



SDI Configuration

Planon Software Suite

Version: L107

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

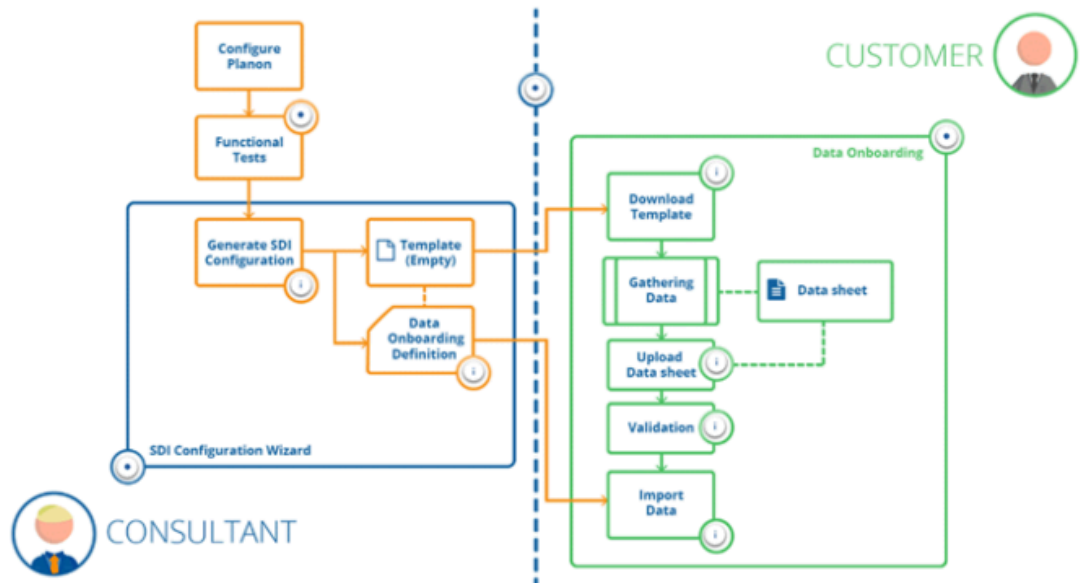
Table of Contents

About SDI Configuration.....	6
SDI Configuration - Concepts.....	6
SDI definition.....	7
Template.....	7
Validation.....	7
Working with SDI Configuration.....	9
Generating an SDI definition.....	9
Generating an SDI definition for communication logs.....	10
Exporting a definition.....	11
Importing a definition.....	11
Change type.....	12
Uploading links.....	12
Downloading a template.....	13
Uploading a data sheet.....	13
Validating a data sheet.....	13
Running an SDI definition.....	14
Specifics.....	14
Address type.....	14
Amount fields in Excel.....	14
Date-Time neutral fields.....	15
Importing a hierarchical structure.....	16
Importing the value of an auto-generated field.....	17
Person type.....	17
References without a unique lookup.....	17
Viewing logs.....	17
Download latest log.....	18

Download logs.....	19
Deleting logs.....	20
Troubleshooting.....	21
Synchronizing records.....	21
Field descriptions.....	24
Definition fields.....	24
Log / Log details fields.....	25
Index.....	26

About SDI Configuration

Planon application managers can use **SDI Configuration** to process SDI definitions.



Process description

1. The application manager liaises with the customer and creates a Planon configuration.
2. Based on the layout configuration, an **SDI definition** and a template (Excel) is generated.
3. The customer downloads the template (Excel) in **Data onboarding** and fills out the required data.
4. The customer ensures that the Excel file is compliant with the template and uploads it in **Data onboarding**.
5. The file is validated, if no errors occur the data can be imported into Planon.



For information about the first two steps, see [Generating an SDI definition \(TSIs \)](#).

SDI Configuration provides similar but more extensive functionality as **Data onboarding** does.

SDI Configuration - Concepts

SDI definition

A ready to use import definition for onboarding data, which comes with a template (Excel) that is based on a Planon layout. You can generate an SDI definition in TSIs or in Layouts .

You can download the template of the data onboarding definition and add data in Excel. Subsequently, this file can be uploaded and imported into Planon by using **Data onboarding** or **SDI Configuration**.

Template

An SDI definition comes with a template (Excel) that can be used to import data into Planon.

When opened in Excel, a specific layout will be visible showing all fields of the layout and their properties, guidelines that will help you when filling out the data.

The cell colors used in the sheet have a specific meaning.

- Green: field properties.
- Red: mandatory field/part of ID field.
- Yellow: specific format is required (picklists). When hovering your mouse over the field, the possible values will be displayed in a tooltip.
- Blue: field name.
- Orange: fields that are needed to set a reference. All fields should be filled in to be able to set the reference.



Do not edit the header, this information is required for the import.

Amount fields in Excel

Validation


A check to ascertain that the data to be imported complies with specific rules.

For uploading a data sheet, the following initial validation is performed to check whether:


- All fields to be imported (compared against the layout) are available.
- Additional fields are added to the data sheet.
- The maximum number of supported rows in the data sheet (10,000) is not exceeded.

When these validations are passed, the following validations are checked against:

- Are the fields set according to the configuration?
 - Len: Length exceeds Planon input length
 - Man: Mandatory field not populated

 Typically, mandatory fields must have a value in the data sheet (Excel). There is an exception for fields that are mandatory and that have a default value in Planon. If this is the case, the cells in the data sheet can be left empty. If there is a default value available, the header row in the data sheet will indicate this.

- ID: Part of search key field not populated
- Uni: Field not unique
- Type: Field type does not match
- Form: Format does not match
- Are unknown pick list values entered (warning when non-enforced pick list)?
- Has the configuration changed (layout, BO definition) in between?
- Are/is the (combination of) part of search key unique?

 If a reference field without a unique ID is available in the data sheet, and therefore other fields have been added to the data sheet and this reference field is set, the corresponding ID fields should also be filled out.

After encountering 5 empty rows, the validation will stop. After completing the validation, the status of the definition will be set to **Validated** or **Validated with errors**.

Working with SDI Configuration

The following topics describe how to use **SDI Configuration** for downloading/uploading data.

SDI Configuration...

- Has a similar structure as **Enterprise Talk**, but:
 - You can only use **SDI Configuration** to process data onboarding definitions.
 - You cannot use **SDI Configuration** to process import-export definitions.
- Does not enable you to add definitions, documents, business object definitions or fields.
- **SDI Configuration** only works for business objects that you can import with **Enterprise Talk**. The following list shows business objects whose fields you cannot import:
 - CAD field mapping (CADFieldMapping)
 - Budget (BaseBudget)
 - Workspaces (WorkSpace)
 - Base question (BaseQuestion)
 - Asset locations (InventoryLocationAssignment)
 - User-translated language BOs, (such as LangBaseAsset)



To import the definition of standard orders, the following fields must be added to the layout and definition and its values must be added to the Excel sheet - even if the fields are not mandatory:

- BusinessObjectDefinitionRef
- RefBODefinitionUserDefined.

Generating an SDI definition

In Layouts and in TSIs you can generate an **SDI definition** by running the **Data onboarding definition** wizard.

By running the **Data onboarding** wizard, a definition and a corresponding template (Excel) will be generated, which can be downloaded in **Data onboarding**.



This topic describes the procedure for Layouts . A similar procedure is also possible from TSIs .

1. Go to **Layouts** and select the (user-defined) business object whose layout you want to export.



If for a business object you are allowed to create user-defined business objects, then you can only generate an SDI definition on the user-defined business objects. If this is not possible for the business object, then you can generate an SDI definition on the system business object.

2. Go to Layouts level, select the layout in the elements panel and click ...
> Generate SDI definition.

The Data onboarding definition wizard appears. Depending on the selected business object, this wizard has either 4 or 6 steps.



You can browse through the wizard by clicking the selection steps in the left panel (instead of clicking **Next** or **Previous**). Use CTRL+Shift or CTRL+click to select multiple items.

- a. Data onboarding definition: fill in a Code and a Name and click Next.
- b. Select fields: from the **Selected** panel, deselect the fields that need not be filled in. By default, all the layout fields are listed in the **Selected** panel. The deselected fields will not be added to the template nor to the data onboarding definition. Click Next to continue.
- c. Part of ID: select the fields to be used for identification and click **Next**.
- d. Part of ID for references: per business object that is referred to (additional tabs in the wizard), select the fields to be used for identification. If no field is selected, often the **Code** or **Code group** field will be used for identification. Click **Next** to continue. In the template, there is a thick black line on the outside borders combining the fields you selected to identify the references.
- e. Select links: select the links (M-to-N or Multiple Select Free Fields) to be imported and click **Next**.
- f. Select part of ID for M-to-N links: for the selected links, select the fields to be used for identification.

3. Click Complete.

Your SDI definition is created. You can download the [Template\(s\)](#) and share it for filling out the data.

4. Click Close.

Generating an SDI definition for communication logs

Communication logs can be created for multiple business objects, which complicates matters if you need to import them. A crucial step in the process, therefore, is identifying the business object for which you want to import the communication log.


When generating an SDI definition for communication logs, a new set of steps (**e** and **f**) is included in the wizard to uniquely identify the link between business object and communication log.

1. Go to **Layouts** and select the (user-defined) communication log whose layout you want to export.
 2. Go to Layouts level, select the layout in the elements panel and click ...
> Generate SDI definition.
- a. Data onboarding definition: fill in a Code and a Name and click Next.

- b. Select fields: from the **Selected** panel, deselect the fields that need not be filled in. By default, all the layout fields are listed in the **Selected** panel. The deselected fields will not be added to the template nor to the data onboarding definition. Click Next to continue.
- c. Part of ID: select the fields to be used for identification and click **Next**.
- d. Part of ID for references: per business object that is referred to (additional tabs in the wizard), select the fields to be used for identification. If no field is selected, often the **Code** or **Code group** field will be used for identification. Click **Next** to continue. In the template, there is a thick black line on the outside borders combining the fields you selected to identify the references.
- e. Select an intermediate business object type: An intermediate business object is a technical business object that specifies the link between the communication log and the business object. Here, you select the link between communication log and business object, for example: Communication logs - order.
- f. Part of ID for intermediate business object: select the fields that you want to use to identify the business object to which you want to link your communication log.

3. Click Complete.

Your SDI definition is created. You can download the [Template\(s\)](#) and share it for filling out the data.

 When opening the downloaded template, the initial fields reference the business object of the communication log, followed by the fields from the communication log itself.

4. Click Close.


Exporting a definition

You can export a definition to reuse it across environments.

1. Go to Definitions.
2. Select the definition that you want export. On the action panel, click Export definition.

Use SHIFT+click or CTRL+click to select and include multiple definitions.

A zip file including the definition and its artifacts appears in your browser's download location. The encrypted template file is included in the `_resources` folder.

 In order to use this functionality, the upload location for secure documents (System Settings) needs to be specified. If not specified, you can proceed to download the zip file, but it will contain an errors.txt file explaining that the location must be filled.

Importing a definition

You can reuse a definition by importing it (from another environment).

1. Go to Definitions.

2. On the action panel, click Import definition.

The upload dialog box appears.

3. Select the definition and click Open and OK.

The definition will be imported. You will be informed once the process is completed.

Change type

After generating a layout definition, it will appear in **SDI Configuration**.


Here, you can perform various actions on the definition:

- Download template
- Upload data sheet
- Validate data sheet
- Run
- Delete

In addition, you can also click **Change type** to make the definition available in Enterprise Talk (where you could further tweak the import definition).

1. On Definitions level, select the definition that you want to make available to Enterprise Talk and click Change type.


The selected definition disappears from the elements list and is now available for editing in Enterprise Talk.

-  • This action is irreversible, and only works in one direction.
- You can only change the type of an SDI definition when its status is **Not uploaded**.

Uploading links

In addition to field values, it is also possible to import reference data, such as links between properties and stores or between properties and permits to work. These links include

- One-to-many (M-to-N) links.
- Multiple select free fields (MSFF) links.

-  By generating an SDI definition, a template is created. The template only holds the search (part of ID) fields of the two business objects that need a relation (link). It is possible to add multiple relations to the same business object.

Downloading a template

1. On Definitions level, click Download template on the action panel.

The **template** is downloaded and appears in your browser's download location. Apart from the fields based on a Planon layout, this template is empty. You can proceed to fill in the data in the template.

When filling in the data sheet it is good to keep the **specifics** in mind.



- Data onboarding definitions are only visible in the elements panel if they are set to **Active** in SDI Configuration.
- For more information about the fields on the **Definitions** level, see .

Amount fields in Excel

Uploading a data sheet

Once you are done completing and verifying the data in the Excel file, you can proceed to upload it.

1. On Definitions level, click Upload data sheet.
2. Browse to and select the data sheet that you want to upload.

The data sheet is uploaded and will be validated. Any errors or warnings that are encountered during validation are subsequently logged and displayed on the Logs level.

Amount fields in Excel

Validating a data sheet

After uploading a data sheet you can validate its content. A valid data sheet is a prerequisite for uploading data into Planon.

1. In the elements panel, select the definition to be validated.
2. On the action panel, click Validate data sheet.

The data sheet is validated. After completing the validation a message appears, pointing to view the logging for the results. The definition's system status on Definitions level is updated accordingly.



For an overview of the validation actions, see [validation](#).

3. Go to the Logs level to view the validation results.

Running an SDI definition

Click **Run** to run the SDI definition manually. The process will be initiated as a background action. The progress of the SDI definition process can be seen in the **Background action progress** bar in the **Background actions** TSI. For more information about background actions, see [Supporting data](#).

After running the definition, the data in the data sheet is imported into Planon. Subsequently, logging will be generated for the imported data.



In order to import the data, the corresponding definition in SDI Configuration must be **Active**.

Specifics

This section describes some specific situations that you will need to take into account.

Address type

Address type is a field that has a specific input requirement.

It is possible to define up to 10 address types. Each address type corresponds with a character: CILoupQRST. The value in the database is a string containing the characters for the selected address types and a space for the non-selected address types.

Example

For an address with address type 2, 5 and 9, the value is:

`<space>I<space><space>U<space><space><space>S<space>`

1	2	3	4	5	6	7	8	9	10
C	I	L	O	U	P	Q	R	S	T
<space>	I	<space>	<space>	U	<space>	<space>	<space>	S	<space>

Amount fields in Excel

When you are using Excel as a tool for capturing data (import/export), note that Excel stores amount values differently than may be expected.

Values in Excel sheets are internally stored as XML (right-click any Excel > 7-Zip > open archive ...).

In the XML, values may be stored using a much finer degree of precision than what is displayed

Example 305.65 might be stored as 305.649999999998.

Planon cannot alter these values coming from the XML.

When using Excel in Planon (**Enterprise Talk, Data Onboarding, SDI Configuration**), this may result in differences between Excel and Planon.

Workaround

- Change the format of all numeric cells in Excel to text.
Or, if this does not work...
- Prefix all numbers in all cells with an apostrophe. An apostrophe before a cell value forces Excel to interpret the value as text. This is mostly useful for values that look like a number or date.

Template

[Downloading a template](#)

[Uploading a data sheet](#)

Date-Time neutral fields

The template header indicates all kinds of information: whether a field is mandatory, what the field length is, and so on. Importantly, when there is a format requirement, the exact format is also listed in the header.

For **DateTimeNeutral** fields, note that the format that you see in Excel may differ from what is actually the cell value as shown in the following example:

	A	B	C
1	Planon input length	100	
2	Mandatory	true	true
3	Unique	true	false
4	Field type	String	DateTimeNeutral
5	Format		YYYY-MM-DDTHH:MM:SS
6	Part of search key	false	false
7	System name	Code	StartDate
8	Default available	true	false
9	Label	Code	Start date
10		10000001	2019-06-17T00:00:00
11		10000002	2019-06-24T09:00:00

Here, when you click the cell, its value is displayed in the formula bar on top (highlighted).

Make sure the value in the cell complies with the DateTimeNeutral format: YYYY-MM-DDTHH:MM:SS. You can type or copy the value in the formula bar. If the cell value does not comply, the import will fail.

Importing a hierarchical structure

When importing a hierarchical structure, a reference to the parent level is required.

Typically, when importing a hierarchical structure, you need to first import the parent and then import the sub (because the sub references the parent). Importing the sub first will result in an error.

If you need to first import the sub, you can do so by filling in NULL for the parent reference.

Planon input length	20	255	255
Mandatory	true	false	false
Unique	false	false	false
Field type	String	String	TechnicalClassification
Format			
Part of search key	false	false	false
System name	Code	Name	ParentRef
Default available	true	false	false
Label	Code	Description	Parent level
	01	Mechanical building services	NULL
	01	Mechanical building services	01
	02	Electrical building services	01

Importing the value of an auto-generated field

If a field value is mandatory in SDI but you cannot fill in a value (for example, because it will be auto-generated), you can override this issue by filling in NULL as a value.

Person type

Person Type being a special field, is stored in the database as string of numbers 0,1,2,3,4,5,6,7,8,9 where each digit matches a particular type.

The value in the database is a string containing the number for selected person types and a space for the non-selected person types.

Example

For a person with person type 2, 5 and 9 the value will be:

`<space>2<space><space>5<space><space><space>9<space>`

1	2	3	4	5	6	7	8	9	0
<space>	2	<space>	<space>	5	<space>	<space>	<space>	9	<space>

References without a unique lookup

When a reference field does not have a unique lookup it sometimes has a combination of fields that make the referenced business object unique. In this case, automatically all fields that make this business object unique will be added to the template (Excel).

Some business objects do not have a unique key at all, not from business logic and not by configuration (this could be the case for example for free business objects). In this case, no other fields than the reference field (lookup) will be available.

Example

The space lookup (code) is not unique.

When there is a space reference in the layout, next to the **space.code** field, automatically also the **property.code** and **floor.code** fields are added.

Viewing logs

After importing your data from the data sheet, errors and warnings encountered during import are displayed on the **Logs** level. You can view the log (details) in order to fix issues.

There are various ways of accessing logs.

Download latest log

To get immediate feedback on the results of the latest run, you can download the latest log. For more information, see [Download latest log](#).

Download logs

To view multiple logs in a single PDF you can download them using the **Download logs** action. For more information, see [Download logs](#).

Navigation selection

1. On Definitions level, select your simple import data definition and go to Logs level.

The Logs level displays the results of a running the definition.

2. Select one or more items from the list, and go to Log details level to view the details of the issues encountered.

Here, you can view all errors and warnings for the selected run. For more information about the fields on these levels, see [Log / Log details fields](#).

Download latest log

To get immediate feedback on the results of the latest run, you can download the latest log.

1. On **Definitions** level, select your import definition and click **Download latest log**.

This will always download the log of latest action that is performed. The log itself is a formatted PDF, which you can view in your browser or by using a PDF viewer.

Example

Summary of total import:

Document: Employee

Start date-time: 2018/03/01 10:57:59 GMT+5:30

End date-time: 2018/03/01 10:57:59 GMT+5:30

UsrEmployee:

Number of business objects processed: 4

Number of business objects skipped: 2

Number of business objects created: 0

Number of business objects updated: 2

FloorRef:

Number of business objects processed: 2

Number of business objects skipped: 2

Number of business objects created: 0

Number of business objects updated: 0

SpaceRef:

Number of business objects processed: 2

Number of business objects skipped: 2

Number of business objects created: 0

Number of business objects updated: 0

Issues found...

UsrEmployee:

Field Code is empty or contains invalid data.(PN_H00002)

for Row 1 to row200, Row250.

UsrSpace:

Field Code is empty or contains invalid data.(PN_H00002)

for Row 1 to row200, Row250.

Source Imported

UsrEmployee new.xlsx Failed

The information in this log is as explicit as possible and is clubbed by row.

Download logs

In addition to viewing the logs in the application, you can also download the logs as a formatted PDF.


This feature is available for:

- Enterprise Talk / SDI Configuration > Business object definitions > Import document logs
- Data Onboarding > Logs
- CAD Import > Import logs

1. Go to the appropriate level (see earlier) and select the log(s) that you want to view.

If you select multiple logs, these will be combined in a single PDF.


2. Click Download logs. Your PDF will be downloaded and you can view it in your browser or by using a PDF viewer.

 The **Download logs** action only properly works for CSV and Excel imports and not so much for XML.

Deleting logs

If you no longer require the available logs or log details, you can delete them.

1. On the Logs (or Log details) level, select the logs (details) that you want to delete and click Delete on the action panel.

 If you delete the logs, the log details will also be deleted.

The selected logs/log details are deleted.

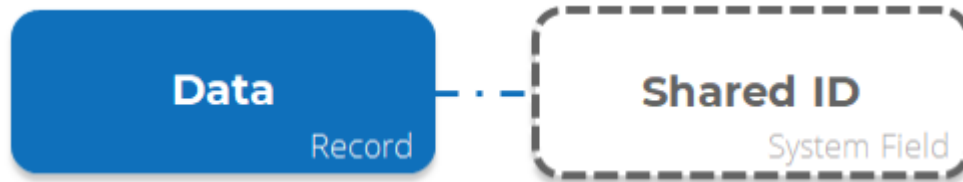
Troubleshooting

The following topic(s) describe(s) specific information that is important to keep into account.

Synchronizing records

A **Shared ID** is a unique, mandatory, and insert-only system field.

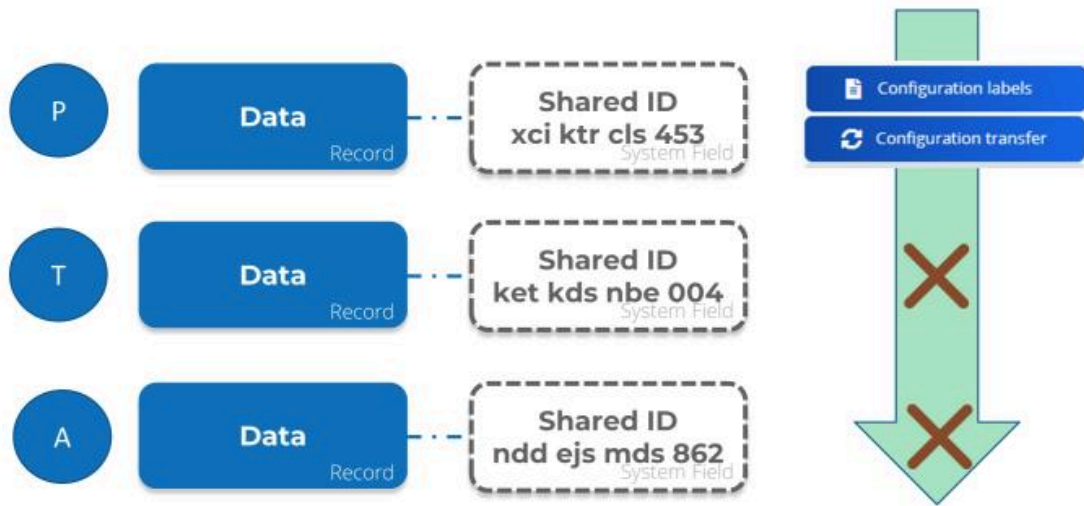
Its purpose is technical: to uniquely identify a record. This is why, while creating a record, the user is not aware of it or needs to worry about it: it is auto-generated during record creation and it cannot be updated later.



Problem

Because of its technical nature, this field is not enabled in GUI and - thus - the user cannot supply a value while creating record via the user interface.

This is problematic when synchronizing data across DTAP environments. If there is no way to synchronize data along with their **Shared IDs**, then the same record in Dev and Test will have different **Shared IDs**, which is functionally incorrect.



This - in turn - is problematic for Configuration Transfer/ Configuration labeling and CAD drawings: it will fail to match the data record with its **Shared ID** in the source and target environments.

Solution

To solve this issue, the **Shared ID** field has been enabled for Enterprise Talk and SDI.

This means that it is now possible to supply the **Shared ID** value while creating a new record using these tools (it needs to be unique, or it will fail).

i If you do not provide any value in Enterprise Talk/SDI document or do not include the field in the Enterprise Talk/SDI document, then it will have a unique default value.

How does this work

The **Shared ID** field was introduced in L69. Consequently, when upgrading to L69 (or later) all the relevant records will have this new field, populated with a unique default value.

So, when upgrading DTAP environments separately to L69 this will result in the same records in Dev, Test, Acceptance and Prod having different **Shared IDs** - as already explained.

To solve this issue, we strongly recommend that after the upgrade to L69 is completed to copy the Prod DB to all the lower DTA(P) environments so that for all the existing records the **Shared ID** is in sync across all the DTAP environments.

Technically, it is required only once to copy the Prod DB to lower DTA(P) when you first-time upgrade to L69.

Once all the DTAP environments are in sync you can use the environments as usual.

Going forward, any time if you create a new record in let's say a Dev environment, then you must import that record along with its **Shared ID** to Test and other environments using Enterprise Talk or SDI. Otherwise, records will not be in sync in the DTAP environments, and this will create issues in Configuration Transfer/Configuration Labeling as discussed.

However, synchronizing the **Shared ID** via Enterprise Talk and SDI only works from L75 onwards. So, any new record can be imported to other environments with its **Shared ID** only from L75 onwards. This means that between L69 to L74 there is no way to sync the **Shared ID** for new records and for that you must upgrade to L75. But existing records will work fine between L69 to L74 - provided you copied the Prod DB to lower DTA(P) environments during the upgrade for L69.

Recap

- When you first-time upgrade to L69 then do not forget to copy the Prod DB to the lower DTA(P) environments.
- If you are below L75, then there is no way to sync the **Shared ID** for the new records.
- From L75 onwards, if you create a new record then you must always first import the data with **Shared ID** to other DTA(P) environments before using Configuration Transfer/Configuration Labeling to avoid the **Shared ID** issues.



As always: first import data, then configuration.

Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Definition fields

Field	Description
Code	Displays the code of the generated definition.
Name	Displays the name of the generated definition.
Sequence	Integer specifying the order of importing the data. The lowest sequence number needs to be imported first. If definitions have the same sequence number, the order of importing these is trivial. If you are importing properties and floors, you must first import properties and subsequently floors.
Active?	Indicate whether you are ready configuring and testing the layout. When you are ready and set this field to Yes , the definition is made available to Data Onboarding.
GUID	A unique identification that is used to match the definition and the data sheet.
Layout	Displays the layout on which the definition is based.
Status	Displays the status of processing the template/data sheet.
User code	Displays the user who created the definition.
Modified by	Displays the user who modified the definition.
Modification date	The date of the last modification.
Insertion date-time	The date of generating the definition.

Log / Log details fields

Field	Description
Application log type	Displays the type of log, which is either: <ul style="list-style-type: none">• Error• Warning• Information
Source	Displays information that identifies the import/export.
Log message	Displays information that will help you understand what went wrong during the import/export.

Index

A

- Address type 14
- Amount values 14
- Autogenerated field value 17

C

- Change type 12

D

- data onboarding 9
- Data onboarding: template 7
- Definition fields 24
- Definition: exporting 11
- Definition: importing 11
- Download latest log 17, 18
- Download logs 17, 19

F

- Field descriptions 24

H

- Hierarchical structure 16

I

- Importing communication logs 10

L

- Log/log detail fields 25
- Logs 17
- lookup 17

M

- MSSF links 12
- M-to-N links 12

N

- NULL 17

O

- Onboarding data 7

P

- ParentRef 16
- Person type 17

R

- Requirement 14, 15, 17
- Rounding differences 14

- Running a definition 14

S

- SDI configuration: about 6
- SDI configuration: working with... 9
- SDI: delete logs 20
- SDI: template 13
- Shared ID 21
- Specifics 14
- Synchronization issue 21

T

- Time neutral fields 15
- Troubleshooting 21

U

- Uploading a data sheet 13

V

- Validation 7, 13