Views, Quick Change & Change Templates

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

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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

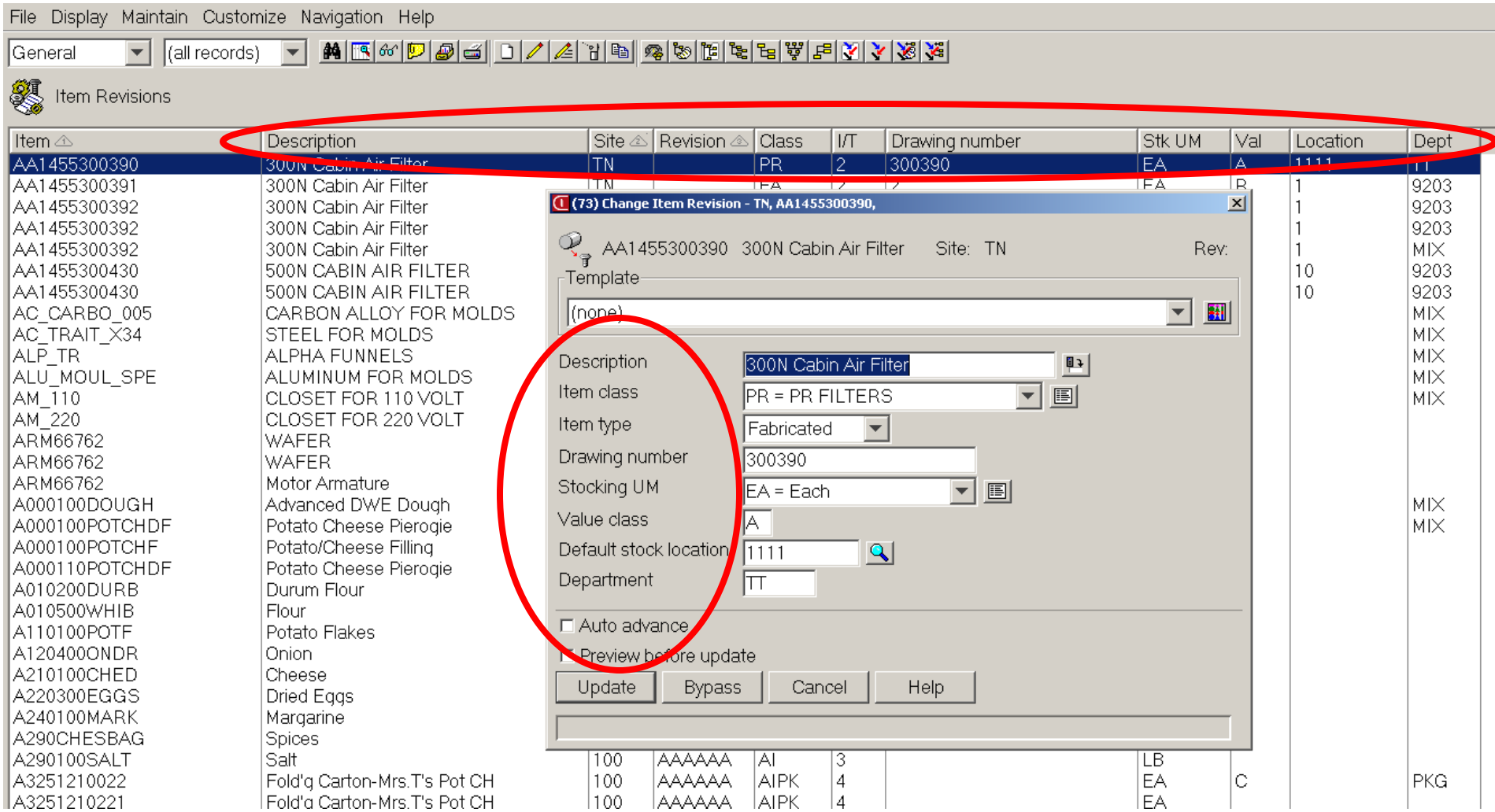
Quick Change

- 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



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VIEWS FOR QUICK CHANGE

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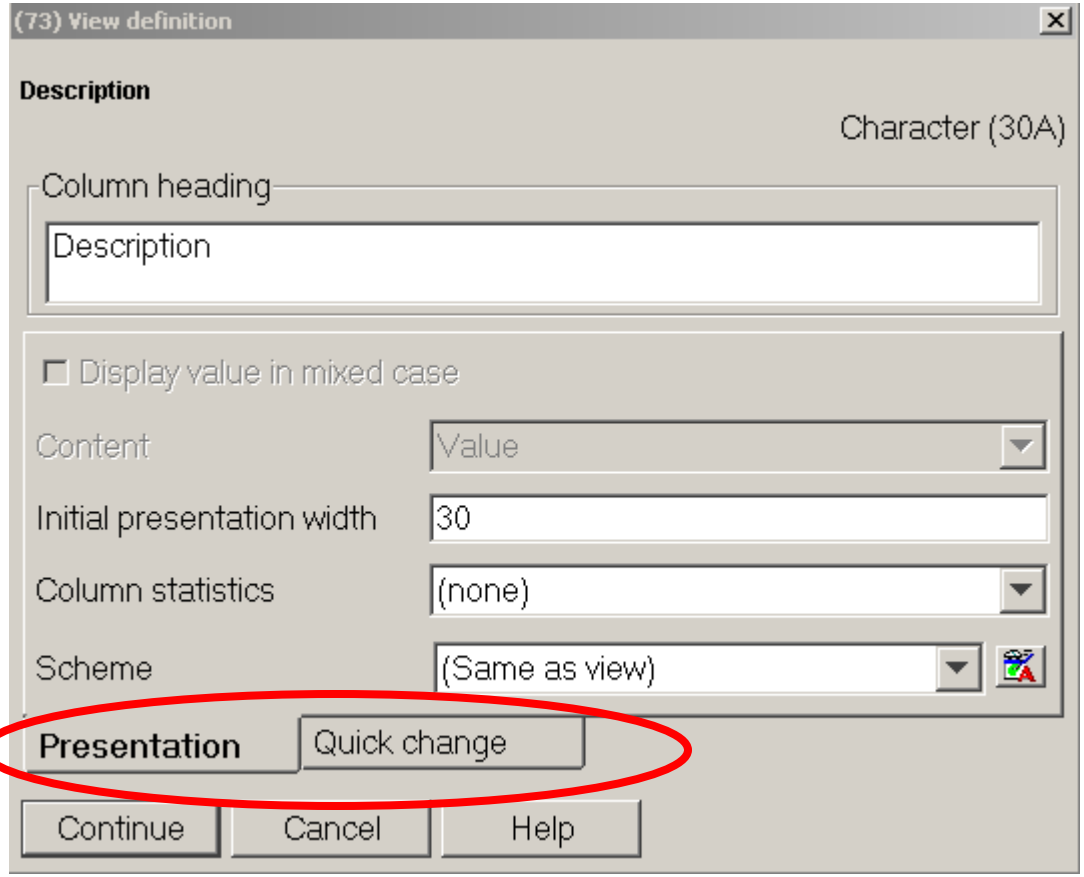
Quick Change View

- 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



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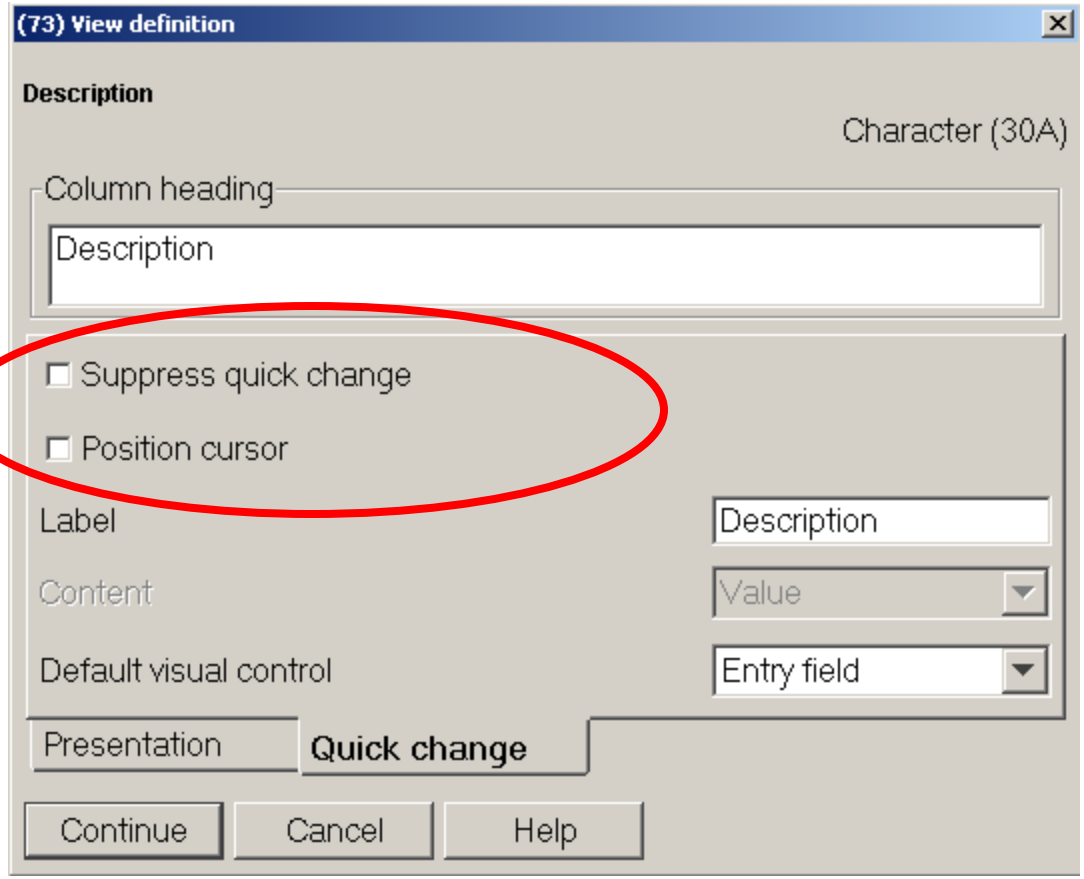
Sample View Add field card

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



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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

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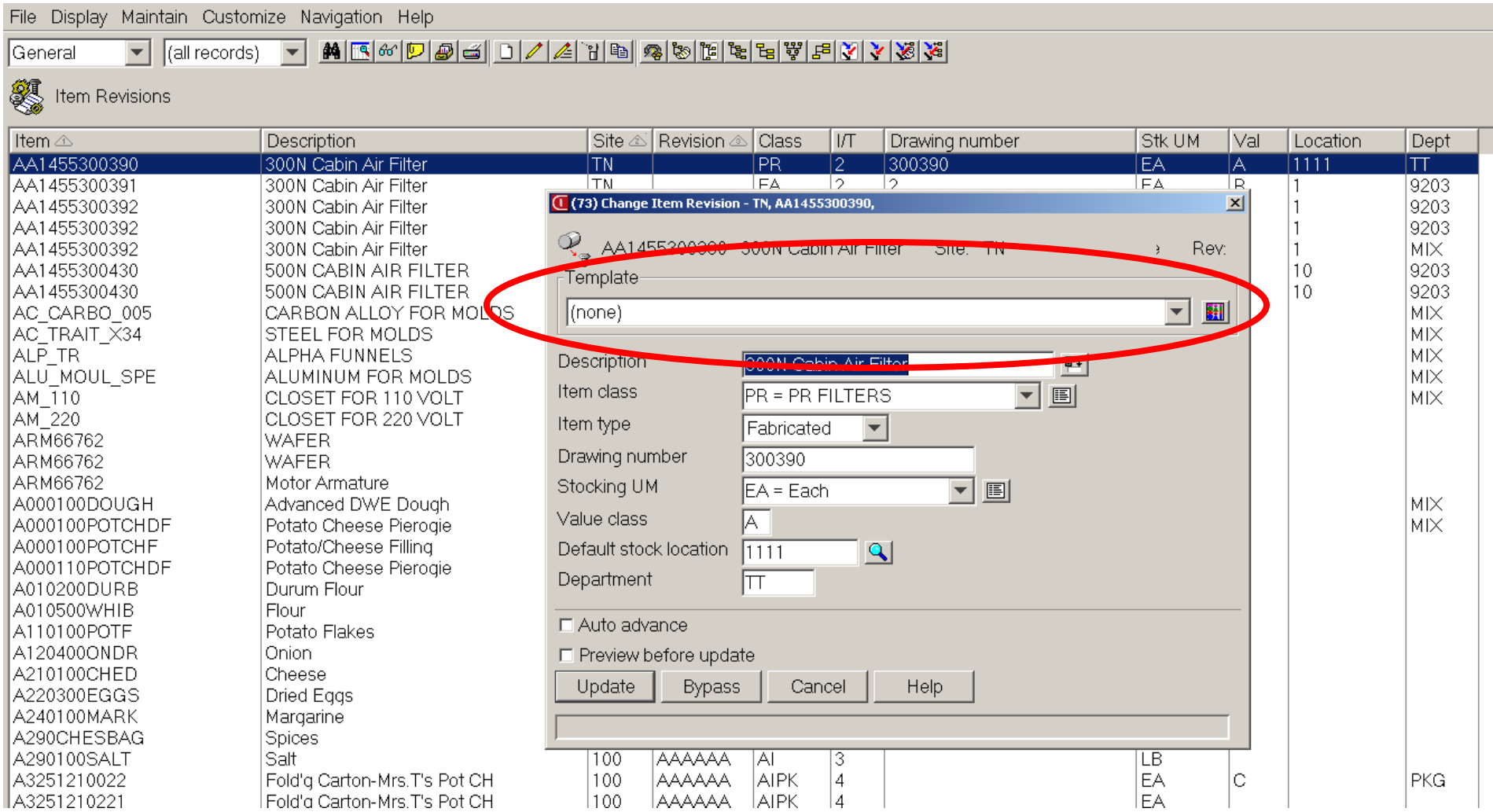
Change Templates

- 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



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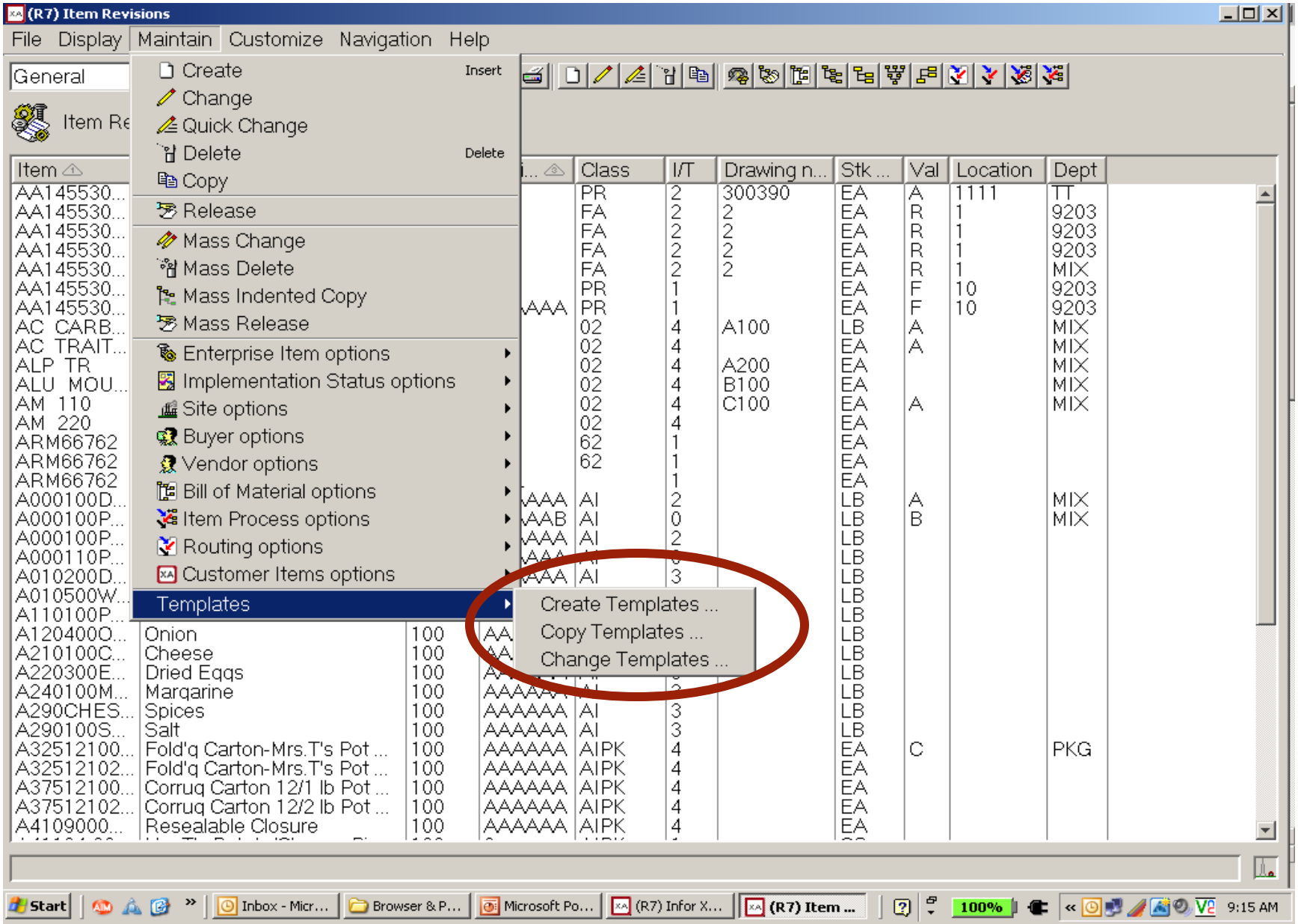

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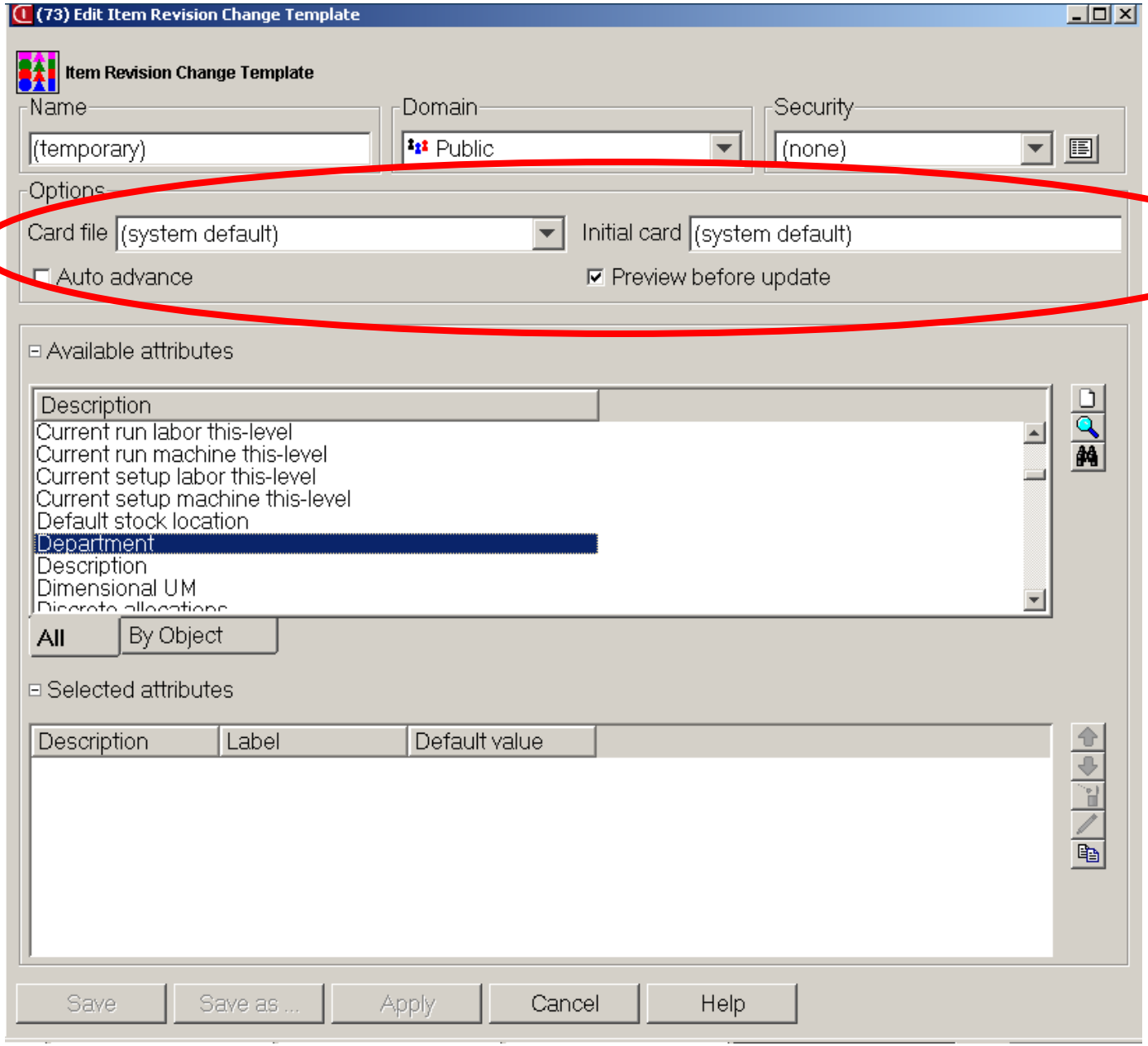

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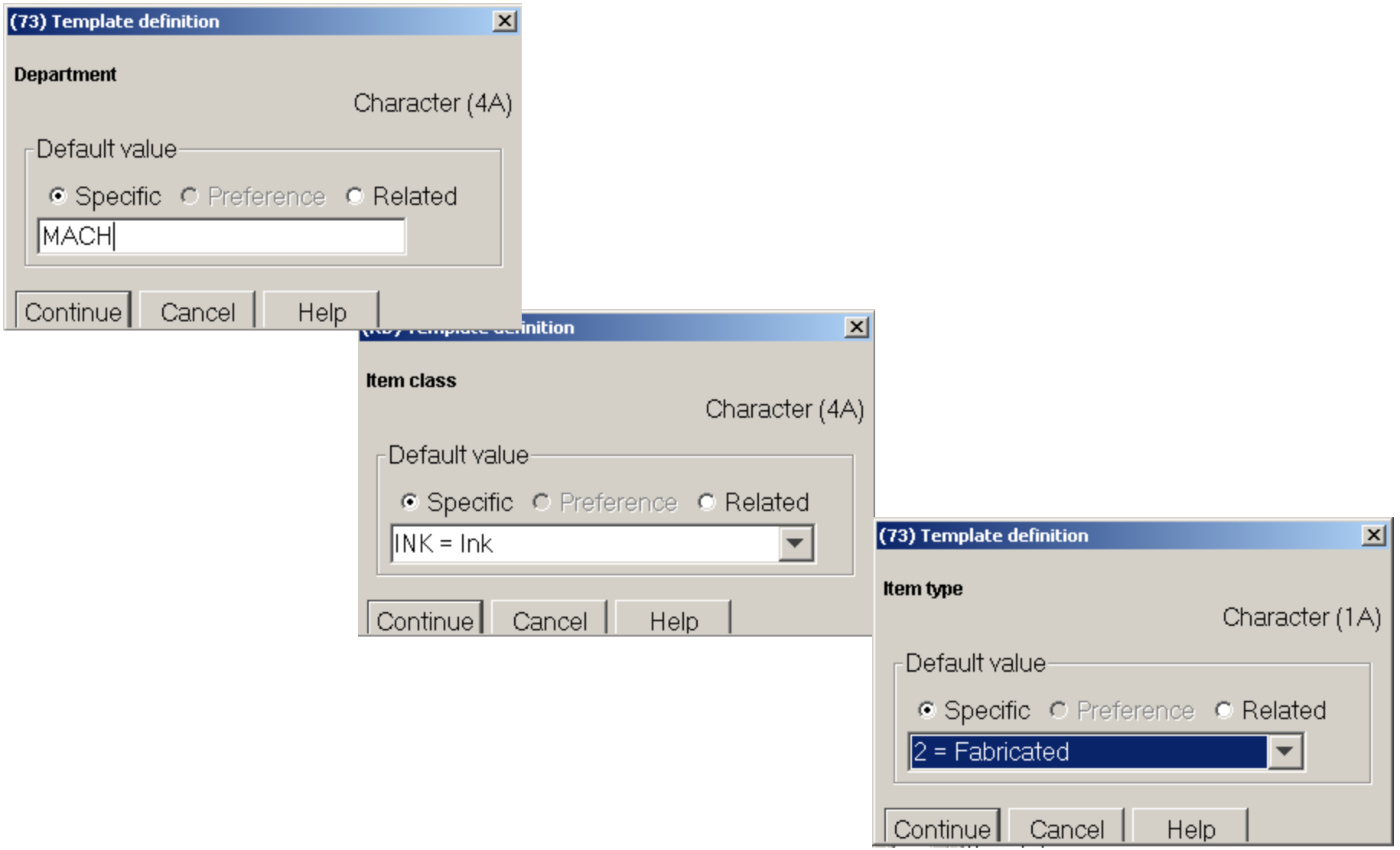
Creating a template



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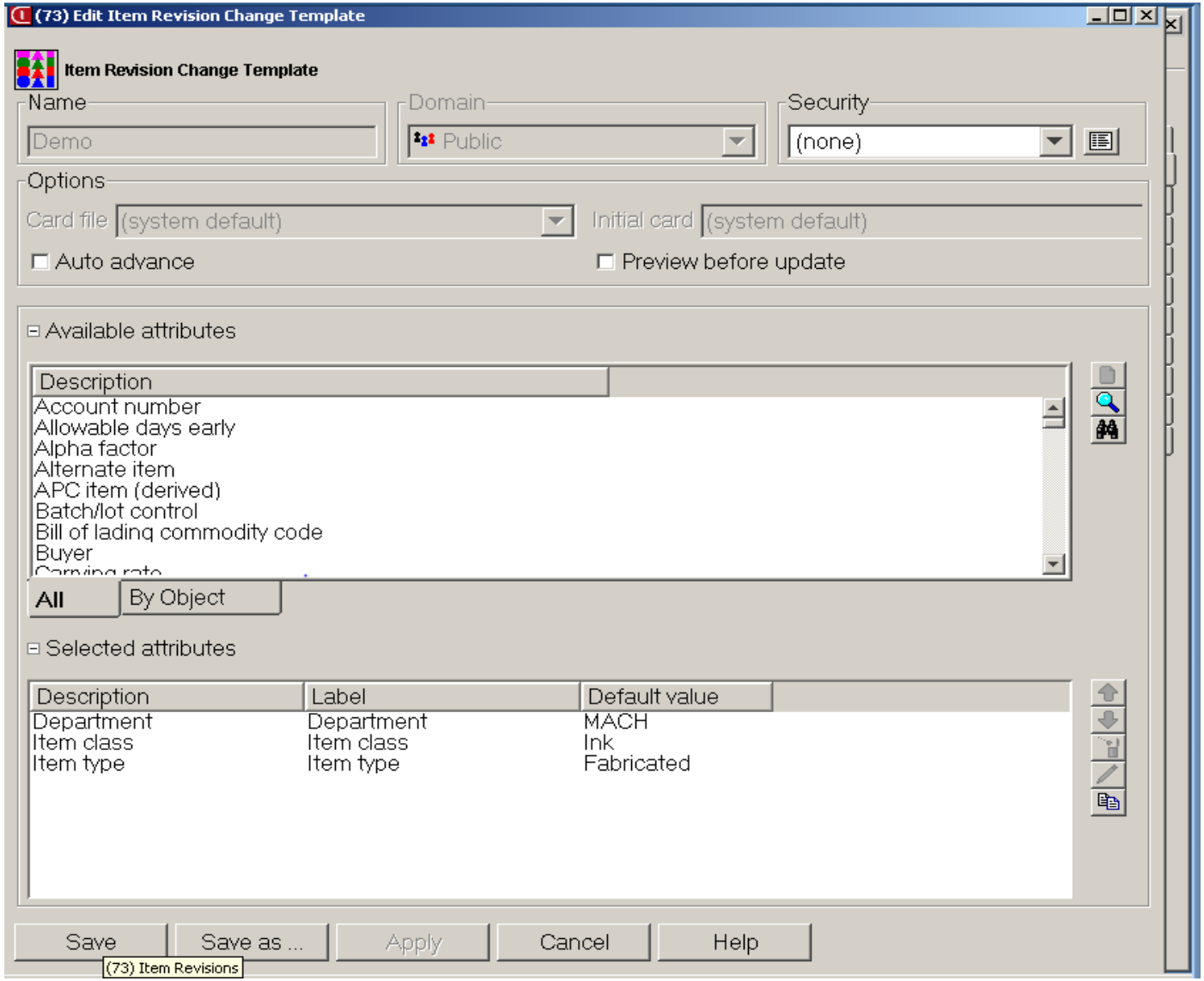
Change Template



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SETTING PREFERENCES

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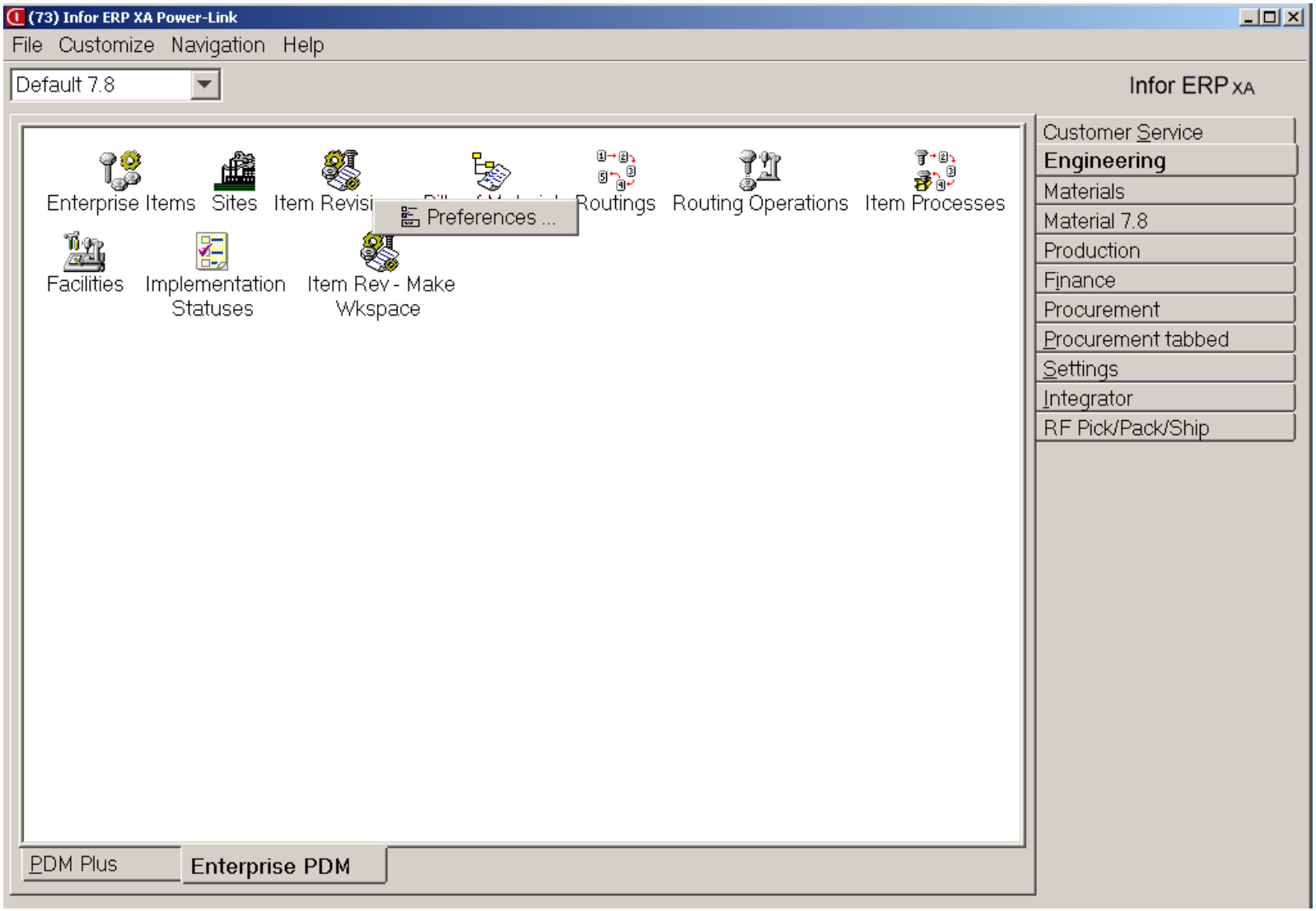
Preferences

- 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



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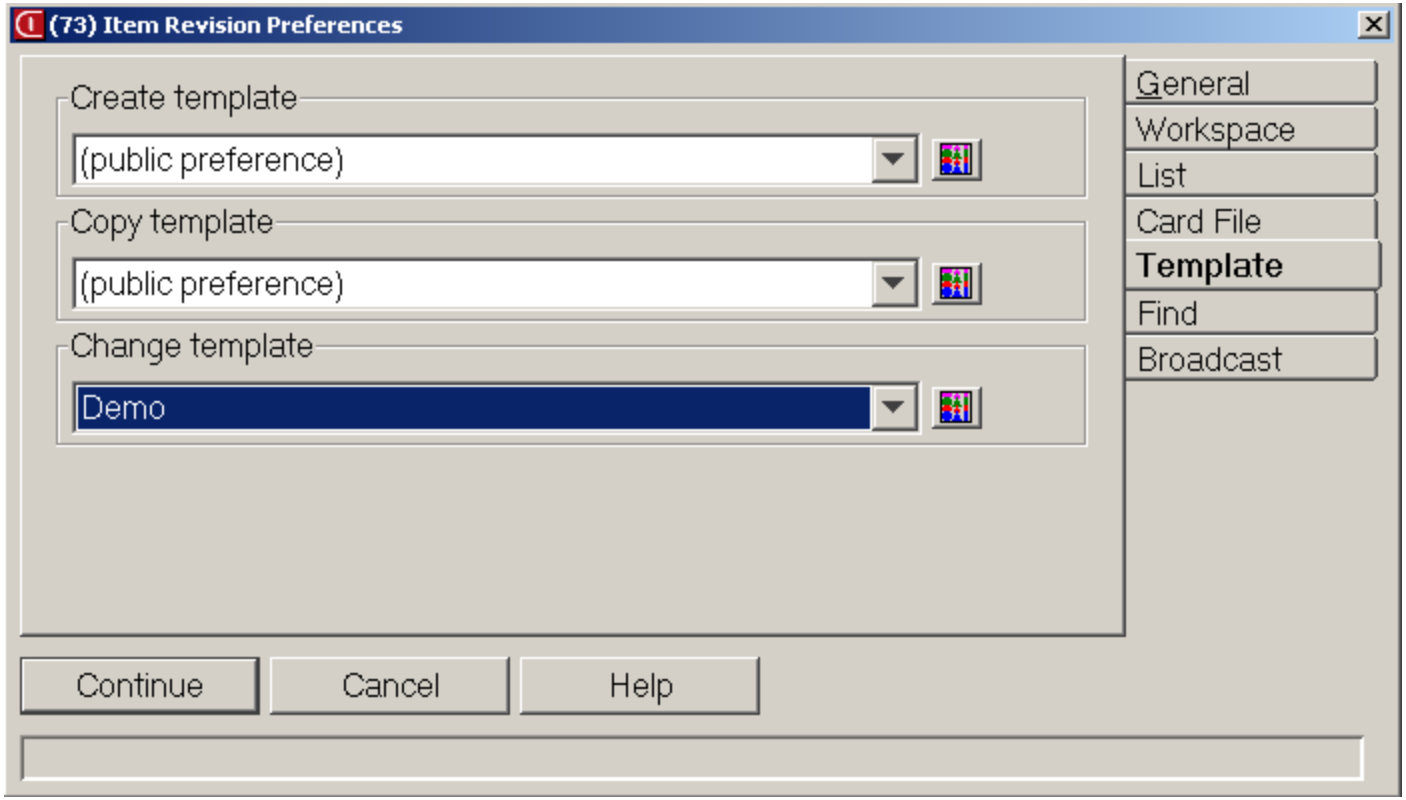
Change Template



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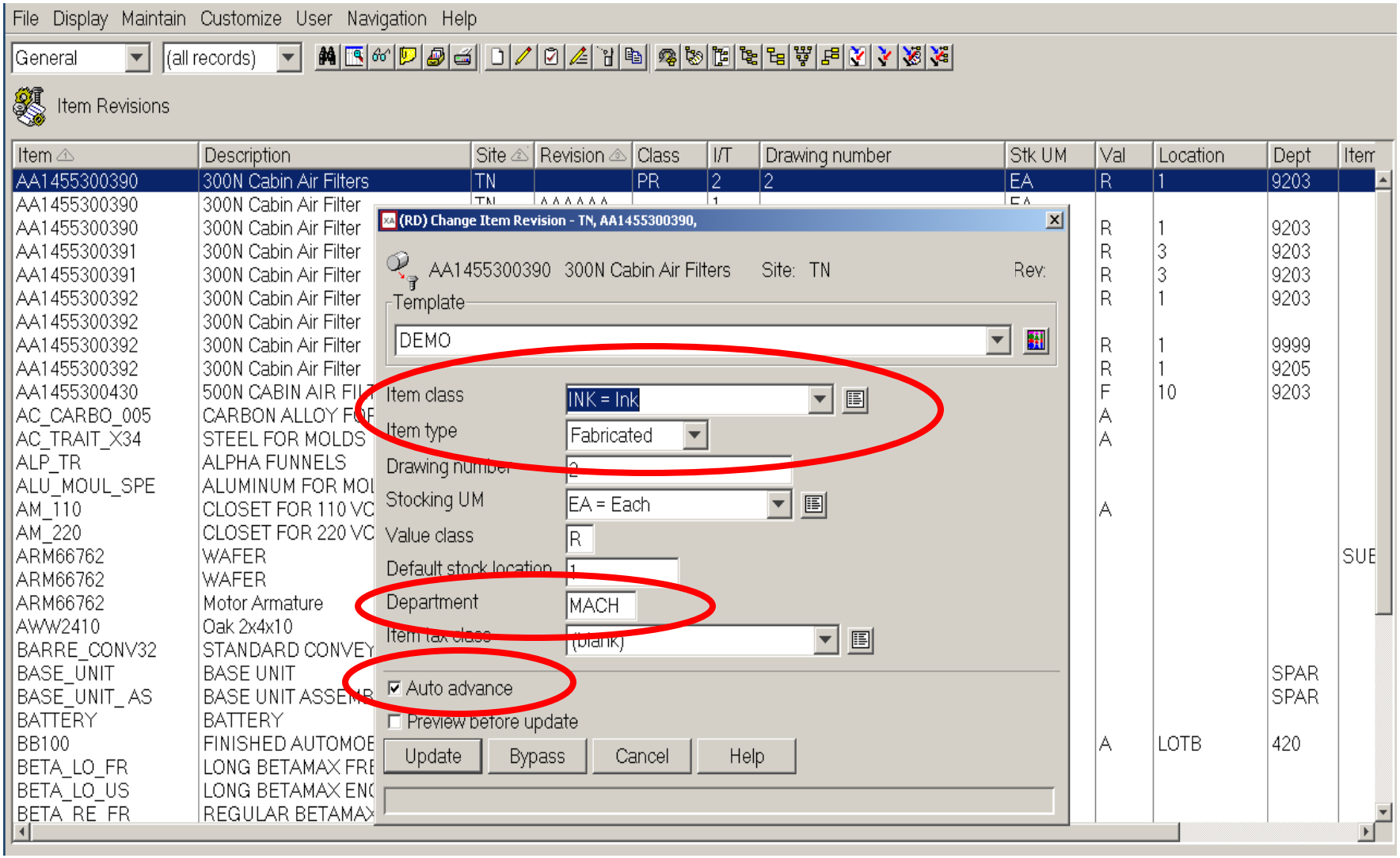
Template Preferences

- 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



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QUICK CHANGE

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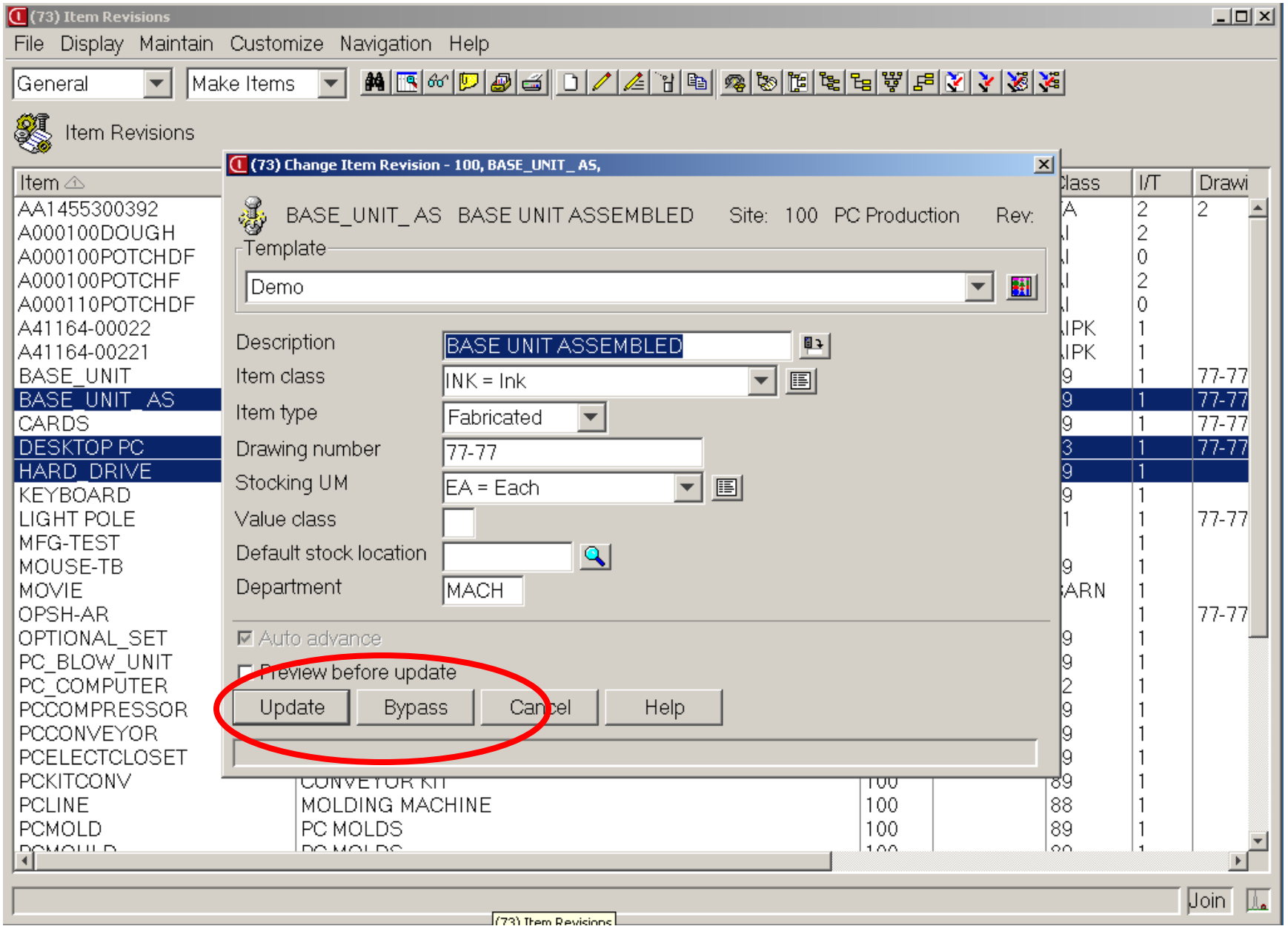
Using Quick Change

- 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



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QUICK CHANGE USING LIST CARDS

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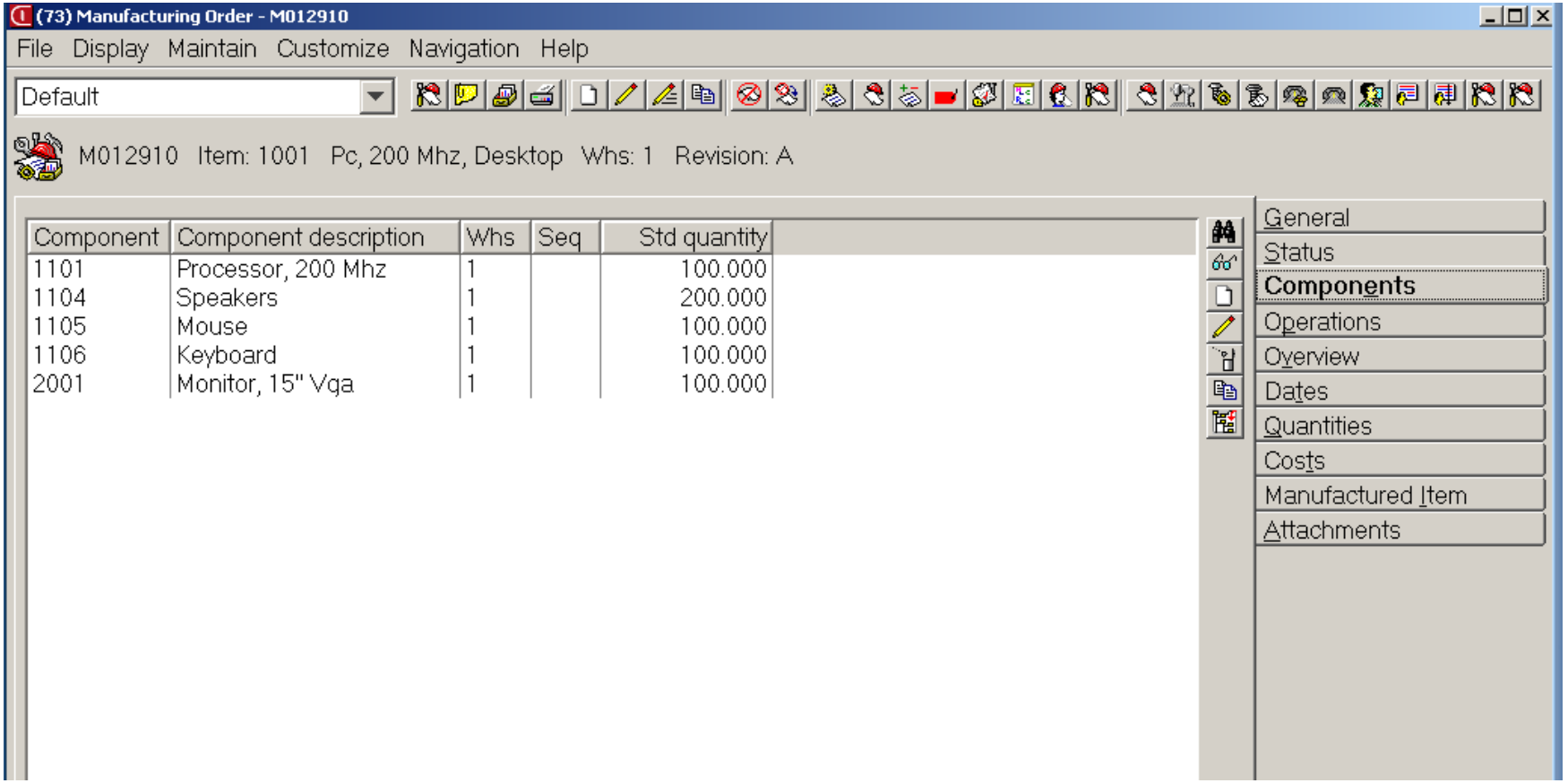
List Card

- 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



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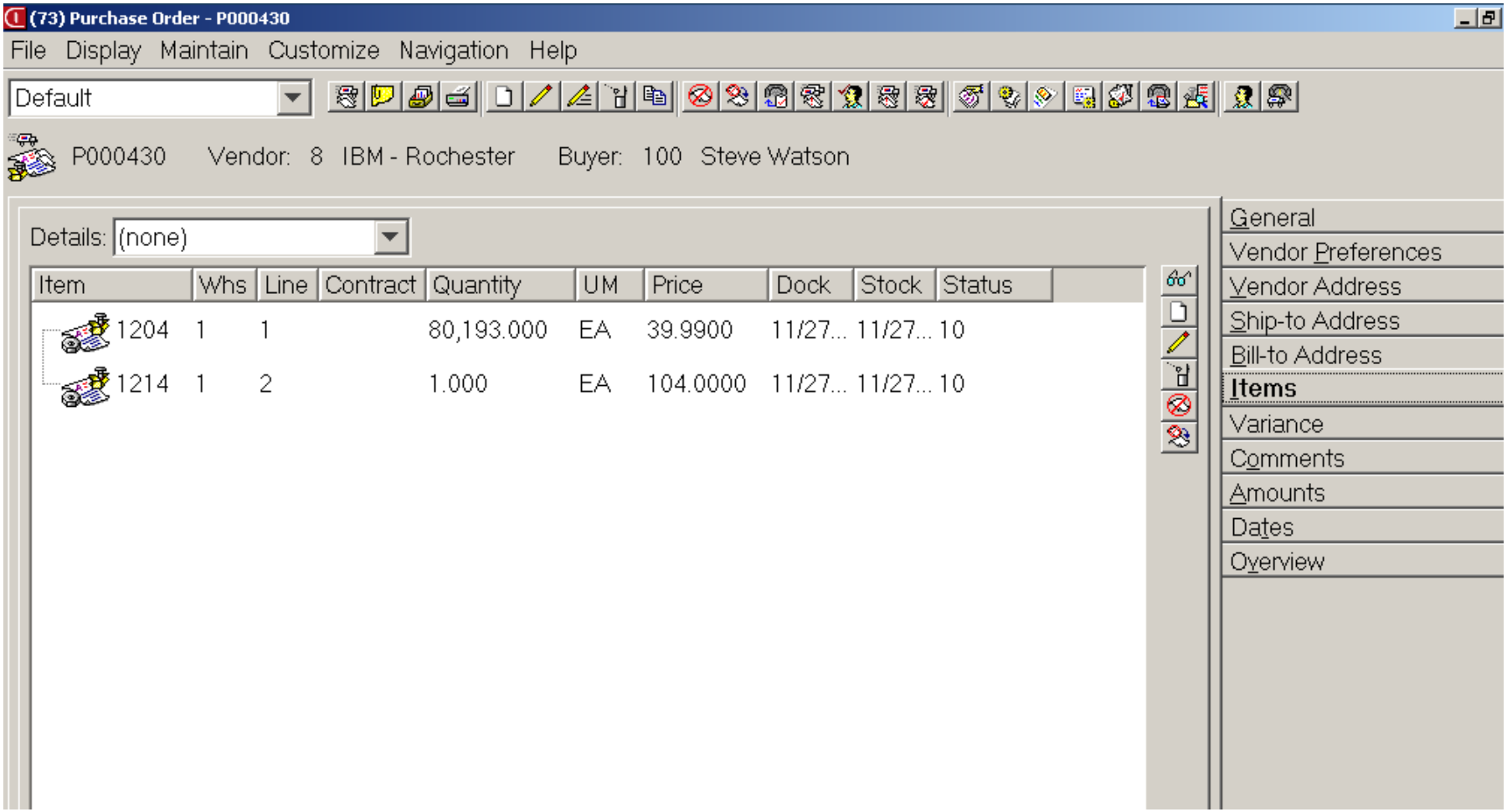
Sample List Card



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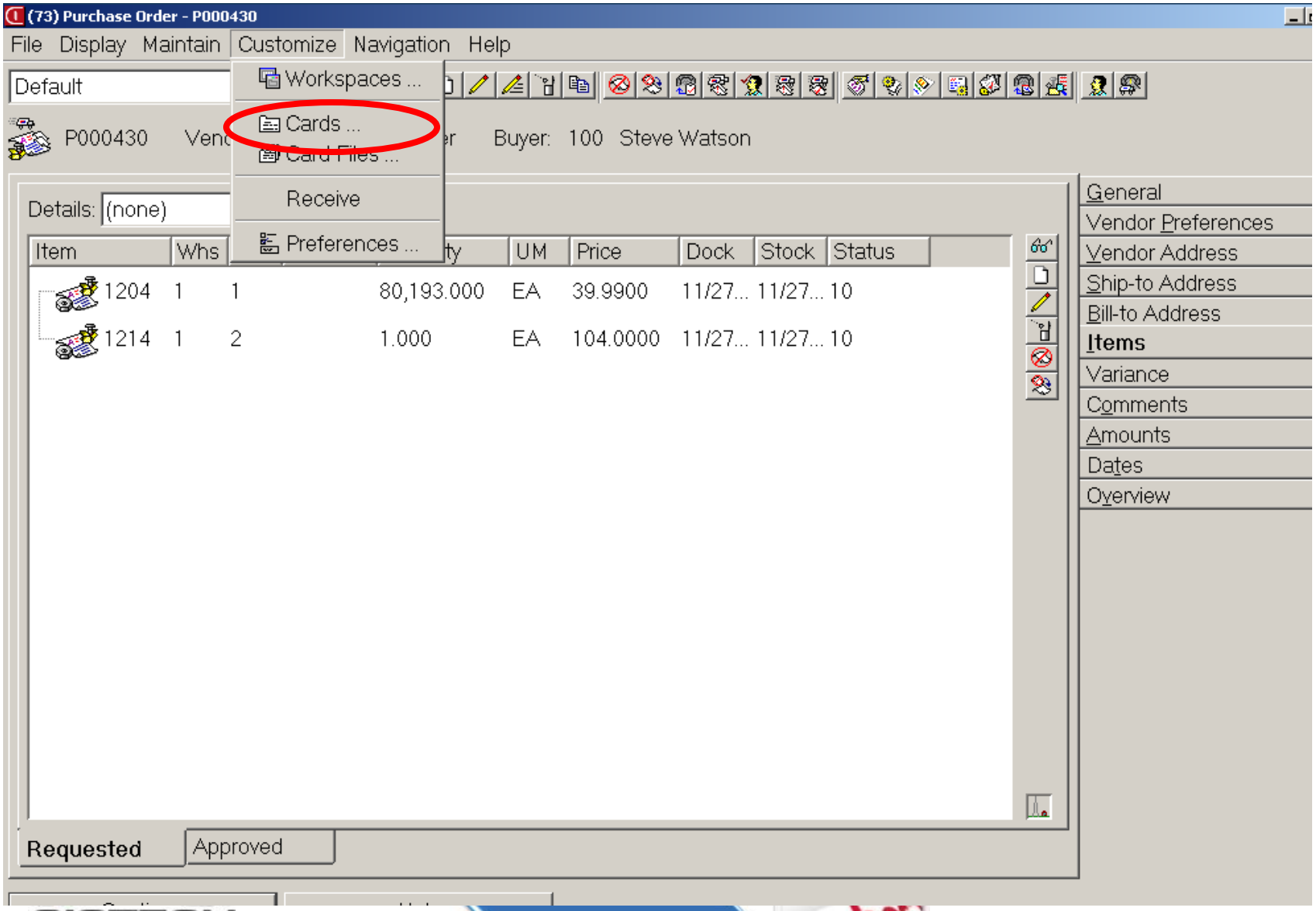
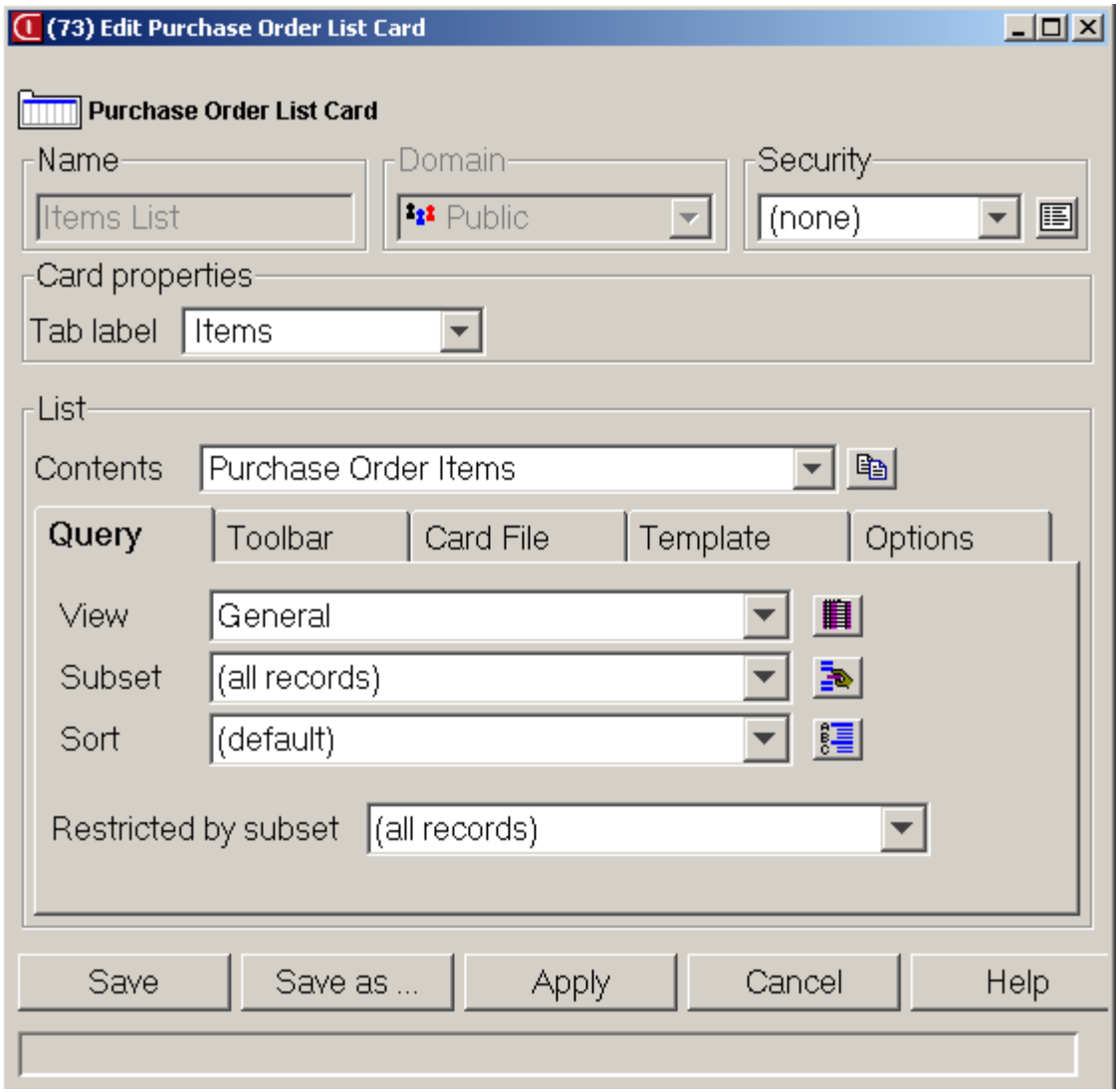
Maintain List Card



Maintain List Card



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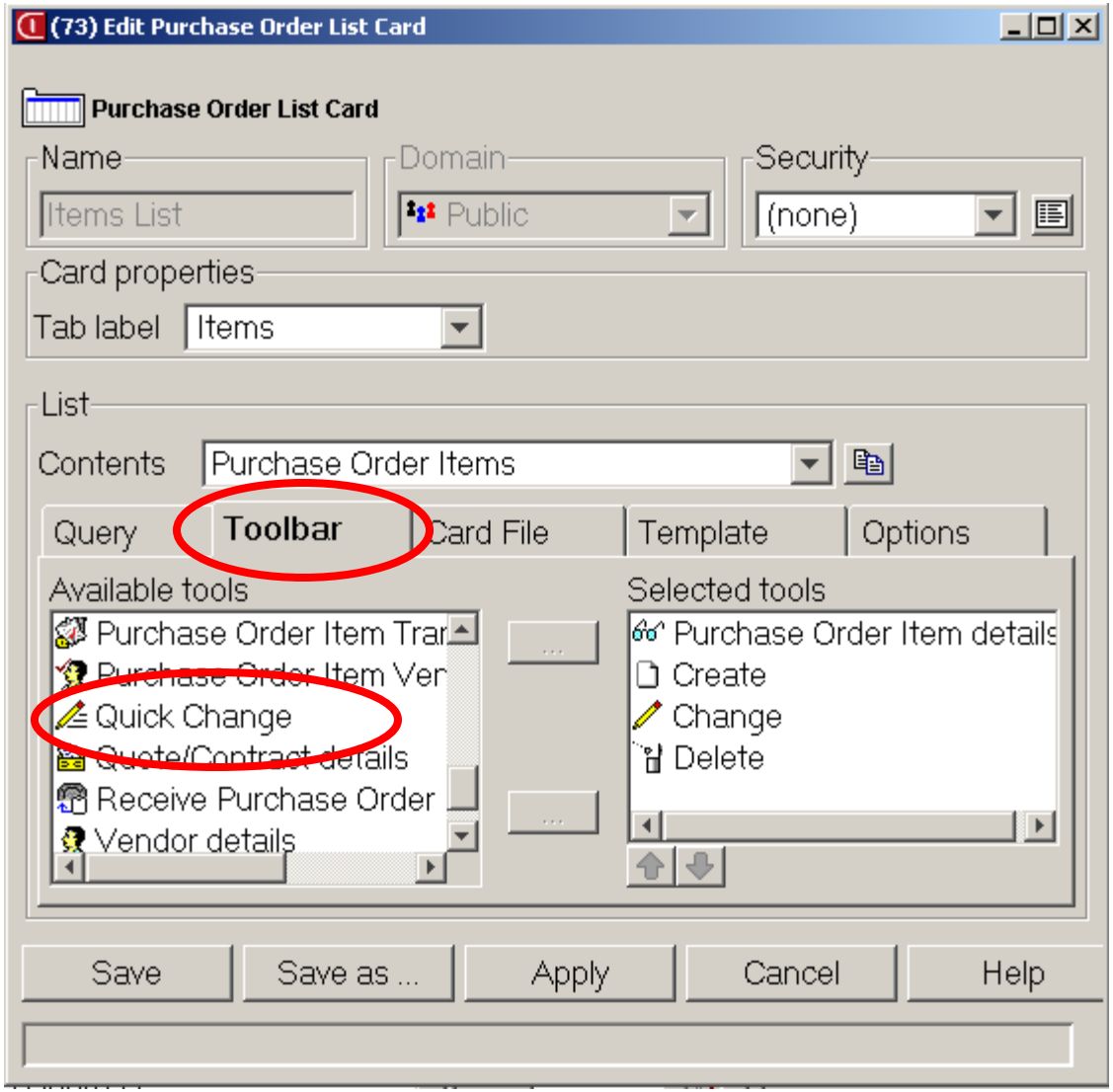
Tool Bar Maintenance



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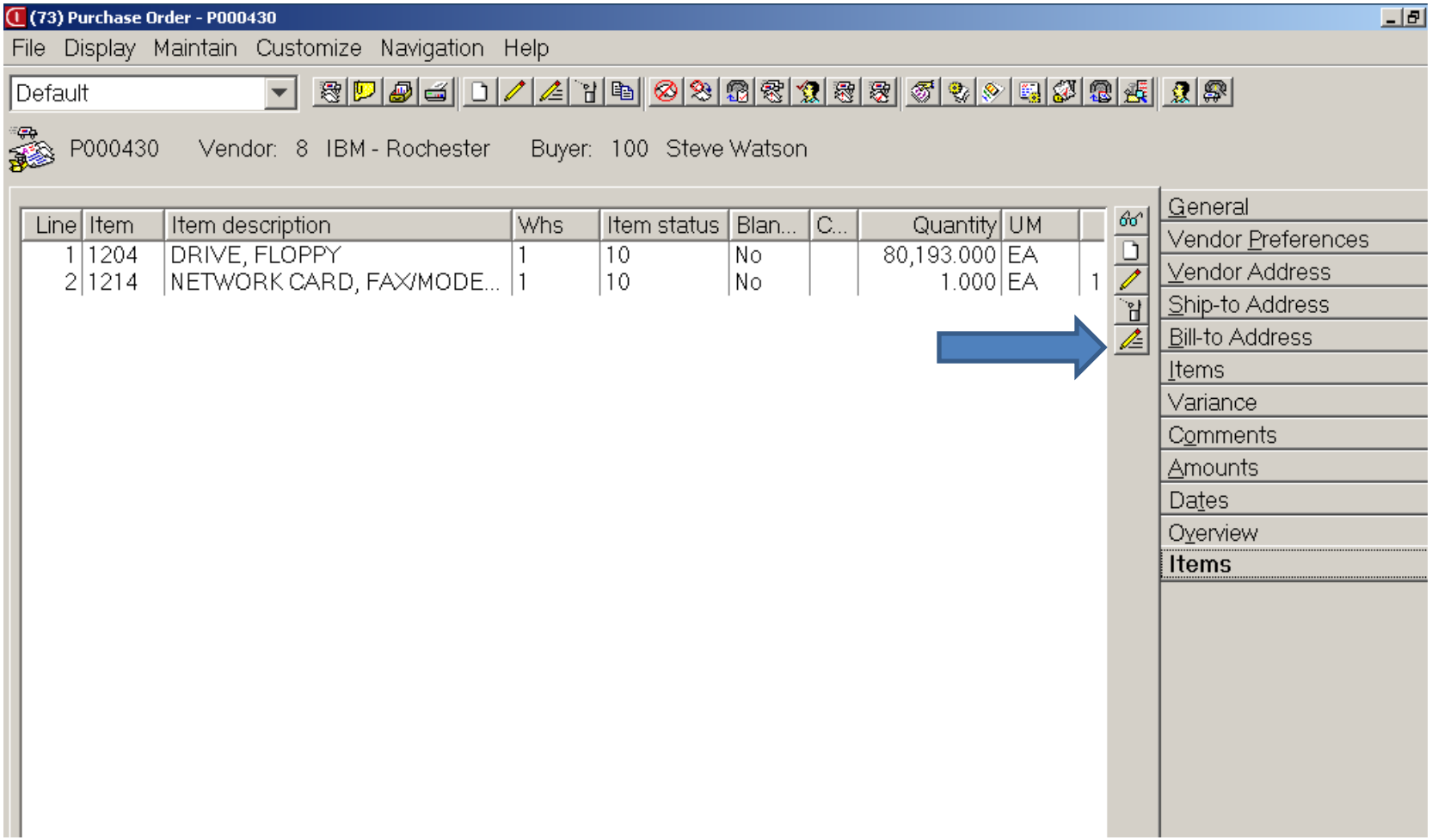
Toolbar after Card Maintenance



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CONCLUSION

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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