



Product Information Manager

PIM

How To Create Or Edit Applied Views

- › **When looking at the Table View in a workflow, you are presented with a defaulted view of predetermined attributes.**
- › **Creating an Applied View will allow you to.**
 - › Customize the table view to show you information that is important to you, and your specific category.
 - › View and enrich information in fields on multiple items at one time.
- › **Users can create multiple views that allow them to work through all the different workflow screens that they have privileges.**
- › **Example B1 is the table view using an Applied View. The Applied View displays the defaulted columns as well as all of the added columns the user included in their new view they created.**

A. This is the default view

Buy-Side Item - Item Review

Select all
 Clear filter
 Apply view
 Clear view

	Assigned to me	Thumbnail	Name	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description*	Unit Cost*
<input type="checkbox"/> Freezer	<input checked="" type="checkbox"/>		Freezer	Item	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer	

B1. This the Applied view that shows the defaulted columns and the added columns

Buy-Side Item - Item Review

Select all
 Clear filter
 Apply view
 Clear view


	Status flag	Deadline	Supplier Nbr	Brand	Description*	Unit Cost*	VPN*	Primary Ship Point (full 8)	Secondary Ship Points	Reject/Del... Reason
<input type="checkbox"/> Freezer	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer		12345			

- › To create your new applied view.
 - › Open your Table View
 - › Click on the Applied View icon **A** and a window will open.
 - › The box that opens will say “Recent Views” on the top left, at the bottom is a Tab to “**ADD VIEW**”
- › Click the circle icon



Buy-Side Item - Item Review

Select all Clear filter Apply view Clear view

	Assigned to me	Thumbnail	Name	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description	Unit Cost
<input type="checkbox"/>	Freezer		Freezer	Item	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer	

Add view

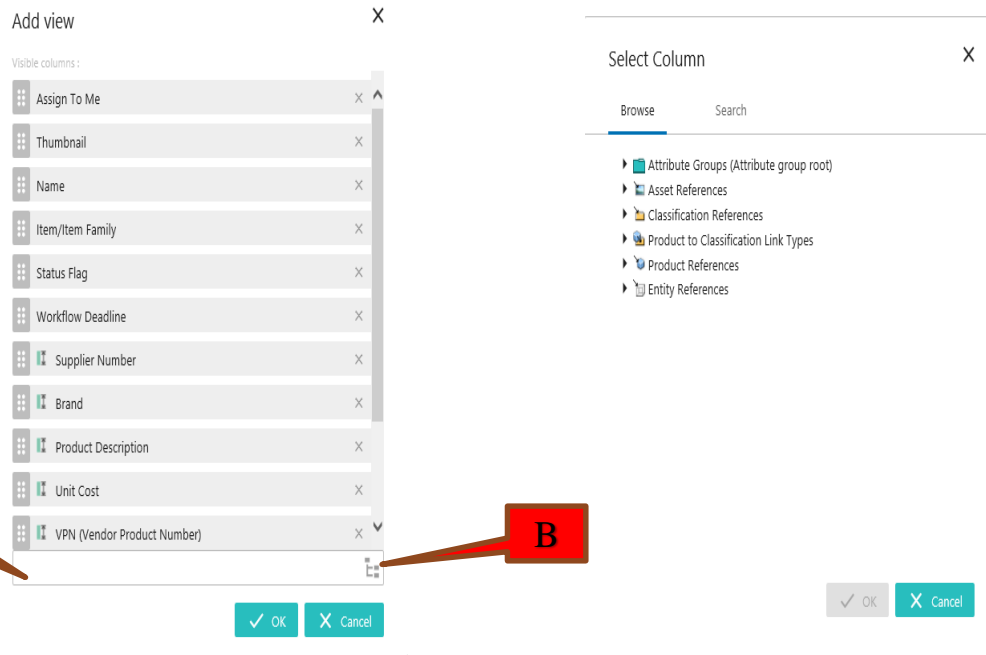
Visible columns :

	Assign To Me	
	Thumbnail	
	Name	
	Item/Item Family	
	Status Flag	
	Workflow Deadline	
	 Supplier Number	
	 Brand	
	 Product Description	
	 Unit Cost	
	 VPN (Vendor Product Number)	

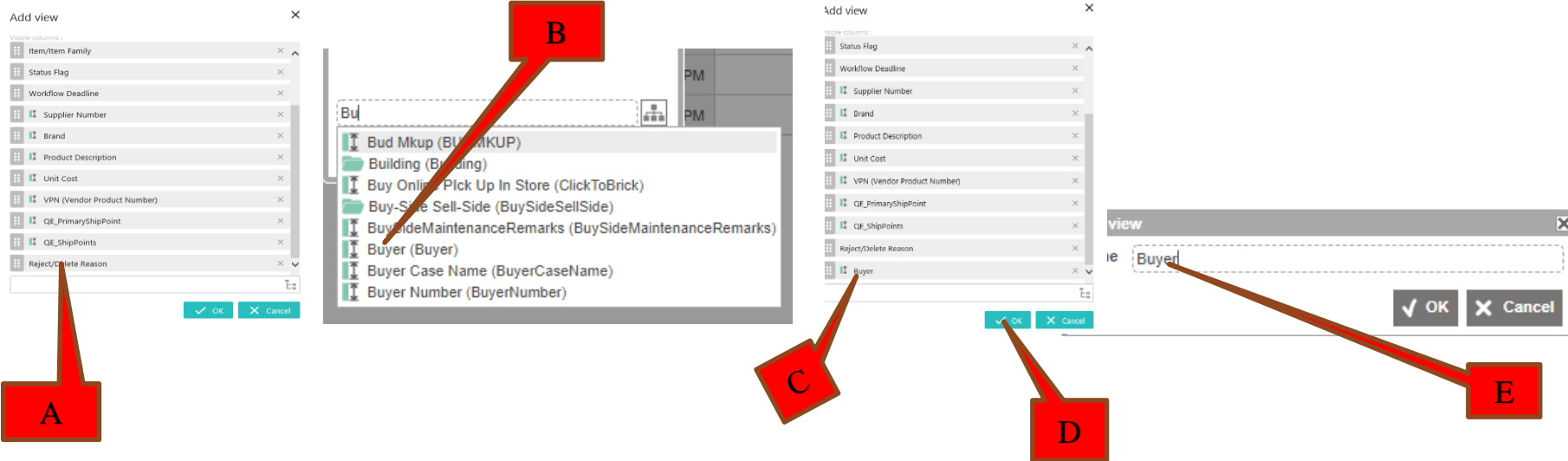
 OK

 Cancel

- › The Edit View box will open.
- › Adding attributes to the view you are creating can be done several ways.
 - › If you know the name of the attribute you can type it directly in the open field at the bottom of the box. **A**
 - › You can use the Browse tab to look through all the attributes by clicking the icon on the right in the open field. **B**
 - › You can use the Search Tab to search for the attribute names .



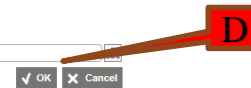
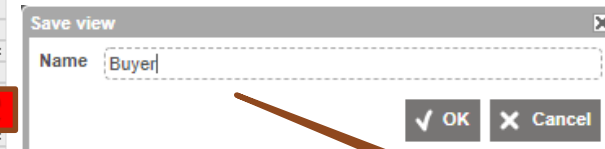
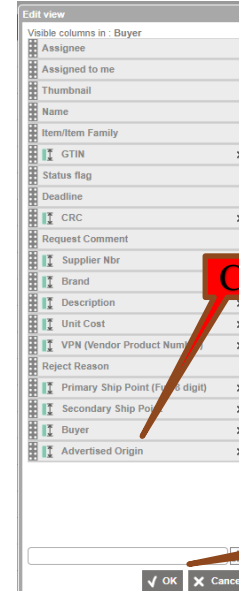
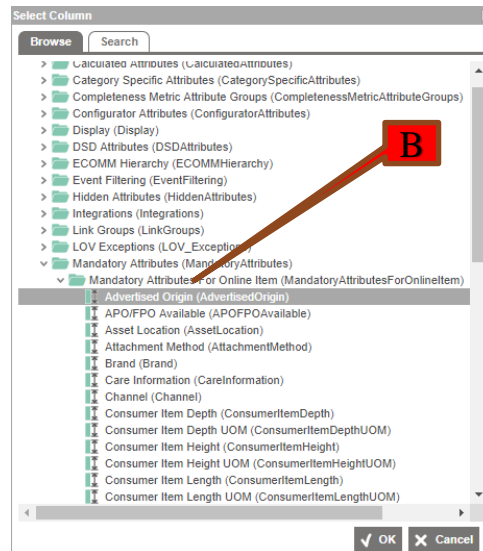
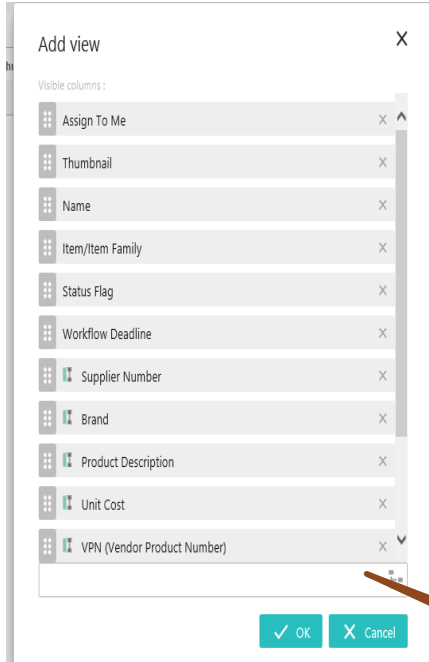
- › **Typing the attributes by name in the open field.**
 - › Start typing the attribute name and matching values will begin to appear for your selection. **A**
 - › Once the name of the attribute shows, click on the name. **B**
 - › The attribute name will show it has been added to the Visible Columns list (Buyer). **C**
 - › Continue this same process adding the attributes you want to see in this view.
- › **When finished click OK.** **D**
- › **The Save View box will open asking you to name your new view.** **E**



The image shows a sequence of four screenshots illustrating the 'Add view' process:

- A:** The 'Add view' dialog box is open, showing a list of 'Visible columns' on the left. The 'Buyer' attribute is highlighted in the list.
- B:** A search box is active, and a dropdown menu shows search results for 'Buyer'. The 'Buyer (Buyer)' option is selected.
- C:** The 'Buyer (Buyer)' attribute has been added to the 'Visible columns' list in the 'Add view' dialog box.
- D:** The 'Add view' dialog box is shown with the 'OK' button highlighted, indicating the user is ready to confirm the changes.
- E:** A 'view' dialog box is open, asking the user to name the new view. The text 'Buyer' is entered into the name field.

- **Using the Browse & Search tabs to add attributes to your applied view.**
 - Click the icon on the right side of the open field. **A**
 - The Select Column box will open, and you click down until you find the attribute you want to add, and click on the attribute. Click OK. **B**
 - The attribute name will show it has been added to the Visible Columns list. **C**
 - Continue this same process adding the attributes you want to see in this view.
- **When finished click OK.** **D**
- **The Save View box will open asking you to name your new view.** **E**

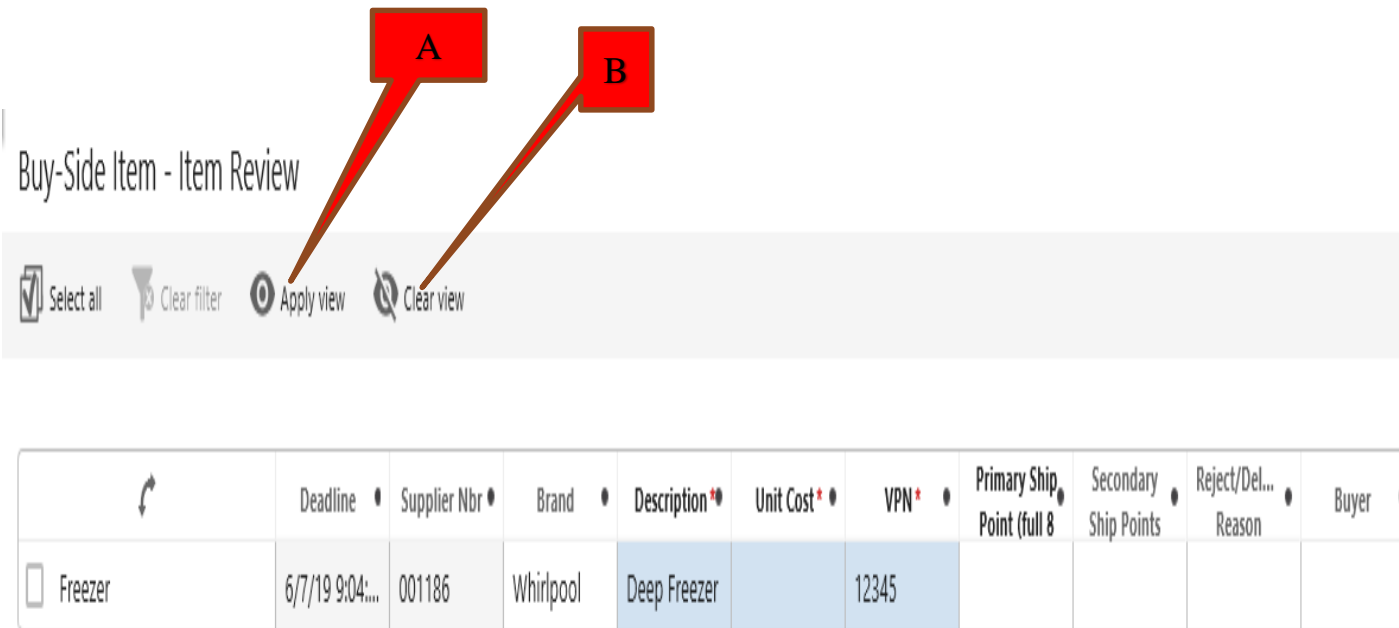


› Using your new Applied View.

- › To use your new view click on the apply view icon, and select the view that you created. A
- › You will see all the new attribute columns you added.

› To clear your view you click on the Clear View icon. B

Buy-Side Item - Item Review



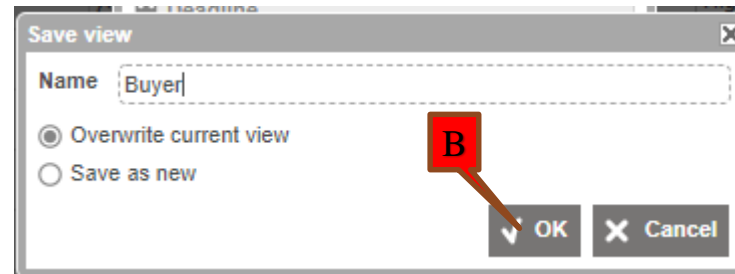
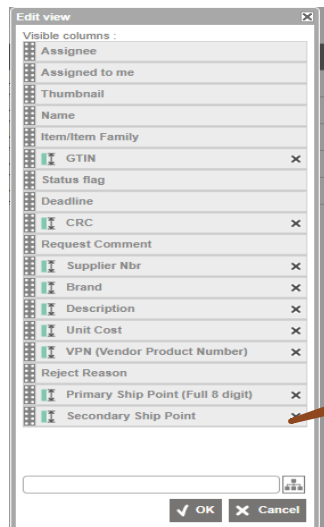
	Deadline	Supplier Nbr	Brand	Description	Unit Cost	VPN	Primary Ship Point (full 8)	Secondary Ship Points	Reject/Del... Reason	Buyer
<input type="checkbox"/> Freezer	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer		12345				

› How to Edit an existing Applied View.

- › To edit your new view click on the apply view icon.
- › The applied views screen will open, click on the pencil icon to the right of the existing view that you want to edit.
- › You will add the new attribute column name.
- › You can remove attribute columns that you don't use, click the X on the attribute that you want to remove from your view. **A**

› When you have finished making your changes click OK.

- › You are overwriting the previously set up view with new information, click OK, **B**



- › **Columns in the Table view can be filtered to narrow items down that you want to work.**
 - › Click on the column header that you want to filter.
 - › The filter icon will show in the header of any columns you have filters engaged. A
 - › You can type in all or part of the information that you are looking to filter on.
 - › You can filter on multiple columns.
- › **To clear your Filters.**
 - › You can click on the header of the column and click the Select All box.
 - › You can refresh/reload the page.
 - › You can click the **EXCHANGE** to go back to your Home Page.

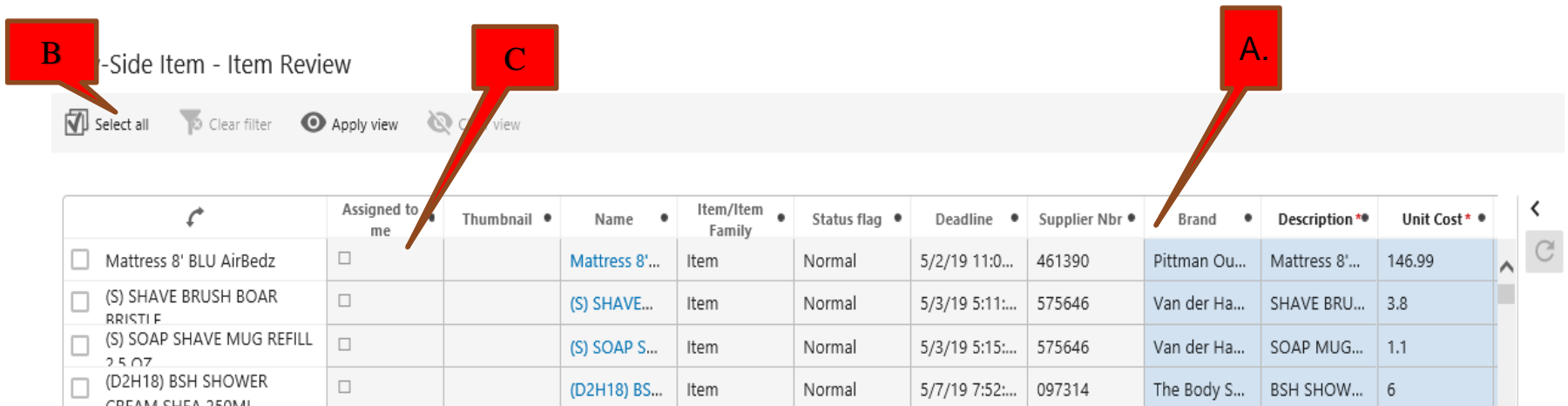
Buy-Side Item - Item Review

Select all
 Clear filter
 Apply view
 Clear view

	Assigned to me	Thumbnail	Name	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description	Unit Cost*
<input type="checkbox"/> Freezer	✓		Freezer	Item	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer	



- **A.** Locate and Select the column that you want to Filter (**Brand** was selected). A box will open up
- **B.** Uncheck the “**Select All**” Scroll to locate your items (**Whirlpool**) and place a check mark in the boxes. Place a check mark in the box on the left. More icons will appear in the Tool Bar.
- **C.** Select “**Assign To Me**”. All of your items will appear to View. Click on the Assign ICON in the Tool Bar and Press “**Release Task**”.










The screenshot shows a software interface titled "Side Item - Item Review". At the top, there is a toolbar with icons for "Select all", "Clear filter", "Apply view", and "Cancel view". Below the toolbar is a table with the following columns: "Assigned to me", "Thumbnail", "Name", "Item/Item Family", "Status flag", "Deadline", "Supplier Nbr", "Brand", "Description**", and "Unit Cost*".


Callout **A.** points to the "Brand" column header. Callout **B.** points to the "Select all" checkbox in the toolbar. Callout **C.** points to the "Assigned to me" checkbox in the first row of the table.

	Assigned to me	Thumbnail	Name	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description**	Unit Cost*
<input type="checkbox"/> Mattress 8' BLU AirBedz	<input type="checkbox"/>		Mattress 8'...	Item	Normal	5/2/19 11:0...	461390	Pittman Ou...	Mattress 8'...	146.99
<input type="checkbox"/> (S) SHAVE BRUSH BOAR BRISTLE	<input type="checkbox"/>		(S) SHAVE...	Item	Normal	5/3/19 5:11:...	575646	Van der Ha...	SHAVE BRU...	3.8
<input type="checkbox"/> (S) SOAP SHAVE MUG REFILL 2.5 OZ	<input type="checkbox"/>		(S) SOAP S...	Item	Normal	5/3/19 5:15:...	575646	Van der Ha...	SOAP MUG...	1.1
<input type="checkbox"/> (D2H18) BSH SHOWER CREAM SHEA 250ML	<input type="checkbox"/>		(D2H18) BS...	Item	Normal	5/7/19 7:52:...	097314	The Body S...	BSH SHOW...	6

- › **Enriching information on multiple items at one time.**
 - › In the column that you want to populate information click on the first box.
 - › Holding down the Shift button you can click on the last box in that group of items, you will notice that all of the boxes between now have a bold box around them. **A**
 - › Holding Ctrl button and selecting items by clicking with your mouse pointer will also work.
- › **Click enter.**
- › **A Value Editor box will open.**
 - › The box will tell you how many items you have selected to edit.
 - › Type in the value that you want to populate on the selected items, and click OK.

Buy-Side Item - Item Review

 Clear all
  Clear filter
  Apply view
  Clear view
  Assign
  Export action
  Submit to next state in workflow


	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description	Unit Cost	VPN	Primary Ship Point (full 8)	Secondary Ship Points	Reject/Del... Reason
<input checked="" type="checkbox"/>	SMSG Galaxy Buds Black	Normal	5/3/19 8:08:...	511949	Samsung	SM-R170N...		SM-R170N...			Populated...
<input checked="" type="checkbox"/>	SMSG 5.0 CU.FT Top Load Washer Active Waterlet	Normal	5/6/19 10:1...	511949	Samsung	WA50R520...		WA50R520...			Populated...
<input checked="" type="checkbox"/>	Freezer	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer	44.00	12345			Populated...



- All of the selected items now have the same values populated for the fields you selected under that attribute column.

Buy-Side Item - Item Review

 Clear all
  Clear filter
  Apply view
  Clear view
  Assign
  Export action
  Submit to next state in workflow

	Item/Item Family	Status flag	Deadline	Supplier Nbr	Brand	Description*	Unit Cost*	VPN*	Primary Ship Point (full 8)	Secondary Ship Points	Reject/Del... Reason	
<input checked="" type="checkbox"/>	SMSG Galaxy Buds Black	Item	Normal	5/3/19 8:08:...	511949	Samsung	SM-R170N...		SM-R170N...			Populated...
<input checked="" type="checkbox"/>	SMSG 5.0 CU.FT Top Load Washer Active WaterJet	Item	Normal	5/6/19 10:1...	511949	Samsung	WA50R520...		WA50R520...			Populated...
<input checked="" type="checkbox"/>	Freezer	Item	Normal	6/7/19 9:04:...	001186	Whirlpool	Deep Freezer	44.00	12345			Populated...

A

› You can change the Table View to show items Vertical or Horizontal.

- › Click on the double ended arrow. **A**
- › Horizontal item view **B**
- › Vertical item view **C**

Buy-Side Item - Item Review

Select all
 Clear filter
 Apply view
 Clear view

	Assigned to me	Thumbnail
<input type="checkbox"/> Freezer	<input checked="" type="checkbox"/>	

Buy-Side Item - Item Review

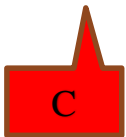
Select all
 Clear filter
 Apply view
 Clear view

	Assigned to me	Thumbnail	Name	Item/Item Family	Status flag	Deadline	Supplier Nt
<input type="checkbox"/> Freezer	<input checked="" type="checkbox"/>		Freezer	Item	Normal	6/7/19 9:04:...	001186

Buy-Side Item - Item Review

Select all
 Clear filter
 Apply view
 Clear view

<input type="checkbox"/> Freezer	<input checked="" type="checkbox"/>
Assigned to me	<input checked="" type="checkbox"/>
Thumbnail	
Name	Freezer
Item/Item Family	Item
Status flag	Normal
Deadline	6/7/19 9:04:10 AM
Supplier Nbr	001186
Brand	Whirlpool
Description *	Deep Freezer
Unit Cost *	
VPN *	12345
Primary Ship Point (full 8 digit) *	
Secondary Ship Points	
Reject/Delete Reason	Populated Example
Buyer	



› Apply views to get you started

› POD Review

- › Search for Mandatory Item Review
- › Add this view
- › Provides much of the basic item data needed to review and approve supplier data

› POD Enrich

- › Search for POD, Modify
- › Provides values that must be enriched by POD User



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Thank You!
