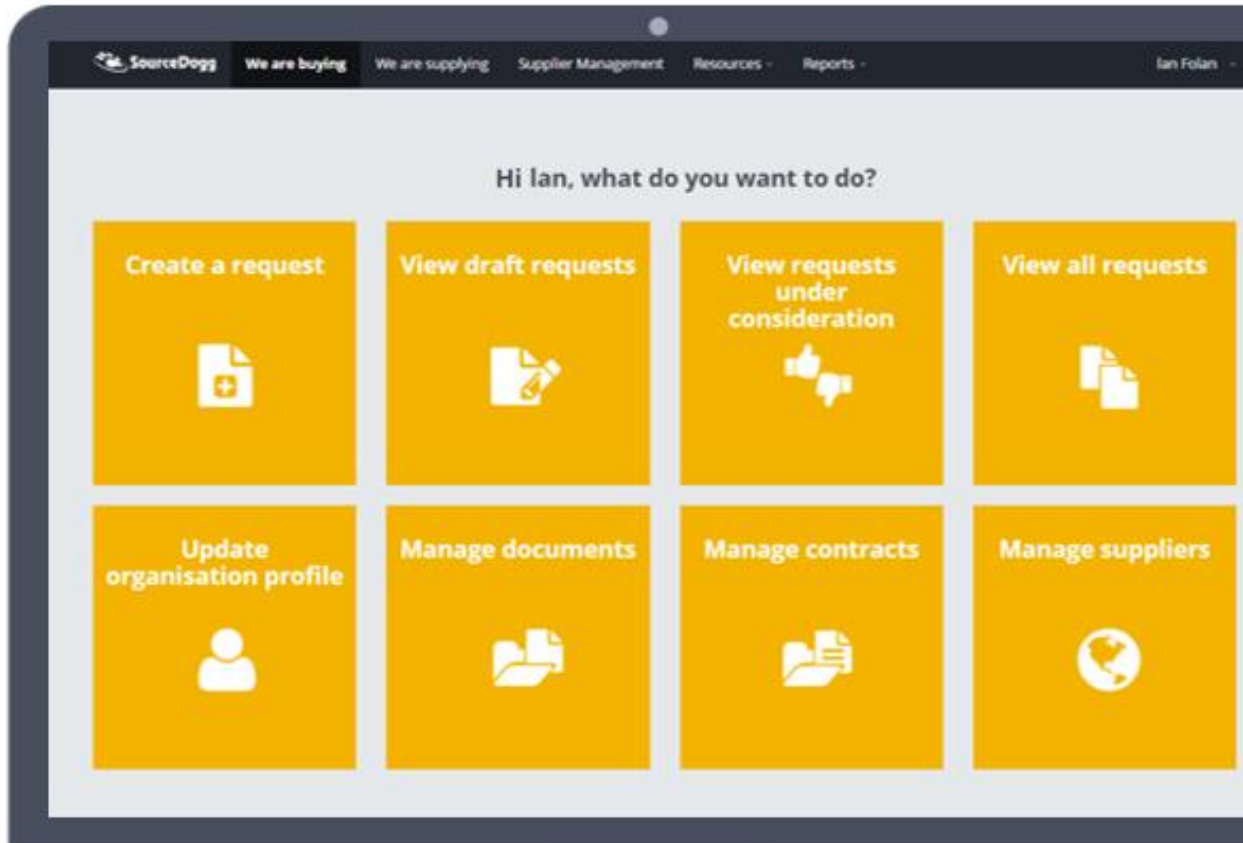




SourceDogg

Validation patterns user guide

Date: 2nd January 2018



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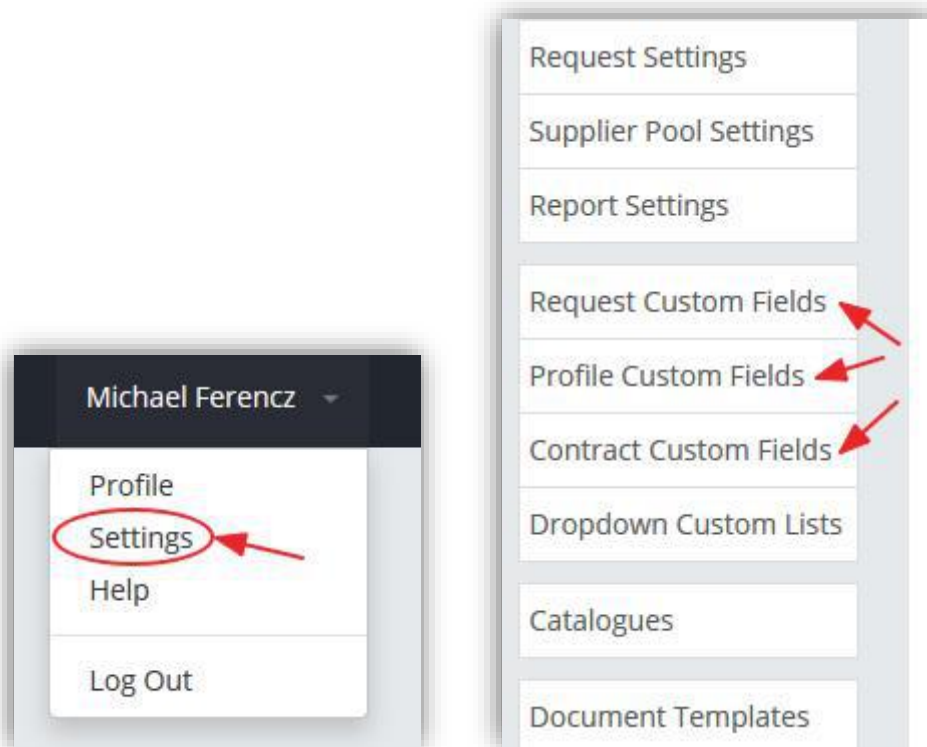
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Introduction


Validation patterns were added as a feature to SourceDogg to enable enforcement of data entry by Buying organisations where deemed necessary. Validation patterns can now be added as an extra feature to all custom fields (supplier profile, contract management, request fields) and also to selected types of questions used in RFx. The main aim is to ensure the data entered by either internal users within an organisation or supplier, match the requirements defined by the Buyer. For example, when requesting a VAT number to be entered a formula can be predefined, that will allow the user to only enter data in the form of two letters followed by a defined number of numbers.







Creating Validation patterns in Custom Fields

To create a custom field, the user must have the administrative user group permissions within their SourceDogg account. To create a custom field, first, open the settings of your account and then select the type of custom field you want to create from the list on the left-hand side.



Profile Custom Fields
Create new custom fields or edit existing ones.


 [Add Custom Field](#)

| NAME | DESCRIPTION | ORDER | |
|------------------------|--|-------|---|
| Category | Please enter Spend Category for this supplier | 1 |  |
| Type of Company | Select the type of the company | 2 |  |
| Spend last 3 years | The amount of money spend with this supplier for the last 3 years | 3 |  |
| Personal Data Approved | Yes No | 4 |  |
| SAP Vendor Number | Please enter the unique vendor number in the format XYZ12345 | 5 |  |
| Relationship Owner | Please enter the supplier relationship manager responsible for this supplier | 6 |  |

To create a new Custom Field, click the “Add Custom Field” button and fill the details for each field.

Name *

Description

Validation Pattern 

[Help with this pattern](#)

Write the validation pattern for the custom field into the Validation Pattern box. For help, click on the “Help with this pattern” link below the text box.

Test the pattern

The validation pattern on custom fields uses [regular expressions](#). This is a commonly used technique for specifying allowable content.

Validation Pattern

`^[A-z][A-z][0-9][0-9][0-9][0-9][0-9][0-9]$`

Test:

AB987643

Examples:

User must enter one of a list of Values
[^One\\$|^Two\\$|^Three\\$](#)

User must enter only numbers
[^\[0-9\]+\\$](#)

User must enter YES or NO
[^YES\\$|^NO\\$](#)

User must enter an Email Address (Basic Check)
[.+@.+\.+.](#)

User must enter a Code of the format POXXXXX or the word "Exempt"
[^PO\[0-9\]\[0-9\]\[0-9\]\[0-9\]\[0-9\]\\$|^Exempt\\$](#)

Result:

VALID

Close

The validation pattern created can be tested here. If the text input matches the validation pattern, the Result button changes to “VALID” and turns green in colour. There are examples of common validation patterns added here. These can be customised further if needed, as per the requirement of the individual organisation.

If the user enters invalid data into the custom field, the field turns red and data entered cannot be saved.

| | |
|-------------------|--|
| SAP Number | <input type="text" value="1265946"/> |
| Custom Data | Unique SAP number in the format YZ123456 |

Only when data matching the validation pattern is entered can the user be permitted to save the data.

| | |
|-------------------|--|
| SAP Number | <input type="text" value="AB125949"/> |
| Custom Data | Unique SAP number in the format YZ123456 |

Creating validation patterns in RFx

This functionality allows using validation patterns when collecting certain types of information from the supplier base, e.g. bank details or VAT number. Validation patterns can be a useful tool to ensure the validity of the critical business data collected by RFx.

Currently, several types of questions in SourceDogg can be set up to contain validation patterns, namely Radio Button, Checkbox, Free text and Matrix.

Radio button

When creating the radio button type question, it is possible to turn on validation on the free text answer choice (if activated).

Allow a free text answer choice

Allow respondents to enter their own answer. Edit the answer choice label below as required.

Please enter your registration number

Enable Validation Pattern

Validation Pattern

[Help with this pattern](#)

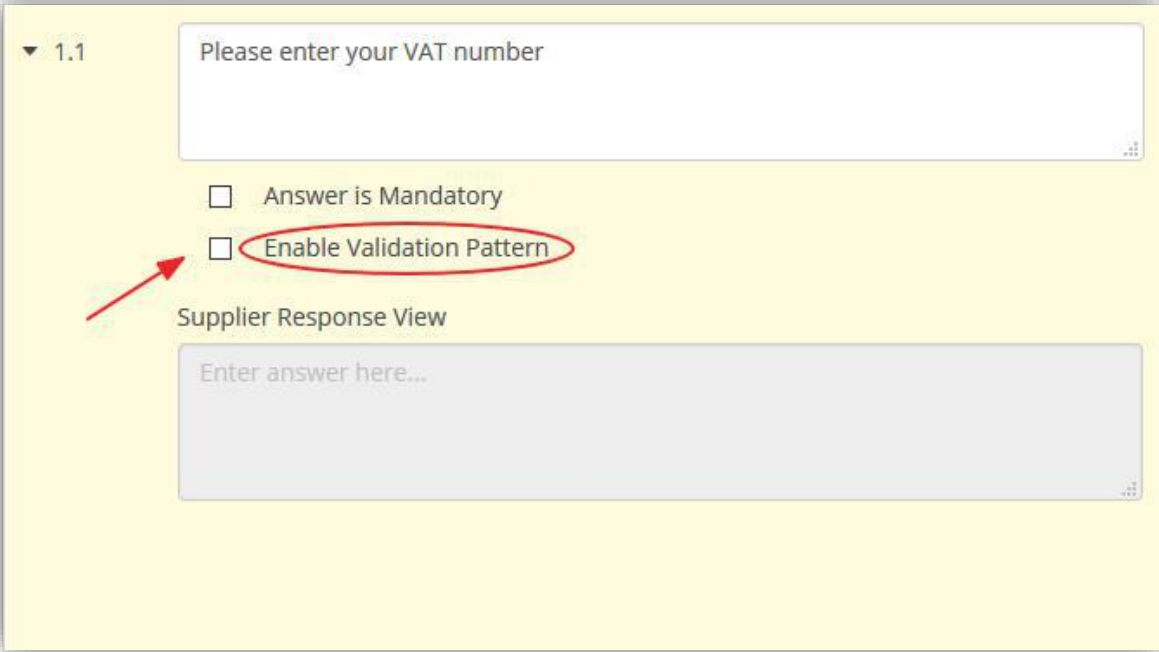
Validation Help Text *

This text will be displayed below the answer box.

Checkbox

The functionality is identical as with the Radio button question above.

Free text



The screenshot shows a configuration panel for a question. At the top left, there is a dropdown menu with the value '1.1'. To its right is a text input field containing the text 'Please enter your VAT number'. Below this input field are two checkboxes: 'Answer is Mandatory' and 'Enable Validation Pattern'. The 'Enable Validation Pattern' checkbox is circled in red, and a red arrow points to it from the left. Below the checkboxes is the text 'Supplier Response View' followed by a larger text input field with the placeholder text 'Enter answer here...'. The entire configuration area has a light yellow background.

To activate the validation pattern for the Free Text question, select the “Enable Validation Pattern” checkbox. Enter the validation pattern or click on the Help button to test the pattern first. You must enter the Validation Help Text, which will guide suppliers as to what information needs to be entered and what format is required.

Validation Pattern

[Help with this pattern](#)

Validation Help Text *

This text will be displayed below the answer box.

Supplier Response View

Enter answer here...

Please enter the VAT number. This must start with two letters followed by min 6 and max of 15 numbers.

To test the pattern first, enter the data into the “Test” field and ensure the Result changes to VALID when the correct data is entered. We recommend testing several values to ensure the correctness of the validation formula for your requirements.

The validation pattern on custom fields uses [regular expressions](#). This is a commonly used technique for specifying allowable content.

Validation Pattern

Test:

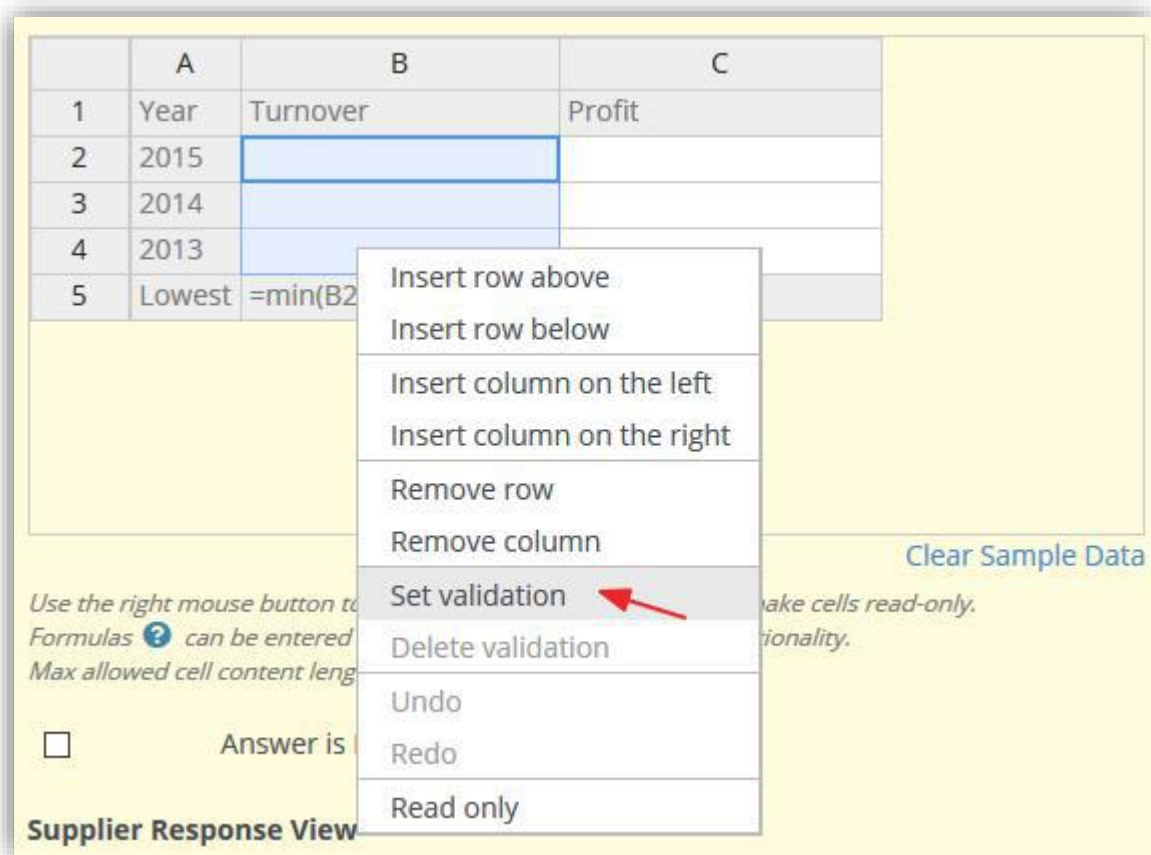
Result:

VALID

Matrix question

When creating the matrix question, it is possible to define the validation for each of the cells individually or to set this up based on the rows, columns or range of cells selected.

To activate the pattern, select the cells you want to apply the validation for and open the context menu by clicking the right mouse button. Click on "Set Validation", which will open the validation settings menu.



Here you can set up the validation for the cells. At the moment it is possible to define patterns for Number, Date and Text Range.

Number

Defines the numerical values that will be permitted as an entry to this cell. It is possible to specify a range for the data entry and negative numbers can also be allowed.

Matrix Cells Type

Cell Type

Range

Min Value Max Value

Set for

- All cells
- Cell
- Column
- Row
- Cell Range

Date

Permits the entry of the date in the format of DD/MM/YYYY from the pre-defined range.

Matrix Cells Type

Cell Type

Range

Min Value Max Value

Text Range

Specifies the number of characters that the supplier can use when entering the data in this cell.

Matrix Cells Type

Cell Type ←

Range ← ←

Min Value Max Value

Examples of Validation Patterns

| Type of validation | Validation Pattern |
|---------------------------|---|
| Email address | <code>^[a-zA-Z0-9_\-\.]+\@([a-zA-Z0-9_\-\.]+\.[a-zA-Z]{2,5})\$</code> |
| Website address | <code>(https?:\V\/(?:www\. (?:!www))[\^\s\.\+\.][^\s]{2,} www\.[^\s]+\.[^\s]{2,})</code> |
| VAT Number | <code>^[A-Z][A-Z][A-Z0-9]{6,15}\$</code> |
| Registration number | <code>^[0-9]{6,10}\$</code> |
| Number of characters (60) | <code>^\{0,60}\$</code> |
| Date | <code>^(?:31(\V - \.)?(?:0?[13578] 1[02]))\1 (?:(?:29 30)(\V - \.)?(?:0?[1,3-9] 1[0-2])\2)(?:1[6-9] 2[0-9]\d)?\d{2}\$ ^(?:29(\V - \.)0?2\3(?:1[6-9] 2[0-9]\d)?(?:0[48] [2468][048] [13579][26]) (?:(?:16 [2468][048] [3579][26])00)))\$ ^(?:0?[1-9] 1\d 2[0-8])(\V - \.)?(?:0?[1-9]) (?:1[0-2])\4(?:1[6-9] 2[0-9]\d)?\d{2}\$</code> |
| Sort Code (UK& Ireland) | <code>^[0-9][0-9][-][0-9][0-9][-][0-9][0-9]\$</code> |
| IBAN (no spaces) | <code>^[A-Z][A-Z][0-9][0-9][a-zA-Z0-9]{12,32}\$</code> |
| IBAN (spaces included) | <code>^[a-zA-Z]{2}[0-9]{2}\s?[a-zA-Z0-9]{4}\s?[0-9]{4}\s?[0-9]{4}\s?[a-zA-Z0-9]{0,4}\s?[a-zA-Z0-9]{0,4}\s?[a-zA-Z0-9]{0,4}\s?[a-zA-Z0-9]{0,4}\s?[a-zA-Z0-9]{0,2}? \$</code> |