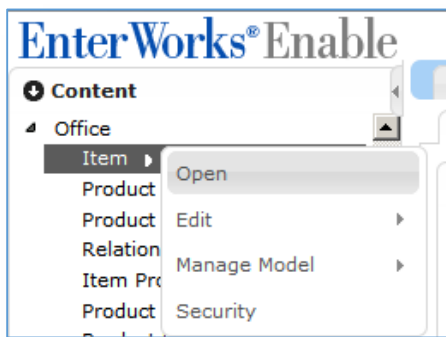



## Using Repository Preference Views

The repository preference views capability is available to define views of your repository. It lets you show the fields that are most important to you on the list screen and only the tabs and fields that you need to see and/or modify on each record. Views can be created by the System Administrator and made available to all users that have access to that repository or each person can create their own views. The following steps are used to create a new repository preference view.

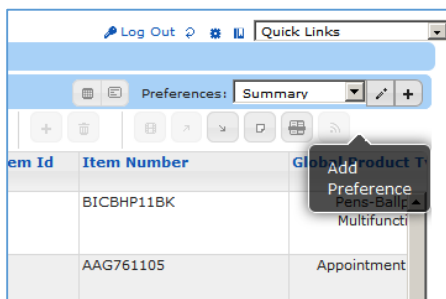
### Defining a Preference View

1. Open the repository that you need a Preference defined.



2. To add a new view, click on the **add** edit button  next to the Preferences dropdown list.

**Note:** Only the creator or users in the Administration group can modify the preference view.



3. Define the new Preferences view in the screen below:

**Add Preference**

Name:

Description:

Type:

Listing View:

List of Records Per Page:  (e.g.: 10,25,50)

Number Of Records Per Page:  (e.g.: must be a number from above list)

Preview Link Table:

Set As Default  Set As Global  Set As Favorite for Detailed Editor

Display Image:  Height:

\* Indicates that this column is a relational column in the repository.

**Display**

Add Remove Up Down Width

**Sort Available** **Sort Selected**

Up Down

Ascending  Descending

**Linked Group Available** **Linked Group Selected**

Accessories  
Companions  
Consumables  
Cross Reference  
Digital Assets  
Downsells  
Item Hierarchy[To PIM\_HierarchyCatalog]

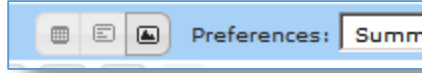
Delete Import Save Cancel

- Enter a **Name** for the new view.
- Enter a **Description** for the new view (optional).
- Select a View Type from the **Type** drop-down list (optional).

**Note:** The only view type at this time is **Export/Import Template** which allows the view to be used as an Export or Import Template.

- d. Select a **Listing View** (Tabular Grid, Card View, or Gallery View).

**Note:** These views are the same ones that can be selected from the toolbar next to the Preferences drop-down list (see section **12.1 – Viewing Repository Records** for details).



Tabular view:

#	Error Ind	Image	Master Item Id	Item Number	Global Product T
1	⚠		50324	BICBHP11BK	Pens-Ballp Multifuncti
2	⚠		50926	AAG761105	Appointment
3	⚠		55219	AAGPPAE12	Calendars-
4	✅		57270	PAP42407	Pens-Ballp
5	⚠		23805	AAGSK4100	Appointment

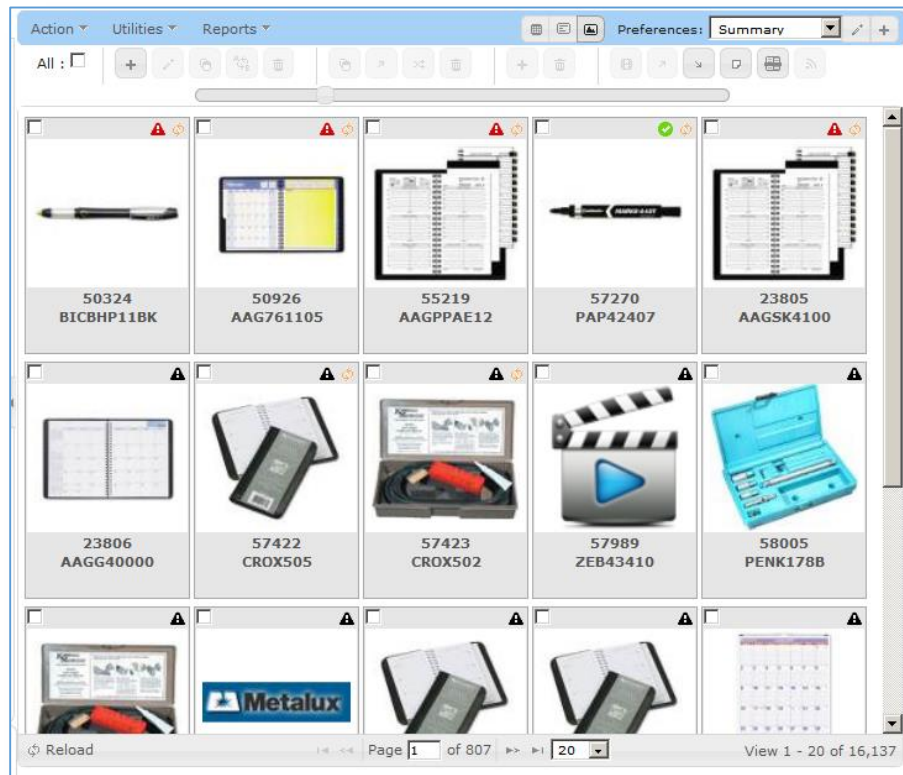


Card view:

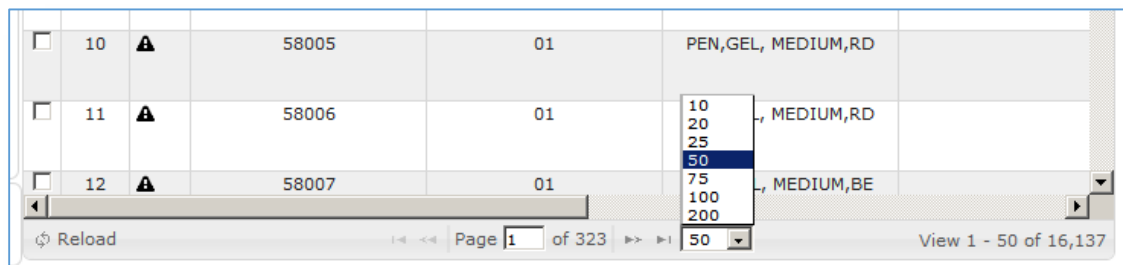
#	Error Ind	Image	Master Item Id	Item Number	Global Product Type
1	⚠		50324	BICBHP11BK	Pens-Ballpoint Multifunctionc
			Item Description	PEN,HIGHLIGHTER COMBO,BK naj test 3	
			Green indicator	N	
			Sellable	N	
			Item Status	InProgress	
2	⚠		50926	AAG761105	Appointment Books
			Item Description	BOOK,APP,8X97/8,WK/MN,BK	
			Green indicator	Y	
			Sellable	Y	

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 Gallery view:

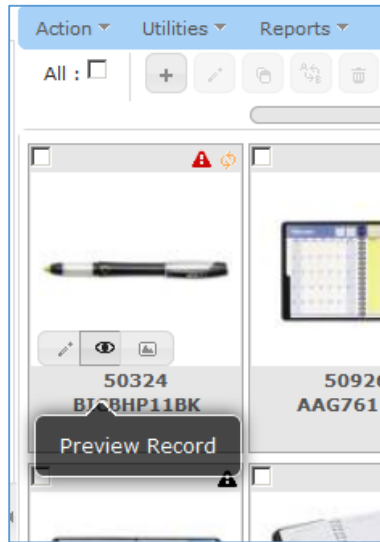


- e. Define the **List of Records per Page** options. The default is 10,20,25,50,75,100,200, 500, 1000 which shows as follows:



- f. Define the **Number of Records per Page** which is the default number of records that will show on the view. It must be one of the numbers that were defined in the list above.
- g. Define the default **Number of Records per Page** which is the number of records that will show when first entering the repository (if it is a default view) or when the view is selected. The value must be one of the defined number of records per page from the field above.

- h. **Preview Link Table** – Select one linked table to show on the preview window. This preview window is accessible via the Gallery view:



The selected link table will be shown on the bottom of the preview screen:

**Preview** 🔄 🗑️ ✖

Master Item Id  
**50324**

Item Number  
**BICBHP11BK**

Global Product Type  
**Pens-Ballpoint Multifunctionc**

Taxonomy  
**Pens.Pens-Combination**


Brand  
**BIC®**

Item Description  
**PEN,HIGHLIGHTER COMBO,BK naj test 3**

Green indicator  
**N**

Sellable Item  
**N**

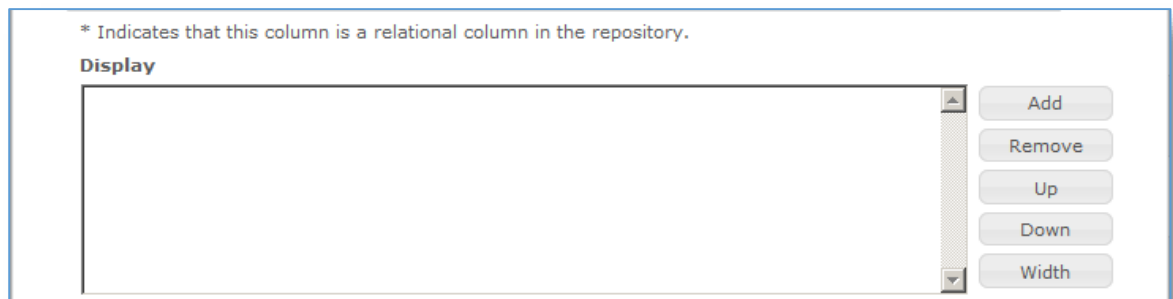
Item Status  
**InProgress**



Master Item Id	Item Number	Item Description
55219	AAGPPAE12	DISPLAY,WALL CAL,ERASBLE
50926	AAG761105	BOOK,APP,8X97/8,WK/MN,BK
24171	AAGPM428	CALENDAR,WALL,MLY,20X30
58059	AAG70N02005	PLANNER,WK/MTH,3.25X6.25

- i. **Set as Default** flag – Set this flag to have this view be the first view to see when the repository list is displayed.

- j. **Set as Global** flag – Set this flag to share this view with all other users that have access to this repository.
- k. **Set as Favorite for Detailed Editor** flag – Set this flag to define this view as the default when editing a record. When a record is opened for editing, only the fields defined in the view will be shown. This will happen when editing a record from any preference list view. Once the record is shown in the editor, another view can be selected from the drop-down list on the top right of the editor window.
- l. **Display Image** – Set this flag when you want the records' image to be displayed on the view.
- m. Select the **Image Context** from the Drop-down list to select the size of the image to display.  
  
**Note:** Be careful what size image is selected for display as it could slow load time of the records being displayed.
- n. If the **Display Image** flag is set, the **Height** in pixels can be entered to override the default size of the Thumbnail.
- o. In the **Display** section click the **Add** button to open the **Select Display Columns** window.



- p. Select the columns that you want to display on the repository list. Use the **ctrl button + mouse left-click** to select more than one field and then click the **Select** button, or select each field separately and click the **Select** button.

**Note:** The fields with an \* indicates they can be sorted. The fields with a **(PK)** are primary keys and the fields with **(BK)** are Business keys.

- q. Click the **Close** button when finished.
- r. To choose one or more fields to sort on before showing the view:
  - a. Select the **Ascending** or **Descending** radio button.
  - b. Select the field(s) to sort on the left (ctrl+left-click to select multiple).
  - c. Click the > arrow button to move the field to the right (or >> to move all).
  - d. Click the **Up** or **Down** buttons to change the sort sequence, if necessary.

**Note:** Only the fields that have been set up as relational (with an \*) are shown/available for sorting.

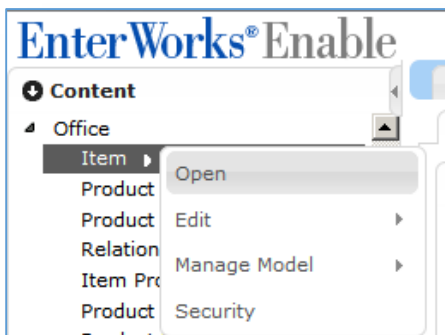
- s. To choose any available Linked Groups to show on the view:
  - a. Select the linked groups to include on the left (ctrl+left-click to select multiple).
  - b. Click the > arrow button to move the field to the right (or >> to move all).
  - c. Click the **Up** or **Down** buttons to change the sort sequence, if necessary.

**Note:** This option only applies to the detail editor view tabs.

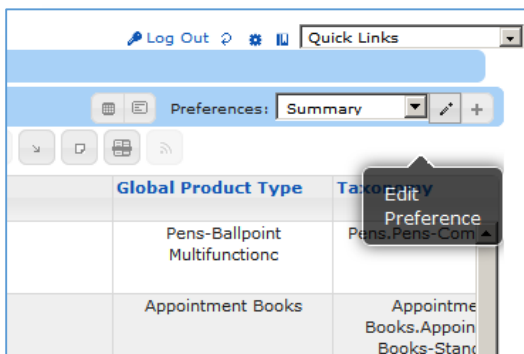


## Editing a Preference View

1. Open the repository that you need a Preference defined.



2. To edit an existing view, click on the **pencil** edit button  next to the Preferences drop-down list.





3. Edit the values in the **Edit Preferences** screen below, as required. Refer to **Section 9.1 - Defining a Preference** view for option details.

**Edit Preference**

Name:

Description:

Type:

Listing View:

List of Records Per Page:  (e.g.: 10,25,50)

Number Of Records Per Page:  (e.g.: must be a number from above list)

Set As Default  Set As Global  Set As Favorite for Detailed Editor

Display Thumbnail Height

\* Indicates that this column is a relational column in the repository.

**Display**

Master Item Id (PK) *	Add Remove Up Down Width
Item Number (BK) *	
Global Product Type (BK) *	
Taxonomy *	
Brand *	
Item Description *	
Green indicator *	
Sellable Item *	
Item Status	

**Sort Available**      **Sort Selected**

Brand *	» > < «	Up Down
Global Product Type *		
Green indicator *		
Item Description *		
Item Number *		
Master Item Id *		
Sellable Item *		

Ascending     Descending

**Linked Group Available**      **Linked Group Selected**

Accessories	» > < «	
Companions		
Consumables		
Cross Reference		
Digital Assets		
Downsells		
Item Hierarchy[To PIM_HierarchyCatalog]		

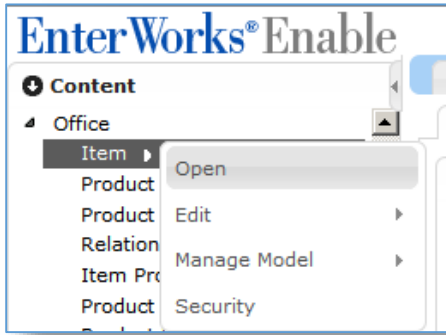
Delete    Import    Save    Cancel

## Using the Preference Views

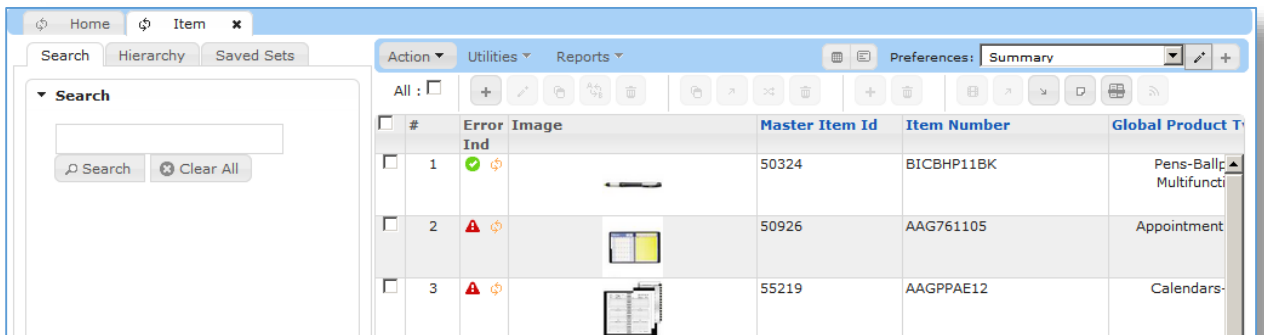
After a Preference view is created, it can be used to control the repository list display or the detailed editor field display as described in the sections below.

### The List Preference Views

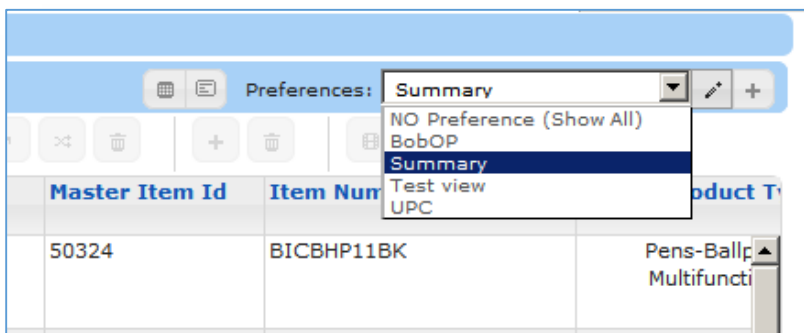
1. Open the repository.



2. The repository list will show the default list preference view as defined by the **Set as Default** flag.

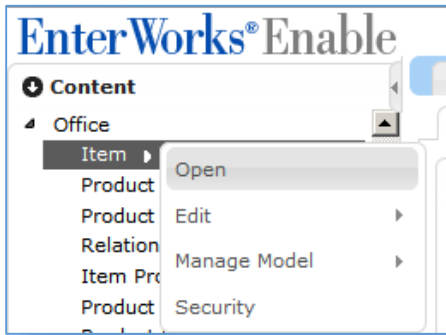


3. Click the **Preferences** drop-down list to select another view for the repository list.

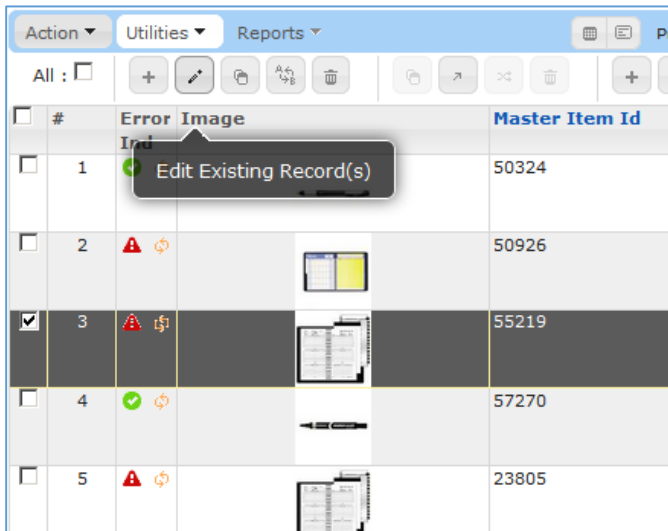


## The Detail Editor Preference Views

1. Open the repository.



2. Open a repository record by selecting the record (using the checkbox) and clicking the Edit Existing Record pencil button on the toolbar, or double-clicking on the record #.



The screenshot shows a table of repository records. The table has columns for '#', 'Error Image', and 'Master Item Id'. A tooltip 'Edit Existing Record(s)' is visible over the pencil icon in the toolbar above the table.

#	Error Image	Master Item Id
<input type="checkbox"/>	1	50324
<input type="checkbox"/>	2	50926
<input checked="" type="checkbox"/>	3	55219
<input type="checkbox"/>	4	57270
<input type="checkbox"/>	5	23805

- The detailed editor view as shown below will show the view that was selected as the default detailed editor view. See the **Set as Favorite for Detailed Editor** option when defining or editing a Preference section above.

Record 3 of 16137

Item

AAGPPAE12  
55219  
DISPLAY,WALL  
CAL,ERASBLE

▶ Error Levels

Summary Marketing Standards

Summary

▼ Summary

Master Item Id  
55219

Item Number  
AAGPPAE12

Sellable Item

Global Product Type  
Calendars-Wall

Item Status  
InProgress

- Click the **Preferences** drop-down list to select another view for the repository list.

Summary

NO Preference (Show All)

BobOP

Summary

Test view

UPC

- The detail editor will show only those fields that were selected in the Preference view's Display section (under the defined tabs that the fields normally show under) and any Linked Groups selected for display as shown below for the Test view.

The Test view fields show up in the Edit Details area below:

- To show all fields within a record, select the **No Preferences (Show All)** view.

Edit 1 record(s)
⌵ ⌶ ✕

<< Record 1 of 1 >>
Action ▾ Reports ▾
NO Preference (Show All) ▾

**Item** ⊞

AAGPPAE12
55219
DISPLAY,WALL
CAL,ERASBLE

Summary ▲
Marketing Standards
Category Specific Facility System
Relationships States
Cross Reference
Digital Assets

**Summary**

**Master Item Id**  
55219

**Item Number**  
AAGPPAE12

**Sellable Item**

**Global Product Type**  
Calendars-Wall

**Product**  
AT-A-GLANCE® 60-Day/30-Day Undated Erasable Wall Planner

**Product Id**  
2503

**Product Line Concatenation**  
AAGPPAE12:Calendars-Wall:AT-A-GLANCE® 60-Day/30-Day Undated Erasable Wall Planner

**Owning Company**  
01 -- [UNITED STATIONERS SUPPLY]

**Lagasse Item Number**

**Identifier Key**

▲ Error Levels

Save Cancel