* and how to update/maintain them.

Publication structures order data according to certain settings and can be used with all data feeds, such as JSON- and XML-feeds which are used to send data from Compano Online Software to third-party software including websites, web shops, ERP-systems and catalogue/print software such as Adobe InDesign.

1.1 Concepts

COS

Compano Online Software

Entity

An entity is a *data-object* in COS, such as *Product, Item, Relations, Manufacturer, Suppliers, etc.*

Product

A product is a manufactured and often branded object which can be described in technical terms

Item

An item is a (collection of) product(s) which are packaged and priced. An item can be described in logistical terms.

Product group

Product groups are used to group a set of products that share the same information, such as a photo, drawing, etc.

Item group

Item groups are used to group a set of items that share the same information, such as assembly manual, energy label, etc.

Recipe

A recipe is a collection of items from either a purchase or sales assortment that belong together. In addition, a recipe can contain costs (labour, travel), discounts and materials.

Recipe group

A recipe group contains multiple recipes. A recipe can belong to several, different recipe groups.

Attachment

An attachment is any file that is coupled with a product, item, product group or item group. Examples of attachments are images, drawings, instruction manuals, instruction videos, or any other document or file.

Publication

A publication presents product and/or item information in a clear and ordered way. Examples of publications are a catalogue, product website or web shop.

Publication structure

A publication structure arranges product and/or item information (including any attachments) in 'tree structure'. This structure can be used to generate a JSON-, XML- or other type of feed to share this information to a website, web shop or catalogue.

Compano Online Software allows for the generation and maintenance of several, different publication structures.

Publication node

The basis for a publication is its 'tree structure'. Each 'branch' of this structure represents a *Publication Node*.

Each publication node either branches into further nodes, or – at the lowest level – contains one or more *Publication Links* of the types Product, Item or Recipe.

Publication-link

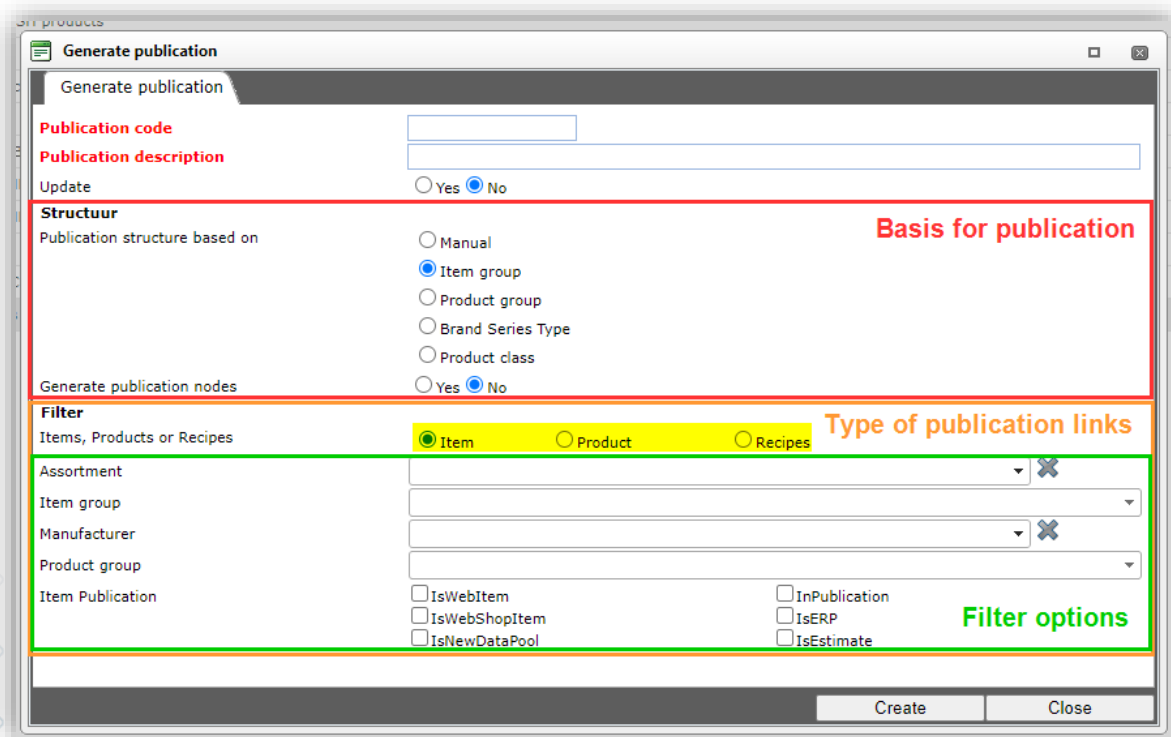
A *Publication Link* represents either one Product, Item or Recipe. Publication links are at the lowest level of the publication 'tree'; you can think of them as 'leaves'.

Data Feed

A data feed (JSON or XML) is based upon a publication structure and contains structured Product, Item or Recipe information. Feeds are used to exchange information from Compano Online Software to third-party systems.

1.2 Publication example

By creating a Publication, data from COS is structured according to, for instance *Item group* or *Brand Series Type* (see the figure below). By setting **Filter** options, **Publication Links** are generated based on data objects such as *Products*, *Items* or *Recipes*. The resulting **Publication Structure** can then be used as the basis for a data feed.



Generate publication

Publication code:

Publication description:

Update: Yes No

Structuur

Publication structure based on: Manual Item group Product group Brand Series Type Product class

Generate publication nodes: Yes No

Filter

Items, Products or Recipes: Item Product Recipes

Assortment:

Item group:

Manufacturer:

Product group:

Item Publication: IsWebItem InPublication IsERP IsEstimate

IsWebShopItem IsNewDataPool

Filter options

Alternatively, Publication Nodes and Links can be added (or removed) manually.

Basis for Publication Structure

A publication structure can be made manually, or automatically generated based on existing information such as item group, product group, brand-series-type or product class¹.

For instance, if you choose to generate a publication structure based on *Item Group* and set *Create Publication Nodes* to *Yes*, the structure will contain a publication node for each item group.

Type of publication links

Each node in the publication structure will contain publication links. You will have to choose whether these links are of the type *Item*, *Product* or *Recipe*.

For instance, should you choose to generate a publication structure with publication links of the type *Product*, then each publication link will represent one product.

Filter

Optionally, you can set one or more filters to further fine-tune the generation of publication links.

For instance, should you choose to set a filter for *Items* with the status *IsWebShopItem*, your publication structure will only contain publications links to items with that status. Any items in your assortment that do not have the *IsWebshopItem* status set, will not be included.

Publication example

Settings:

- Publication structure based on: *Product Group*
- Assortment: *Osram LED lamps*
- Type of Publication links: *Product*

Osram

- **NODE:** LED Ball- and Candle lamps (product group level 1)
 - o **NODE:** Fitting E27 (product group level 2)
 - **LINK:** Osram Parathom Classic E27 A | Warm White
 - **LINK:** Osram Parathom Classic E27 A | Cool White
 - **LINK:** Etc.
 - o **NODE:** Fitting E14 (product group level 2)
 - **LINK:** Osram Parathom Retrofit Classic E14 B 6.5W 827 Filament | Extra Warm White
 - **LINK:** Osram Parathom Retrofit Classic E14 P 2.8W 827 Matt | Dimable - Very Warm White
 - **LINK:** Etc.
- **NODE:** LED Filament lamps (product group level 1)
 - o **NODE:** A Filament (product group level 2)
 - **LINK:** Osram Parathom Retrofit Classic E27 A Filament
 - o **NODE:** 827 Filament (product group level 2)
 - **LINK:** Osram Parathom Retrofit Classic E14 P 4.5W 827 Filament | Dimable - Very Warm White
 - **LINK:** Etc.
- **NODE:** LED Tubes (product group level 1)
 - o **LINK:** Etc.

¹ For now, only **ETIM** product classes can be used to generate publication structure.

2 Creating a publication

Publications are used as a basis for JSON- or XML-feeds. However, when you need to create a data feed, a publication is **not** mandatory:

Publication + data feed	Data feed only
Exact control over structure	Can be based on products, items, product group or item group
Option to delete individual products / items/ recipes (fine-tuning)	No need for manual update
Potentially needs to be update manually	

2.1 Publication scenarios

There are several possible scenarios for creating a publication. Which scenario to choose depends on the purpose of the publication. A publication can serve as the basis for a:

- Data feed for a (product) website
- Data feed for a web shop
- Data feed for a (digital) catalogue
- Data feed for an ERP-system, CAT-software, or other third-party applications

A data feed can be either an **XML feed** or a **JSON feed**. Which feeds best suits your needs depends, among other things, on what the receiving party (web design bureau, publisher, etc.) can handle or prefers.

Some things to consider are:

XML

- Feed needs to be actualized manually whenever new products, items or recipes are added to COS;
- Automatic refresh can be set in COS;
- Automatic, periodic upload to third parties (FTP) is an option.

JSON

- Can be a live feed;
- Better suited for exchanging large amounts of data:
 - Records can be retrieved in batches of 100, 200, or any other set size;
 - Data can be retrieved using several, nested feeds, which limits the amount of data per feed.
 - Extensive filtering options for retrieving data, including *Date since* and *New in Feed*

Publications can either be **generated** based upon a set of parameters or created **manually**.

Another option is to first generate the publication and then manually fine-tune it. The following paragraphs will discuss each method of creating a publication.

2.2 Generating a publication

Generating a publication is by far the easiest method of creating a publication. The basic structure of the publication can be based on:

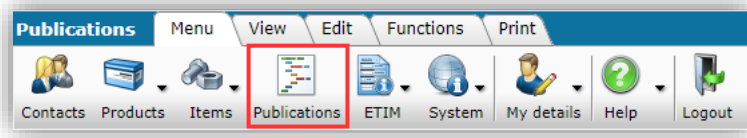
- Item group
- Product group
- Brand Series Type

- Product class

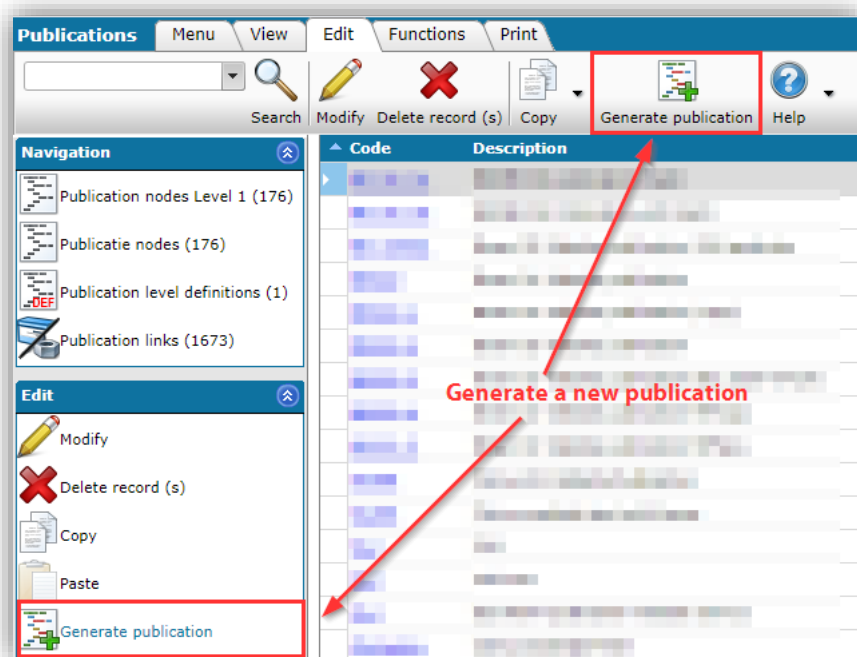
Which basic structure to use, depends on your situation and is best left to the Compano consultant.

To generate a new publication structure:

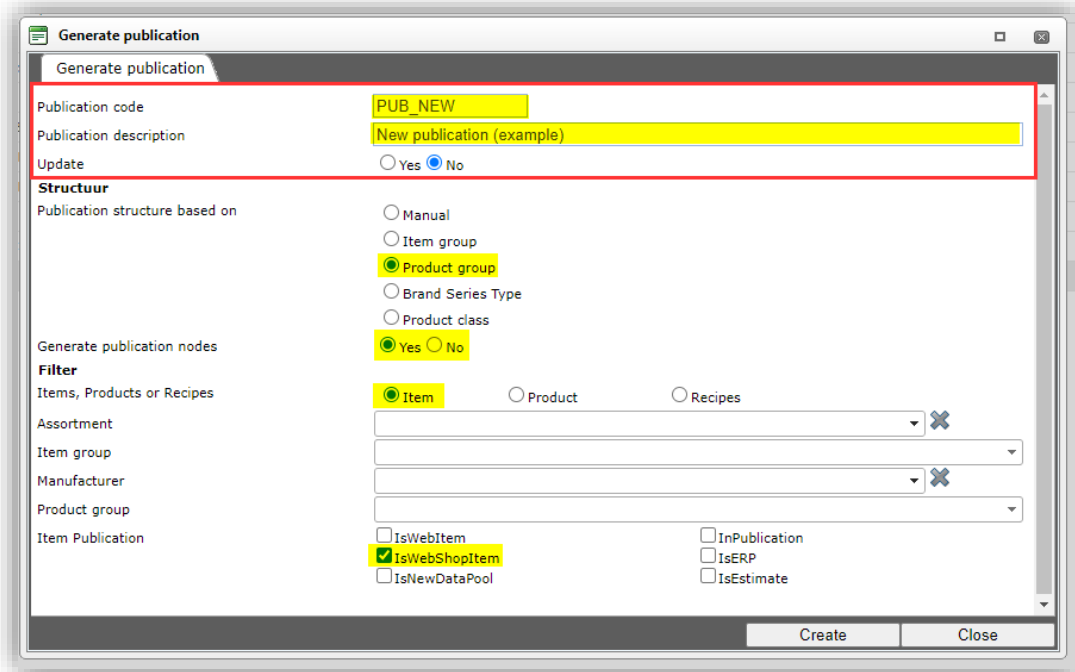
1. Navigate to *Menu > Publications*.



2. Under *Edit* click on the *Generate publication* button:



3. Depending on your needs, fill in the parameters on which the publication structure should be based. Note: In this example we will create a structure for web shop items, based on product groups:



Generate publication

Generate publication

Publication code: PUB_NEW

Publication description: New publication (example)

Update: Yes No

Structuur

Publication structure based on:

- Manual
- Item group
- Product group
- Brand Series Type
- Product class

Generate publication nodes: Yes No

Filter

Items, Products or Recipes: Item Product Recipes

Assortment: [Dropdown]

Item group: [Dropdown]

Manufacturer: [Dropdown]

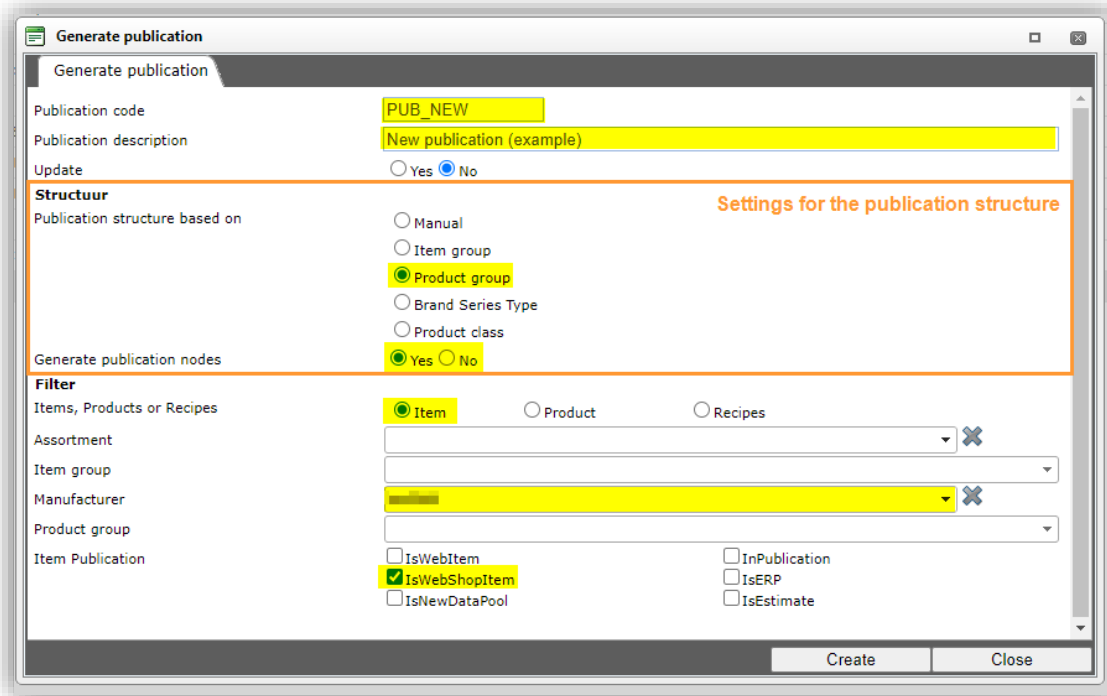
Product group: [Dropdown]

Item Publication:

- IsWebItem
- IsWebShopItem
- IsNewDataPool
- InPublication
- IsERP
- IsEstimate

Create Close

- a. **Publication code:** Type a publication code. This code will be used to refer to the publication structure, for instance when calling a data feed. Note: Keep the code simple and use CAPITALS and underscores for easy reference.
 - b. **Publication description:** Type a description for the publication. For instance, to indicate what the structure is used for.
 - c. **Update:** When generating a *new* publication structure, set this option to *No*. For further information on this setting, see chapter 9. [Publication maintenance](#)
4. Next, choose the settings for the **publication structure**:



Generate publication

Generate publication

Publication code: PUB_NEW

Publication description: New publication (example)

Update: Yes No

Structuur Settings for the publication structure

Publication structure based on:

- Manual
- Item group
- Product group
- Brand Series Type
- Product class

Generate publication nodes: Yes No

Filter

Items, Products or Recipes: Item Product Recipes

Assortment: [Dropdown]

Item group: [Dropdown]

Manufacturer: [Dropdown]

Product group: [Dropdown]

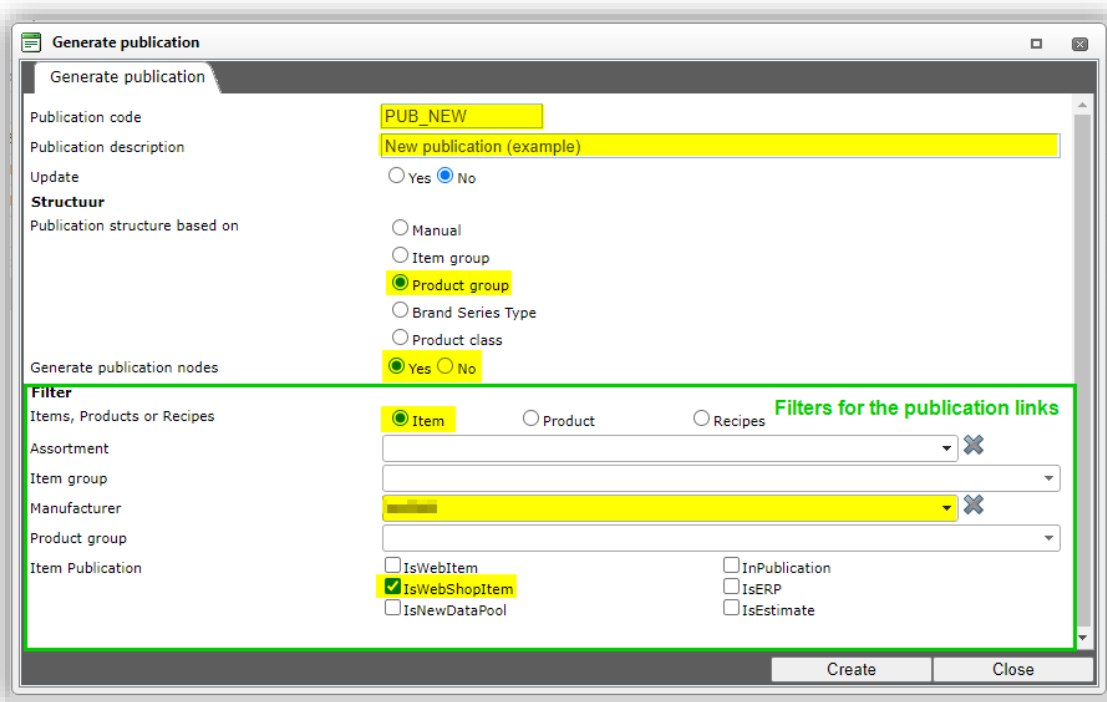
Item Publication:

- IsWebItem
- IsWebShopItem
- IsNewDataPool
- InPublication
- IsERP
- IsEstimate

Create Close

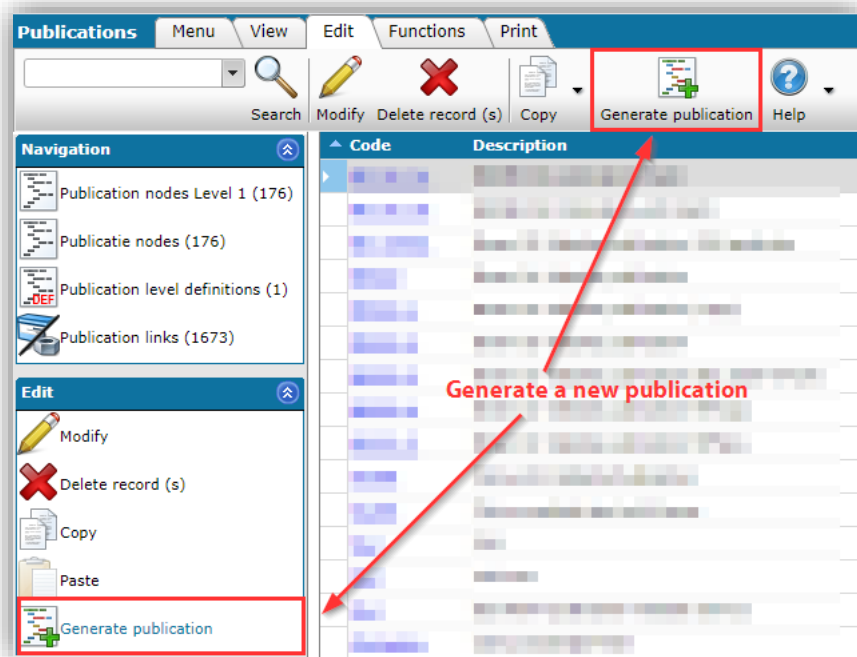
- a. **Publication structure based on:** Choose on which existing structure the publication will be based:

- i. **Manual:** Use this option if you need to set-up the structure by hand. For an explanation of manually creating a publication structure, see the next paragraph: Manually creating a publication
 - ii. **Item group:** Use the structure of the item groups as a basis for this publication.
 - iii. **Product group:** Use the structure of the product groups as a basis for this publication.
 - iv. **Brand Series Type:** Use the structure of Brand, Series and Type as a basis for this publication.
 - v. **Product class:** Use the *ETIM Product Classes* as a basis for this publication.
- b. **Create publication nodes:** If set to *Yes* this will generate publication links to actual Items, Products or Recipes; depending on the settings of the Filter. **Note:** Only set this option to *Yes* when you are creating a publication structure, or if you need to update an existing publication structure, for instance because a new product group has been added. **Warning:** Never update a manually altered publication, as updating will add (new) nodes and publication links based on the settings in Structure and Filter.
5. Next, set the options for the *Filter*, to determine which publication links are coupled to the structure:

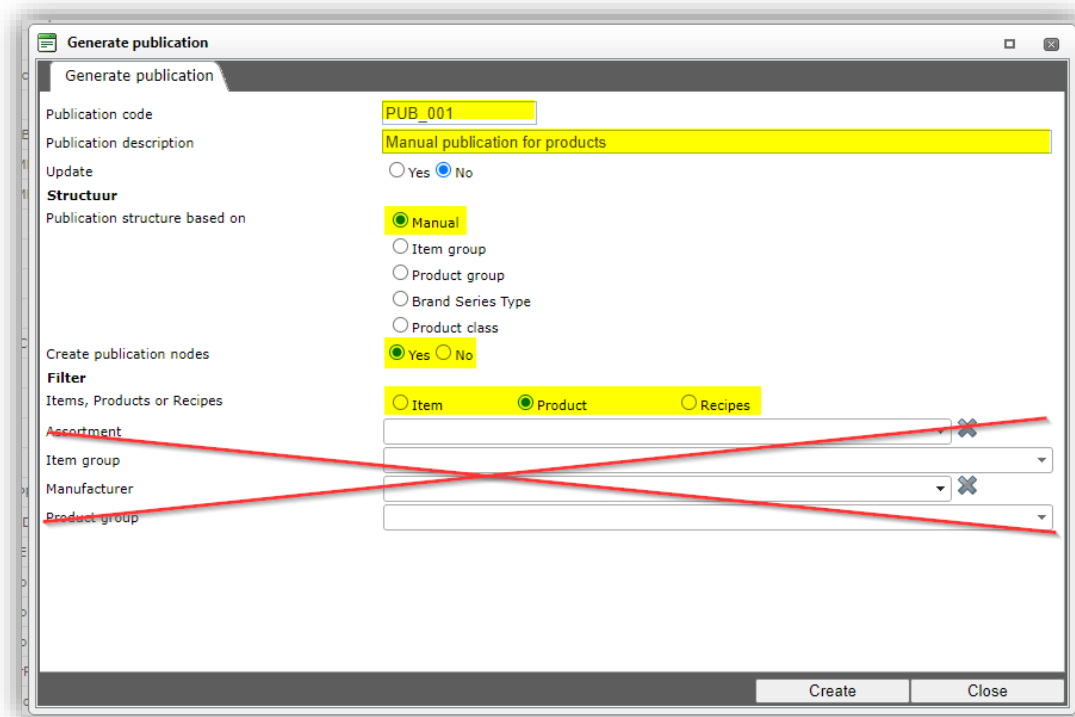


- a. **Items, products or recipes:** Choose the type of publication link that will be generated, either links to individual Items, Products or Recipes.
 - b. **Assortment:** Add only links from this assortment. **Note:** If you chose to base the structure on *Item Group* then you are **required** to select an *Assortment*.
 - c. **Item group (optional):** Add only links from this specific item group
 - d. **Manufacturer (optional):** Add only links from this specific manufacturer. **Note:** If you chose to base the structure on *Product Group*, *Brand Series Type* or *Product class* then you are **required** to select a *Manufacturer*.
 - e. **Product group (optional):** Add only links from this specific product group
 - f. **Item publication (optional):** Add only links to items with this status or this set of combined statuses (multiple selection). **Note:** In this example this option is used to select only items with the *IsWebshopItem* status.
6. Once you set all filters correctly, click on the *Create* button. Depending on the number of links that will be created, this might take a while:

2. Under *Edit* click on the *Generate publication* button:



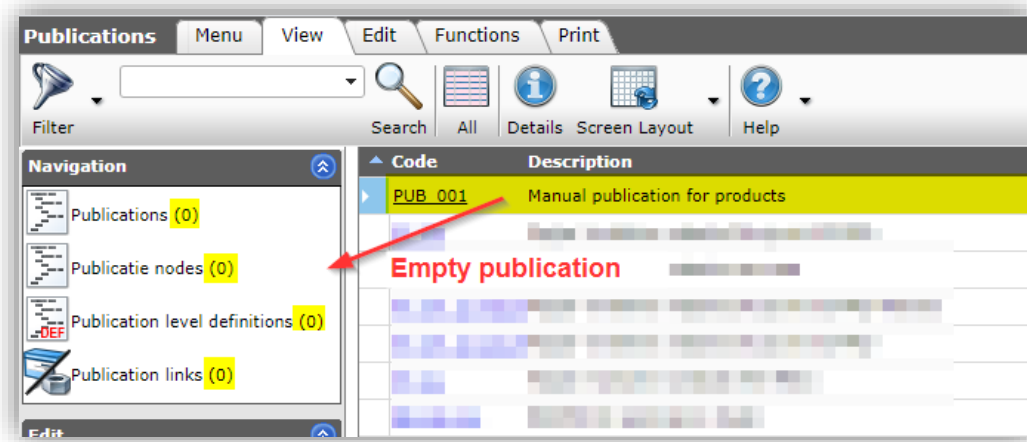
3. **Structure:** Next, in the pop-up window, choose the settings for *Manual*:



- a. **Publication code:** Type a publication code. This code will be used to refer to the publication structure, for instance when calling a data feed. Note: Keep the code simple and use CAPITALS and underscores for easy reference.
 - b. **Publication description:** Type a description for the publication. For instance, to indicate what the structure is used for.
 - c. **Update:** When you are creating an *empty* publication structure, set this option to *No*.
 - d. **Create publication nodes:** Set this option to *Yes*.
7. **Items, Products or Recipes:** Even though you are creating an empty publication, you will need to specify if the eventual (manually added) publications links are of the type Item, Product or Recipe.

For instance, if your publication is based on Products, you can only add publication links of the Product type.

8. The other Filter settings will have no effect as a manually created Publication will always start as an **empty** publication; i.e. levels, nodes and links are added manually.
9. Next, click on the *Create* button; this will create the empty Publication:



2.3.1 Publication levels

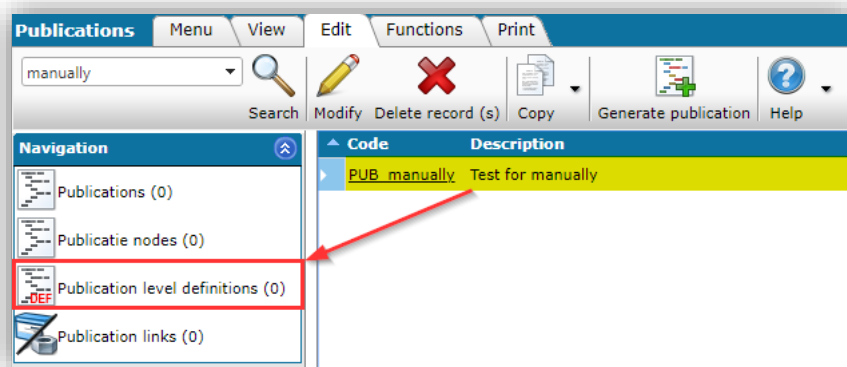
Once you have created the (empty) Publication, you can start structuring it by adding **levels**, **nodes** and **links**. However, before you can start with adding publication levels, you will need to define the layering of these levels:

To define the following layering:

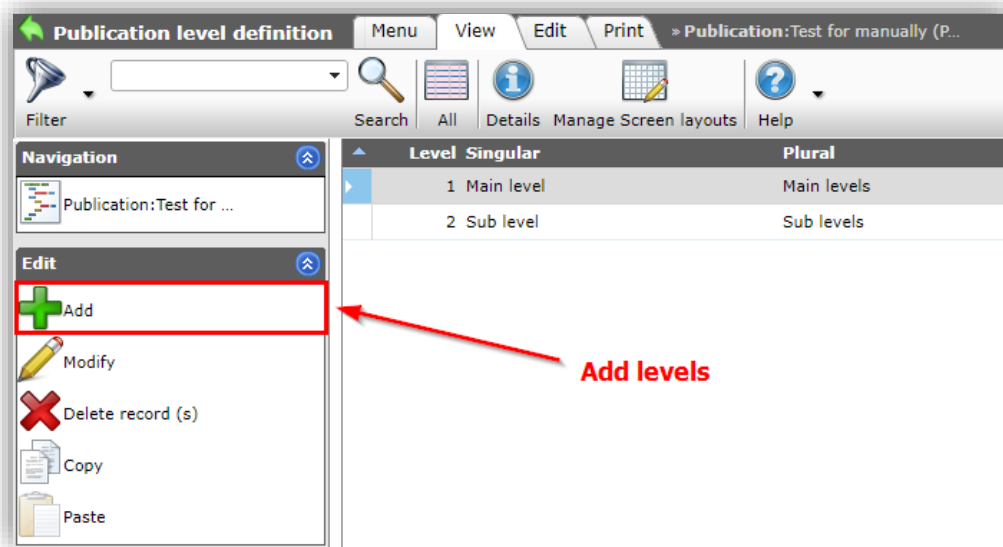
```

Main level
  Main level 1
    Sub level
      Sub level 1
      Sub level 2
  Main level 2
    Sub level
      Sub level 1
      Sub level 2
Etc...
  
```

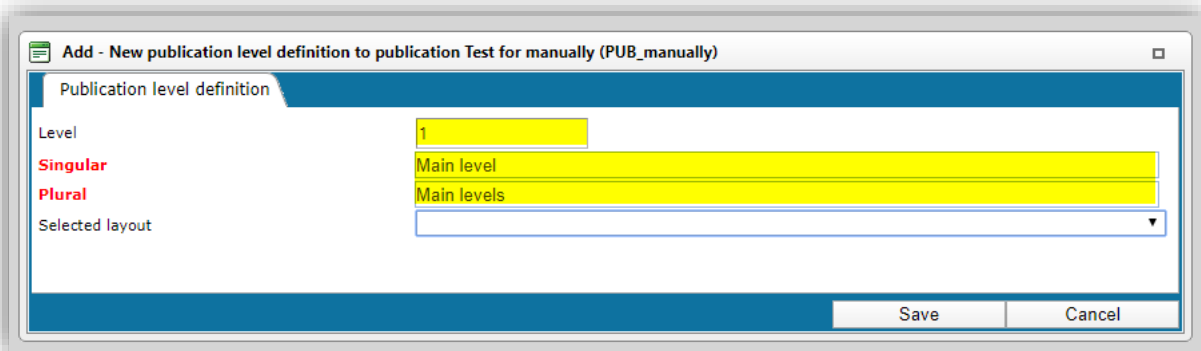
1. Select the manually created Publication and under *Navigation* click on *Publication level definitions*:



2. Under *Edit*, use the **+Add** button to start adding Publication levels:



3. In the pop-up screen, fill in the required fields:



Add - New publication level definition to publication Test for manually (PUB_manually)	
Publication level definition	
Level	1
Singular	Main level
Plural	Main levels
Selected layout	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- Level:** The new level is automatically assigned a number; or you can type your own number.
 - Singular (required):** Type a name² for the level, singular
 - Plural (required):** Type a name for the level, plural
 - Selected layout (optional):** Select a print lay-out. Note: This option has not been implemented yet.
4. Keep adding as many levels and sub-levels as you will need; the number of levels and their organization will determine how your structure is layered:

Level	Singular	Plural
1	Main level	Main levels
2	Sub level	Sub levels

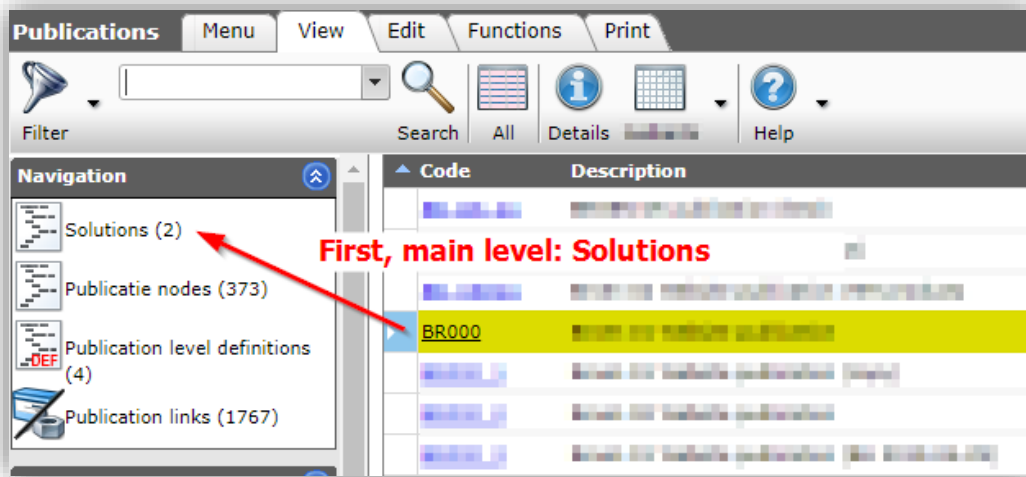
Example

To give an example from the field, the Publication below contains a main level of several *Solutions* and each Solution will contain one or more *Product groups*:

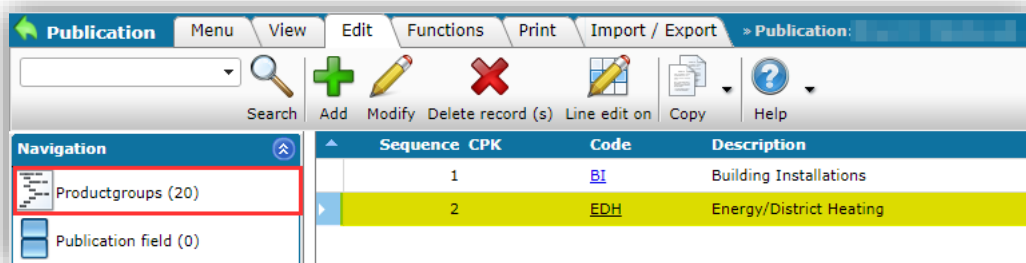
Level	Singular	Plural
1	Solution	Solutions
2	Productgroup	Productgroups

² Note: the names (singular and plural) that you type will be used in the navigation box in the left side panel of the Compano software for easy navigation.

At the main level *Solutions* there is a total of 2 Solutions:



At the second level, the solution *Energy/District Heating* contains 20 *Product groups*:



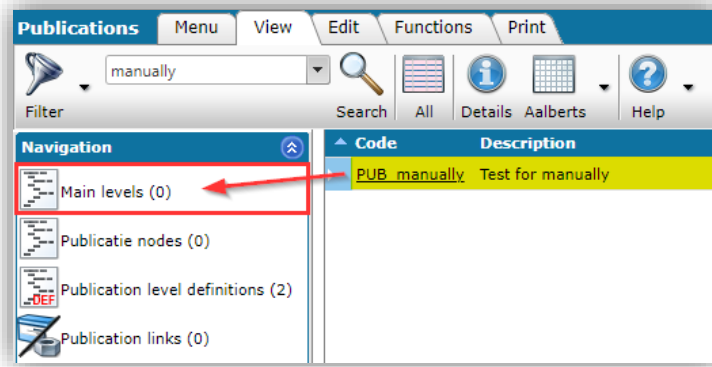
These are:

Sequence	CPK	Code	Description
100	EDH	4.1.2.1	Steel ball valves - DN10-50 - Full bore, PN25
101	EDH	4.1.2.2	Steel ball valves - DN10-50 - Full bore, PN25
102	EDH	4.1.2.3	Steel ball valves - DN10-50 - Full bore, PN25
103	EDH	4.1.2.4	Steel ball valves - DN10-50 - Full bore, PN25
104	EDH	4.1.2.5	Steel ball valves - DN10-50 - Full bore, PN25
110	EDH	EDH.FRV	Floating ball valves
120	EDH	EDH.TMV	Trunnion mounted valves
130	EDH	EDH.FMSV	Flexible main stop valve
140	EDH	EDH.SV	Steam valve
145	EDH	EDH.HTV	Hot tap valves
150	EDH	EDH.BV	Branching Valves
155	EDH	EDH.SBV	Steel ball valves
160	EDH	EDH.PIFRB	Pre-insulated floating ball valves
170	EDH	EDH.ACC	Accessories
175	EDH	5.2.4	Accessories - BROEN Gear - DN200-700RB
180	EDH	5.2.6	Accessories - Planetary Gear
185	EDH	6.2.6	Accessories - Planetary gear
190	EDH	15.2.6	Accessories - Planetary Gear - DN150-500
200	EDH	13.3.6	Accessories - Mobile Gear
205	EDH	13.3.8	Pre-insulated Ball valves - Accessories - Gear - DN100-400

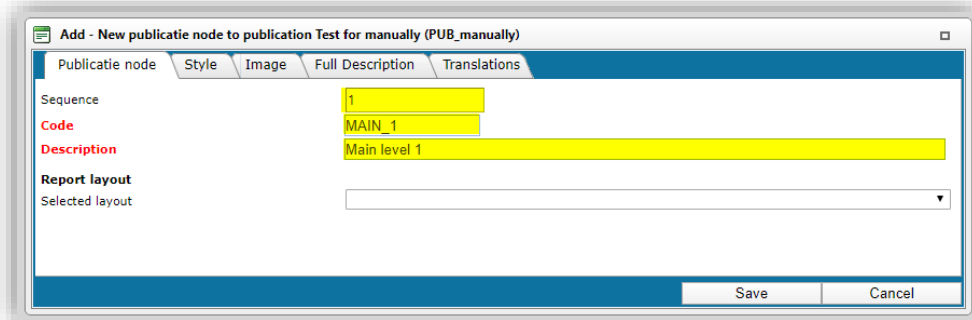
2.3.2 Adding publication nodes

Once you have created the publication levels, you can then add publication nodes to each level:

1. Select the Publication.
2. Under *Navigation*, navigate to publication level to which you want to add Publication nodes, in this example *Main levels*:



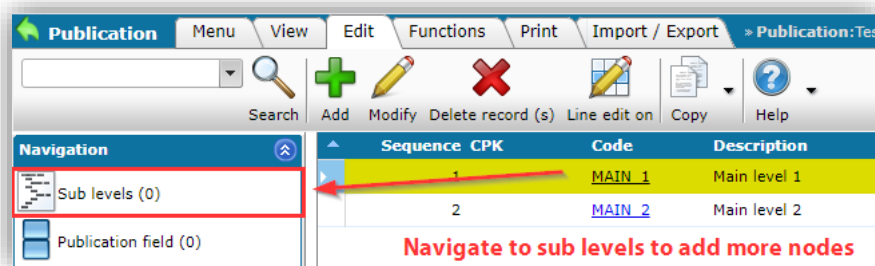
3. Under *Edit*, click on **+Add**:



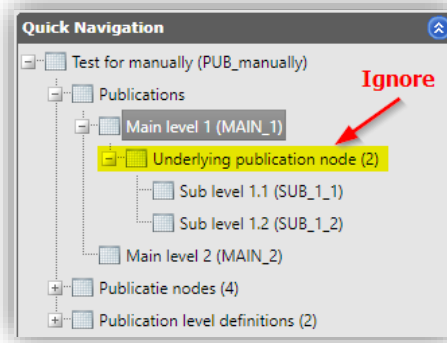
- Sequence:** The sequence number is automatically increased
- Code:** Type a code for the publication node. This code can be used to refer to the publication node, for instance when calling or filtering a data feed. Note: Keep the code simple and use CAPITALS and underscores for easy reference.
- Description:** Type a description for the publication node. This can be used to indicate what the node is used for.

4. Next, click on **Save**, then keep adding as many nodes to this level as you need.

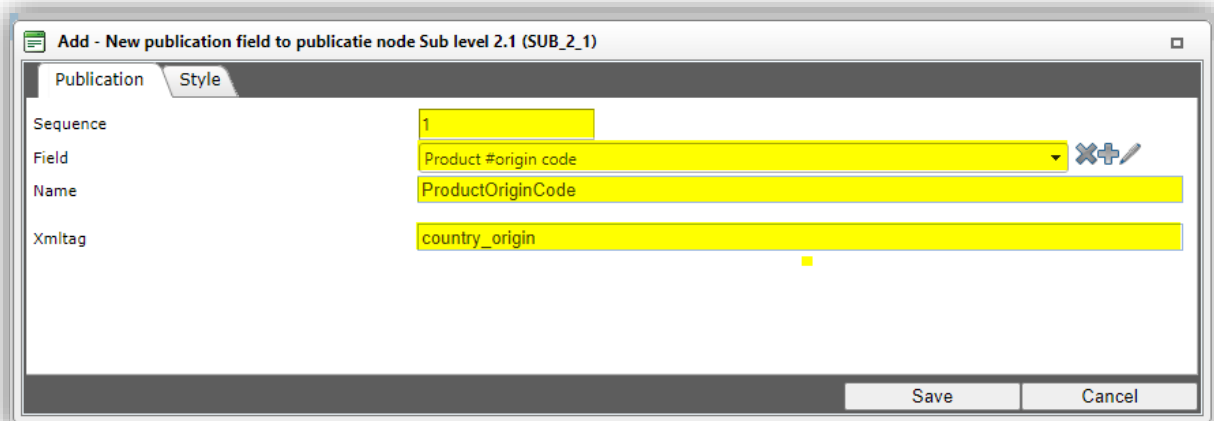
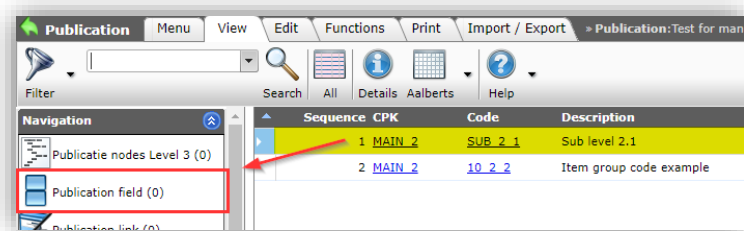
Important: Publication nodes can be added to **any** level of the Publication. For instance, to add nodes to *Sub levels*, simply navigate to Sub levels and follow the same procedure as above:

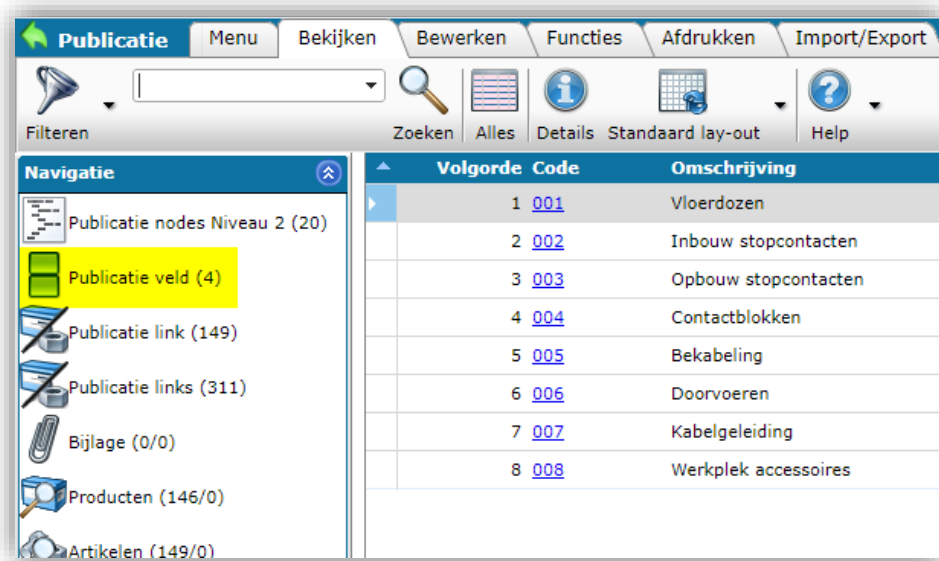


Note: The tree structure of your publication is visible in the right side-panel of the Compano application, under *Quick Navigation*. Please ignore the *Underlying publication node* entry as this is not part of the publication structure you created:



Note: Apart from the basic information needed to create publication levels and nodes, you can also add extra information on the tabs Style, Image, Full description and Translations. For a detailed explanation, see chapter [Fout! Verwijzingsbron niet gevonden.. Adding publication fields](#). Optionally, extra publications fields can be added to each publication level (node).





3 User-defined fields

User-defined fields of Item and Product are available in the field selector and can be added to a publication as follows:

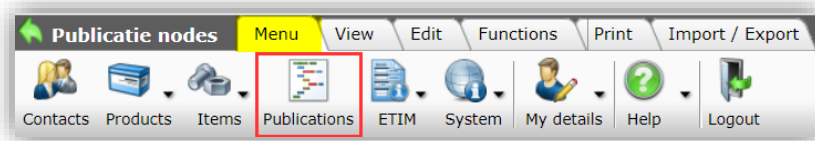
- To a Publication print with a maximum of 4 levels
- To Publication node lay-outs

Additional options in this manual.

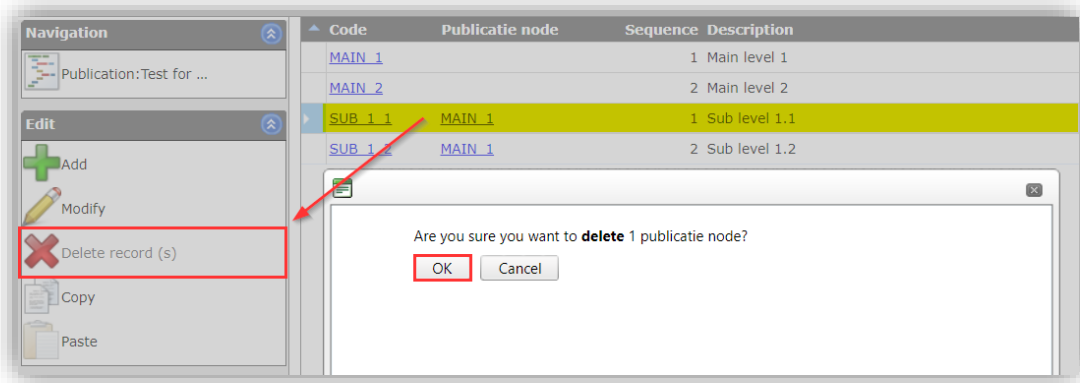
3.1.1 Removing publication nodes

Individual publication nodes can also be removed manually:

1. Through the *Menu* go to *Publications*:



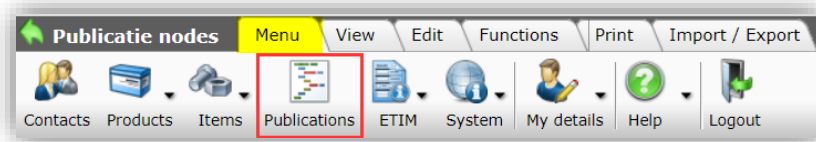
2. Navigate to the level which contains the node(s) you need to remove.
3. Select to the node to be removed and under *Edit* click on *Delete record(s)*. Note: you have the option to select multiple nodes and remove them at the same time.
4. In the pop-up window, confirm that you want to delete the publication node(s):



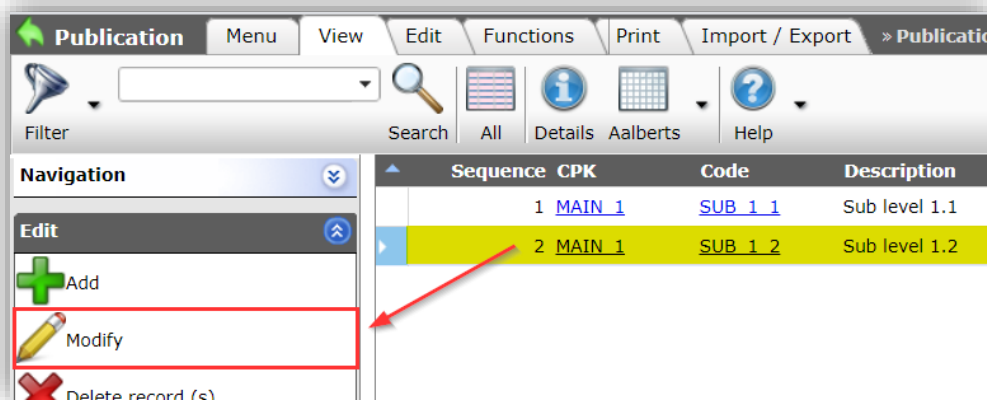
3.1.2 Editing publication nodes

Using the *Modify* function you can change the Sequence, Code or Description of publication levels and nodes:

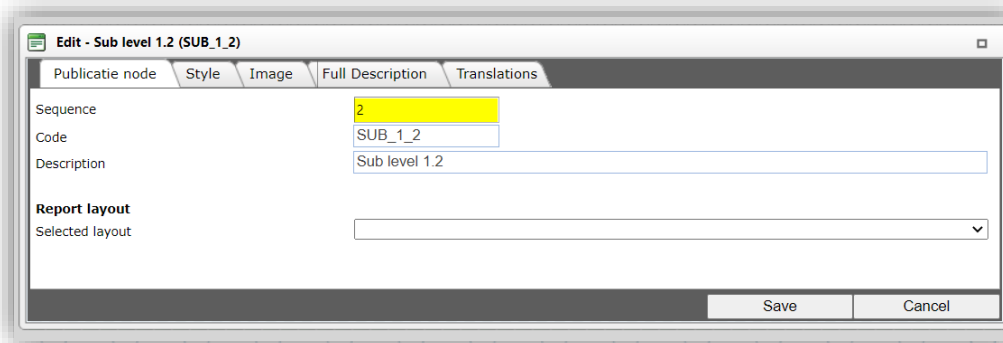
1. Through the *Menu* go to *Publications*:



2. Navigate to the level which contains the node(s) you need to edit.
3. Select to the nod and under *Edit* click on *Modify*:



4. In the pop-up window, edit the fields that you need to change, for instance the *Sequence* number:



3.1.3 Copying publication nodes

Publication nodes can be copied using the standard copy and paste shortcuts CTRL-C and CTRL-V. You are allowed to copy and paste from one node to another, even if these nodes are on different levels.

Note: Should you have added any attachments to a node (see chapter [8 ATTACHMENTS](#)) then you will need to copy these attachments to the copied node separately (!).

3.2 Fine-tuning a publication

A common practice is to first generate a publication based upon a certain set of parameters as mentioned in paragraph [2.2 GENERATING A PUBLICATION](#) and then *fine-tune* the resulting publication as needed. This is a time-saving procedure when only a part (or parts) of the publication needs to be altered.

All methods mentioned in paragraph [2.3 MANUALLY CREATING A PUBLICATION](#) can be used for this fine-tuning process: adding, removing, editing or copying levels and/or nodes.

4 Adding links to publication nodes

Links to products, items or recipes can be added to a publication node. This can be done either:

1. Manually
2. Generated based on group code

4.1 Adding individual items, products or recipes links

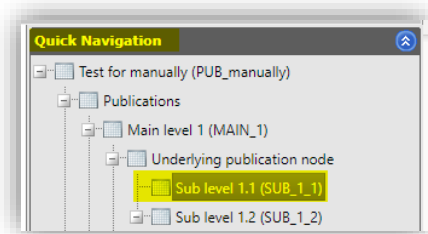
Adding individual publication links for items, products or recipes can be used for populating a manually created publication, or for fine-tuning a generated publication. **Note:** You can only add publication links of the type that was specified at the moment of creation of the publication structure. See chapter [2 CREATING A PUBLICATION](#).

Example

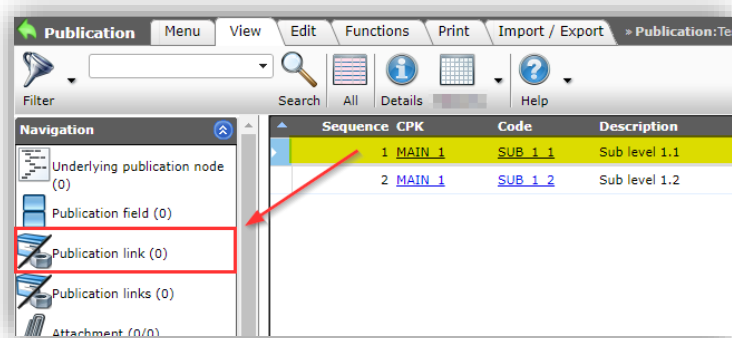
The explanation below will be based on the example of *adding individual publication links to two items*. However, the same method can be applied to adding a links to products or recipes.

To add a publication link:

1. Navigate to the level of the publication where you want to add the publication link. **Note:** to navigate you can either use the Quick Navigation the in the right side-panel, or the Navigation menu in the left side-panel:

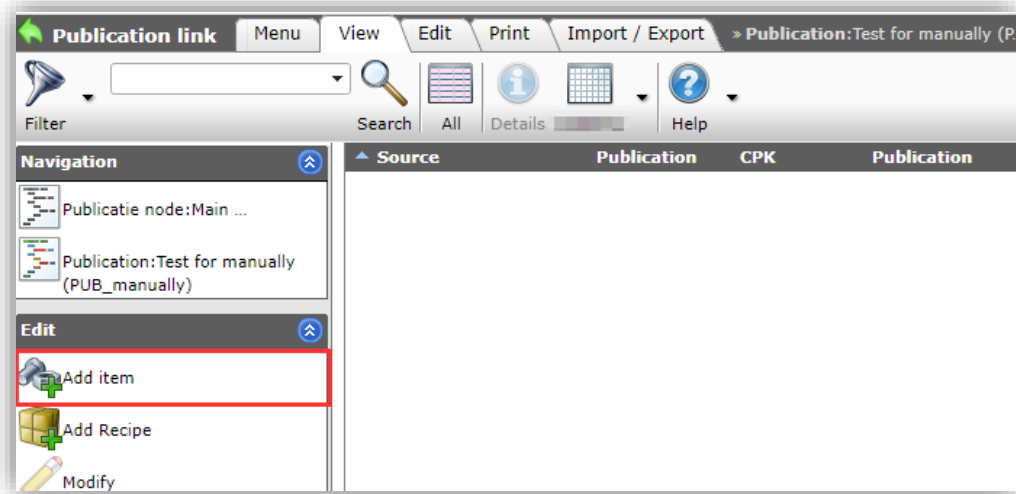


Or:

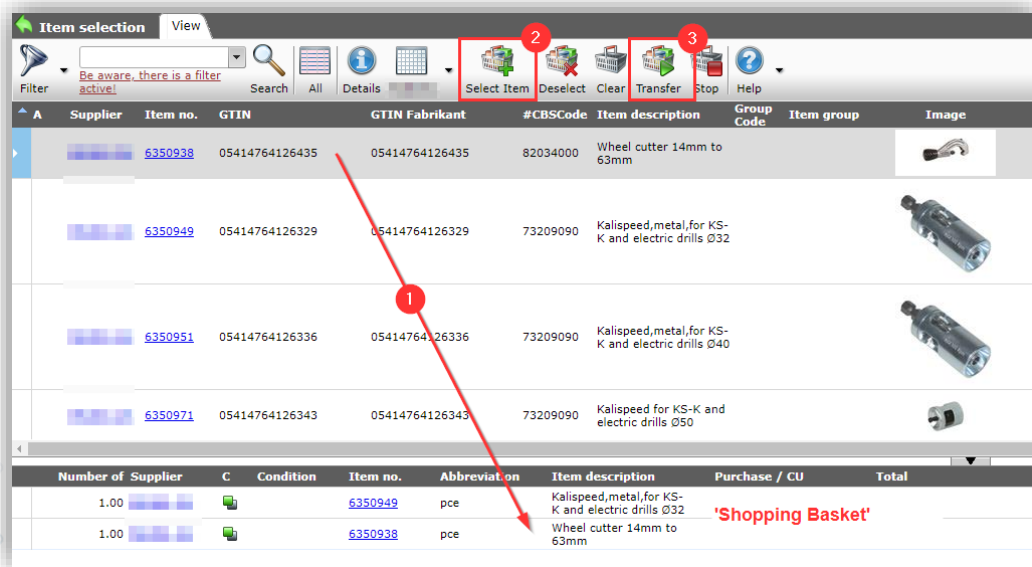


Note: You will find **two** entries to publication links under Navigation. The first, *Publication link*, contains the publication links at the level of the selected node, the second, *Publication links* (plural!) contains an overview of *all* publication links of *all* underlying publication nodes.

- Once at the correct level, under Edit, click on **+ [link type]**. In this example: **+Add item**:

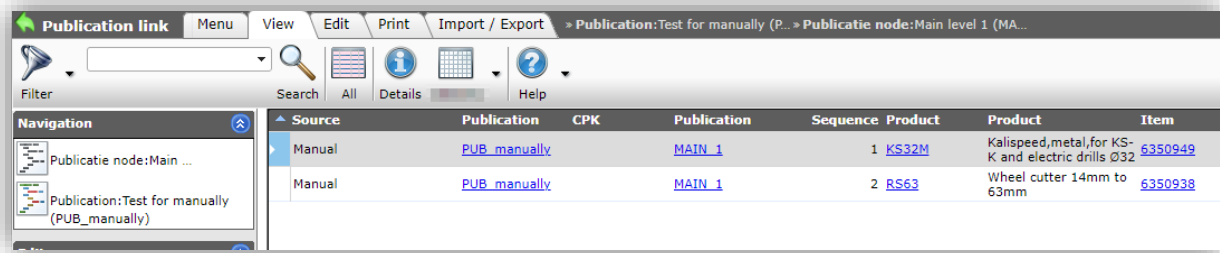


- The next screen will present you with an overview of available Items:



- Use the Filter and Search options to find the Items you want to add.

- b. Select one or more items (1) and use the +Select Item button to add them to the 'shopping basket' at the bottom of the screen.
- c. Click the Transfer button to add the items in your shopping basket as publication links to your node:



4. Repeat this procedure for any other nodes to which you want to add items (or products, or recipes).

4.2 Adding a group of products or items links

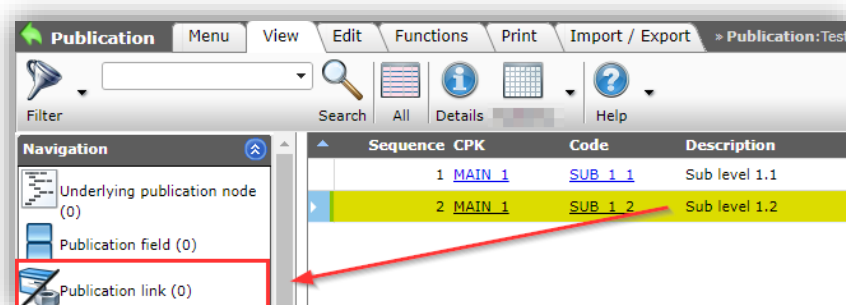
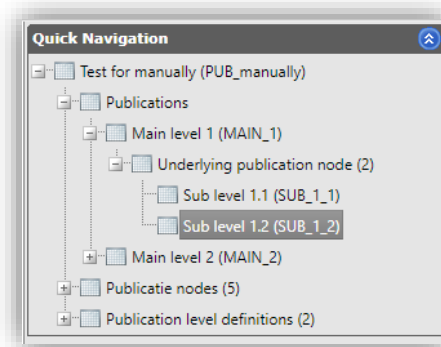
Example

The explanation below will be based on the example of **adding a group of items**. However, the same method can be applied to adding a group of products.

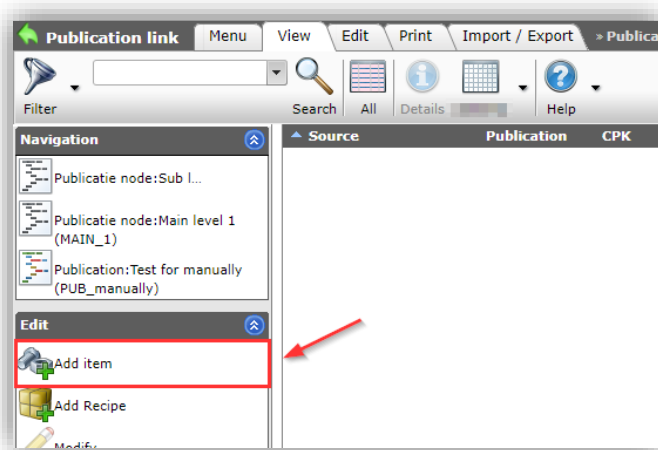
4.2.1 Manually adding links to a group

To manually add publication links to a group of items:

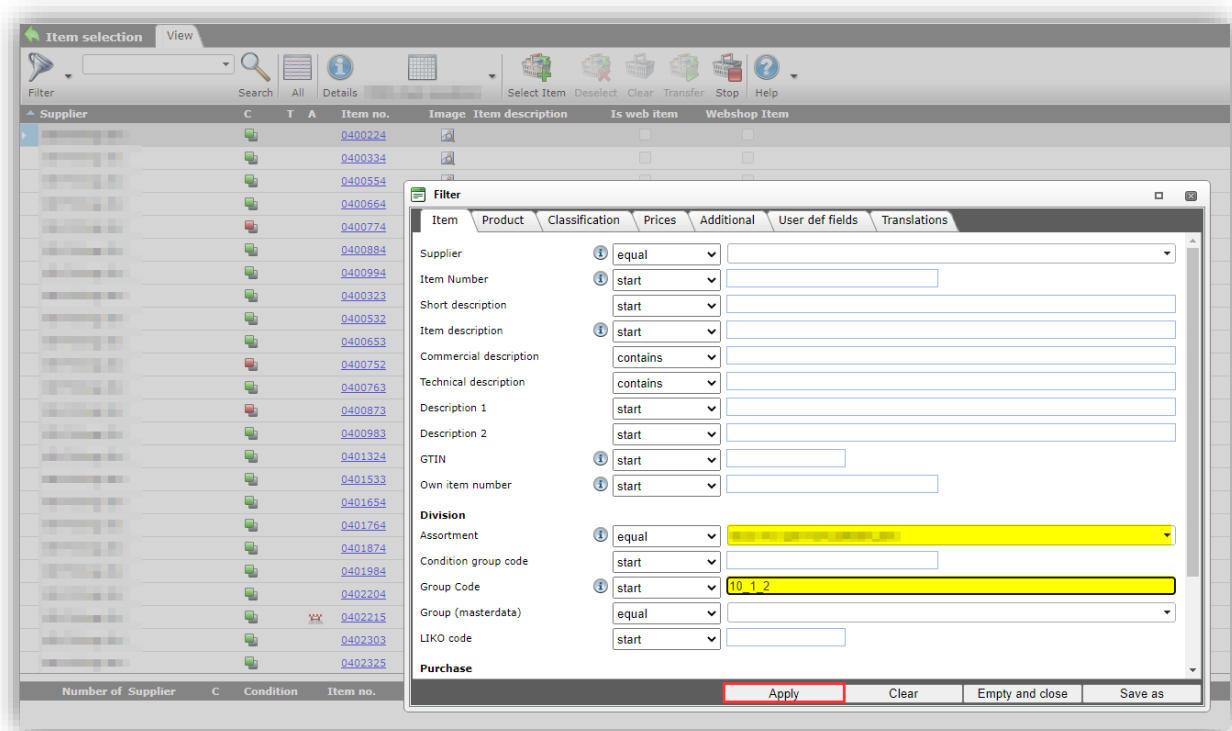
1. Navigate to the level of the publication where you want to add the items of the item group. Note: to navigate you can either use the Quick Navigation the in the right side-panel, or the Navigation menu in the left side-panel:



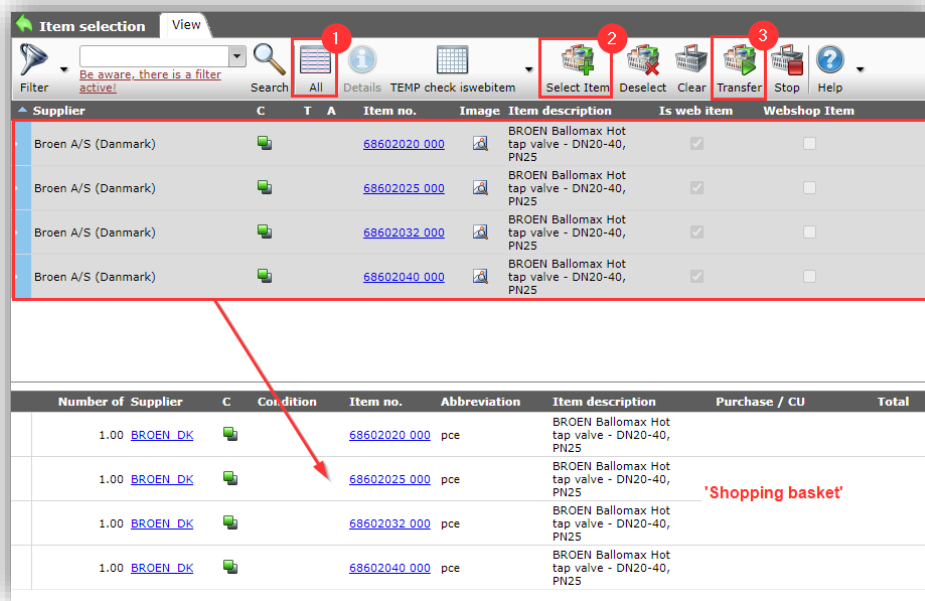
2. Next, under Navigation, click on *Publication link*.
3. On the next screen, click on *+Add Item*



4. You will be presented with an overview of all available items. Use the Search and Filter options to select and add the items from the item group. For instance, to add all items from the item group with code 10_1_2 use these Filter settings:



5. Once you have found the correct items, select them using the *All*-button (1), then add them to the 'shopping basket' using the *+Select item* button and then *Transfer* them (3) to create the publication links:



6. The result will look something like this:



4.2.2 Generating links in a group

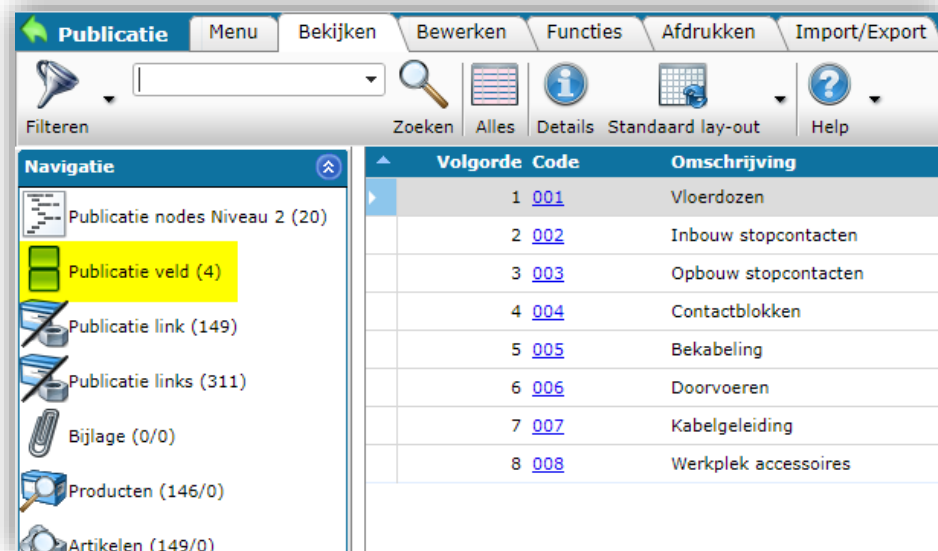
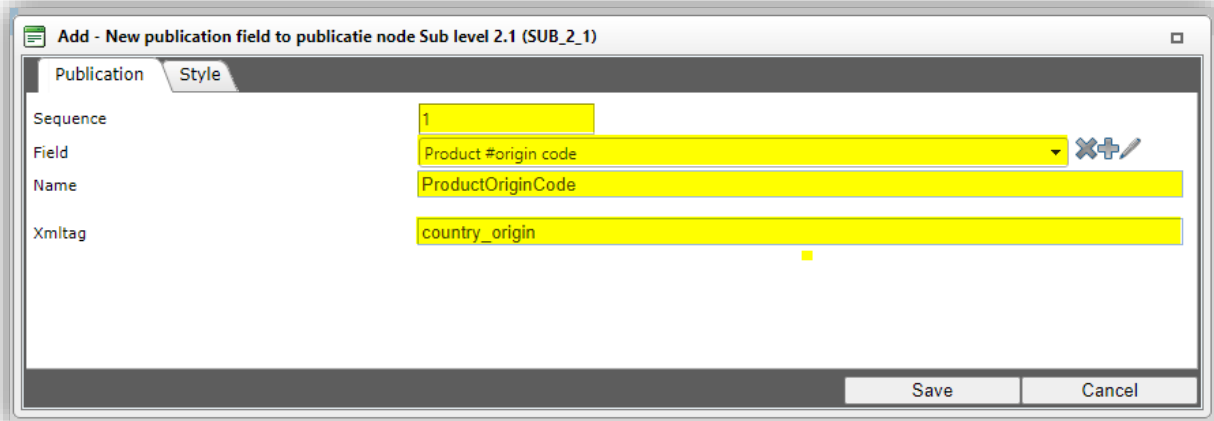
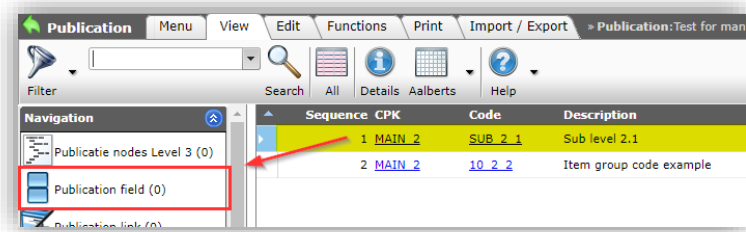
Another option is to **generate** the item links based on the Item Group Code.

To generate item links this way:

- Add a publication node where the **publication node code** is exactly the same as **the item group code**.
- Update the publication; see [UPDATING PUBLICATION LINKS](#).

5 Adding publication fields

Optionally, extra publications fields can be added to each publication level (node).



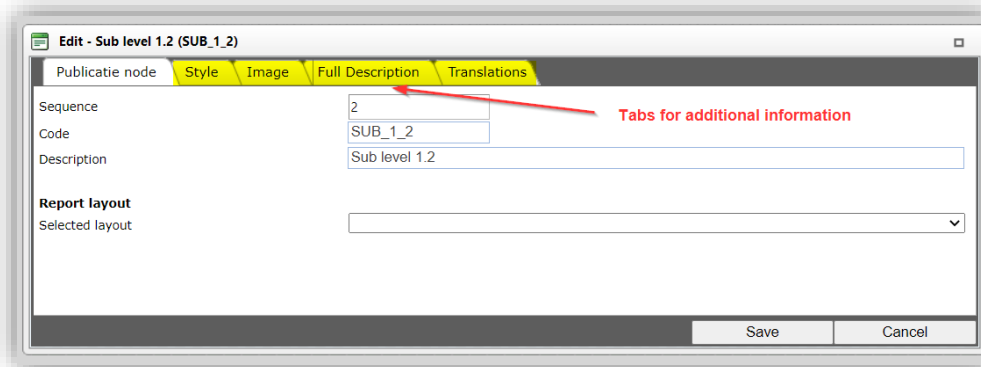
6 User-defined fields

User-defined fields of Item and Product are available in the field selector and can be added to a publication as follows:

- To a Publication print with a maximum of 4 levels
- To Publication node lay-outs

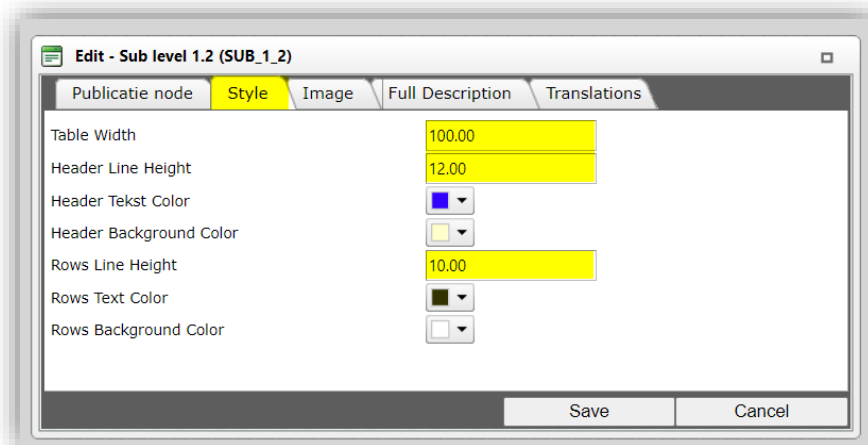
7 Additional options

Any publication level or node can contain additional information, such as HTML-styles or attached images. This information can be maintained on additional tabs in the Edit window of a level or node:

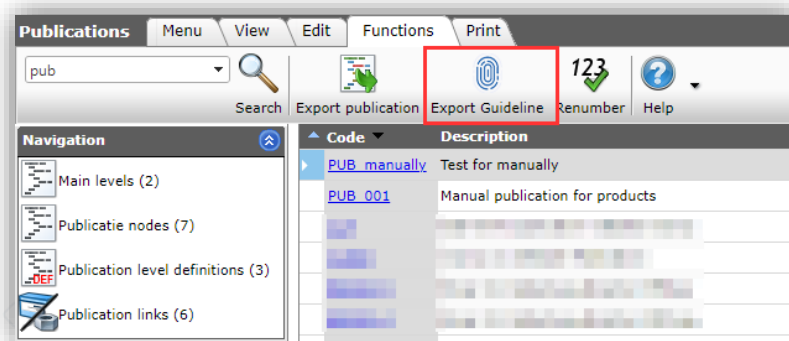


7.1 Style

On the *Style* tab a limited number of HTML styling tags can be added to the publication level or node:



These tags, including their settings/values, will be exported when using the *Export Guideline*³ option under Functions:



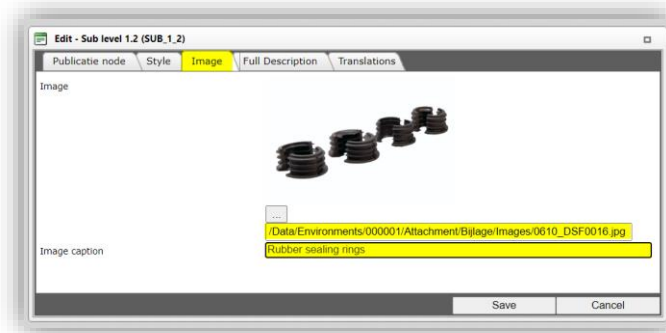
In future these styling tags may be exported in any data feed based upon the publication and can thus be used by a web designer or catalogue publisher to format content.

³ [Guideline](#) is a database publisher based in Belgium.



7.2 Images

On the *Image tab* an Image and optional Image caption can be added to the publication level or node:

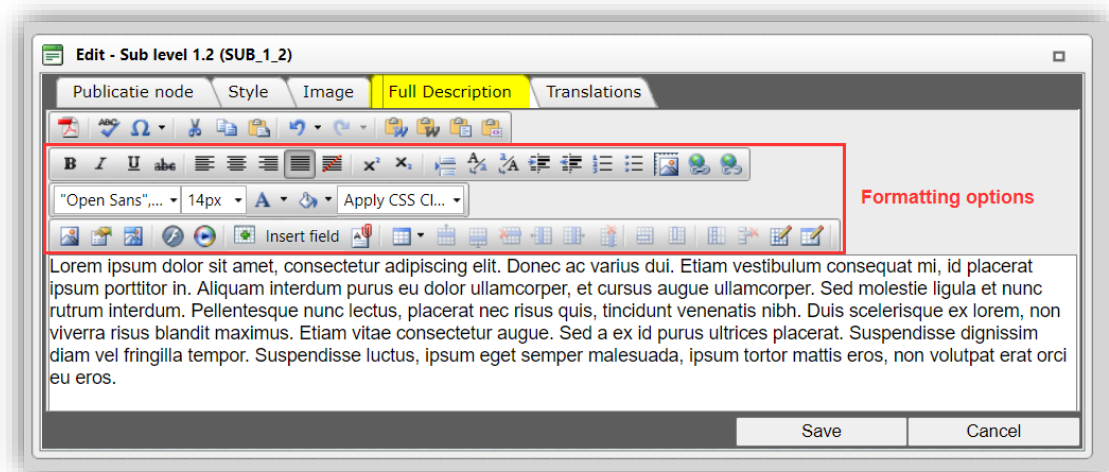


To add an image to a level or node, simply upload and select an image from your PC or enter an external link, such as: <https://mycompano.com/products/324987234.jpg>.

Note: Any image(s) only shows at that specific node; i.e. underlying nodes do **not** inherit any images.

7.3 Full description

Should you need to add any additional text to the publication node, for instance a general description of the product group, you can do so on the *Full Description* tab:

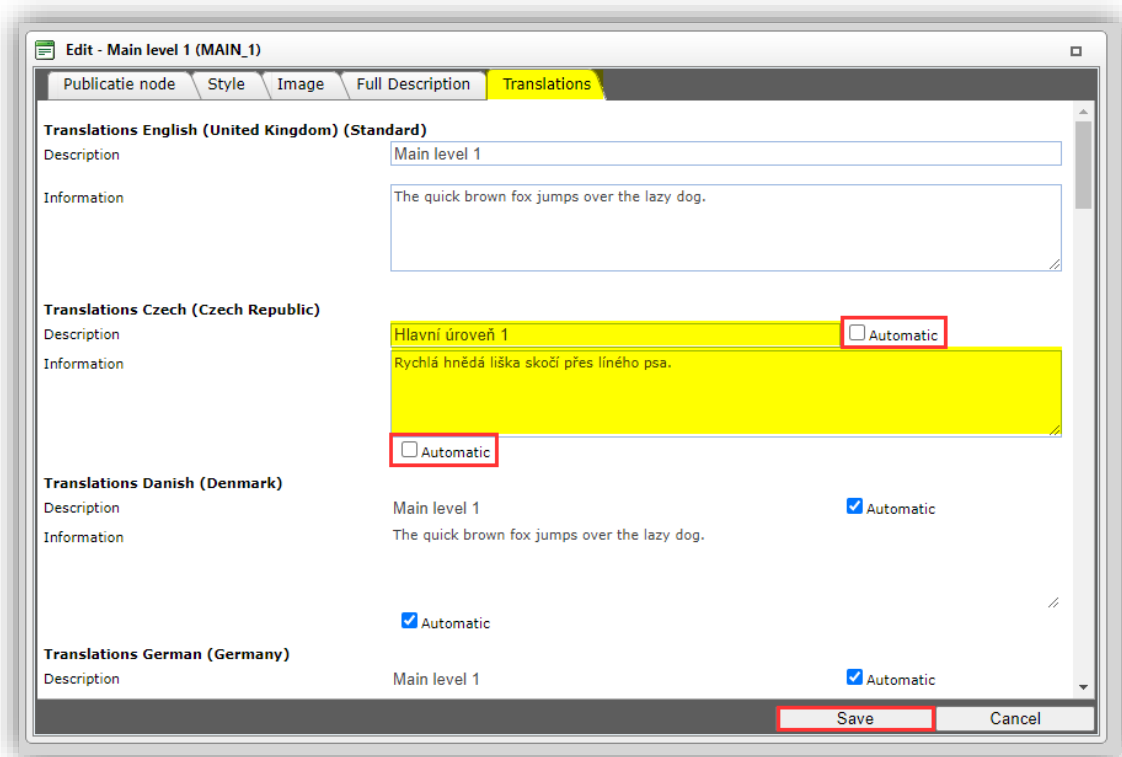


Note: The text can be formatted using the buttons in the editor bar. This will insert simple HTML tags that will be exported in the data feed and can thus be used by a web designer or catalogue publisher to format content.

7.4 Translations

On the *Translations* tab, translations of the Publication level or node (short) *Description* and *Full Description* can be added. To change a *Description*, first remove the checkmark at *Automatic*⁴:

⁴ When the *Automatic* check box is checked, the translation will automatically fall back to the Standard (default) language of the application. In the example above, this is the English (UK) language.



- a. **Description:** Translation of the field *Description* (Publication node tab)
- b. **Information:** Translation of the field *Full Description* (Full Description tab). Note: Formatting can be added by using (simple) HTML-tags, such as ``, ``, etc.

8 Attachments

Attachments can (and will) be added to publication nodes. How attachments are added, depends on the type of publication: generated or manually created.

More information on adding attachments, defining attachment types and inheritance of attachments can be found in the *COS PIM Manual Adding Attachments*.

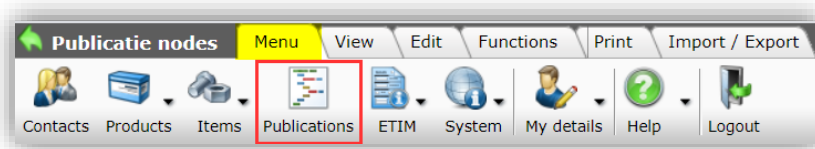
8.1 Generated publications and attachments

When generating a publication based on either product group or item group, any attachments that have been added to these groups will be 'copied' to the corresponding publication node. Thus, there is no need add any attachments to the node manually.

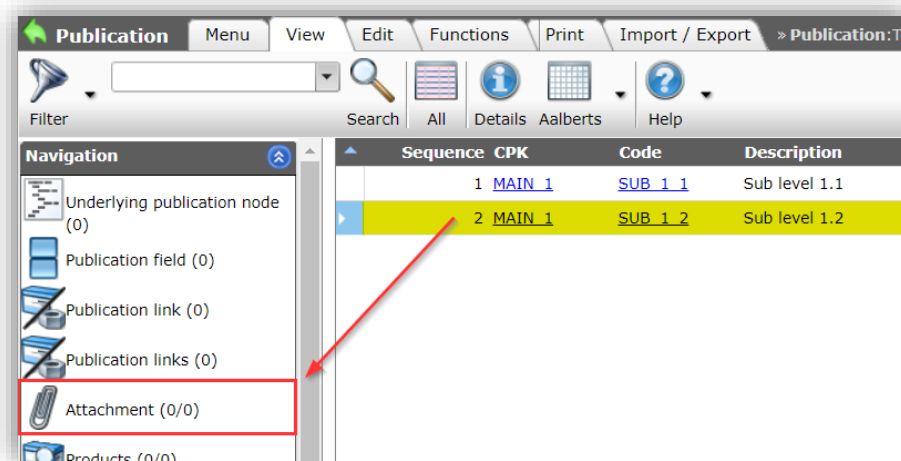
8.2 Manually created publication and attachments

Manually created publications differ in that they usually contain *manually* created 'group' nodes. Attachments to these 'group' level nodes need to be added manually:

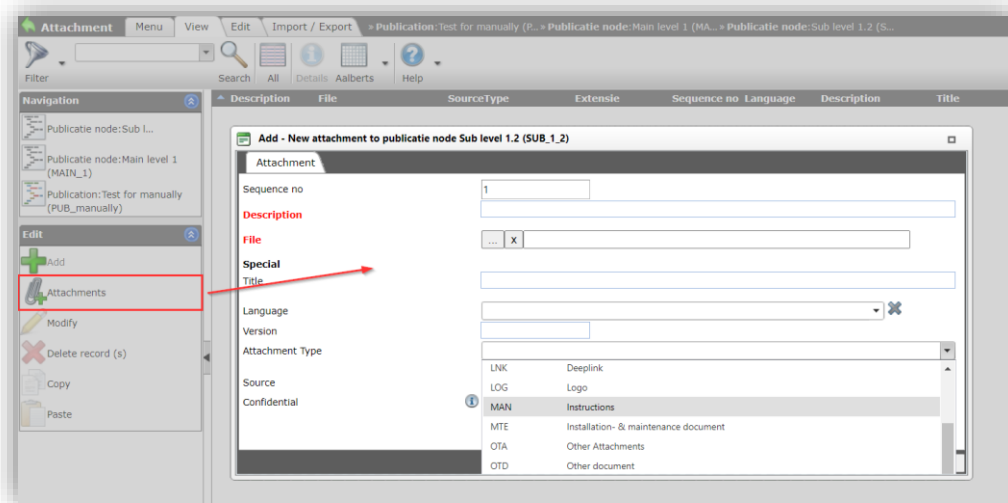
1. Through the *Menu* go to *Publications*:



2. Navigate to the level which contains the node where you want to add the attachment.
3. Select the level or node in the list and under *Navigation* click on *Attachment*:



4. On the next screen, under *Edit* click on *+Add*. Note: do NOT use *+Attachments*
5. A popup window will open where you can add the attachment:



- a. **Sequence**: Type the sequence number here. This sequence number can be used on, for instance, a web shop to determine the order in which the attachments are displayed.
- b. **Description**: Type a short description indicating what the attachment represents.
- c. **File**: Either upload and select a file from your PC or enter an external link to the attachment, such as: <https://mycompano.com/products/324987234.pdf>
- d. **Title (optional)**: Type a title for the attachment. This title could be used on, for instance, a product website as a caption for an image.
- e. **Language (optional)**: Select a language if relevant, otherwise leave blank when the attachment is multilingual. For example, an energy label could be language-specific; you would then add separate attachments for each language.
- f. **Version (optional)**: Enter a version number if need to keep track of different versions of the same attachment.
- g. **Attachment Type**: Choose the right attachment type from the drop-down list. Note: you are allowed to add your own attachment types to this list.

9 Publication maintenance

In certain scenarios publications need to be maintained, especially if new products, items or recipes have been added, or if new levels or nodes have been added (manually).

9.1 Updating publication links⁵

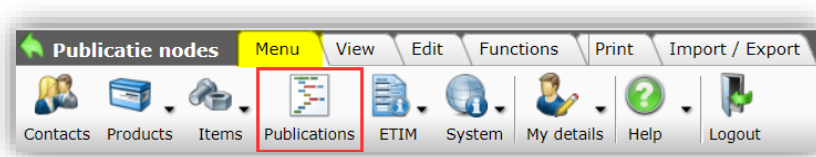
In your Publication the publication links can have been generated according to one of these two scenarios:

1. **Based on (manual) publication structure:** With *Create publication nodes* set to *Yes* (see paragraph [2.2 Generating a publication](#)), publication links for all products, items or recipes are added to the publication structure. This means that, whenever new products, items or recipes are added to the application, the publication needs to be updated, so as to generate links for this additions.
2. **Based on Product or Item Group:** If the Publication structure is based on either Product or Item group and *Create publication nodes* was set to *No*, then new products or items which have been added to the application will be automatically retrieved by any data feed based upon the publication.

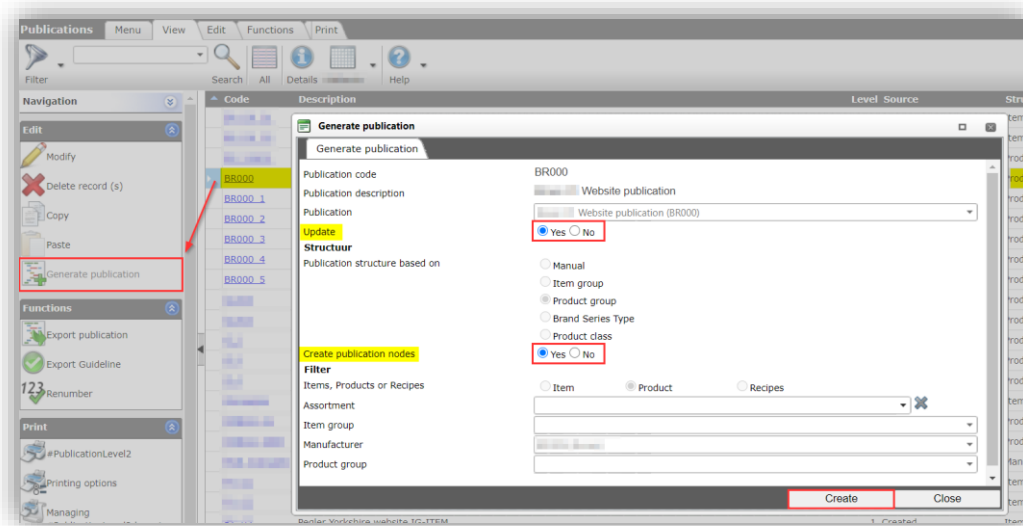
9.2 Updating publication structure

Whenever the basis for your publication structure changes, for instance new product groups are added, or you introduce a new series or type, the publication structure needs to be updated:

1. Through the *Menu* go to *Publications*:



2. Select the publication that you need to update and under *Edit* click on *Generate publication*.
3. In the pop-up window:



- a. **Update:** Set this option to *Yes*
4. **Create publication nodes:** set this option to *Yes* to update the information of existing nodes AND add any new nodes for, for instance, new product groups. Warning: Leave this option set to *No* when

⁵ Whether your publication needs to be updated also depend on how publications and data feeds based upon them have been set up. Your Compano consultant can inform you about the best update practice for your set up.

updating manually fine-tuned publication structures. Otherwise, any nodes that you had removed manually will again be added (!)

5. Click on *Create* to update the publication. Note: even though the button is labeled 'Create', you will be **updating** the Publication.

9.3 Effects of updating publication structure

When updating a publication structure in combination with product groups can have different effects, which are described below:

9.3.1 Adjusting the description of the publication node

With the same description as that of the product group:

After updating, the description of the publication node will be the same as the description of the product group.

9.3.2 Adjust the description of the product group

After updating, the description of the publication node is changed in accordance with the adjustment to the product group.

9.3.3 Add image to product group

After updating, the image is added to the publication node, provided that the attachment type is PPI.

Note: The image will not appear as an attachment, and the update report will state that there are no changes.

9.3.4 Product group image change

After updating, the image of the publication node is changed to the new image.

Note: The update report will indicate that there are no changes.

9.3.5 Archiving product group image

After updating, the image will **not** be removed from the publication node! Images attached to publication nodes will have to be removed manually.

Note: The update report will indicate that there are no changes.

9.3.6 Removing image from product group

After updating, the image will be removed from the publication node.

Note: The update report will indicate that there are no changes.

9.3.7 Delete image on publication node

An image cannot be deleted from a publication node if it is inherited from a product group, by editing the publication node and clicking the 'X' next to the image.

If an image is attached to a publication node, it has to be removed manually from the publication node.

9.3.8 Changing an image on the publication node

Must be done via attachments on publication node, or by product group.

9.3.9 Archiving product group

After updating, the publication node is **not** deleted.

9.3.10 Delete product group

After updating, the publication node is not deleted. This means that after deleting the product group, the publication node must also be deleted.

9.3.11 Moving the product group

After updating, the publication node will also be moved in the same way as how the product group was moved, including all publication links.

Note: The publication nodes at the 'old' location will still exist, they will have to be removed manually!

9.3.12 Relocation of publication node

It is not allowed to move a publication node, however, publication nodes can be copied and pasted to a new location.

Note: After copying, the 'old' publication node will have to be deleted.

9.3.13 Delete Publication Node

Warning: If you do not delete the product group, then after updating, the publication node will again be created.

9.3.14 Product group code changed for product

After updating, the product is moved to a new publication node in accordance with the adjustment of product group.

Warning: The product will also remain at the old location, thus this 'old' publication link will have to be removed manually.

9.3.15 Product group code on product emptied

The Publication link remains, but changes from "Created" to "Manual". The publication link still needs to be removed manually.

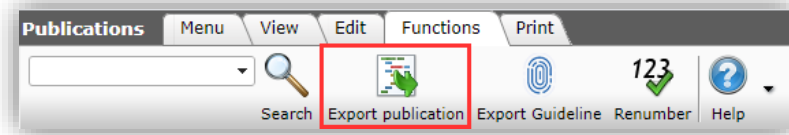
10 Export publication

Publication are mostly used as a basis for data feeds, however they can also be manually exported as a XML-file.

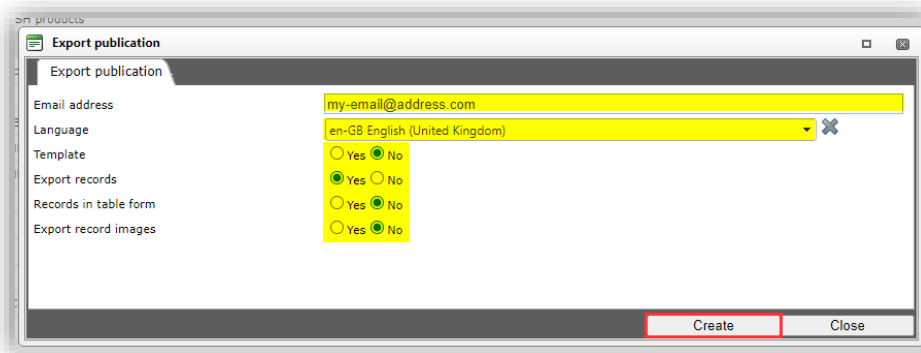
10.1 Export

To export a publication:

1. Through the Menu go to *Publications* and select the publication you need to export.
2. Next, go to the *Functions* tab and click on *Export publication*:



3. In the pop-up window:

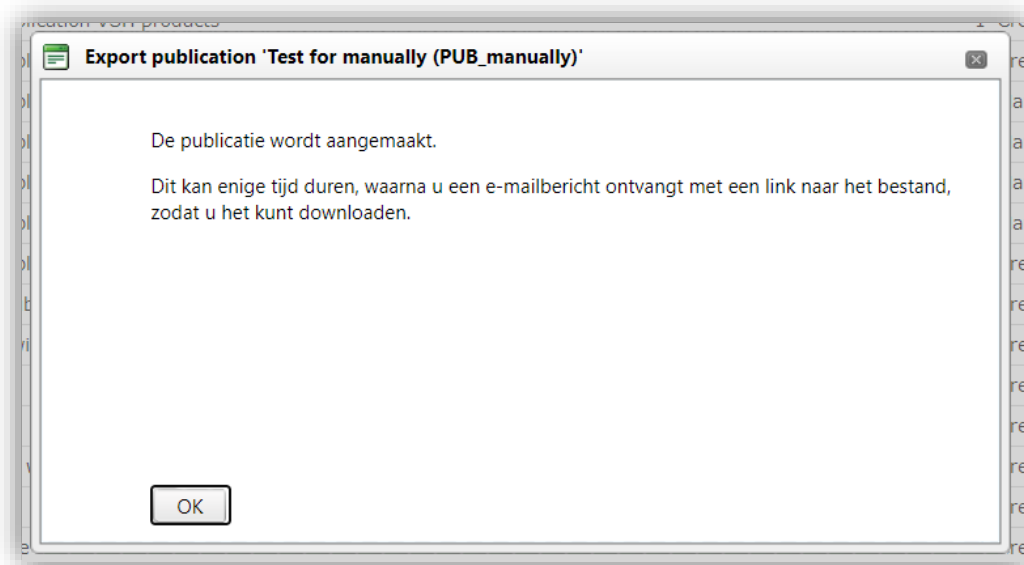


- a. **Email address:** Type the email address to which the link for download of the publication will be sent.
- b. **Language:** Select in which language the data will be exported.
- c. **Template:** Yes/No. When set to Yes, a trial export, with minimal data that gives an idea of what a real export will look like will be created.

Note :The trial export behaves slightly differently:

- Of all nodes, only the first one will be exported. So only the first top-level node, the first sub-level node, etc.
- Only the first record of each node will be exported.
- No images in the export, regardless of whether the checkmark is checked.
- For the not-as-table export: The first two UDF fields of the table, instead of the complete set of user-defined fields.
- For the not-as-table export: The first two classification fields of the table, instead of the complete set of classification fields.

- d. **Export records:** Yes/No
 - e. **Records in table form:** Yes/No
 - f. **Export record images:** Yes/No. When set to Yes, images and drawings will be exported in a separate folder. You will receive both the XML file and images in a compressed file format (ZIP).
4. Click on *Create*. A message will be displayed, informing you that you will receive an email containing a link to where you can download the resulting XML-file and, optionally, any exported images or drawings.



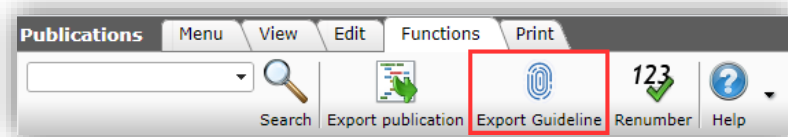
Note: Publications exported using the Export publication function will contain a default, fixed set of data fields.

10.2 Export Guideline

[Guideline](#) is a database publisher based in Belgium. Using the Export Guideline function, an XML export including special formatting tags can be exported. For an explanation of the formatting tags, also see paragraph [7.1 STYLE](#)

To export a publication:

1. Through the Menu go to *Publications* and select the publication you need to export.
2. Next, go to the *Functions* tab and click on *Export Guideline*:



3. In the pop-up window:



- a. **Email address:** Type the email address to which the link for download of the publication will be sent.
- b. **Language:** Select in which language the data will be exported.
- c. **Add images + attachments:** Yes/No.