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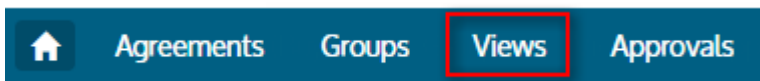
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Summary

Views provide the Buyer Administrator with control over what content is visible to their requisitioners in the Marketplace. By attaching agreements and users to views you control what content is available to whom. In addition, the Lists feature provides even greater flexibility, allowing you to create shopping lists of specific items for users on the view.


Accessing the Views screen

To access your views click Views in the Product Manager menu.



Create a new View

1. From the Product Manager menu click Views > Create, or
2. Click the Create View link on the dashboard



Views

Views enable you to group Agreements together from multiple suppliers and provide the means for controlling user access to specific content on the Mar ...read more

[Create a View](#)

3. In the Create View form enter the name for the View.
4. Add a description of the view.
5. Once complete click the save button.

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Create View

View Name *

Description

[Cancel](#) [Save](#)



The next screen is where you add content and users to the view. You can also use Lists to create easy-to-access shopping lists for some or all of your users.

1. As this is a new view, the status will be 'Empty'.
2. Until the view is published the view can be deleted.
3. The description can be edited. Simply click into the description field to edit it.
4. To add content to the view, click the Agreements button.
5. To add users to the view, click the Users button.
6. Once you have added agreements and users to your view, click the Lists button to add lists.

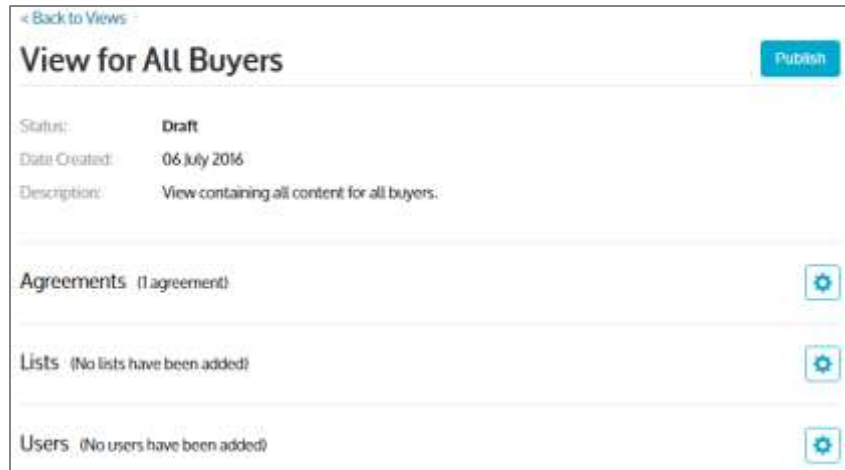
Add or Remove Agreements

To add or remove agreements to/from your view, click the Agreements button.


All Agreements will be displayed and will also indicate if the Agreement is available or unavailable. If the Agreement has expired (and therefore unavailable) it cannot be added to the View.

1. Use the 'Sort by' filter on the right to sort the results. The number of results displayed per page can also be changed here.
2. To add an agreement to your view, click the  button to the right of the agreement. Once added, the button will change to a ; click this to remove the agreement from the view.
3. If an agreement or its price list has expired, then it will show as 'Not available.'
4. Once all the relevant agreements have been added, click the 'Save' button to the right of the search bar.

The screenshot below shows the view with an agreement added.



Add or Remove Users

To manage the users on your view, click the Users  button.

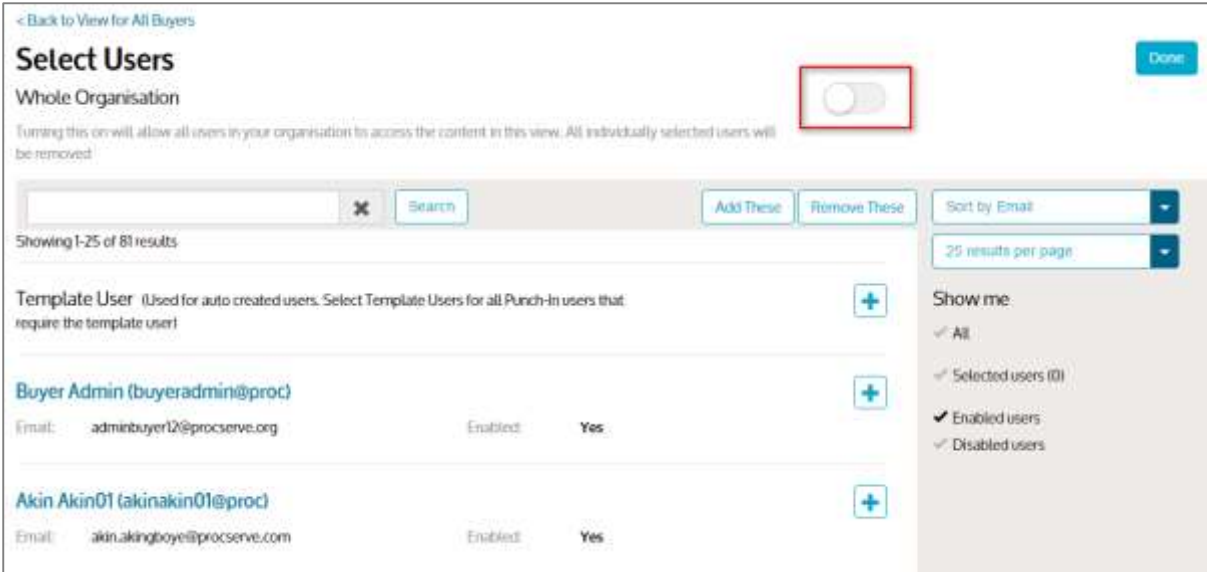
On the Select Users page you can choose to

1. add all users in the organisation, or
2. add all the users on a page, or
3. add users individually.

Add or Remove All Users

1. All users in the organisation can be added to this View by clicking the Whole Organisation toggle switch to ON. If the switch is on then all current users in the organisation will have access to the content in the view, and any users added later will also have access to the content.
2. To select users individually or per page turn the Whole Organisation toggle switch to OFF.
3. To quickly remove all users from the list, turn Whole Organisation ON, and then immediately turn it OFF. Any users that were on the view are now removed.
4. When you have finished, click Done.



The screenshot below shows the Whole Organisation toggle switch OFF. To verify the state of the button at any time, move your mouse over it to view a tooltip.

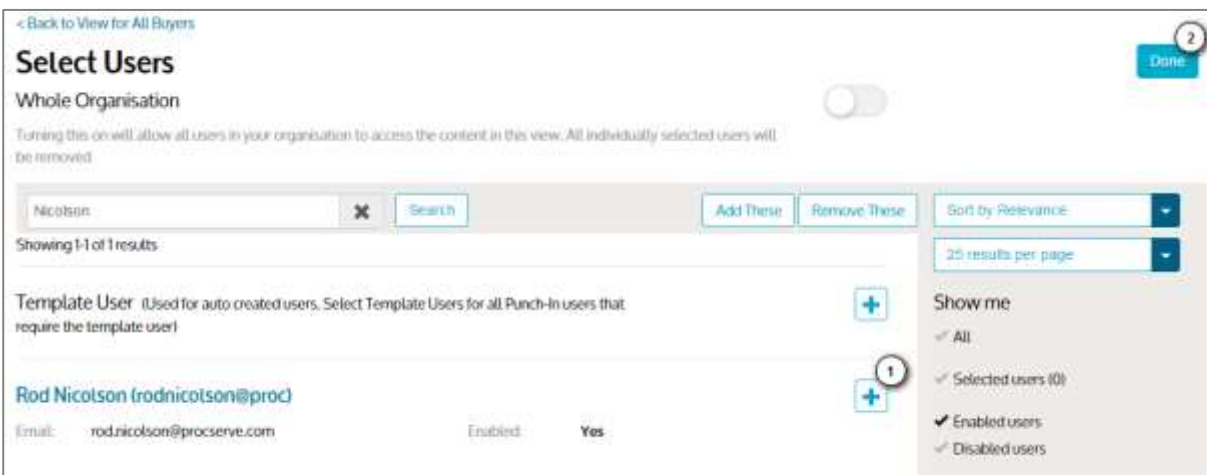


Add or Remove All Users on a Page

1. To add or remove users individually or by page, the Whole Organisation toggle switch must be OFF.
2. To add a large number of users, but less the whole organisation, use the 'Add These' or 'Remove These' buttons.
3. Clicking 'Add These' will add all users shown on the page. By using a combination of the search field and the 'results per page' drop down it is possible to add or remove small groups of users, or up to a hundred people at a time.
4. When you have finished, click Done.

Add or Remove Individual Users

1. To add a single user, click the  button to the right of the user. Once added, the button will change to a ; click this to remove the user.
2. When you have finished, click Done.



Organisation Lists

The Organisation Lists feature allows you to create organisation shopping lists containing specific items, thus tailoring to your shoppers' specific needs and corporate functions, allowing for greater flexibility.


If for example, as a buyer admin, you would like to make the ordering process more efficient, you can create specific organisation lists with items meeting the needs of your buyers. Your buyer can then select the appropriate item from your organisation list instead of sifting through hundreds of items in their catalogue.

Finding Your Lists

1. In Product Manager click the Views menu option, and the name of the view to which you want to add a list.
2. Select the Lists option. The List Directory (below) will load.
3. By default, the page shows the lists that are available to your users. If you have created lists, but not yet made them available to your users, you will need to click the All or 'Not available to users' filter to view them.
4. If you have many lists, you can search, filter and sort within the directory.



Create a List


1. Lists are comprised of two elements, users and content. Before creating a list make sure you have added at least one agreement, some users, and the view has been published.
2. In the Views section of Product Manager select the view to which you want to add a list.
3. On the Manage View page (below), click the  button next to the Lists section.


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Standard Buying View

Published

Status: **Published**
Date Created: 14 March 2016
Description: The standard view for all buyers.

Agreements (1 agreement) 

Lists (1 list) 

Users (Assigned to all the users in the organisation) 

4. On the List Directory click the Create button.

List Directory

Showing 1-1 of 1 results

Go Crazy List

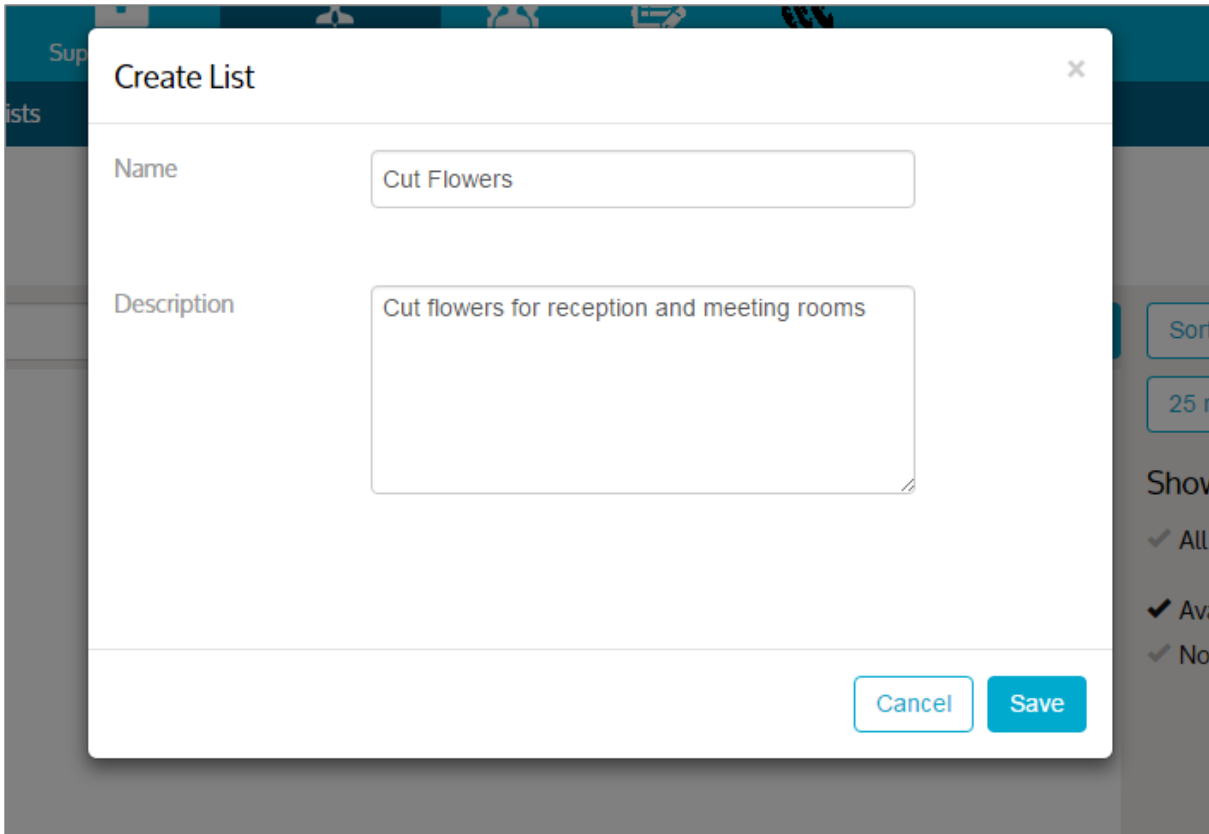
Items: 2 Available:

Descriptions: No limits



Sort by Name
25 results per page

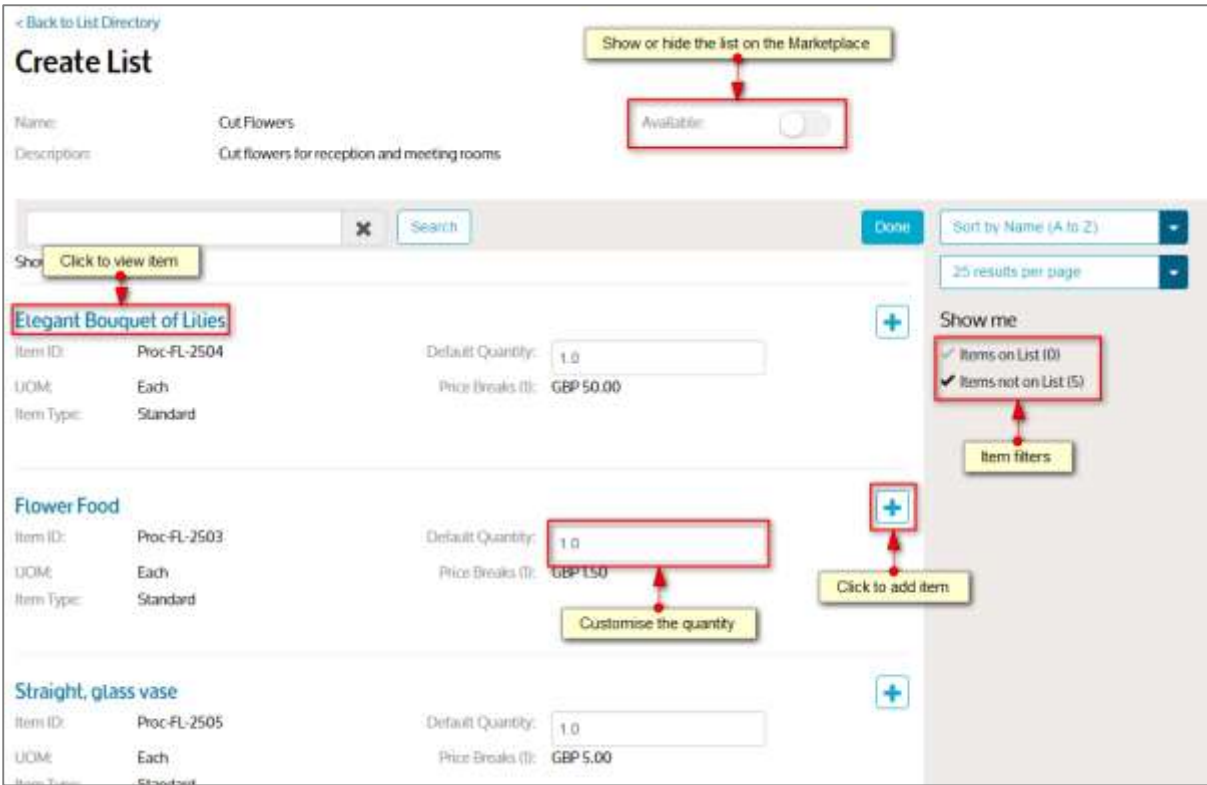
Show me
 All
 Available to users (1)
 Not available to users (0)

5. In the Create List form add a list name and a short description and click 'Save'.
Note: The list name will be shown in the Marketplace, so make it meaningful to your buyers.



The screenshot shows a 'Create List' modal window. The 'Name' field contains 'Cut Flowers' and the 'Description' field contains 'Cut flowers for reception and meeting rooms'. The window has a close button in the top right corner and 'Cancel' and 'Save' buttons at the bottom right.

6. The 'Create List' page shows the list name, description, search/sort/filter features and the list of standard items on the view.
7. The filter on the right panel allows you to filter between and view 'items on' and 'items not on' the list.
8. Clicking the item name will show the item details.
9. Add items to the list by clicking the  button next to each item. Once added, the button changes to a  button and the numbers by the filters will change. You may add up to 250 items to each list.
10. The 'Default Quantity' option allows you to set the minimum order quantity.
11. In order to make the list available to your users in the Marketplace, click the 'Available' toggle button on the top of the page and vice versa.
Note: The view must be published first so the list will show in the Marketplace. The view does not need to be republished after you have toggled the 'Available' button.
12. When you have finished adding items, click 'Done'.





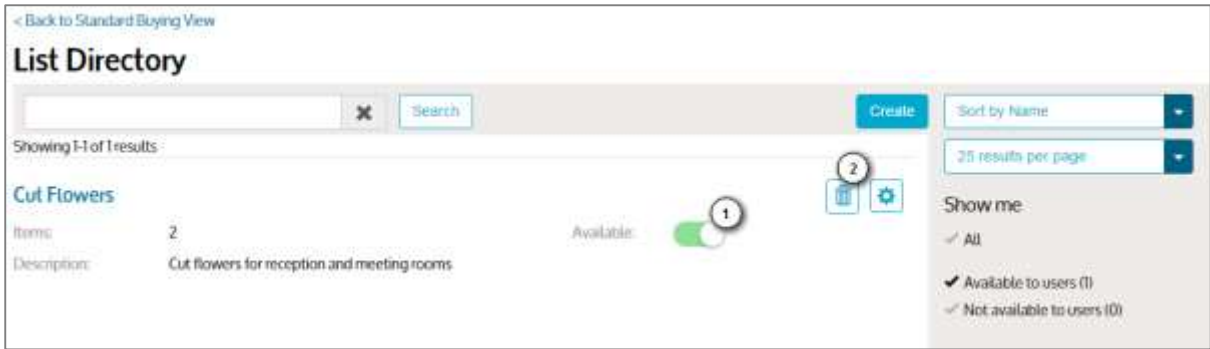
The list as it appears in the 'My Lists' menu on Marketplace (to your shoppers):



Manage Lists

To remove a list from the Marketplace you can either make it 'unavailable' or delete it.

1. To make the list unavailable to your buyers, by hiding it on your buyers 'My List' menu, click the 'Available' toggle button. It can be found on both the 'List Directory' and the 'Manage List' page.
2. To permanently delete the list click the  button.
3. To edit the list, click the  button.



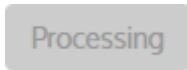
Publish View

If changes are made to the Agreements section, the view must be published to make the changes available in the Marketplace.

If a view has changes that need publishing the button will look like this:



Clicking Publish will cause the system to process your changes and publish them in the Marketplace. While the data is being processed the button will look like this:



If the view does not need publishing the button will be disabled and will look like this:

