

# Views, Quick Change & Change Templates

Use the View to set up the fields for Quick Change then add a Change Template to minimize entry

# What is Quick Change?

- Quick change allows you to change one record at a time for all items in a subset
- The fields that are in the view will be displayed on a system created card where they can be changed
- An 'Auto Advance' option will move from one item to the next on the list/list card
- You can key information in the field to be changed or use a Change Template to populate the information to the field

# Quick Change

- Use Quick Change when 'mass change' is either not available (due to security settings) or the field to be changed has different values for different records
- Quick change is a powerful function that is available on any list or list card (PO Items, CO Items, MO components, etc.)
- Quick Change will 'walk' you through the records in the list, one at a time to allow you to change the records

# Quick Change

- There is a 'Bypass' key that allows you to skip an record in the list
- The PowerLink functions that are used are:
  - View (Quick Change card)
  - Quick Change
  - Change Template (optional)
  - Preferences (to set the Change Template default)

# Quick Change

File Display Maintain Customize Navigation Help

General (all records)

Item Revisions

Item	Description	Site	Revision	Class	I/T	Drawing number	Stk UM	Val	Location	Dept
AA1455300390	300N Cabin Air Filter	TN		PR	2	300390	EA	A	1111	TT
AA1455300391	300N Cabin Air Filter	ITN		IFA	2	300390	EA	R	1	9203
AA1455300392	300N Cabin Air Filter								1	9203
AA1455300392	300N Cabin Air Filter								1	9203
AA1455300392	300N Cabin Air Filter								1	MIX
AA1455300430	500N CABIN AIR FILTER								10	9203
AA1455300430	500N CABIN AIR FILTER								10	9203
AC_CARBO_005	CARBON ALLOY FOR MOLDS									MIX
AC_TRAIT_X34	STEEL FOR MOLDS									MIX
ALP_TR	ALPHA FUNNELS									MIX
ALU_MOUL_SPE	ALUMINUM FOR MOLDS									MIX
AM_110	CLOSET FOR 110 VOLT									MIX
AM_220	CLOSET FOR 220 VOLT									MIX
ARM66762	WAFER									
ARM66762	WAFER									
ARM66762	Motor Armature									
A000100DOUGH	Advanced DWE Dough									MIX
A000100POTCHDF	Potato Cheese Pierogie									MIX
A000100POTCHF	Potato/Cheese Filling									
A000110POTCHDF	Potato Cheese Pierogie									
A010200DURB	Durum Flour									
A010500WHIB	Flour									
A110100POTF	Potato Flakes									
A120400ONDR	Onion									
A210100CHED	Cheese									
A220300EGGS	Dried Eggs									
A240100MARK	Marqarine									
A290CHESBAG	Spices									
A290100SALT	Salt									
A3251210022	Fold'g Carton-Mrs.T's Pot CH		100	AAAAAA	AI	3			LB	
A3251210221	Fold'a Carton-Mrs.T's Pot CH		100	AAAAAA	AIPK	4			EA	C
			100	AAAAAA	AIPK	4			EA	PKG

(73) Change Item Revision - TN, AA1455300390

AA1455300390 300N Cabin Air Filter Site: TN Rev:

Template: (none)

Description: 300N Cabin Air Filter

Item class: PR = PR FILTERS

Item type: Fabricated

Drawing number: 300390

Stocking UM: EA = Each

Value class: A

Default stock location: 1111

Department: TT

Auto advance

Preview before update

Update Bypass Cancel Help

# VIEWS FOR QUICK CHANGE



# Quick Change View

- The fields that are flagged as 'maintainable' in the view will be available to be changed as part of quick change
- Fields that are flagged as 'not maintainable' will not be displayed on the Quick Change card
- When adding a field to a view, there are 2 tabs on the card:
  - View
  - Quick Change

# Sample View Add field card

(73) View definition

**Description** Character (30A)

Column heading

Description

Display value in mixed case

Content Value

Initial presentation width 30

Column statistics (none)

Scheme (Same as view)

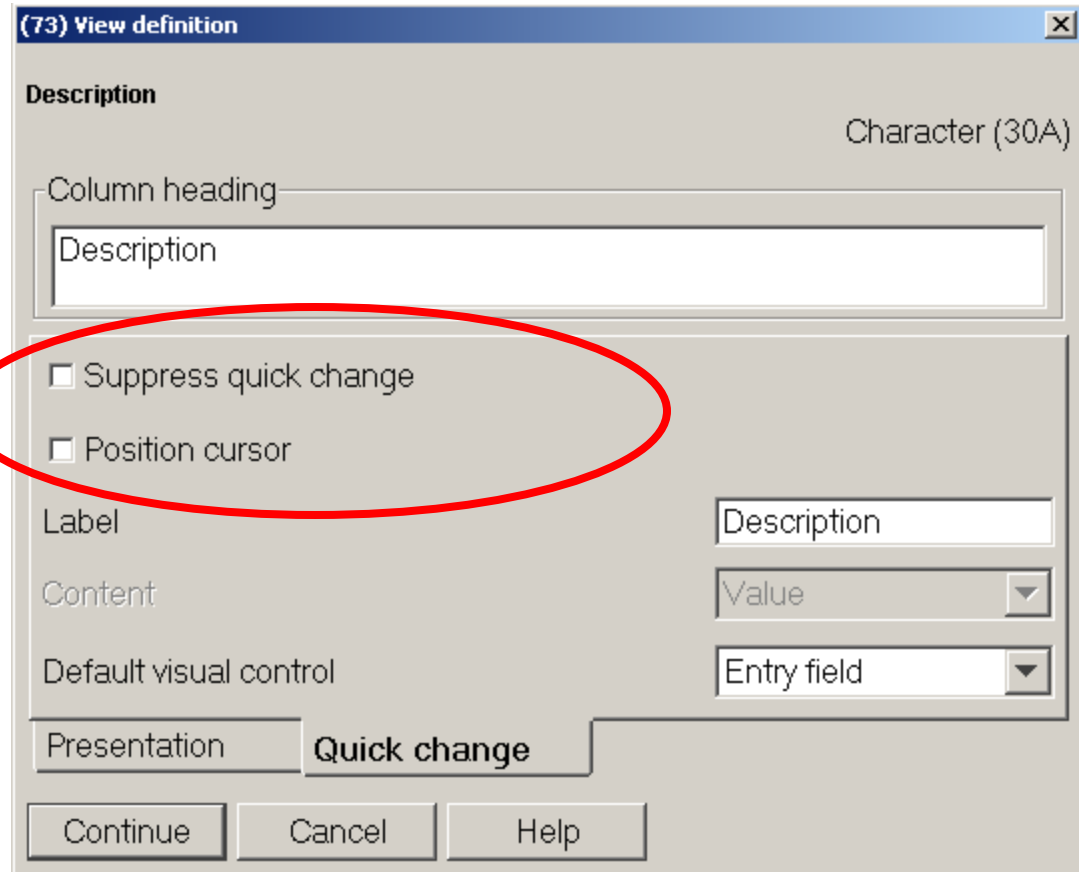
**Presentation** Quick change

Continue Cancel Help



# Sample View Add field card

- Suppress Quick Change
  - Removes the field from the Quick Change card
- Position cursor
  - Has the cursor in the field



The screenshot shows a dialog box titled '(73) View definition' with a close button in the top right corner. The dialog is divided into two tabs: 'Presentation' and 'Quick change', with the 'Quick change' tab currently selected. The 'Description' field is set to 'Character (30A)'. The 'Column heading' field contains the text 'Description'. Below this, there are two checkboxes: 'Suppress quick change' and 'Position cursor'. The 'Suppress quick change' checkbox is highlighted with a red oval. The 'Label' field contains 'Description', the 'Content' field contains 'Value', and the 'Default visual control' field contains 'Entry field'. At the bottom of the dialog, there are three buttons: 'Continue', 'Cancel', and 'Help'.

# Quick Change View

- First step of using quick change is to create the view with the fields that are necessary to be maintained
- Use the 'Quick Change' tab when creating the view to determine what field the cursor should be in when changing the records in the subset

# CHANGE TEMPLATES FOR QUICK CHANGE



# Change Templates

- Quick Change gives the ability to use a change template to set default values for specific fields
- When the 'Quick Change' card is displayed a list of 'Change Templates' is shown at the top of the card and a change template can be selected
- If you do not have security access to 'Mass Change', Quick Change with a Change Template can accomplish the same thing in a minimum amount of time

# Quick Change

File Display Maintain Customize Navigation Help

General (all records)

Item Revisions

Item	Description	Site	Revision	Class	I/T	Drawing number	Stk UM	Val	Location	Dept
AA1455300390	300N Cabin Air Filter	TN		PR	2	300390	EA	A	1111	TT
AA1455300391	300N Cabin Air Filter	TN		FA	?	?	FA	R	1	9203
AA1455300392	300N Cabin Air Filter								1	9203
AA1455300392	300N Cabin Air Filter								1	9203
AA1455300392	300N Cabin Air Filter								1	MIX
AA1455300430	500N CABIN AIR FILTER								10	9203
AA1455300430	500N CABIN AIR FILTER								10	9203
AC_CARBO_005	CARBON ALLOY FOR MOLDS									MIX
AC_TRAIT_X34	STEEL FOR MOLDS									MIX
ALP_TR	ALPHA FUNNELS									MIX
ALU_MOUL_SPE	ALUMINUM FOR MOLDS									MIX
AM_110	CLOSET FOR 110 VOLT									MIX
AM_220	CLOSET FOR 220 VOLT									MIX
ARM66762	WAFER									
ARM66762	WAFER									
ARM66762	Motor Armature									
A000100DOUGH	Advanced DWE Dough									MIX
A000100POTCHDF	Potato Cheese Pierogie									MIX
A000100POTCHF	Potato/Cheese Filling									
A000110POTCHDF	Potato Cheese Pierogie									
A010200DURB	Durum Flour									
A010500WHIB	Flour									
A110100POTF	Potato Flakes									
A120400ONDR	Onion									
A210100CHED	Cheese									
A220300EGGS	Dried Eggs									
A240100MARK	Marqarine									
A290CHESBAG	Spices									
A290100SALT	Salt									
A3251210022	Fold'g Carton-Mrs.T's Pot CH									
A3251210221	Fold'a Carton-Mrs.T's Pot CH									

**(73) Change Item Revision - TN, AA1455300390,**

AA1455300390 300N Cabin Air Filter Site: TN Rev:

Template: (none)

Description: 300N Cabin Air Filter

Item class: PR = PR FILTERS

Item type: Fabricated

Drawing number: 300390

Stocking UM: EA = Each

Value class: A

Default stock location: 1111

Department: TT

Auto advance

Preview before update

Update Bypass Cancel Help

General

Item Revisions

Item

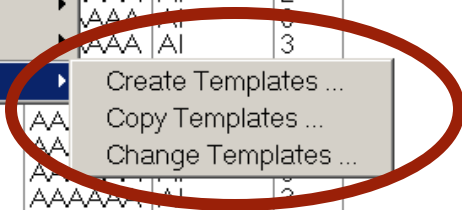
AA145530...  
 AA145530...  
 AA145530...  
 AA145530...  
 AA145530...  
 AA145530...  
 AA145530...  
 AC CARB...  
 AC TRAIT...  
 ALP TR...  
 ALU MOU...  
 AM 110...  
 AM 220...  
 ARM66762...  
 ARM66762...  
 ARM66762...  
 A000100D...  
 A000100P...  
 A000100P...  
 A000110P...  
 A010200D...  
 A010500W...  
 A110100P...  
 A1204000...  
 A210100C...  
 A220300E...  
 A240100M...  
 A290CHES...  
 A290100S...  
 A32512100...  
 A32512102...  
 A37512100...  
 A37512102...  
 A4109000...

- Create
- Change
- Quick Change
- Delete
- Copy
- Release
- Mass Change
- Mass Delete
- Mass Indented Copy
- Mass Release
- Enterprise Item options
- Implementation Status options
- Site options
- Buyer options
- Vendor options
- Bill of Material options
- Item Process options
- Routing options
- Customer Items options

Templates



Class	I/T	Drawing n...	Stk ...	Val	Location	Dept
PR	2	300390	EA	A	1111	TT
FA	2	2	EA	R	1	9203
FA	2	2	EA	R	1	9203
FA	2	2	EA	R	1	9203
FA	2	2	EA	R	1	MIX
PR	1		EA	F	10	9203
PR	1		EA	F	10	9203
02	4	A100	LB	A		MIX
02	4		EA	A		MIX
02	4	A200	EA			MIX
02	4	B100	EA			MIX
02	4	C100	EA	A		MIX
02	4		EA			
62	1		EA			
62	1		EA			
	1		EA			
AAA AI	2		LB	A		MIX
AAB AI	0		LB	B		MIX
AAA AI	2		LB			
AAA AI	3		LB			
AAA AI	3		LB			
AAA AI	3		LB			
AAAAA AI	2		LB			
AAAAA AI	3		LB			
AAAAA AI	3		LB			
AAAAA AIPK	4		EA	C		PKG
AAAAA AIPK	4		EA			
AAAAA AIPK	4		EA			
AAAAA AIPK	4		EA			
AAAAA AIPK	4		EA			



### Item Revision Change Template

Name: (temporary)    Domain: Public    Security: (none)

Options:  
Card file: (system default)    Initial card: (system default)  
 Auto advance     Preview before update

Available attributes

- Description
- Current run labor this-level
- Current run machine this-level
- Current setup labor this-level
- Current setup machine this-level
- Default stock location
- Department**
- Description
- Dimensional UM
- Discrete allocations

All    By Object

Selected attributes

Description	Label	Default value
-------------	-------	---------------



# Creating a template

(73) Template definition

Department Character (4A)

Default value

Specific  Preference  Related

MACH

Continue Cancel Help

(73) Template definition

Item class Character (4A)

Default value

Specific  Preference  Related

INK = Ink

Continue Cancel Help

(73) Template definition

Item type Character (1A)

Default value

Specific  Preference  Related

2 = Fabricated

Continue Cancel Help





# Change Template

**(73) Edit Item Revision Change Template**

**Item Revision Change Template**

Name:  Domain:  Security:

Options

Card file:  Initial card:

Auto advance  Preview before update

Available attributes

Account number  
Allowable days early  
Alpha factor  
Alternate item  
APC item (derived)  
Batch/lot control  
Bill of lading commodity code  
Buyer  
Carrying rate

Selected attributes

Description	Label	Default value
Department	Department	MACH
Item class	Item class	Ink
Item type	Item type	Fabricated

Save Save as ... Apply Cancel Help

(73) Item Revisions

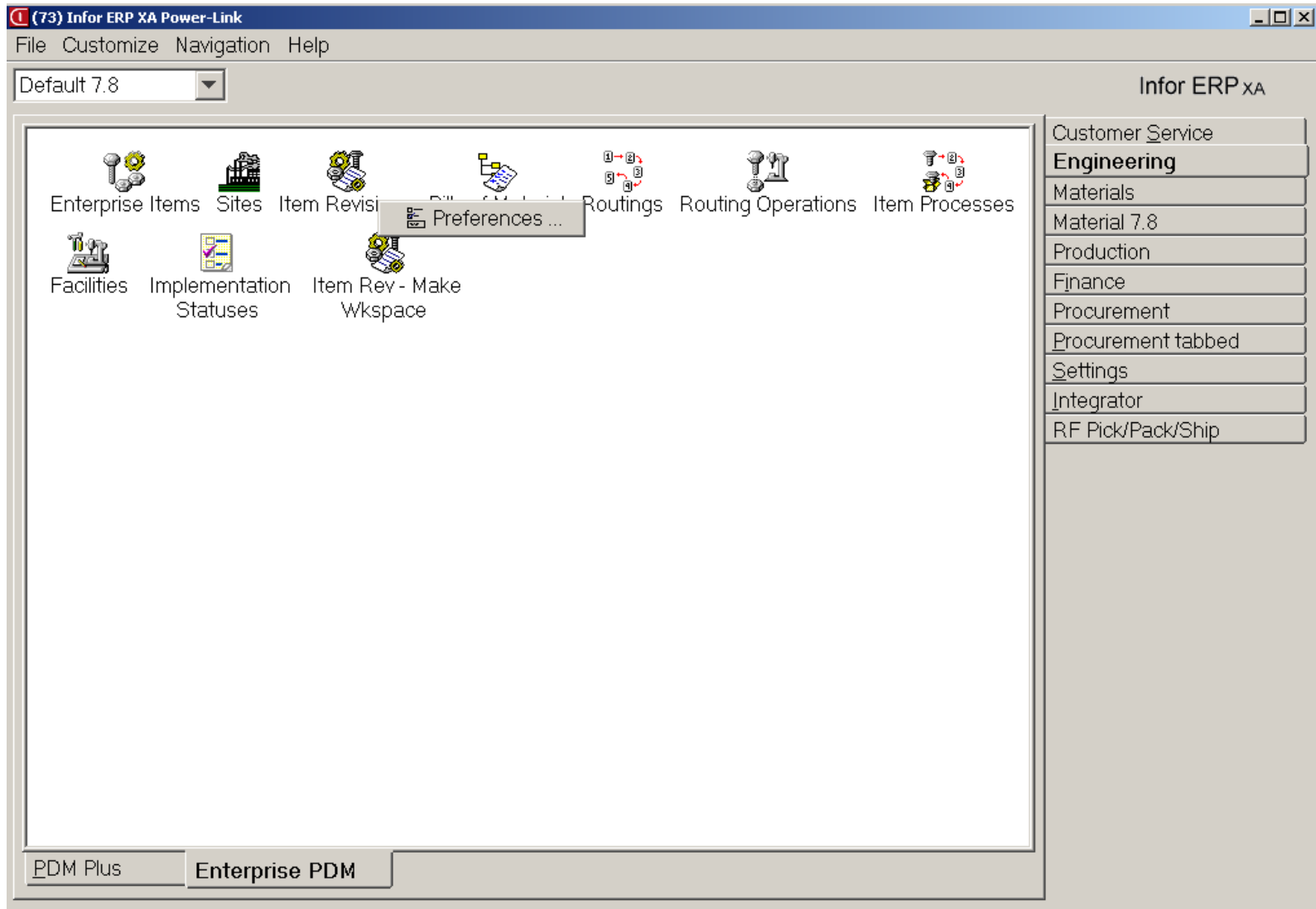
# SETTING PREFERENCES



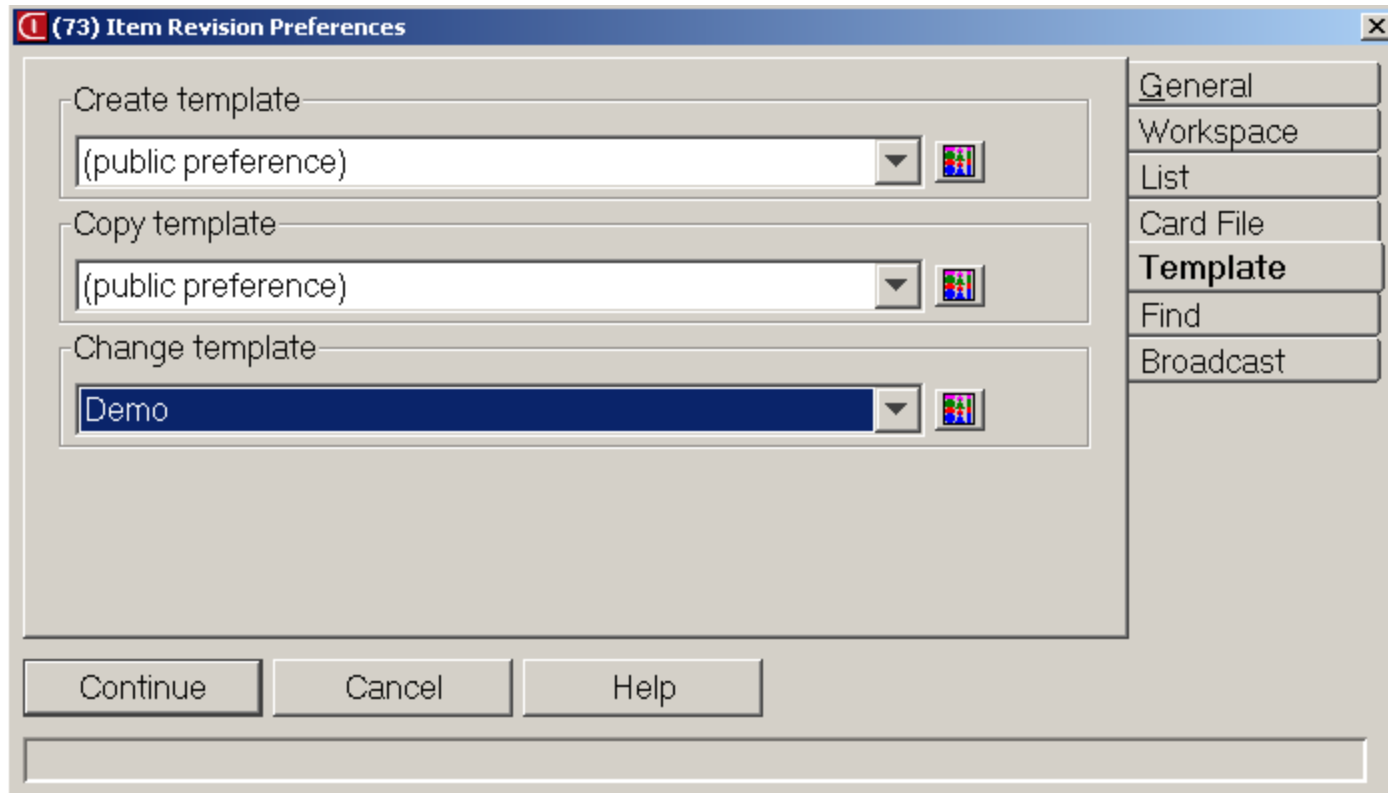
# Preferences

- There are separate cards in the preference settings for:
  - List
  - Card/Card File
  - Find
  - General
  - Templates
  - Broadcast
- Access preferences either by Right Clicking on the object or from the 'Maintain' menu

# Setting Preferences



# Change Template



# Template Preferences

- By setting the Change Template in the Preferences you will not have to select the Template with each record that is being Quick Changed
- The Change Template will populate the fields with the values in the template
- Template field values can still be changed during the quick change function

Item Revisions

Item	Description	Site	Revision	Class	I/T	Drawing number	Stk UM	Val	Location	Dept	Item
AA1455300390	300N Cabin Air Filters	TN		PR	2	2	EA	R	1	9203	
AA1455300390	300N Cabin Air Filter	TN	AAAAAAA		1		EA	R	1	9203	
AA1455300391	300N Cabin Air Filter							R	3	9203	
AA1455300391	300N Cabin Air Filter							R	3	9203	
AA1455300392	300N Cabin Air Filter							R	1	9203	
AA1455300392	300N Cabin Air Filter							R	1	9999	
AA1455300392	300N Cabin Air Filter							R	1	9205	
AA1455300392	300N Cabin Air Filter							F	10	9203	
AA1455300430	500N CABIN AIR FILTER							A			
AC_CARBO_005	CARBON ALLOY FOR							A			
AC_TRAIT_X34	STEEL FOR MOLDS							A			
ALP_TR	ALPHA FUNNELS										
ALU_MOUL_SPE	ALUMINUM FOR MOU										
AM_110	CLOSET FOR 110 VC							A			
AM_220	CLOSET FOR 220 VC										
ARM66762	WAFER										SUE
ARM66762	WAFER										
ARM66762	Motor Armature										
AWW2410	Oak 2x4x10										
BARRE_CONV32	STANDARD CONVEY										
BASE_UNIT	BASE UNIT										SPAR
BASE_UNIT_AS	BASE UNIT ASSEMB										SPAR
BATTERY	BATTERY										
BB100	FINISHED AUTOMOE							A	LOTB	420	
BETA_LO_FR	LONG BETAMAX FRE										
BETA_LO_US	LONG BETAMAX ENC										
BETA_RE_FR	REGULAR BETAMAX										

**(RD) Change Item Revision - TN, AA1455300390,**

AA1455300390 300N Cabin Air Filters Site: TN Rev:

Template: DEMO

Item class: INK = Ink

Item type: Fabricated

Drawing number: 2

Stocking UM: EA = Each

Value class: R

Default stock location: 1

Department: MACH

Item tax class: (blank)

Auto advance

Preview before update


Update Bypass Cancel Help

# QUICK CHANGE





# Using Quick Change

- Select the view and subset to get a list of records to be changed
- Either:
  - Single click on the first record in the list, or
  - Hold down control and single click on the records to be changed, or
  - Single click on the first record to be changed, hold down the shift key and single click on the last record to be change
- Then press the Quick Change  key

# Using Quick Change

- The fields that are included in the Change Template will have the values from the template in the field
- Any 'maintainable' field (as defined by the view) can be changed
- Click on 'Update' to change the record or 'Bypass' to skip the change
- The Change Template controls whether 'Auto Advance' or 'Preview before Create' are checked

(73) Item Revisions

File Display Maintain Customize Navigation Help

General Make Items

Item Revisions

Item

- AA1455300392
- A000100DOUGH
- A000100POTCHDF
- A000100POTCHF
- A000110POTCHDF
- A41164-00022
- A41164-00221
- BASE\_UNIT
- BASE\_UNIT\_AS**
- CARDS
- DESKTOP\_PC
- HARD\_DRIVE
- KEYBOARD
- LIGHT\_POLE
- MFG-TEST
- MOUSE-TB
- MOVIE
- OPSH-AR
- OPTIONAL\_SET
- PC\_BLOW\_UNIT
- PC\_COMPUTER
- PCCOMPRESSOR
- PCCONVEYOR
- PCELECTCLOSET
- PCKITCONV
- PCLINE
- PCMOLD
- PCMOLD

(73) Change Item Revision - 100, BASE\_UNIT\_AS,

BASE\_UNIT\_AS BASE UNIT ASSEMBLED Site: 100 PC Production Rev.

Template: Demo

Description: BASE UNIT ASSEMBLED

Item class: INK = Ink

Item type: Fabricated

Drawing number: 77-77

Stocking UM: EA = Each

Value class:

Default stock location:

Department: MACH

Auto advance

Preview before update

Update Bypass Cancel Help

class	I/T	Drawi
A	2	2
J	2	
J	0	
J	2	
J	0	
IPK	1	
IPK	1	
9	1	77-77
9	1	77-77
9	1	77-77
3	1	77-77
9	1	
9	1	
1	1	77-77
1	1	
9	1	
ARN	1	
1	1	77-77
9	1	
9	1	
2	1	
9	1	
9	1	
9	1	
89	1	
88	1	
89	1	
89	1	

(73) Item Revisions Join

# QUICK CHANGE USING LIST CARDS



# List Card

- A 'List Card' is controlled by the same elements as any other list:
  - View
  - Subset
  - Sort
- When creating the list card, you can customize the 'toolbar' options (on the right side of the card)
- Quick Change is a toolbar option for most list cards

# Sample List Card

(73) Manufacturing Order - M012910

File Display Maintain Customize Navigation Help

Default

M012910 Item: 1001 Pc, 200 Mhz, Desktop Whs: 1 Revision: A

Component	Component description	Whs	Seq	Std quantity
1101	Processor, 200 Mhz	1		100.000
1104	Speakers	1		200.000
1105	Mouse	1		100.000
1106	Keyboard	1		100.000
2001	Monitor, 15" Vga	1		100.000

General  
Status  
**Components**  
Operations  
Overview  
Dates  
Quantities  
Costs  
Manufactured\_Item  
Attachments

# Sample List Card



(73) Purchase Order - P000430

File Display Maintain Customize Navigation Help

Default

P000430 Vendor: 8 IBM - Rochester Buyer: 100 Steve Watson

Details: (none)

Item	Whs	Line	Contract	Quantity	UM	Price	Dock	Stock	Status
 1204	1	1		80,193.000	EA	39.9900	11/27...	11/27...	10
 1214	1	2		1.000	EA	104.0000	11/27...	11/27...	10

General  
Vendor Preferences  
Vendor Address  
Ship-to Address  
Bill-to Address  
**Items**  
Variance  
Comments  
Amounts  
Dates  
Overview



# Maintain List Card

The screenshot shows a software window titled "(73) Purchase Order - P000430". The menu bar includes "File", "Display", "Maintain", "Customize", "Navigation", and "Help". A dropdown menu is open, with "Cards ..." highlighted by a red circle. Other menu items include "Workspaces ...", "Card Files ...", "Receive", and "Preferences ...". The main area contains a table with columns: Item, Whs, Qty, UM, Price, Dock, Stock, and Status. Two items are listed: 1204 and 1214. At the bottom, there are "Requested" and "Approved" buttons.

Item	Whs	Qty	UM	Price	Dock	Stock	Status
1204	1	1	EA	39.9900	11/27...	11/27...	10
1214	1	2	EA	104.0000	11/27...	11/27...	10



# Maintain List Card

(73) Edit Purchase Order List Card

**Purchase Order List Card**

Name:  Domain:  Security:

Card properties

Tab label:

List

Contents:

**Query** | Toolbar | Card File | Template | Options

View:

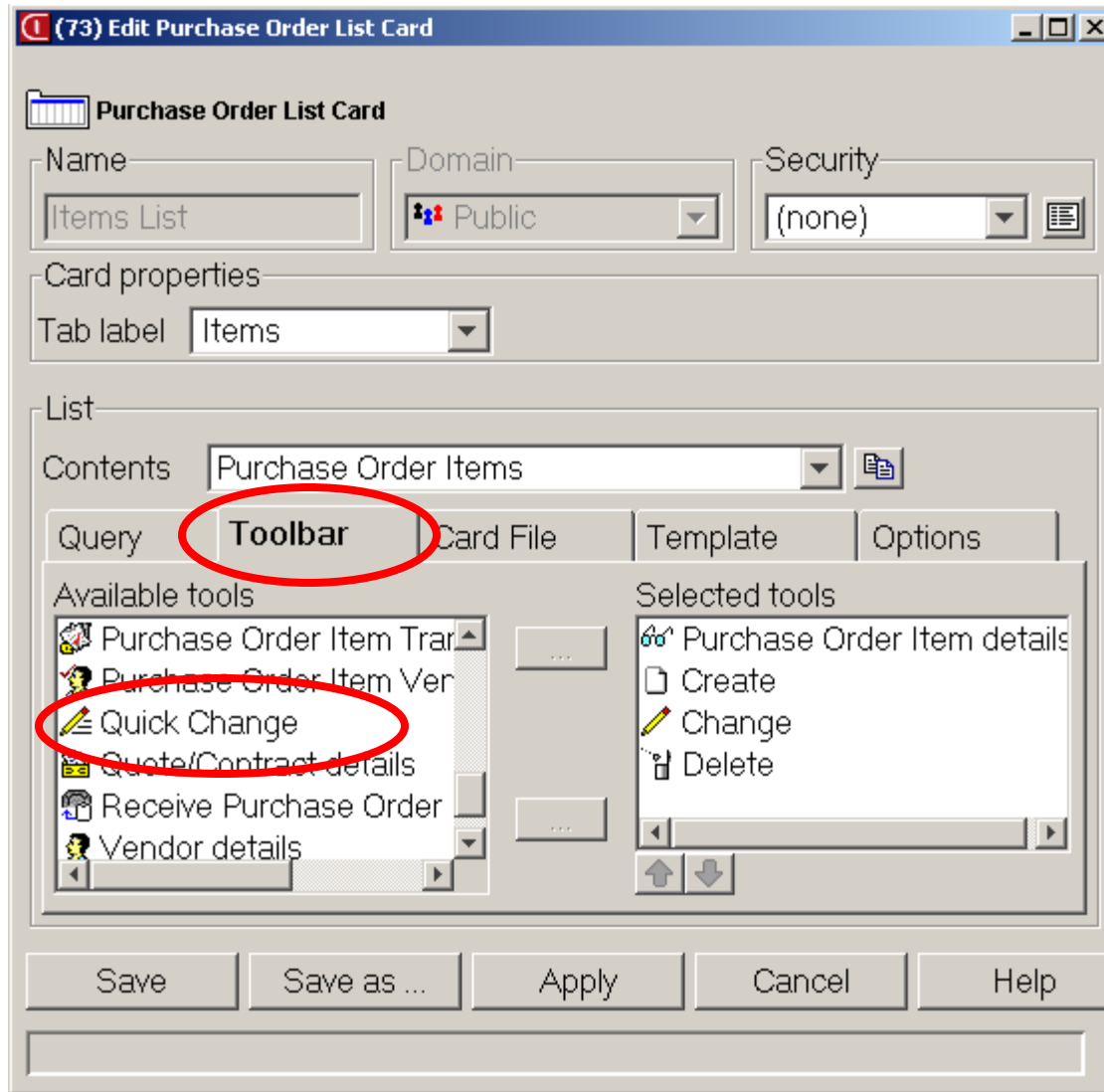
Subset:

Sort:

Restricted by subset:

Save | Save as ... | Apply | Cancel | Help

# Tool Bar Maintenance



# Toolbar after Card Maintenance


(73) Purchase Order - P000430  
File Display Maintain Customize Navigation Help

Default

P000430 Vendor: 8 IBM - Rochester Buyer: 100 Steve Watson

Line	Item	Item description	Whs	Item status	Blan...	C...	Quantity	UM	
1	1204	DRIVE, FLOPPY	1	10	No		80,193.000	EA	
2	1214	NETWORK CARD, FAX/MODE...	1	10	No		1.000	EA	1

General  
Vendor Preferences  
Vendor Address  
Ship-to Address  
Bill-to Address  
Items  
Variance  
Comments  
Amounts  
Dates  
Overview  
Items



# CONCLUSION



# Summary

- The 'Power' in PowerLink comes from combining the variety of functions available within the application
- Quick Change is a powerful time saving tool that utilizes a combination of:
  - View definition
  - Subset
  - Change Template
  - Preferences