Create a New Series

Step-by-step instructions that demonstrate how to create a new series on Littelfuse.com

Prerequisites:

Trainings:

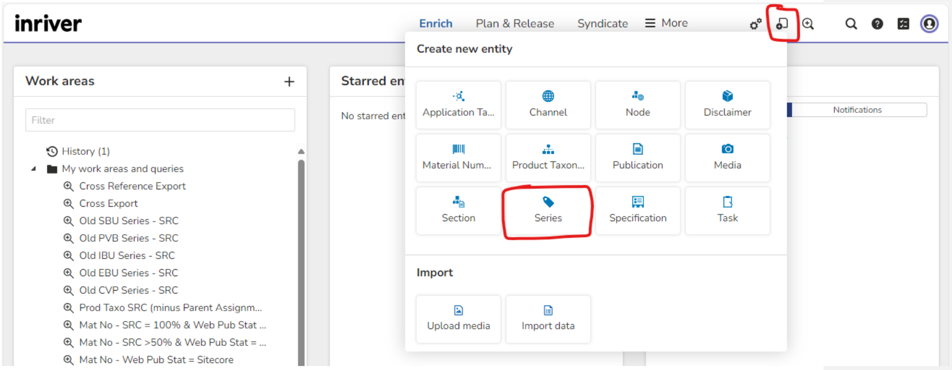
1. Navigation 101
    a. Get a basic understanding of the three systems that power Littelfuse.com and how they work together: (Product Information Management) PIM;
    b. Web Digital Asset Management (DAM); and
    c. Sitecore (LF.com's Content Management System (CMS)).
2. Understand QA vs PRD, enter into QA first then submit Change Request (can be bulk) for approval for PRD
3. Sitecore Readiness Criteria (SRC) training in PIM.
    a. Learn about SRC and how to use it.
    b. Learn why it is a best practice for providing an excellent user experience for displaying product information on Littelfuse.com.
4. Understand the fundamentals of the DCX Product hierarchy.
    a. Learn to successfully understand the DCX Product hierarchy and how to use it for product series and part planning.
5. In River "Get Started" courses (1-9). – A free curriculum provided by In River that introduces the basic concepts, terminology, and definitions within the PIM system.

Configurations:

1. The product taxonomy path to where then new series is intended to be placed should already be existing. If not, refer to the "Create a New Product Category Page" training document.
2. The Material Numbers (children) that will reside under the newly created Series should already exist in the PIM system. For more information about creating new Material Numbers, refer to the "Create a New Material Number" training document.
3. Users will need access to the systems listed below along with adequate privileges:
    a. In River (PIM) – Content Author
        i. Ivanti form…
    b. WebDAM – Contributor Role

            i. Ivanti form…
    c. Sitecore – Role?
            i. Ivanti form

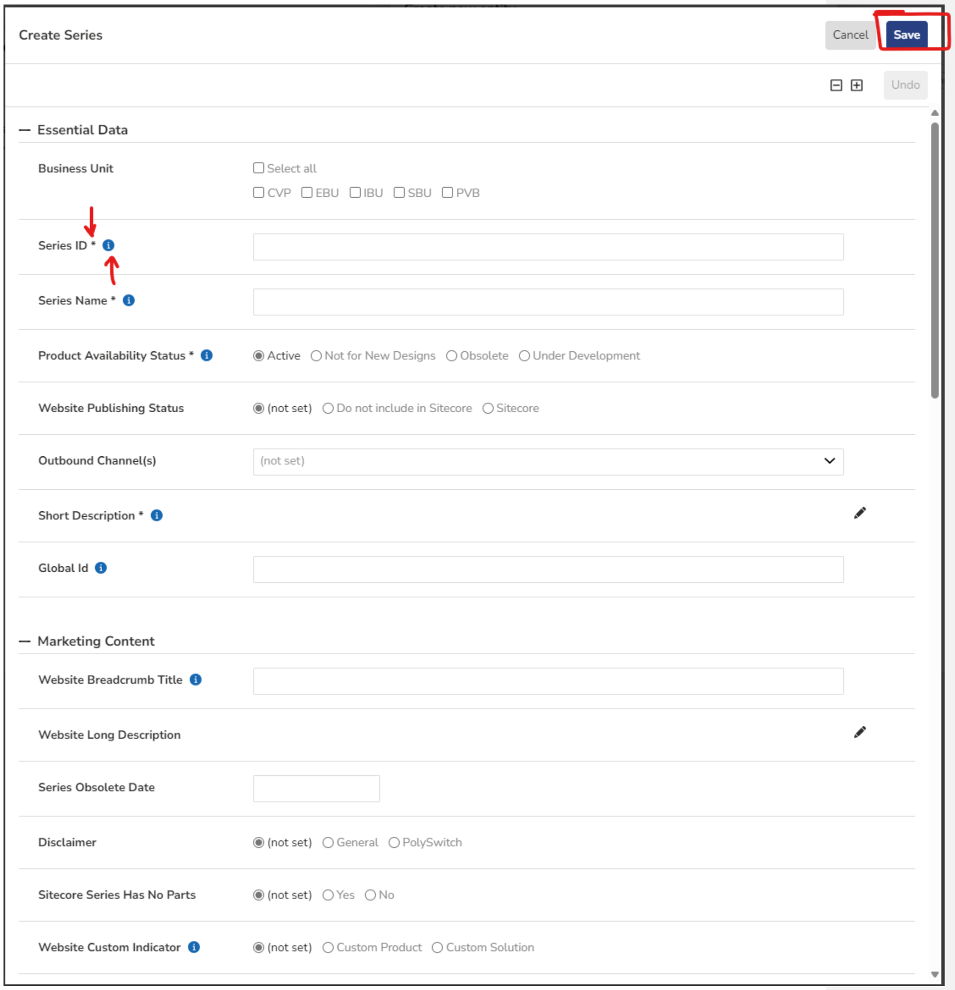
Follow These Steps

1. Log into the [In River (PIM) system]
    a. Select the "DCX PRD" environment (if applicable)
2. Select the Create New Entity icon in the tool bar, then select the Series icon in the menu.
    a. 

3. In the Create Series form, populate the fields. Once the fields are populated, select the Save button.
    a. Required:
            i. Series ID
            ii. Series Name
            iii. Product Availability Status
            iv. Short Description
    b. Highly Suggested:
            i. Business Unit (required in order to meet Sitecore Readiness Criteria)
            ii. Website Publishing Status (required in order to meet Sitecore Readiness Criteria)
            iii. Website Breadcrumb Title
            iv. Website Long Description
            v. Disclaimer
            vi. Features (1-10)
            vii. Benefits (1-10)

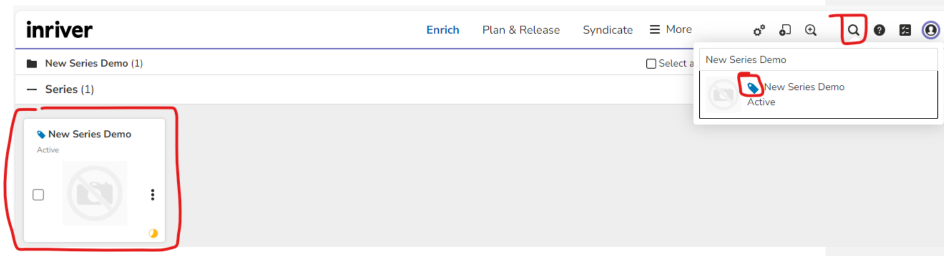
viii. Applications (1-10)
ix. Meta Title Tag
x. Meta Description Tag
xi. Meta Keyword Tag

c. Required fields indicate the minimum requirements to create the Series entity in PIM. I.e. you will not be able to 'Save' the form until you have populated values in the required fields. Those fields are denoted with an asterisk. They alone are not the same requirements that control if/when the entity will flow to Sitecore and eventually Littelfuse.com. Those requirements are defined by the "Sitecore Readiness Criteria".
d. You can hover over the information icon beside a given field to learn more information about that field's purpose and/or restrictions.



e.

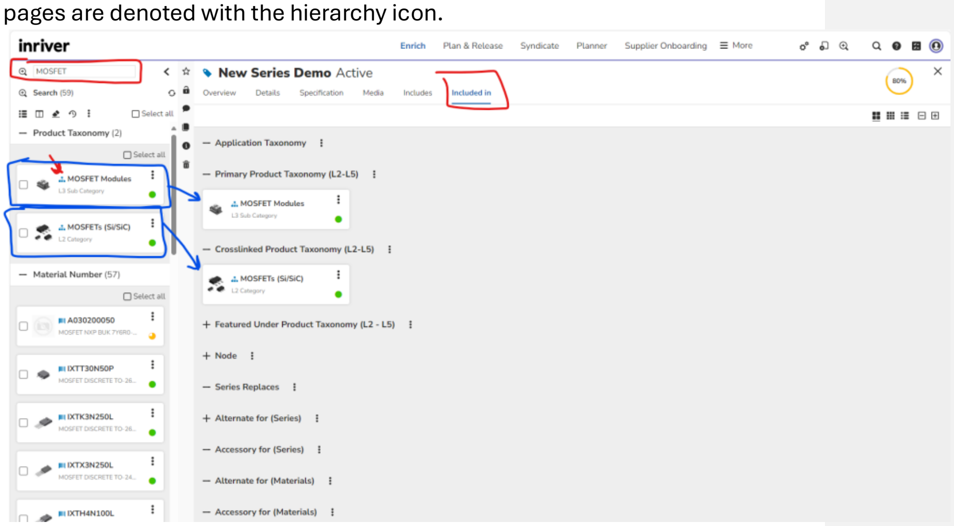
4. After the series is created, it should be linked to its taxonomy/hierarchy parent(s).
    a. Search for the Series you have just created using the magnifying glass in the tool bar. You should see a result with a price tag icon. Select that result. The price tag denotes the Series entity in PIM.

b. 

c. Within the Series page, navigate to the “Included in” tab.

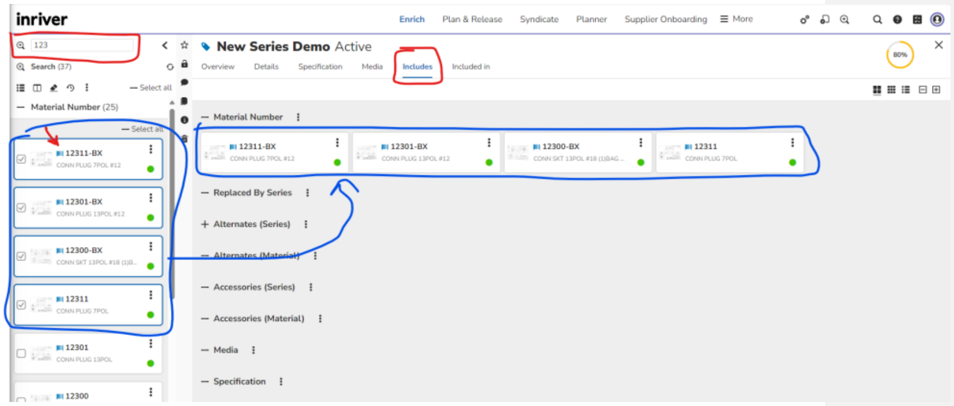
d. Search for the intended parent of the series using the search bar on the left hand side of the page. From the results set that appears in the left hand pane of the page, drag and drop the parent Product Taxonomy page into the Primary Product Taxonomy (L2-L5) relationship section of the Series enrichment area. If the Series should appear under a secondary parent (a.k.a. crosslinked), find the secondary parent via the steps above and drag/drop the secondary parent into the Crosslinked Product Taxonomy (L2-L5) relationship section of the Series enrichment area.

e. Only Product Taxonomy pages can be parents of series. Product Taxonomy pages are denoted with the hierarchy icon.

f. 

5. After linking to the parents, the new Series should be linked to its children (Material Numbers).
   a. Repeat step 4.a
   b. Within the Series page, navigate to the “Includes” tab.

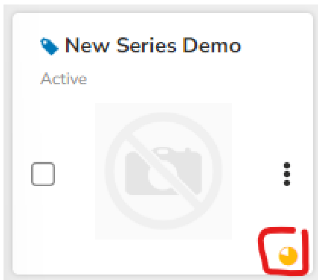
c. Search for the intended children (Material Numbers) of the series using the search bar on the left hand side of the page. From the results set that appears in the left hand pane of the page, drag and drop the children Material Numbers into the Material Numbers relationship section of the Series enrichment area. Pro Tip: You can select multiple Material Numbers and drag/drop them all at once (limit 25 at a time). The Material Number entities are denoted by the barcode icon in PIM.

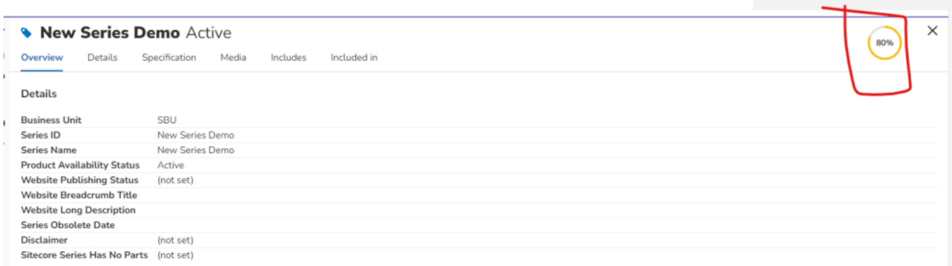


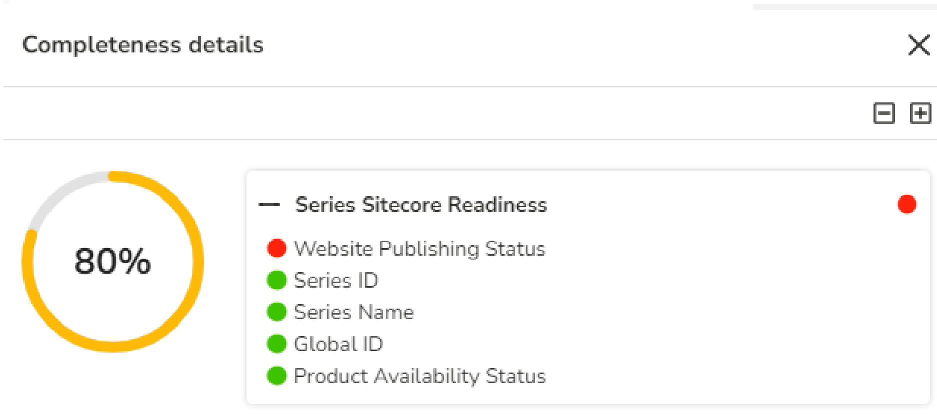
d.

6. Sitecore Readiness Criteria (SRC): minimum requirements necessary for a Series entity to flow from PIM → Sitecore → Littelfuse.com
    a. All BUs have the same SRC. The SRC for the Series entity is:
        i. Business Unit = not empty
        ii. Series “Sitecore Readiness Criteria” must be Complete *
            1. Website Publishing Status = not empty
            2. Series ID = not empty
            3. Series Name = not empty
            4. Product Availability Status = not empty
            5. Global ID = not empty (this is a system generated field; no user action is needed/possible)
        iii. The Series must have a parent relationship established (Step 4)
        iv. * This is a completeness criteria configured in the PIM system. You can quickly check it by slicking on the small circle on the Series card or in the top right corner of the Series enrichment page.

v.







vi. Note: The SRC requires the Website Publishing Status field to be 'not empty'. But in order for the Series to show on Littelfuse.com, the value should be equal to 'Sitecore'.

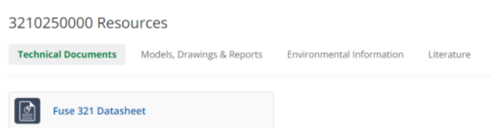
7. More information about additional relationships can be found in the "Series Entity" training document.

*** This concludes the actions that are performed in PIM. *As soon as* the Series is created, the Series ID will be added to the list of options in the Series ID field in WebDAM so that assets may be linked to the newly created Series.

Commented [LG1]: What is the sync time?

(Add instruction where to get to the correct screen. (Levi/Mustafa))100**Series Relationship in Included section**

a. Alternates and Accessories – L6s or L7s that can be dragged and dropped in PIM to show under Related Products section for users
b. Related Applications (**Application Taxonomy)** – Applications pages that can be dragged and dropped in PIM to show as baseball cards (image, title, description, link auto-pulls in)
c. **Primary Product Taxonomy (L2-L5)** - Associate series to parent
d. Material Number - L7/parts that belong to the L6/series, can be dragged and dropped in PIM

8. Associate assets in WebDAM to this new series
    a. Note: below applies to new assets. The metadata of existing assets can be updated to the same effect
    b. Datasheet
        i. Tag the Following metadata for the Datasheet Asset associated with the Series you are working on:
            1. Series ID
                a. Select the Series ID from the Picklist in the metadata field, which will be coming from PIM
                b. This will associate the Asset to the Series ID in PIM
            2. Resource Type
                a. Datasheets – displayed in parametric table, upper right of series page, and in Resource section
                b. Note: the Asset will appear in the Resources Section, Technical Documents Tab. See this link for full mapping of Resource Types and Resources Section Tabs: Resource Types Mapping and Sequencing on Littelfuse.com
                c. 

            3. Business Unit
            4. Document Title
            5. Include in Systems
                a. **PIM, Sitecore** – this makes sure the asset will be visible available in PIM and published on the website

Commented [SP2]: @Levi Gant can u please check all PIM fields, add any field length/specifics missing

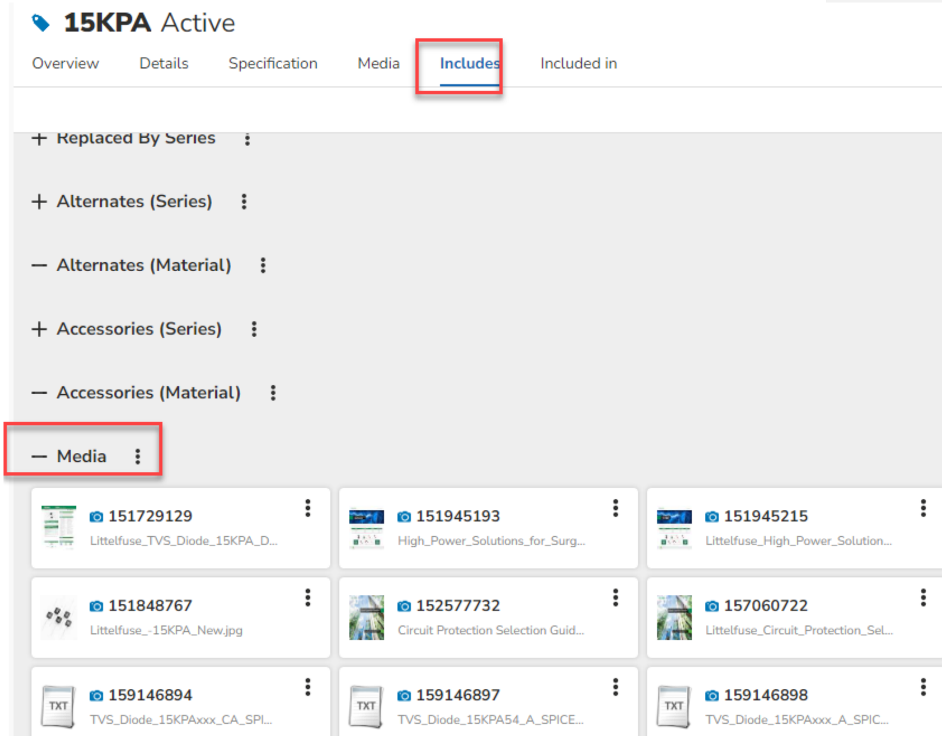
Commented [JR5R3]: @Mustafa Syed Thank you!

        6. Process Trigger
            a. Yes

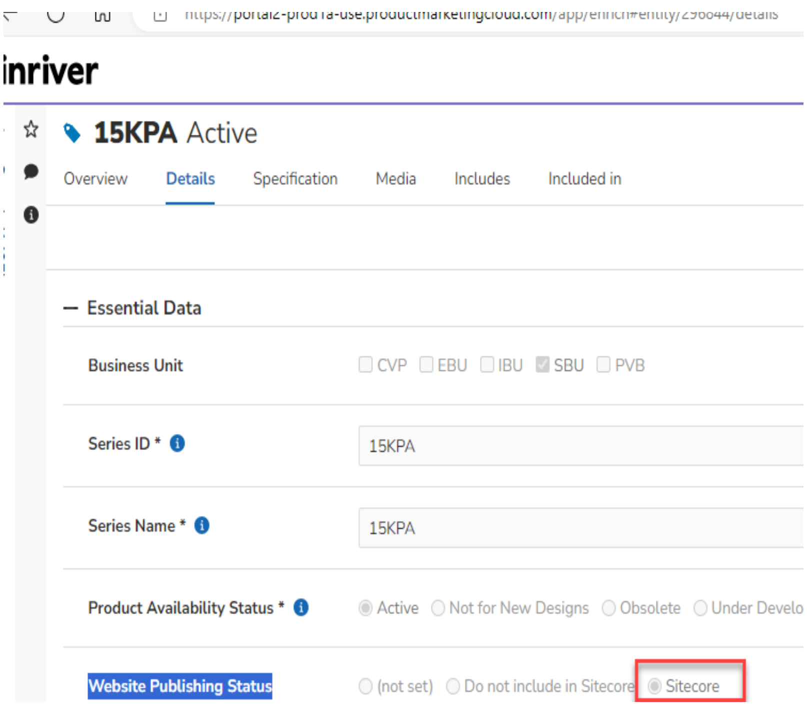
c. Overview Image
    i. Tag this metadata for the Series' Product Overview Image asset:
        1. Series ID
            a. Select the Series ID from the Picklist in the metadata field, which will be coming from PIM
            b. This will associate the Asset to the Series ID in PIM
        2. Resource Type
            a. Image
        3. Sitecore Image Type
            a. Product Overview Image
        4. Business Unit
        5. Alt/Tag
        6. Include in Systems
            a. PIM, Sitecore
                i. this makes sure the asset will be visible available in PIM and published on the website
        7. Process Trigger
            a. Yes
d. Carousel Image
    i. Tag this metadata for the Series' Product Carousel Image asset:
        1. Series ID
            a. Select the Series ID from the Picklist in the metadata field, which will be coming from PIM
            b. This will associate the Asset to the Series ID in PIM
        2. Resource Type
            a. Image
        3. Sitecore Image Type
            a. Product Carousel Image
            b. Note: the Overview image will appear as the first image in the Carousel per Sitecore logic, and the Carousel image will appear as the second image in the Carousel
        4. Business Unit
        5. Alt/Tag
        6. Include in Systems

a. PIM, Sitecore
    i. this makes sure the asset will be visible available in PIM and published on the website
7. Process Trigger
    a. Yes

9. Update “Sitecore Readiness Criteria” in PIM so series reaches Sitecore/website
    a. Check the assets are linked to your series by selecting Media from Include



    b. **Update Website Publishing criteria** to **Sitecore** – This will send the series to Sitecore and publish the website



10. The series page is now available on website without parametric table

   a. Wait for 3 hrs before you raise helpdesk ticket – email id (Helpdesk)

11. There are 2 methods to add a Parametric table to a New Series page

   a. Use an existing table: This method makes sense when creating a new Series page and there is already an existing Series which utilizes the same desired Specs.

      i. Create an Ivanti ticket and include:

         1. Request: "Add parametric table to a Series"
         2. New Series Name
         3. New Series Global ID
         4. Existing Series Name
         5. Existing Series Global ID

      ii. CDM team will set up the table and inform you when it is live.

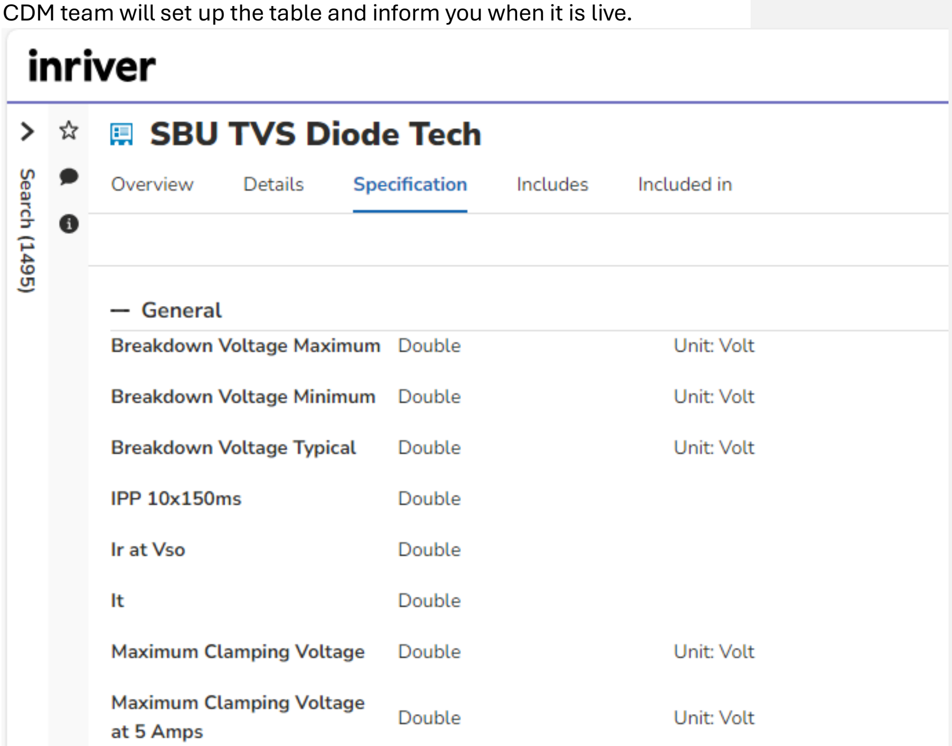
   b. Create a new Parametric table: A new table can be created with any valid specs used by the parts within the series

      i. Create an Ivanti ticket and include:

         1. Request: "Create new parametric table for a Series"
         2. Attach this template containing the below details:

PIM Page Name	Series: “Series Name”
PIM GUID	“Global Id”
PIM Spec Template Name	“Name”
PIM Spec Name	Name of the specification, ***as listed on the Spec Template**** Spec names as viewed on the PIM Part Pages have the Unit of Measure appended to them – these will not exist in Sitecore.
Order #	A number representing the Column (left to right) and Facet (top to bottom) order of each Spec. Note the orders for Column and Facet are the same.
EC Display Name (if different from PIM EC Name)	If nothing is entered here, then the PIM Spec Name will be what appears in the Parametric Columns and Facets.

ii. CDM team will set up the table and inform you when it is live.



12. New series is published and available on website with parametric

Disclaimer / -

For each integration wait 15 to 1hr
Check metadata in webdam
Check SRC in PIM