

eTurns

Quick List

[Help documentation](#)



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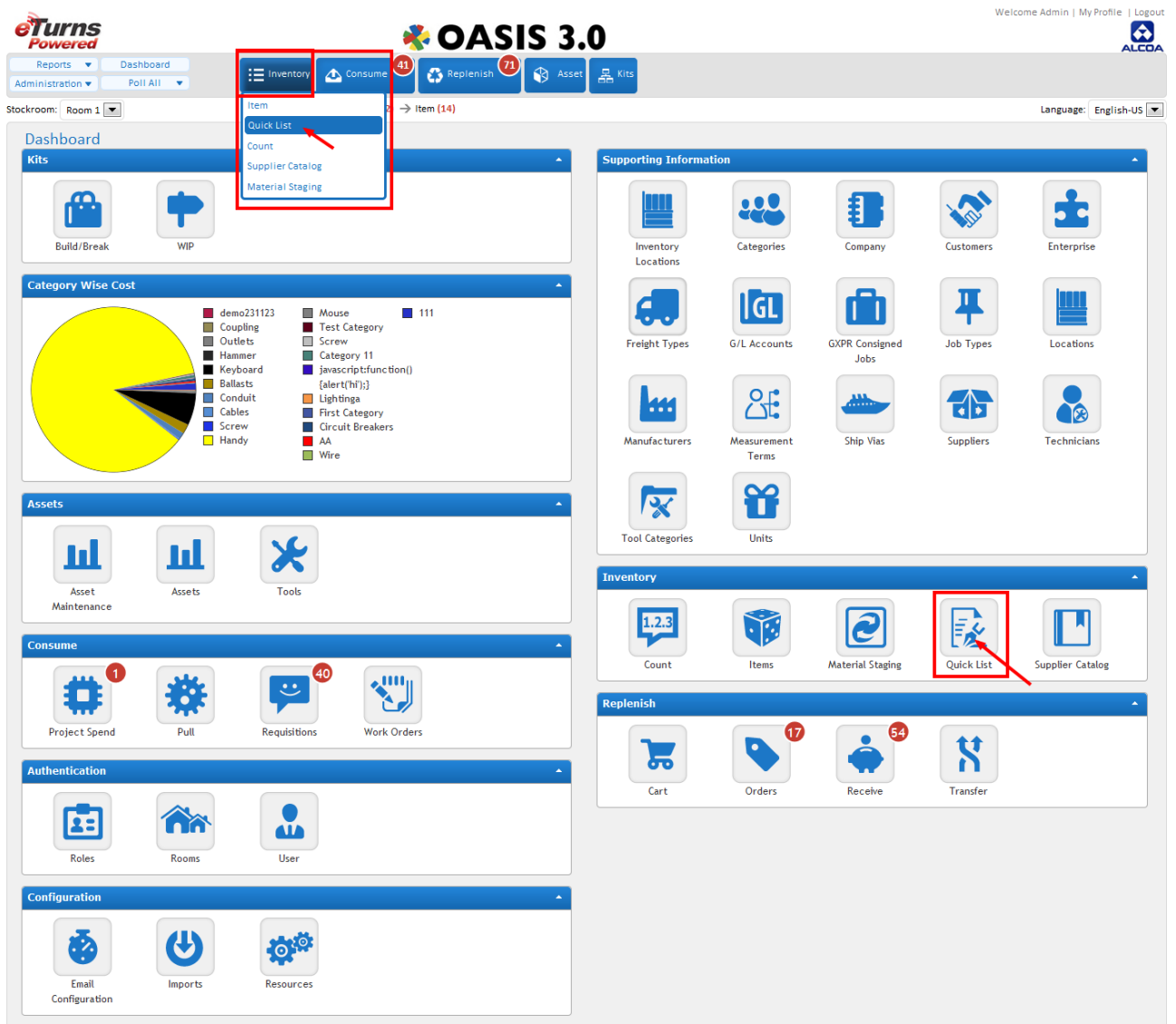
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Quick List consists of number of items grouped together to be ordered simultaneously for user convenience. The items that are needed often are collected together to form a Quick list. The Quick list can be used for multiple purposes.

Guidelines

a. Open Quick list:

To open quick list, user may either select Quick list from Inventory dropdown or simply click the Quick list icon listed under Inventory on Dashboard.



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Figure 1

The following page appears on screen:

QuickList

Search

Show 10 Records < 1 2 3 4 5 > Go To Page: Go

Narrow Search By:

- User (Created by)
- User (Updated by)
- Date Created
- From To
- Date Updated
- From To
- UDF1
- UDF2

Clear

ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited
89	test_r		General	3	Room 1	4/23/2013 04:43:16 PM	4/23/2013 04:43:16 PM	Admin	Admin	No	No	abc	ccc
88	wise		Asset	0	Room 1	4/22/2013 06:37:53 PM	4/23/2013 12:13:09 PM	Indi	Admin	No	No	abc	ccc
87	xyz		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc
85	viratetest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc
80	Donald_2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc
78	Donald_Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc
77	Oil_Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc
75	Quicklist_PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc
74	sdfsfsfsfsdfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc

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Figure 2

b. Create a New Quick list:

To create a new quick list, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Enter the particulars and hit "Save" button, the New Items grid then appears on screen, to add new items to the list.

QuickList

Quick List Name

Comment

Type

UDF1

UDF Edited

UDF3

UDF4

UDF5

Save **Cancel**

*Indicates required field(s).
☒ Check before the textbox or dropdowns if you want to save this value preserved when you visit this page next time.

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Figure 3

eTurns Powered **OASIS 3.0** Welcome Admin | My Profile | Logout

Reports Dashboard Inventory Consume 30 Replenish 66 Asset Kits

Administration Poll All

Stockroom: Room 1 Consume (2) → Requisitions (2) → Item (14) Language: English-US

QuickList

Room: Room 1 Created On: 4/22/2013 6:37:53 PM Created By: Admin Updated On: 4/22/2013 6:37:53 PM Updated By: Admin

Quick List Name: UDF1: UDF Edited: UDF3: UDF4: UDF5:

Comment:

Type: General

Search

Show: 50 Records < > Go To Page:

ID	Item Number	Description	Quantity	On Hand Quantity	On Transfer Quantity	Long Description	Supplier	Category
No data available in table								

0 - 0 of 0

Figure 4

- The “New Item” button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click “Add”. The user may also enter various quantities together and then hit the “Add All” button at the bottom of the page. To close the selection, hit “Close”.

Add Item to Quicklist

Search

Show: 10 Records < 1 2 3 4 5 ... 70 > Go To Page:

Narrow Search By:

Supplier: Add

Manufacturer: Add

Category: Add

Cost: Add

Stock Status: Add

Item Type: Add

User (Created by): Add

User (Updated by): Add

Date Created: Add

From: To: Add

Date Updated: Add

From: To: Add


UDF 1: UDF 2: Clear

Qty	ID	Item Number	Room	Created On	Updated On
2	32796	ItemNumber921187	Room 1	4/20/2013 04:13:55 PM	4/20/2013 05:27:50 PM
5	32795	ItemNumber31	Room 1	4/19/2013 01:46:55 PM	4/19/2013 07:13:57 PM
	32794	Jayhind	Room 1	4/18/2013 04:49:45 PM	4/20/2013 04:44:17 PM
	32793	Outlook	Room 1	4/18/2013 04:31:52 PM	4/20/2013 12:47:28 PM
	32792	CP now satisfied with the change 999995	Room 1	4/18/2013 03:47:03 PM	4/20/2013 02:55:43 PM
	32791	CP Amit together, do not edit it:- 999983	Room 1	4/18/2013 03:26:13 PM	4/20/2013 03:13:05 PM
	32790	Item For MS test	Room 1	4/18/2013 02:46:58 PM	4/19/2013 07:13:57 PM
	32789	Item For MS Check	Room 1	4/18/2013 02:42:38 PM	4/18/2013 02:42:38 PM
	32788	ItemForMSCheck	Room 1	4/18/2013 02:38:28 PM	4/18/2013 02:38:28 PM
	32787	ItemNumber999988	Room 1	4/17/2013 01:59:46 PM	4/20/2013 02:55:41 PM

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Figure 5

- The items to be added in the quick list can be filtered by:
 - Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.


- b. **Manufacturer:** This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.
- c. **Category:** This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.
- d. **Cost:** This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.
- e. **Stock Status:** This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.
- f. **Item Type:** This filter allows filtering the type of item to be entered in the quick list. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.
- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on  icon.

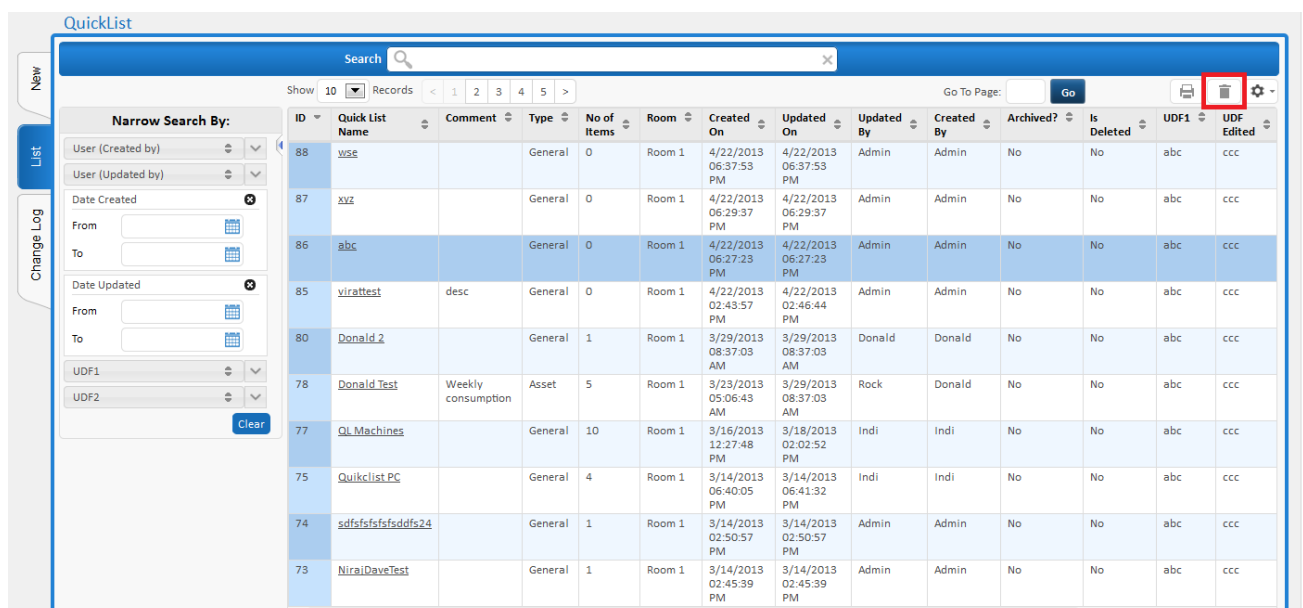
Note: Quick list provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new quick list page. REFER Figure 3

c. Edit an existing Quick List:

To edit an existing Quick list in any module, click on the item and new screen in accordance to the selected tab appears on screen. The quantity of item may be updated; also new items can be added to quick list as well as deleted. To edit any item in list the user must have the required authorization.

d. Delete a Quick List:

A Quick list can be deleted, by selecting the record and then click on Delete icon  or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected records.



The screenshot shows the 'QuickList' application interface. On the left is a 'Narrow Search By:' panel with filters for 'User (Created by)', 'User (Updated by)', 'Date Created', 'Date Updated', 'UDF1', and 'UDF2'. The main area displays a table of quick lists with columns: ID, Quick List Name, Comment, Type, No of Items, Room, Created On, Updated On, Updated By, Created By, Archived?, Is Deleted, UDF1, and UDF Edited. A red box highlights the 'Delete' icon (a trash can) in the top right corner of the table.

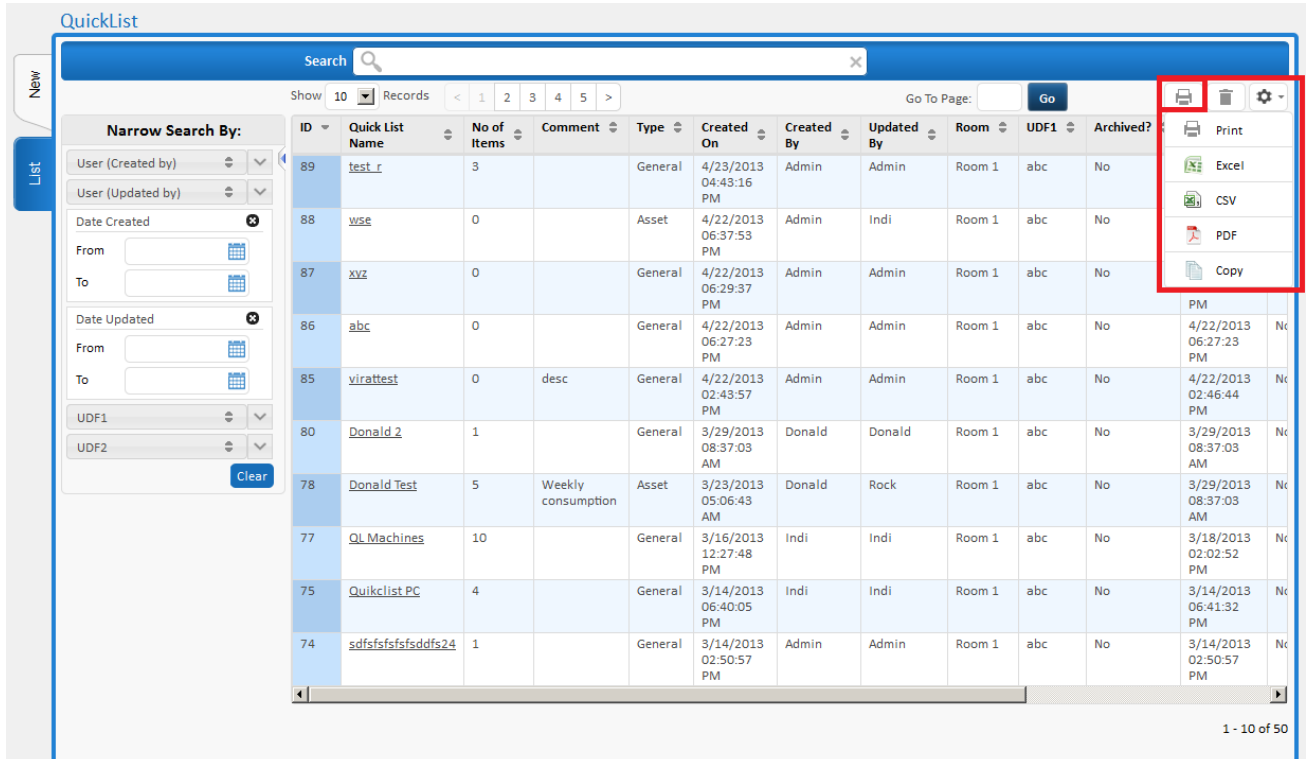
ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited
88	vsse		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc
87	xvz		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc
85	viratetest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc
80	Donald 2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc
78	Donald Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc
77	OL Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc
75	Quicklist PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc
74	sdfsfsfsfsdfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc
73	NiraiDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc

Figure 6

e. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.



The screenshot shows the QuickList application interface. On the left, there is a sidebar with 'New' and 'List' buttons. The main area features a search bar and a table of records. A 'Narrow Search By:' panel is on the left, and a table of records is on the right. In the top right corner, a menu is open, showing options: Print, Excel, CSV, PDF, and Copy. The 'Copy' option is highlighted with a red box.

ID	Quick List Name	No of Items	Comment	Type	Created On	Created By	Updated By	Room	UDF1	Archived?
89	test_r	3		General	4/23/2013 04:43:16 PM	Admin	Admin	Room 1	abc	No
88	wse	0		Asset	4/22/2013 06:37:53 PM	Admin	Indi	Room 1	abc	No
87	xvz	0		General	4/22/2013 06:29:37 PM	Admin	Admin	Room 1	abc	No
86	abc	0		General	4/22/2013 06:27:23 PM	Admin	Admin	Room 1	abc	No
85	viratetest	0	desc	General	4/22/2013 02:43:57 PM	Admin	Admin	Room 1	abc	No
80	Donald 2	1		General	3/29/2013 08:37:03 AM	Donald	Donald	Room 1	abc	No
78	Donald Test	5	Weekly consumption	Asset	3/23/2013 05:06:43 AM	Donald	Rock	Room 1	abc	No
77	QL Machines	10		General	3/16/2013 12:27:48 PM	Indi	Indi	Room 1	abc	No
75	Quicklist PC	4		General	3/14/2013 06:40:05 PM	Indi	Indi	Room 1	abc	No
74	sdfsfsfsfsddfs24	1		General	3/14/2013 02:50:57 PM	Admin	Admin	Room 1	abc	No

Figure 7

f. View change log for a Quick List:

To view the updated history of a quick list, select the list and click on Change log tab. It displays when the list was created and the number of times it was updated.

QuickList

ID	History ID	Action	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	UDF1	UDF Edited	UDF3	UDF4	UDF5
78	10151	insert	Donald Test	Weekly consumption	General	8	Room 1	3/23/2013 05:06:43 AM	3/23/2013 05:06:43 AM	Donald	Donald	abc	ccc			
78	10158	update	Donald Test	Weekly consumption	Asset	8	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	abc	ccc			

Change Log

Figure 8

To view the log for individual items of the quick list, click on item name and items change log is displayed in a pop up.

Quick List History

Room : Created On : 3/23/2013 5:06:43 AM Created By : Donald Updated On : 3/23/2013 5:06:43 AM Updated By : Donald

Quick List Name : Donald Test UDF1 : abc

Comment : Weekly consumption UDF Edited : ccc

Type : General UDF3 : UDF4 : UDF5 :

Close

History ID	Action	ID	Item Number	Description	Quantity	On Hand Quantity	On Transfer Quantity	Long Description	Supplier	Category	Quick List History ID
10443	update	10270	ItemNumber_#47		9	2000		Long Description text			10151
10442	insert	10280	ItemNumber_#38		678	2000		Long Description text			10151
10441	delete	10272	ItemNumber_#54		4	2000		Long Description text			10151
10429	insert	10272	ItemNumber_#54		4	2000		Long Description text			10151
10428	insert	10271	ItemNumber_#58		1	2000		Long Description text			10151
10427	insert	10270	ItemNumber_#47		10	2000		Long Description text			10151

Figure 9

Note: The Change log is displayed in View only mode.

g. Search the Quick list for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

- Main Search:** To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

QuickList

Search

Show 10 Records < 1 2 3 4 5 > Go To Page: Go

Narrow Search By:

User (Created by)

User (Updated by)

Date Created From To

Date Updated From To

UDF1

UDF2


Clear

ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited
88	Wse		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc
87	XVZ		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc
85	viratetest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc
80	Donald 2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc
78	Donald Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc
77	QL Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc
75	Quicklist PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc
74	sdfsfsfsfsddfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc
73	NiraiDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc

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Figure 10

ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

- To open Narrow search, click on the small Triangular icon  on the top left corner of the screen.
- The following screen appears:

QuickList

Search

Show 10 Records < 1 2 3 4 5 > Go To Page: Go

Narrow Search By:

User (Created by)

User (Updated by)

Date Created From To

Date Updated From To

UDF1

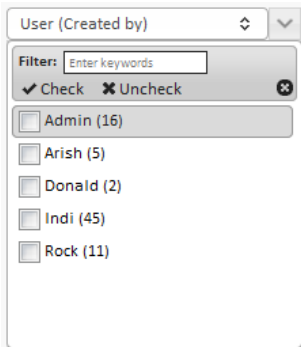
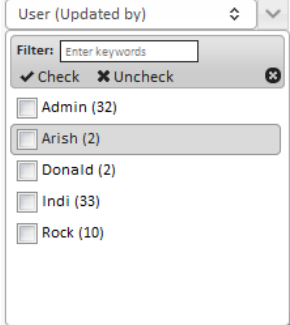

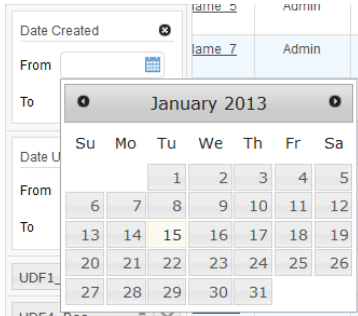

UDF2

Clear

ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited
88	Wse		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc
87	XVZ		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc
85	viratetest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc
80	Donald 2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc
78	Donald Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc
77	QL Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc
75	Quicklist PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc
74	sdfsfsfsfsddfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc
73	NiraiDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc

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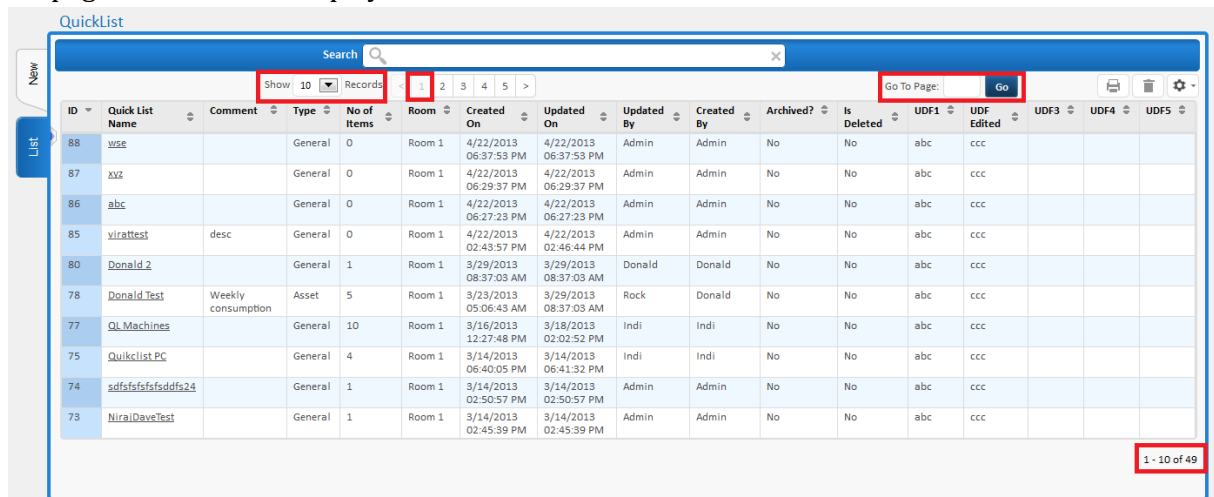
Figure 11

Field	Description
User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. Note: To cancel the selections made at any point of time, click .</p>
Date Created and Date Updated	<p>They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.</p>  <p>Note: To clear the entire selection, click </p>

Note: At point of time only one of the either searches will work.

h. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click “Go”.



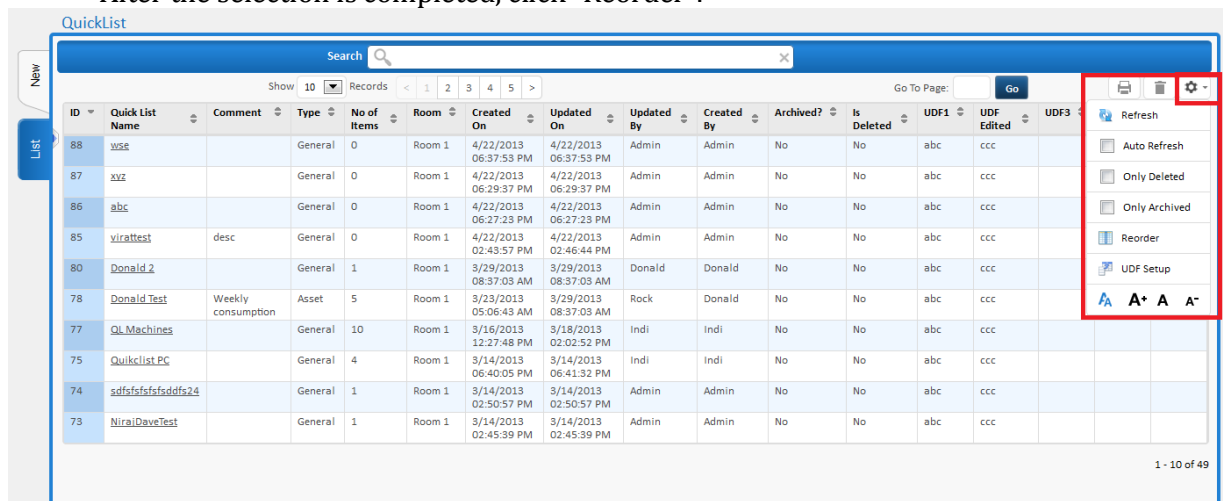
ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited	UDF3	UDF4	UDF5
88	WSE		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc			
87	XVZ		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc			
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc			
85	viratTest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc			
80	Donald_2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc			
78	Donald_Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc			
77	QL_Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc			
75	Quicklist_PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc			
74	sdfsfsfsfsdfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc			
73	NiraiDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc			

Figure 12

i. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- Refresh: This option refreshes the module and displays the latest changes implemented.
- Auto Refresh: This option automatically refreshes the screen in specified time.
- Only Deleted: This option reflects only the deleted records of the module on screen. To select it, check the checkbox in front of the option.
- Only Archived: This option reflects only the archived records of the module on screen. To select it, check the checkbox in front of the option.
- Reorder: This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.
 - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
 - User may also drag and drop fields to be arranged in order of choice.
 - After the selection is completed, click “Reorder”.



ID	Quick List Name	Comment	Type	No of Items	Room	Created On	Updated On	Updated By	Created By	Archived?	Is Deleted	UDF1	UDF Edited	UDF3	UDF4	UDF5
88	WSE		General	0	Room 1	4/22/2013 06:37:53 PM	4/22/2013 06:37:53 PM	Admin	Admin	No	No	abc	ccc			
87	XVZ		General	0	Room 1	4/22/2013 06:29:37 PM	4/22/2013 06:29:37 PM	Admin	Admin	No	No	abc	ccc			
86	abc		General	0	Room 1	4/22/2013 06:27:23 PM	4/22/2013 06:27:23 PM	Admin	Admin	No	No	abc	ccc			
85	viratTest	desc	General	0	Room 1	4/22/2013 02:43:57 PM	4/22/2013 02:46:44 PM	Admin	Admin	No	No	abc	ccc			
80	Donald_2		General	1	Room 1	3/29/2013 08:37:03 AM	3/29/2013 08:37:03 AM	Donald	Donald	No	No	abc	ccc			
78	Donald_Test	Weekly consumption	Asset	5	Room 1	3/23/2013 05:06:43 AM	3/29/2013 08:37:03 AM	Rock	Donald	No	No	abc	ccc			
77	QL_Machines		General	10	Room 1	3/16/2013 12:27:48 PM	3/18/2013 02:02:52 PM	Indi	Indi	No	No	abc	ccc			
75	Quicklist_PC		General	4	Room 1	3/14/2013 06:40:05 PM	3/14/2013 06:41:32 PM	Indi	Indi	No	No	abc	ccc			
74	sdfsfsfsfsdfs24		General	1	Room 1	3/14/2013 02:50:57 PM	3/14/2013 02:50:57 PM	Admin	Admin	No	No	abc	ccc			
73	NiraiDaveTest		General	1	Room 1	3/14/2013 02:45:39 PM	3/14/2013 02:45:39 PM	Admin	Admin	No	No	abc	ccc			

Figure 13



j. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row