Infor Mongoose
Basic Concepts User Guide

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Basics

Browse through this section of the help so that you understand and can use the application interface more effectively.

NOTE: Most of the directions and descriptions in these topics assume that you are using the WinStudio smart client. The web client has a slightly different interface, and not all options apply. Differences between the two clients are noted where applicable.

This section is designed to help you learn:

- How the system works
- What the major features of the system are
- How to customize the interface to your own working preferences
- How to most effectively use the system and its features

This area of the help includes the following major topics:

- Getting Around in the System
- Using the Explorer
- Keyboard Navigation and Other Navigation Tips
- Context (Right-Click) Menus
- Getting Help
- Setting User Preferences
- Working with Forms, Collections, Records, Fields, and Notes
- Reference
- Keyboard Shortcuts
- Menus
- Toolbars

Getting Around in the System

The application user interface is designed to be intuitive and easy to use. At the same time, we provide you with the flexibility to customize the system and set your own preferences

This section contains information to help you learn about:

- Using the Explorer: Use the Explorer to locate and open forms. You can also customize the way you organize and use forms to reflect your preferences.
- Using the Keyboard: Use your keyboard to navigate and work in the system.
- Using Context (Right-Click) Menus: Context menus, often called "right-click menus," are shortcuts to perform actions on the current field or value.
- Using the Help: Get help when you need it, quickly and easily. Context-sensitive help is available on most forms, fields and buttons.
- Setting Preferences: You can customize many aspects of the user interface. For example, you can select different colors and fonts.

Using the Explorer

The Explorer is often the starting point for working in the system. The Explorer tree pane presents a hierarchical view of the forms in the system, similar to Windows Explorer. Within the Explorer, forms are grouped in folders. These are things you can do in the Explorer:

- Navigate through the folders to find and open a form. See Opening the Explorer and Structure of the Explorer.
- Set up your favorite forms as a group, so you can get to them easily. See Customizing 'My Folders'.
- Change the way you view the Explorer, to accommodate the way you work. See Changing Your View of the Explorer and Customizing the Explorer Buttons and Tree View.
- Set certain forms to open automatically when you log into the system. See the AutoRun information in Customizing 'My Folders'.

Opening the Explorer

To open the Explorer, from the **View** menu, select **Explorer**.

Depending on what theme you are using, the Explorer might open automatically when you log in to the system.

Setting the Opening Level

You can set the Explorer to always open at a certain level, for example, with the Customer Service forms showing in the Explorer tree. For more information about how to do this, see Customizing the Explorer Buttons and Tree View.

Structure of the Explorer

Structure of the Explorer

When open, the **Explorer** displays a hierarchy of folders and forms. Initially, the Explorer displays only the top-level folders:

- My Folders
- Master Explorer Folders
- Public Folders
- User Folders

NOTE: Your system administrator might have reorganized, removed, or renamed any of the folders described in this topic.

The Explorer has two panes:

- Use the top (Tree) pane to expand a folder to display and select subfolders and forms.
- Click the buttons in the lower (Button) pane to display different trees in the current folder level.

You can customize the Explorer buttons and tree view to show only the areas of the application that you need.

The setting of the **Select by Name Instead of Caption** option on the **Select Form** dialog affects the order in which forms display in the Explorer tree structure. If the option is selected, the forms display in alphabetical order in the Explorer according to the form name; otherwise, they display in order by the form caption.

Master Explorer Folders

Expand the **Master Explorer** folder, and you see a set of subfolders similar to this:

- All Forms
- Modules

These subfolders are divided into groups that provide different ways of locating any form in the system.

If the Button pane is displayed, you can also use the buttons to move to different areas within a level.

All Forms

Expand the **All Forms** subfolder, and Explorer displays under it all forms available to you, arranged in alphabetical order. If you know the name of the form you want, this is often the fastest way to access it.

For tips on locating forms, see Finding and Opening Forms in the Explorer.

Modules Folder

The Modules folder displays forms grouped mostly by application modules. To find a form based on the area of the application where it exists, select the appropriate module subfolder . The Modules folder also includes the **Codes** subfolder, which contains forms where you set up codes that are used throughout the system, and the **System** subfolder, which contains forms used for general application administration.

Subfolders

The Modulesfolders contain multiple levels of subfolders.

The list of forms subfolders can be further subdivided by function, for example Files, Queries, Reports, and Utilities. These are the functional subfolder types:

Folder Type	Description
Activities	Forms used for day-to-day activities. These forms typically perform common actions on records, such as copying them, generating line sequences, printing worksheets, and so on.
Files	Forms where you can set up codes and parameters used within the module.
Queries	Forms to help you find specific records by using filtering techniques. For more information, see About Query Forms.
Reports	Forms to set up the parameters for printing specific information from the records. For more information, see Reports Overview.
Utilities	Forms used for activities generally performed by administrators or managers. Utilities usually require Site Developer (system administrator) permissions to use.

NOTE: A system administrator can remove or hide folders and subfolders, so you may not see all of the folders mentioned here in your Explorer window.

Public Folders

The **Public Folders** subfolder contains any forms your system administrator has set up to appear there. These forms are typically available to anyone in an organization.

Only those designated as a **Site Developer** on the **Users** form (usually system administrators) can make changes in this folder.

User Folders

The **User Folders** folder allows those who have **Site Developer** editing permissions (on the **Users** form) to view and edit the **My Folder** contents of any user in the system. This folder is available only to those who have these editing permissions.

My Folders

You will probably find, as you work, that there are some forms that you use more often than others. The **My Folders** folder is designed to provide you a place where you can create your own set of commonly used forms. If you want, you can also rename subfolders and forms in **My Folders** to reflect your preferences. Finally, you can also select sets of forms to open automatically whenever you log on to the system.

For more information, including the procedures to do these things, see Customizing My Folders in the Explorer.

In addition, your system administrator can use **My Folders** to create shortcuts to forms and automate them opening for you when you log on.

Changing Your View of the Explorer

The system provides several ways for you to adjust the **Explorer** window to your preferences. You can:

- Customize the Explorer buttons and tree view.
- Dock or undock the Explorer window in the workspace area.
- Move and the Explorer and resize its viewing area.
- Pin or unpin the Explorer window. This option allows the Explorer window to slide in and out of view automatically as you work.

Docking and undocking the Explorer

When you *dock* the Explorer, the system "attaches" the Explorer window to one side of the workspace area. There are a number options for docking: You can dock to the left, right, top, or bottom of the workspace area.

When you *undock* the Explorer, the Explorer is allowed to "float," and you can move it wherever you want, independent of the WinStudio workspace window.

To dock the Explorer: Click-and-hold in the title bar and then drag the Explorer until you see the superimposed docking "stations". As you drag your pointer over each docking station, the display highlights to show the area that the Explorer will occupy by default if you select that docking station. To dock at a particular station, drag the Explorer window until you have the station you want the Explorer to occupy and then release the pointer button.

To undock the Explorer: Click-and-hold in the title bar and then drag the Explorer to the position you want it to occupy, being careful not to release the pointer button with one of the docking stations highlighted.

Moving and resizing the Explorer

You can *move* the Explorer window freely only if it is undocked. You can *resize* the viewing area whether Explorer is docked or undocked.

To move the Explorer, click-and-hold in the title bar and drag the Explorer to the desired location.

To resize the Explorer viewing area when it is:

- Docked, drag the "free" side of the Explorer to the desired position.

  When the Explorer is docked, only one side is free to move, the side opposite to its primary location. For example, if the Explorer is docked to the right side of the workspace area, only the left side is movable.

- Undocked, drag any side or corner, the same as you would resize any other window.

Pinning and unpinning the Explorer

Pinning the Explorer keeps the viewing area displayed regardless of whether you are working with it actively.

Unpinning the Explorer allows its viewing area to slide out of view automatically when you are not actively viewing it.

To pin or unpin the Explorer, you must have the Explorer docked. With the Explorer docked, click the pin/unpin icon in the title bar.

To view the Explorer when it is hidden (out of view), position your pointer over the Explorer button where the Explorer is docked.

Customizing 'My Folders'

Customizing 'My Folders'

In Explorer, you can customize the contents of **My Folders** in several ways:

- Add your own subfolders (see Adding Folders).
- Add or copy forms into your **My Folders** or any subfolders you have created (see Adding Forms to Folders or Copying Folders or Forms).
- Rename folders or forms to reflect your use of those folders and forms (see Renaming Folders or Forms).

CAUTION: Do not rename the **AutoRun** or **PreLoad** subfolders.

- Delete folders and forms (see Deleting Folders or Forms).

  CAUTION: Do not delete the **AutoRun** or **PreLoad** subfolders.

- Use the **AutoRun** and **PreLoad** subfolders to set up forms that open automatically when you log on (see Setting Up Forms to Open Automatically).

Adding Folders

You can add your own (sub)folders to **My Folders**.

NOTE: Your editing permissions determine whether you can add subfolders to other folders, but the procedure is basically the same.

To add a subfolder:

1. In **My Folders**, select the folder or subfolder below which the new subfolder is to be added.

   For example, if you want to add a subfolder at the top level underneath **My Folders**, select **My Folders**. If you want to add a subfolder to **AutoRun** or another subfolder, select that subfolder.

2. Right-click the selected folder and from the context menu, select **New Folder**.

   The system adds the new subfolder and temporarily names it **New Folder**.

3. Right-click the new subfolder, and from the context menu, select **Properties**.
4. In the **Caption** field of the **Explorer Object Properties** dialog box, enter the new name for the folder.
5. Click **OK**.

Adding Forms to Folders

You can add forms to **My Folders** or any of its subfolders. Your editing permissions determine whether you can add forms to other folders.

To add a form to a folder:

1. In the Explorer tree pane, right-click on the form and select **Copy**.
2. Navigate to **My Folders**.
3. In the tree pane, select the My Folders folder or subfolder to which you want to add a form.
4. Right-click on the folder and select **Paste**.

If you are working in the Explorer tree view with buttons turned off (that is, **Display Explorer Buttons** is not selected in the Settings window), you can also drag and drop a form from its current folder into the folder where you want to create a copy.

Notes:

- You are not really creating a copy of the form itself, only creating a shortcut to that form.
- You can copy only one form at a time.

Copying Folders or Forms

To facilitate the way you work, you can copy folders and forms from the **Master Explorer** folder or **Public Folders** to **My Folders**.

NOTE: Your editing permissions determine whether you can copy forms to other folders.

To copy folders or forms:

1. In the Explorer, navigate to the folder or subfolder that contains the form or folder you want to copy.
2. In the tree pane, right-click on the form or folder and select **Copy**.
3. Navigate to the folder in which you want to create a copy.
4. In the tree pane, right-click on the folder and select **Paste**.

If you are working in the Explorer tree view with buttons turned off (that is, **Display Explorer Buttons** is not selected in the Settings window), you can also drag and drop a form from its current folder into the folder where you want to create a copy.

NOTES:

- You are not really creating a copy of the form itself, only creating a shortcut to that form.
- You can copy only one form at a time.
- You can rename your copy of the form in the Explorer. For the procedure, see Renaming Folders or Forms.

Renaming Folders or Forms

To facilitate the way you work, you can rename folders and forms in **My Folders**.

NOTE: Your editing permissions determine whether you can rename items in other folders.

To rename a folder or form:

1. In the Explorer window, select the folder or form you want to rename.
2. Right-click the folder name, and from the context menu, select **Properties**.
3. In the **Caption** field of the **Explorer Object Properties** dialog box, type the new name.
    - When changing the name of a form, do not change the contents of the **Form Name** field. If you do, either the form will not open at all, or the wrong form will open.
    - Renaming a form changes its title (caption) only in the current folder in the **Explorer** window. The actual form name, the title of the same form as displayed in other folders, and the caption displayed in the form when it is open are all unchanged.
4. Click **OK**.

Deleting Folders or Forms

You can delete folders and forms from **My Folders**. Your editing permissions determine whether you can delete from other folders.

CAUTION: Do not delete the **AutoRun** or **PreLoad** subfolders. If you do, you will lose the functionality they provide until you recreate them. For more information, see Setting Up Forms to Load Automatically.

To delete a folder or form:

1 Select the folder or form you want to delete.

2 Right-click the item and then, from the context menu, select **Delete**.

Setting Up Forms to Load Automatically

Typically, you will find that there are a few forms that you use constantly or very often. You can use the **AutoRun** and **PreLoad** folders in **My Folders** to load and even open these forms automatically when you log in to the system.

- **AutoRun:** When you log in, the system automatically loads and opens any forms in the **AutoRun** folder. The system opens them at their default size and cascades them in the workspace.
- **PreLoad:** When you log in, the system automatically retrieves any forms in the **PreLoad** folder from the database into memory. This allows them to display more quickly when you open them later.

If the **AutoRun** or **PreLoad** folder is missing from **My Folders**, you can recreate it by adding a new folder and naming it **AutoRun** or **PreLoad**. For the procedure to add folders, see Adding Folders.

To set up forms to open automatically, copy the forms you want to load and/or open automatically into either the **AutoRun** or the **PreLoad** folder.

For the instructions to copy forms, see Copying Folders or Forms.

Changing Your View of the Explorer

The system provides several ways for you to adjust the **Explorer** window to your preferences. You can:

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To pin or unpin the Explorer, you must have the Explorer docked. With the Explorer docked, click the pin/unpin icon in the title bar.

To view the Explorer when it is hidden (out of view), position your pointer over the Explorer button where the Explorer is docked.

Adding Images to Explorer Nodes

For Explorer folders and forms whose properties you have permission to change, you can specify a different image. For example, if you have a My Folders folder called "MyReports," you can include a picture of a printer on the MyReports folder.

To do this, right-click on the folder and select **Properties**. In the Explorer Object Properties dialog box, click the browse button next to the **Image File Name** field. The browse dialog opens by default to the application's working folder on the local computer. Your image files must reside in this folder, and they must be graphic file types, for example .png or .gif.

Some Explorer nodes do not allow you to browse for an image filename, as indicated with an asterisk (*) in the table below. In that case, a system administrator can choose to replace the default image file for those nodes in the local working directory, using the same default file name.

The default image filenames are listed here:

Explorer Node	Default Image File Name
Master Explorer *	xMasterFolder
Public Folders *	xPublicFolders
User Folders *	xUserFolders
My Folder *	xMyFolder
AutoRun / Preload Folders	xAutoRunPreload
All Forms *	xAllForms
Form (Regular)	xFormRegular
Form (Query)	xFormQuery
Workspace	xWorkspace

Keyboard Navigation and Other Navigation Tips

The system provides a variety of ways to use the keyboard instead of a mouse to select menu commands, open forms, choose options, and so on. Many of these keyboard commands and shortcuts are common to Windows applications.

For a complete list of keyboard shortcuts, see Keyboard Shortcuts.

This topic contains hints and tips for using the keyboard to accomplish many tasks and navigate through forms more easily.

- Using Access Keys and Keyboard Shortcuts
- Navigating Through Fields, Buttons, and Other Components
- Navigating Through Notebook Tabs
- Navigating in Grids

Using Access Keys and Keyboard Shortcuts

You can use access key combinations and keyboard shortcuts to make selections from menus, drop-down lists, and other form options. *Access keys* are indicated on menus and other components by underlined letters in names or labels.

On Menus

To open a menu

1. Press ALT and the underlined letter in the menu's name.

   If you do not see any letters underlined in menu names, press the ALT key.

2. After the menu is displayed, to choose a command do one of the following:
   - Press the key corresponding with the underlined letter on the command entry.
   - Use the arrows to select the command you want, and then press Enter.

Some menu entries also list *keyboard shortcuts* that you can use without first opening the menu.

In Forms and Dialog Boxes

To use the keyboard to select tabs, options, and buttons:

1. When you select a tab or option, the focus shifts to the selected component, and it is highlighted.
2. To run the comman represented by a button, press ALT and the underlined letter in the button's name.

Alternatively, you can tab to the button and then, with focus on the button, press ENTER.

In Drop-down Lists

To select an item from a drop-down list box, using only key combinations:

1. With focus on the drop-down list box, press ALT+down arrow to display the drop-down list. Then use the up and down arrow keys to find the item you want.
2. Press TAB or ENTER.

To move away from the list without selecting an item, press ESC or SHIFT+TAB.

Navigating Through Fields, Buttons, and Other Components

When using the keyboard to navigate around non-grid forms and form views, the primary key is the TAB key. Starting with the cursor in any field, when you press the TAB key, the cursor moves to the next active field or button.

If you prefer, you can use the ENTER key rather than the TAB key. To use this option:

1. From the **View** menu, select **Settings**.
2. On the **Run Time** tab, select the check box labeled **ENTER key behaves like TAB key**.

For more information about this option, see Run Time Settings, **Behavior Settings**.

The general sequence, as you "tab through" fields and buttons is top-to-bottom and then left-to-right, both within each group box and between group boxes. There are, however, exceptions, based on the form's structure and design.

When you reach the last active field or button, the cursor moves back to the first field or button on the form and starts back through the sequence.

To navigate *backwards* through the fields and buttons, press SHIFT+TAB.

Navigating Through Notebook Tabs

When a *notebook tab* is selected and has the focus on the form, you can use the directional arrow keys on the keyboard to select other tabs.

You cannot use the TAB key here; if you do so, the focus changes to the first active or available field on that notebook tab.

Navigating in Grids

The system offers several means to navigate within a grid (see Grid Forms and Grids). Which one you use is a matter of personal choice.

NOTES:

- In a multiview form, clicking a row in the grid causes that record to be displayed in the detail view.
- In a form with more than one collection, moving between records in the primary collection also controls the display of records in the subcollection.

To navigate to the **next** record in the collection (do one):

- Press **F8**.
- Press the down arrow key.
- On the toolbar, click the **Go to the next object in the current collection** button.
- From the **Actions** menu, select **Next**.

To navigate to the **previous** record in the collection (do one):

- Press **F7**.
- Press the up arrow key.
- On the toolbar, click the **Go to the previous object in the current collection** button.
- From the **Actions** menu, select **Previous**.

To navigate to the **first** record in the collection (do one):

- Press CTRL+up arrow.
- On the toolbar, click the **Go to the first object in the current collection** button.
- From the **Actions** menu, select **First**.

To navigate to the **last** record in the collection (do one):

- Press CTRL+down arrow.
- On the toolbar, click the **Go to the last object in the current collection** button.
- From the **Actions** menu, select **Last**.

To navigate to the **next column** in the record (do one):

- Press TAB. This takes you to the next *active* or *enabled* column, skipping over all columns that are read-only.
- Press the right arrow key. This takes you to the next column whether it is active or not.

NOTE: Unless you are in the last record in the collection, if you are in the last column of the record, doing either of these actions takes you to the first column in the next record.

To navigate to the **previous column** in the record (do one):

- Press SHIFT+TAB. This takes you to the previous *active* or *enabled* column, skipping over all columns that are read-only.
- Press the left arrow key. This takes you to the previous column whether it is active or not.

NOTE: Unless you are in the first record in the collection, if you are in the first column of the record, doing either of these actions takes you to the last column in the previous record.

To view the next or previous set of records in a collection when there are more records than can fit into the viewing area of a grid, use the PAGE UP or PAGE DOWN keys.

Context (Right-Click) Menus

Context menus are commonly known as right-click menus, because they are typically called forth by right-clicking on something. WinStudio makes very widespread use of context menus, so it is a good idea to become familiar with the kinds of things you can use them for.

- In the **Explorer** window, right-clicking displays options for working with folders and forms.

  NOTE: These options are not available by any other means.

- In a form, you can right-click a field or other component (such as a button) to display commands that help you complete or use that field.

You can also use the **Edit** menu for most of these same commands and options.

- In a form, if you right-click *outside* a field, the context menu provides commands that help you use that form.

  You can also use the **Actions** menu for most of these same commands and options.

- Drop-down lists have their own sets of context menu options. For more information, see About Drop-down Lists.

Setting User Preferences

Setting User Preferences in the WinStudio Client

NOTE: Many of the settings described here apply only to the WinStudio smart client and are not included in the web client. For information about the user preferences you can set in a web client, see Setting User Preferences in a Web Client.

You can customize many aspects of the WinStudio interface to your preferences. Among other things, you can customize:

- The way you log on to the system
- The fonts and colors the system uses for forms, fields, and other components, using themes
- How forms look and behave in Design Mode
- Whether and how the diagnostics tools work
- Whether the toolbar displays
- How often the system should check for new messages in your **Inbox** form
- Whether the system should notify you of new messages and if so, how
- How unread messages should be displayed in the grid (top) view of the **Inbox** form

For details about the settings options, see one of the following topics:

- Runtime and Layout Settings - These are the settings that control how the system looks and behaves when you are using it in normal day-to-day operations. For most, these are the only options you need be concerned with.
- Design Time Settings - These are settings that control aspects of how forms look and behave when you are in Design Mode. You need these only if you are actively involved with creating or modifying forms in the system.
- Diagnostics Settings - These are settings that control how the system works when you are trying to diagnose problems and bugs while designing and modifying forms. You need these only if you are actively involved with creating and modifying forms in the system.
- Event System Settings - These are settings that control how often the system checks for new messages in your **Inbox**, whether and how you are notified of new messages, and how the system displays unread messages in the **Inbox**. There are also settings that determine how you interact with certain Application Event System forms.

Setting User Preferences in the WinStudio Client

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- How forms look and behave in Design Mode
- Whether and how the diagnostics tools work
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Setting User Preferences in a Web Client

Like the WinStudio smart client, you can set a variety of display and operational preferences. The options you have in a web client, however, are more limited than in the smart client.

The web client offers these user preference options:

Behavior options

Layout options

Event System options

Behavior options

Option	Notes/Description
Wildcard character	Enter the character to be used as a wildcard character when you search for information with Filter-in-Place or query forms. The default character is the asterisk (*).
Show configuration name on caption	When selected, this option causes the name of the system configuration to which you are currently logged on to display in the title bar of WinStudio.
Auto-delete all unmodified new rows	Under normal system operation (that is, when this option is not selected), any row that the system inserts in a grid automatically is automatically deleted if you move away from the row without changing anything in it. However, the system does not treat rows that you create using a menu option, toolbar option, or keyboard shortcut the same way. With these rows, the system normally attempts to validate them, whether you have modified them or not. When this option is selected, the system treats all new rows as if they were inserted automatically by the system. In other words, if you manually create a row and then navigate away without changing anything, the system automatically deletes it.
Prompt to save form splitter changes	When selected, this option allows you to save any changes you might have made to the position of the splitter bar in multiview forms. For example, suppose you have a multiview form open, and at some point, you moved the splitter bar to enlarge your view of the grid side of the form. You like that change and want to make it permanent, so that every time you open the form, the splitter bar is right where you positioned it. If this option is selected, when you try to close the form, the system displays a confirmation box that asks if you want to save the current splitter bar position. To save the form configuration, click Yes. If this check box is cleared, you cannot save splitter bar position changes at all.
Prompt to save grid changes	When selected, this option allows you to save any changes you might have made to the grid view in multiview forms. For example, suppose you have a multiview form open, and at some point, you widened some columns and narrowed other columns on the grid side of the form. You like the changes and want to make them permanent, so that every time you open the form, the grid side is just as

	you have it now. If this option is selected, when you try to close the form, the system displays a confirmation box that asks if you want to save the current grid side configuration. To save the configuration, click Yes. If this check box is cleared, you cannot save grid side changes at all.
Data Record Cap and List Record Cap	The term caps refers to the maximum number of records or items that the system can return at one time. There are two types of caps that you can reset for your work: Data records Drop-down lists Both of these types of caps have the same three options: Use default - Forces the system to use the system default cap setting. This is the default option. Retrieve all - Forces the system to retrieve all records or display all items in a list, overriding the system default settings. NOTE: This option is not recommended for most operations, because the time it takes to retrieve all records or display all items on a list can be excessive and slow the system down. Use specified max - Allows you to set your own maximum. For example, if you want the system to return 350 records, you would set this field for the Data Records to 350. If you select this option, you must also enter a number in the field next to it. A -1 in this field means that the system default setting is being used. This setting is not saved when you sign out of the system. NOTES: Rather than having to reset the cap for collections, you can use the "Get more rows in the current collection" button on the main toolbar. System administrators can override either the Retrieve all or Use specified max setting with a system-wide maximum record cap that is set in the Process Defaults form. So, for example, if you set the system to display up to 500 items, but the administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250. For more information on caps, see About Caps.
Language	From the drop-down list, you can select a language for the text in field labels, button labels, menus, online help, and other parts of the user interface. Then click Apply. When you click Apply, the User Preferences

	window closes. NOTE: Only those languages that are installed and available on your system appear on this drop-down list.

Layout options

The web client offers only one layout option: **Theme**

Use the drop-down list to select a theme. Any user-created themes will be shown here along with two that are provided with the application. The two options that are provided by default are:

- Infor
- Classic

NOTE: The web client honors only the settings for background colors, foreground colors, and fonts for any given theme. The web client does *not* honor settings for non-tabbed form layout, menu bar, group boxes, notebook tabs, or the Explorer.

For more information about themes, see About Themes.

Event System options

The web client offers only one Event System option: **Handler editing mode**

This option has to do with the display of metadata in the **Event Actions** form and with the behavior of the **Event Handler Diagram** form. You can choose to interact with these forms either in **Normal** mode or in **Expert** mode.

For more information, see Handler Editing Options.

Getting Help

Downloading the Latest Help

To get the latest Help files, go to our support site and find the documentation page for your product version number. You can download the Help files as a ZIP file.

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Using the Help

This system provides several ways for you to get help with a form, a field or other component on a form, or procedures to accomplish various tasks. This system makes extensive use of context-sensitive help, which allows you to easily get help when and where you need it, so you can get back to the task at hand.

To get help on a form, with focus on the form, select **Help > Current Form**.

To get help with a field, button, menu, or other component of a form, do any of these:

- Right-click on the component and select **Help**.
- With focus on the component, select **Help > Current Field**.
- With focus on the component, press F1.

Field-level help is available on some, but not all, forms. In most cases where field-level help is not available, there is a **Related Topics** link to a process topic that describes the fields.

To get general help or to browse the help, select **Help > Contents and Index**.

To search for a phrase, open the help and click the **Search** tab. Specify a term or phrase and press Enter. To reduce the number of results, be as specific as possible. To search for an exact phrase, enclose the phrase in quotation marks.

When you open more than one context-sensitive help topic during a session, the new help topic either displays in the same tab or window, or it opens a new tab or window, according to the default option you set for your browser.

To get background and technical information about the current form, with focus on the form, select **Help > About This Form**.

You can also print help topics.

Printing Help Topics

You might find it helpful to print out certain Help topics to use as quick reference.

To print the current topic:

1. Display the topic you want to print.
2. Right-click in the topic contents pane and from the context menu select **Print**.
3. The system displays the Windows **Print** dialog box.
4. If necessary, select the appropriate printer, and then click **Print**.

Contacting Support

The support site contains information that can help you research your own questions based on documentation that our support personnel have created. A comprehensive search engine is available to help broaden your search and narrow the range of responses.

To use the support site, you must have a support agreement and user ID.

To log on to the site, go to the Infor Xtreme Online Support Web site. From this site, you can do the following:

- Gain easy access to critical support resources like the Knowledge Base, software updates, and release notes
- Obtain documentation for your product
- Log and track incidents
- Access the tools you need to keep your software running efficiently
- Link to additional Infor resources.

Other Documentation

All product documentation is available for download from our support site. When you log on to the site, choose the support area for your product.

About Forms, Fields, Records, and Collections

WinStudio is a database-oriented user interface. To get or submit information, you generally access one or more tables in databases. The application uses *fields* and other components on *forms* to present *collections* of data *records*.

You must understand these basic concepts:

- Forms
- Fields
- Records
- Collections

Forms

A *form* is the window through which you interact with information in a database. Looking up information, entering new information, and generating reports are typical interactions. Each form is devoted to a business task or to several related tasks.

For example, you can use an **Attendance** form to record and track employee work attendance records. You can use this form, then, to view attendance information about a particular employee, to get an idea of how many employees are using sick time, how many employees were absent on a given day, and so on. This form would display and allow you to work with all data related to employee attendance.

For more information about forms, see Working with Forms.

Fields

A *field* is an area on a form that displays a piece of information from the database. If the data already exists and can be viewed, the field typically displays the information. Fields also allow you to enter and save new data. Forms usually have a number of fields that all display related pieces of information.

Our example Attendance form has fields that each display a different but related piece of information:

- **Employee** (ID number)
- Employee name (not labeled)
- **Date**
- **Reason** (code)
- Reason description (not labeled)
- **Hours**

- **Paid**

For more information about fields, see Working with Fields.

Records

A *record* is a group of related pieces of data or information. Each piece of information displays in a separate field on the form. Taken together, they constitute one record.

In our example, the fields together display one record that contains information about a paid absence of an employee: the employee's name and ID number, the date and reason for the absence, and so on.

A form can display multiple records in a grid, and you can select the record you want to see from that grid.

For more information about records, see Working with Records.

Collections

A group of related records is a *collection*.

Our example Absence collection is displayed, as with many forms, on the grid (left) side of the form.

With many forms, it is possible to view collections of all available records. But, in practice, you typically work with a specific subset of records in a particular collection. Using our **Attendance** form, you can query for attendance records over a period of time. For instance, you might want to review all attendance records for the past month. Or you might want to review the attendance records of a single employee for the past year. In these cases, you can perform a query that will retrieve as a collection only those records you want to view.

For more information about collections, see Working with Collections.

Primary Collections and Subcollections

Most forms display only one collection. Some forms, however, display two collections, a *primary collection* and a *subcollection*. A subcollection is associated with a particular record in the primary collection. For example, if each record in the primary collection represents a work group at your company, the subcollection records associated with each work group record might include the employees who are members of that group.

When working with forms that present primary collections and subcollections, keep in mind that:

- Subcollections are often (though not always) presented as part of a multiview form. For more information, see About Multiview Forms .
- Usually the primary collection is in the grid (left) side of the form and the subcollection is in the detail view (right) side.
- As you navigate from record to record in the primary collection, the system displays the records in the subcollection associated with the current record in the primary collection.

As an example, the **Users** form contains both a primary collection and a subcollection. In this case, the subcollection (on the **Groups** tab) shows the group memberships for the selected user record in the primary collection. The group membership subcollection is different for each user record.

Working with Forms

A *form* is a window through which you interact with information in a database. Looking up information, entering new information, and generating reports are typical interactions. Each form is devoted to a business task or to several related tasks. Nearly everything you do in WinStudio will involve the use of one or more forms.

Types of Forms

The system uses these basic types of forms:

- Multiview forms
- Query forms
- Grid-only forms and grids
- Detail-only forms
- Report forms
- Utilities and activities

Finding Forms

Of course, to accomplish any work in the system, you must know how to locate and open the forms you need. The system provides two basic ways to locate and open forms:

- Using Explorer (see Finding and Opening Forms Using the Explorer)
- Using the **Select Form** dialog box (see Finding and Opening Forms Using the Select Form Dialog Box)

Navigating Through Forms

The system provides a number of options for navigating through forms as you work with them. For more information, see Keyboard Navigation and Other Navigation Tips or Changing Focus in Collections.

Workspaces and Forms

As you work, you will usually find that there are a limited number of forms that you use regularly. In many cases, these forms are interrelated. You can set up and use personal *workspaces* to have the system open and automatically arrange these forms for you. For more information, see Using Workspaces.

Form Types

Query Forms

Most multiview forms have *query forms* associated with them. These query forms usually have the same name as the associated multiview form, appended with **Query**. You can use these query forms to help locate particular records that you are concerned with. You can then return the results of your query to the associated multiview form automatically.

Query forms typically consist of the following components:

- The criteria selection box, where you set the criteria used to limit your search. This box contains two tabs:
  - The **Primary Criteria** tab is used for the most common search criteria. There are typically from two to four fields on this tab. For more information, see Primary Criteria in Query Forms.
  - The **Additional Criteria** tab is used mostly to refine and narrow the search. For more information, see Additional Criteria in Query Forms.
- **Action buttons** - These buttons, located along the upper right side of the form, allow you to perform various actions in your search. For more information about these buttons, see Buttons on Query Forms.
- **Results grid** - This grid displays the results of your query in tabular format. You can use the scroll bars to locate and select the particular record you are looking for.

For the basic procedure to perform a typical query, see Finding Records Using a Query Form.

Finding Records Using a Query Form

Most multiview formshave a query form associated with them. You can use these query forms to select a collection of records and return the collection to the multiview form.

CAUTION: Records retrieved by a query form replace the current collection of records in the multiview form. Be sure to save any changes you want to retain in the multiview form before you retrieve records with a query form.

To perform a typical query using a query form and return the results to the associated multiview form:

1. With a multiview form open, perform one of the following actions:
   - Press CTRL+Q.
   - From the **Actions** menu, select **Filter > By Query**.
   - Right-click on the form somewhere *other than* on a field, and then, from the context menu, select **Filter > By Query**.

   NOTE: On a form that is not associated with a query form, the **By Query** menu option is not available.
2. (Optional) Use one or both fields on the **Primary Criteria** tab to set the primary search criteria. For more information about setting primary search criteria, see Primary Criteria in Query Forms.

3 (Optional) Use the fields and buttons on the **Additional Criteria** tab to refine the search criteria further. For more information about setting addition search criteria, see Additional Criteria in Query Forms.

4 Click **Refresh**. The system returns all records that meet your search criteria.

5 (Optional) Repeat Steps 2 - 4 as desired to get the return results you need.

6 To return the results of your query to the parent multiview form, click **OK**.

7 When asked if you want to return the result to the mutliview form, click **Yes**.

For examples of queries, see Sample Queries.

Primary Criteria in Query Forms

On the **Primary Criteria** tab of a query form, you can specify query criteria for the principal fields on the associated multiview form. Usually these fields represent only the two or three most commonly searched criteria for the form. For example, in a form used to maintain information about customers, primary fields might include customer identification number and customer name.

The same fields are also listed on the Additional Criteria tab. This means that query criteria for the principal fields can be specified on either tab.

Primary criteria consist of an *operator* for the selected field on which you want to filter data and a *value* for the field. By default, the comparison operator for all primary criteria is **like**, and the values are empty. With these settings, all records are considered a match. The result set is the same as the result set from executing Filter-in-Place when no values are entered in fields on the form.

Primary criteria are automatically joined by a Boolean AND. That is, records are retrieved from the database only if they meet *all* the specified criteria.

To specify primary criteria for a query:

1 In a query form, select the **Primary Criteria** tab.

2 For a field on which you want to filter, from the drop-down list, select an operator.

For more information about operators, see Operators on Query Forms.

3 Enter a value for the field.

Remember that you can use wildcards in your search.For more information, Using Wildcard Characters.

4 To find records that contain a null value in the field, you can also enter the **Null** keyword.

For more information, see Using the Null Keyword.

5 To find records compared to the current date, you can use the CURDATE() keyword. See Sample Queries for more information.

Alphabetic input is *not* case-sensitive.

6 To filter on more than one field, repeat steps 2 and 3.

7 To perform the query and return the results, click **Refresh**.

Example

Suppose that you own a company that deals primarily with bicycle retailers. You want to retrieve all records that contain "bi" in the **Name** field, so that you will get a collection displaying all records that contain either "bike" or "bicycle."

Notice that, in the figure below, the *operator* for the **Name** field is **like**, which is the default.

The value ***bi*** restricts the results to those records containing "bi" in the **Name** field. The wildcard character (*) matches all other possible combinations of characters that come either before or after the search value "bi". Because no value is specified for the **Customer** field, that field can contain any value. As a result, the query might return records containing "Bicycle Center" and "Terry's Bike Shop" in the **Name** field.

The text that you enter here is not case-sensitive.

Additional Criteria in Query Forms

On the **Additional Criteria** tab of a query form, you can specify search criteria for any of the fields on the associated multiview form.

NOTE: This tab includes the fields that are listed on the Primary Criteria tab. This means that you are not obligated to specify primary criteria before doing a query.

One reason for using the **Additional Criteria** tab for the principal fields, rather than using the **Primary Criteria** tab is if you want to do a Boolean OR search, rather than a Boolean AND search on those fields. The **Primary Criteria** tab only allows AND searches.

Query Clauses

Query criteria are made up of *query clauses*. A query clause consists of a Boolean search delimiter, a field name, an operator, and a value. For example, to retrieve records for vendors located in New York, you would create a clause similar to the following:

AND State = 'NY'

where

- **State** is a field name on the multiview form in which vendors are defined in your system.
- **=** is an operator specifying that returned results must match the value exactly.
- **NY** is the value that you want the system to search for in the **State** field.

NOTE: The letter **N** might appear between the operator and the value in the clause. This **N** indicates that the system is using Unicode (double-byte) character codes.

Multiple clauses, if you use them, work sequentially. That is, the system searches using the first defined clause, then applies the second clause to the returns, and then the third clause, and so forth. This means that the order in which you define your clauses must be planned carefully, as order can make a difference.

AND and OR (Boolean) Searches

You can create multiple clauses and join them by Boolean AND or OR filters. Clauses joined by AND retrieve only those records that meet the criteria specified in *all* clauses. Clauses joined by OR retrieve records that meet *any one* of the criteria.

The system adds the Boolean filter automatically when you define the query clause. If you select the check box labeled **OR instead of AND with previous clause**, the clause is defined as an OR clause. If that check box is cleared, the system defines the clause as an AND clause.

To specify additional criteria:

1. In a query form, select the **Additional Criteria** tab.
2. From the first drop-down list box, select a field on which you want to filter.
3. In the second drop-down list box, select the operator you want to use.

   For more information about the operators available, see Operators on Query Forms.
4. In the third field, enter a value that you want to use as the search criteria. Remember that:
   - You can use the wildcard character to match unspecified characters.
   - To find records containing a null value in the field, you can enter the **Null** keyword.
   - To use the **Null** keyword, the operator must be **=** (equals). To find records in which the field is not null, use the **Null** keyword with the **<>** (not equal) operator.

   For more information about the **Null** keyword, see Using the Null Keyword.
   - To find records compared to the current date, you can use the CURDATE() keyword. See Sample Queries for more information.
   - Alphabetic input is *not* case-sensitive.
5. Specify whether to join the current query clause with the previous clause by AND or OR:
   - To use OR, select the check box labeled **OR instead of AND with previous clause**.
   - To use AND, clear the check box labeled **OR instead of AND with previous clause**.
   - If the current clause is the first clause you have defined for the query form, accept the default, which is AND.
   - If you specified any primary criteria, be sure to select AND or OR according to how you want to join the current clause with the primary criteria.
6. Click **Add**. The system adds the clause to the list.
7. Repeat steps 2-6 for each additional clause.

To remove a clause from the list:

1. In the list of clauses, select the one you want to remove.
2. Click **Remove**.

Operators on Query Forms

Query forms support the following comparison operators:

Operator	Description
like	Returns records containing a field value that matches the value you type using one or more wildcard characters. If you do not use a wildcard character, Like acts the same as = (equals). This is the default operator for the Primary Criteria tab fields.
= (Equal)	Returns records containing a field value that matches exactly the value you type. You cannot use wildcard characters with this operator.
> (Greater than)	Returns records containing a field value greater than the value you enter. With letters, > refers to alphabetical order from A to Z. This entry is not case-sensitive; in other words, "King" is the same as "king", as far as the system is concerned. You can use wildcard characters with this operator.
< (Less than)	Returns records containing a field value less than the value you enter. With letters, < refers to alphabetical order from A to Z. This entry is not case-sensitive; in other words, "King" is the same as "king", as far as the system is concerned. You can use wildcard characters with this operator.
<> or != (Not equal)	Returns records containing field values that do not match exactly the value you enter. You cannot use wildcard characters with this operator.
Not like	Returns records containing a field value that does not match the value you type using one or more % wildcard characters. If you do not use a wildcard character, Not like acts the same as <> or != (Not equal). Not like does not appear in the drop-down list of operators, but you can type Not like in the operator field.

Buttons on Query Forms

Query forms have the following action buttons:

Button	Description
OK	Click to return any search results that match the current criteria to the parent multiview form and close the query form. If you opened the query form to perform a form-level query, the result set is a

	collection of records, which can be returned to the parent form. If you opened the query form to find a value for a single field in a form, the result is a field value in the currently selected record in the Results pane. This value can be returned to the corresponding field in the parent form. NOTES: When you click this button, if you have selected any results to return to the parent form, the system prompts you for confirmation. If you want to return the results to the parent form, click Yes. You should be aware, though, that if you do this, the system will overwrite the previous collection on the multiview form with the collection being returned from the query form. In a form-level query, records returned to the parent form match the current criteria. These records may be different from records displayed in the Results pane. The difference can occur when you specify criteria, click Refresh to display the search results, and then change the criteria without clicking Refresh to display the new results. This is typically the last button you click on the query form, as it returns you to the parent multiview form. To get the results of your query, you must first click Refresh.
Cancel	Closes the query form without returning any search results to the parent multiview form. Whether you opened the query form from a form or a field, no information is returned to the parent form or field.
Clear	Clears any search criteria from the query form without closing it. This can be useful if you make a mistake and want to start over without having to close the query form.
Refresh	Searches the database using the current criteria and displays the selected records in the Results grid.
Add (Additional Criteria tab only)	Adds the criteria currently in the specification fields to the list of query clauses. Criteria in the specification fields do not become part of the filter until you click this button.
Remove (Additional Criteria tab only)	Removes the selected query clause from the list of clauses.

Sample Queries

This topic presents sample queries that are typical of the kinds of queries you might need to do in the performance of your responsibilities. These sample queries include:

- A wildcard query
- A range query
- A **null** query
- A query that includes reference to the current date

Sample Wildcard Query

Suppose you work in Human Resources, and you need to access the employee records for all employees in the Administration department (400) whose last names begin with letters in the last half of the alphabet. Your query might work something like this:

1 Open the **Employees** form, from which you can access all employee personnel records.

2 On the toolbar, click the Filter button, which retrieves all employee records to this form.

3 Press CTRL+Q to display the **Employees Query** form.

4 On the **Primary Criteria** tab:

- With Last Name as the criteria, select > (Greater than) as the operator
- Specify **M*** in the adjacent value field.

5 On the **Additional Criteria** tab, specify this information in the three query criteria fields:

- From the first drop-down list, select **Department**.
- From the operator drop-down list, select = (Equals).
- From the adjacent value drop-down list, select **400**, which is the Administration department.

6 Click **Add**.

7 Click **Refresh**. The system retrieves all records that meet the specified criteria and displays them in the **Results** grid.

8 To return these records to the parent multiview form (**Employees**), click **OK**.

9 When the system prompts for confirmation, click **Yes**.

NOTE: When you click **Yes**, the system returns *all* retrieved records to the parent form, replacing whatever was previously displayed in that form. You cannot pick and choose which records to return.

Sample Range Query

Suppose you want to find all records for a particular vendor (ID number **9**), relating to payments made during the latter half of the month of September, 2011. This means that we want to query for a set of records spanning a calendar *range* from September 16 to September 30, 2011.

You can use a query like this:

1 Open the **A/P Payments** form.

2 On the toolbar, click the Filter button, which retrieves all accounts payable (A/P) payment records.

3 Press CTRL+Q.

4 On the **A/P Payments Query** form, **Primary Criteria** tab, for the **Vendor** criteria fields:

- Select = (Equals) as the operator.
- In the adjacent drop-down list, select the appropriate vendor ID, in this case, **9**.

5 On the **Additional Criteria** tab, in the three query criteria fields:

- From the first drop-down list, select **Check Date**.
- From the operator drop-down list, select > (Greater than).
- From the adjacent value drop-down list, enter **09/15/2011**.

Because there is no operator for "greater than or equal to" (>=), we use the day *before* the first day for which we want records.

6 Click **Add**.

7 From the first drop-down list, select **Check Date**.

8 From the operator drop-down list, select < (Less than).

9 From the adjacent value drop-down list, enter **10/01/2011**.

Because there is no operator for "less than or equal to" (<=), we use the day *after* the last day for which we want records.

10 Click **Add**.

11 Click **Refresh**.

The system retrieves all records that meet the specified criteria and displays them in the **Results** grid.

12 To return these records to the parent multiview form (**A/P Payments**), click **OK**.

13 When the system prompts for confirmation, click **Yes**.

NOTE: When you click **Yes**, the system returns *all* retrieved records to the parent form, replacing whatever was previously displayed in that form. You cannot pick and choose which records to return.

Sample Null Query

Suppose you want to identify all locations for your company that have no *work centers* associated with them. You can use a query like this:

1 Open the **Locations** form.

2 Press CTRL+Q.

3 On the **Additional Criteria** tab, in the three query criteria fields:

- From the first drop-down list, select **WC** (for "Work Center").
- From the operator drop-down list, select **=** (Equals).

- In the adjacent value field, enter **null**.

4 Click **Add**.

5 Click **Refresh**.

The system retrieves all records that meet the specified criteria and displays them in the **Results** grid.

6 To return these records to the parent multiview form (**Locations**), click **OK**.

7 When the system prompts for confirmation, click **Yes**.

NOTE: When you click **Yes**, the system returns *all* retrieved records to the parent form, replacing whatever was previously displayed in that form. You cannot pick and choose which records to return.

Sample Query Using Current Date

Suppose you want to find all jobs with a start date in the past week. From the Job Orders form, use a query that includes the CURDATE keyword, like this:

```
Start < CURDATE(1)

AND Start > CURDATE(-8)
```

CURDATE() with no parameters returns just the date with no time component. CURDATE(30) represents the current date plus 30 days, and CURDATE(-30) represents 30 days in the past.

Grid-only Forms and Grids

The most common form type or part of a form used to display records and collections of records is a *grid*, which displays a collection of records using a tabular (row-column) format. A grid can constitute the sole content of a form, in which case it is called a *grid form*. Grids can also be used in other forms, most commonly multiview forms.

For information about navigating through a grid, see Keyboard Navigation and Other Navigation Tips.

Grid-only Forms

A *grid-only form* is a form in which all data is displayed and modified using a grid, similar to a spreadsheet or table display.

A grid-only form displays IDO collection data using a single grid. Each row in a grid represents one record in the collection.

Grid-only forms are typically used to define and display related groups of values, settings, parameters, or codes. The collections they display are usually small with a limited amount of data.

Some fields (columns) contain display-only data, usually indicated by shaded cells. Other columns can be used to enter and modify related data. Usually, you can enter the values you want directly in editable fields, but some fields require you to select values from a drop-down list.

Grids in Other Forms

Forms that are not purely grid forms can also make use of grids to display and manipulate data.

Grids in Multiview Forms

A *multiview form* uses a grid in one view of the form, usually the view on the left of the splitter bar.

The grid displayed in a mutiview form works similar to a grid form.

Grids in Query Forms

Query forms make use of grids to display the records returned from a query using that form. These grids display in the bottom portion of the query form and are labeled **Results**.

For more information about **Results** grids in query forms, see About Query Forms.

Grids in Report, Activity, and Utility Forms

Some report, activity, and utility forms retrieve records and allow you to preview and select what records will be processed, using a grid.

For specific information about forms that use grids, see the online help for those forms.

NOTE: Many of these forms include a **Select** option (check box) for each record that is returned for preview. When you select a record using this option, the system displays an **(m)** in the row label for that record. This indicates that the record has been selected but not yet processed.

On such forms, when you select **Commit** and click **Process**, the system processes all (and only) selected records, that is, all records with the **Select** option selected *and* the **(m)** indicator in the row label. If all selected records process successfully, then typically the system refreshes the form. Normally, when the form is refreshed, all selected records, having already been processed, no longer display.

In a case where the system is set to process records individually, there might occur an error midway through processing of records. In this case, typically, the records that were processed before the error occurred are already committed in the database. The collection is not refreshed, so they still appear in the grid; yet the **(m)** indicator is now gone. If you then attempt again to process the records, these records are not processed again.

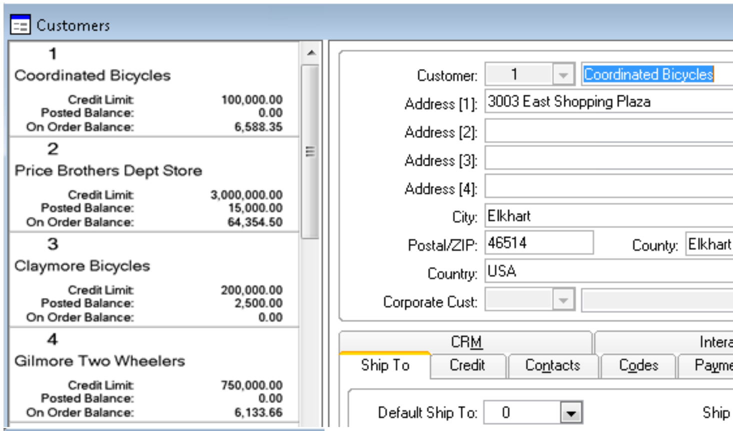
In a case where the system is set to process all records as a batch, and there occurs an error, the system does not complete the processing of any records. In this case, the system returns all records to the status they had before processing was attempted.

Report Forms

Report forms are used primarily to generate reports for a wide range of uses. In some cases, report forms are also used to generate forms or other documents required to complete some business task.

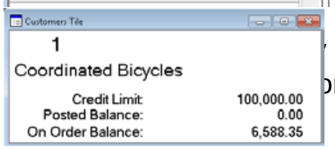
Many report forms allow you to generate a preview before actually printing or sending the generated report file.

For more information about reports and report forms, see [Reports Overview] or the online help for the specific report form you are interested in.



displayed on mobile devices. They can
ıformation, see the related topics.

iles instead of in a grid, an appropriate
. For example, this multiview form



in the tiles in the left pane are set up on the corresponding tile form. In
ɔnding tile form looks like this:

Tile forms are not intended to be displayed standalone.

Utilities and Activities Forms

Utilities and *activities* are specialized forms that are usually associated with other, more basic forms. They typically process multiple records in one operation, performing tasks such as purging records, updating values, posting transactions, or changing the status of records.

For instance, suppose you need to change the status of a range of job operations to **Complete**. You could use a **Complete Job Operations** utility to change them all at one pass, rather than having to change each job operation separately.

Utilities and activities forms typically present pairs of fields and other options that allow you to define ranges of and criteria for records to be processed.

Previewing and Selecting Records

Many (though not all) utilities and activities forms include a grid section, in which you can preview records before processing. Often, these forms include a **Select** option (check box) for each record that is returned for preview. When you select a record using this option, the system displays an **(m)** in the row label for that record. This indicates that the record has been selected but not yet processed.

On such forms, when you select **Commit** and click **Process**, the system processes all (and only) selected records, that is, all records with the **Select** option selected *and* the **(m)** indicator in the row label. If all selected records process successfully, then typically the system refreshes the form. Normally, when the form is refreshed, all selected records, having already been processed, no longer display.

In a case where the system is set to process records individually, there might occur an error midway through processing of records. In this case, typically, the records that were processed before the error occurred are already committed in the database. The collection is not refreshed, so they still appear in the grid; yet the **(m)** indicator is now gone. If you then attempt again to process the records, these records are not processed again.

In a case where the system is set to process all records as a batch, and there occurs an error, the system does not complete the processing of any records. In this case, the system returns all records to the status they had before processing was attempted.

Finding and Opening Forms

About Finding and Opening Forms

There are two ways to find and open forms:

- To locate and open a form based on its function, if you do not know the name of the form, you can use the Explorer. For more information, see Finding and Opening Forms Using the Explorer.
- If you know the name or caption used for the form, you might find it easier and quicker to use the **Select Form** dialog box. For more information, see Finding and Opening Forms Using the Select Form Dialog Box.

You can open more than one form at a time. Each form opens in a separate window that can be resized, minimized, or maximized. You can also use the **Window** menu to position opened forms in a cascade or tile arrangement.

If there are forms that you use regularly, you can arrange these and save them as *workspaces*, so that it is easier to find, open, and arrange these forms. You can also put them in your **My Folders** directory, where you can find them easily and even set them to load or open automatically when you log in. For more information on these options, see Using Workspaces or Customizing 'My Folders'.

Finding and Opening Forms Using the Explorer

You can use the Explorer to find and open forms. The Explorer is most useful when you do not know the name of the form, but you know how the form is used, or who uses the form.

In the Explorer, you can look up forms by application module, or you can open the **All Forms** folder and type the first few letters of the form name.

To find and open a form using the Explorer:

1. In the **Explorer** window, expand the **Master Explorer** or another folder to display the list of forms that contains the form you want.

   To see the complete list of forms, expand the **All Forms** folder.

2. Locate the form you want to open.
3. To quickly locate a form name in a long list of names:
   a. Click any form in the list.
   b. Type the first few letters of the form you want to find. Explorer selects the first form name that starts with the letters you typed.

c Use the down arrow or scroll wheel to refine your search.

4 Double-click the name for the form you want.

Finding and Opening Forms Using the Select Form Dialog Box

If you know the name or caption of a form you need, one of the quickest and easiest ways to find and open it is by use of the **Select Form** dialog box. But even if you do not know the exact name, this is a powerful option, because of the filtering capabilities in the **Select Form** dialog box.

To open a form using the **Select Form** dialog box:

1 From the **Form** menu, select **Open**.

The system displays a list of all the forms on your system. By default, forms are listed by caption (the title that displays when the form is open).

To toggle the list so that forms are listed by the internal form name, select the check box labeled **Select by Name Instead of Caption**.

2 To restrict the list by filtering:

- In the **All Containing** field, enter the portion of the caption or name that you know.
- To have the system match the capitalization as you typed it, select the check box labeled **Case-sensitive**. Otherwise, clear the check box.
- Click **Filter**.

The system displays a list of all forms that have captions or names matching your criteria.

3 In the list, select the form you want.

4 Click **OK**.

Using Workspaces

After you have worked with the system for awhile, you will probably find that there is a certain set of forms that you work with frequently (if not daily), and that you like to use in a particular arrangement in your work area.

The system provides a way to save and open such a configuration of forms easily, so you do not have to redo it every time you use the system. In the system, this configuration of forms is called a *workspace*.

Once you have set up and saved a workspace, you can either open it manually through the Form menu, open it through a shortcut in the Explorer, or set the system to open it automatically when you log in. You can also later modify the arrangement of the forms, and even add or delete forms from the workspace. And, should you decide you no longer need it, you can delete a workspace.

For more information, see the following subtopics:

- Setting Up and Saving Workspaces
- Opening Workspaces
- Creating a Workspace Shortcut

- Changing the Forms in Workspaces
- Deleting Workspaces

Setting Up and Saving Workspaces

A *workspace* is a configuration of forms that open together. If you use a group of forms often, you can set up a workspace that lets you open all the forms with one command, with the size and position of the forms preset.

To set up and save a workspace:

1. Open each form that you want to include in the group and then adjust the size and position of each form to the configuration you want. Here are some tips:
   - To remove the **Explorer** window from the group, minimize it.
   - To move a form, drag the title bar.
   - To change the form's size, drag the borders.
   - To arrange the forms as tiled or cascaded windows, use the **Window** menu.
2. From the **Form** menu, select **Workspaces**.
3. In the **Workspaces** dialog box, click **New**.
4. In the **Name** field of the **Specify a Name for the New Workspace** dialog box, type the name of the workspace.
5. Click **OK**.
6. Click **Set from Current Forms**.
7. Click **Done**.

Opening Workspaces

Once saved, there are three possible ways to open workspaces. You can:

- Open the workspace manually through the Form menu.
- Open a workspace shortcut in the Explorer.
- Have the system open the workspace automatically when you log in.

  NOTE: Before you can open a workspace, you must have first saved it. For more information, and the procedure, see Setting Up and Saving Workspaces.

To open a workspace manually:

1. From the **Form** menu, select **Workspaces**.
2. Select the name of a saved workspace.
3. Click **Exit and Open**.

To open a workspace from a shortcut:

1 Go to the folder in the Explorer where the shortcut is saved. (See Creating a Workspace Shortcut for instructions to save the shortcut.)

2 Double-click on the shortcut.

To have a workspace open automatically when you log in to the system:

1 Create a shortcut to WinStudio.

For information and instructions to create a shortcut, see the documentation for your operating system.

2 Add a command-line parameter to specify a workspace:

- Right-click the shortcut you just created.
- From the popup context menu, select **Properties**.
- In the **Target** field, after the base target definition, add the following:

-wWorkspaceName

where:

- **-w** is the command option.
- ***WorkspaceName*** is the name of the workspace you want to open automatically when you log in.

NOTES:

There is no space between the -w command and the name of the workspace.

If there are any spaces in the name of the workspace, you must enclose the workspace name in quotation marks, as in the following example:

-w"My Workspace"

EXAMPLE: The following is a typical command line in a shortcut:

"C:\Program Files\Acme\WinStudio.exe" -wMyWorkspace

When you use the shortcut to access the system, the workspace opens automatically.

NOTE: The workspace opens automatically *only* when you use this shortcut to open WinStudio. This means, among other things, that you can use different shortcuts to open different workspaces when you log in.

Creating a Workspace Shortcut

To create a workspace shortcut:

1 Set up and save the workspace.

2 In the Explorer, right-click on a folder and select **New Workspace Shortcut**. This option is enabled when you have read and write permissions for the folder.

3 Select a workspace from the list of workspaces you have created and click **OK**.

4 To change the name or description of the workspace shortcut, right-click on the new shortcut and select **Properties**.

To use the shortcut, double-click on it. The forms included in the workspace open.

Changing the Forms in Workspaces

After you set up and save a workspace, you can add forms to it, delete forms from it, and adjust the size and position of the forms.

To change the forms in a workspace:

1. Open an existing saved workspace as described in Opening Workspaces.
2. Adjust the forms in the workspace as needed:
   - To delete a form from the workspace, close the form.
   - To add a form to the workspace, open the form.
   - Adjust the size and position of each form.
3. From the **Form** menu, select **Workspaces**.
4. Select the name of the workspace you are changing.
5. Click **Set from Current Forms**.
6. Click **Done**.

Deleting Workspaces

To delete a workspace:

1. From the **Form** menu, select **Workspaces**.
2. Click the name of the workspace you want to delete.
3. Click **Delete**.
4. Click **Done**.

Customizing a Form

As a user, you can customize many aspects of the way a given form looks, and save those changes so that, every time you open the form, it includes your changes. Changes you can make in run-time, regardless of your editing permissions, include:

- The size of the form
- The position of the splitter in multiview forms
- The sequence of columns in a grid display
- The width of columns in a grid
- Whether columns in a grid display or not

NOTE: Before you can save these changes:

- Your system administrator must have the **Allow saving form runtime changes** process default set to **1**.
- You must select both of these **Runtime Behavior** options in **User Preferences**:
  - Prompt to Save Form Splitter Changes
  - Prompt to Save Grid Changes

If you do not select these options, Mongoose does not save your run-time form changes.

Any changes beyond these require that you have editing permissions that allow you to go into Design Mode and make changes there.

Working with Collections

A *collection* is a set of related records. The records that the system retrieves are almost always related by the form you are using. Quite often, they are further limited to records that meet certain search criteria you can set by using *filters*.

Retrieving Collections

A large part of the work you do in this system probably involves locating the right records you need to work with. The system provides several means of helping you retrieve just the right collections you need. For more information, see Retrieving Collections.

Processing Collections

Once you have the collection of records that you need, you can process them in a variety of ways, including (but not limited to):

- Sorting collections
- Previewing collections before printing them
- Printing collections
- Exporting collections to external files
- Copying collections to or from a spreadsheet
- Create and format graphs based on the collection

Retrieving Collections

A large part of the work you do in this system probably involves locating the right records you need to work with. The system provides at least two ways of helping you retrieve just the right collections you need:

- To return records that match specified criteria in one or more fields, use Filter-in-Place.

  For more information, see Finding Records with Filter-in-Place.

- To specify search criteria and return selected records to a parent multiview form, use query forms.

  For more information, see Finding Records Using a Query Form.

In performing these searches, you can usually use filters, wildcard characters, and specify records to return if a certain field is empty (null). For more information, see Understanding Filters, Using Wildcard Characters, or Using the Null Keyword.

You can also limit or expand the number of records that a particular search can return. For more information, see About Caps.

Finding Records with Filter-in-Place

When you activate Filter-in-Place, any collection currently associated with the form is cleared and fields on the form become blank. You can then specify filter criteria in one or more fields and retrieve a collection of records that meet those criteria.

If a previous search has already been done, any fields that were used as search criteria can still have the search criteria in them. To clear the form of all search criteria, press F5.

To find records with Filter-in-Place:

1. Open a form that is used to retrieve records.
2. Activate Filter-in-Place mode. From the **Actions** menu, select **Filter > Begin in Place**.
3. Enter a value in one or more fields to specify criteria for the records you want to retrieve. For tips on specifying filter criteria, see Filter Options (below).
4. Perform Filter-in-Place. From the **Actions** menu, select **Filter > Execute in Place**.

   The system displays all available records that match the filter criteria you designated. The number of records retrieved is limited to the current cap on data records. For more information, see About Caps.
5. (Optional) To view the next set of records (beyond the record cap), click the "Get more rows in the current collection" button.

If no records meet the criteria, the system automatically places the form in "new" mode. You can create a new record (as you would after selecting **New** on the **Actions** menu), or you can repeat this procedure with different filter criteria. If you repeat the procedure, your previous filter criteria are initially specified in the fields. You can adjust them, or you can remove all of them. To remove all of them, on the **Actions** menu, point to **Filter**, and then click **Clear in Place**.

Filter Options

If you leave all fields blank, the collection is unfiltered, and the system retrieves all records up to the current cap on data records. This is often undesirable, so the system provides several means to filter and thus limit the return results for a search:

- You can use wildcards in filter criteria as you would in a query form. The default wildcard is *****. For more information, see Using Wildcard Characters.
- You can use operators such as > (greater than), < (less than), and <> (not equal to) to augment your filter criteria. For more information, see Operators on Query Forms.

NOTE: Unlike query forms, Filter-in-Place does not support the logical operators AND and OR. If you need to specify multiple criteria for one field or perform Boolean searches, use the **Additional Criteria** tab of the query form associated with your form, instead of Filter-in-Place. Also, Validators do not run in Filter-In-Place mode.

- To find records that are blank (contain null values) in specific fields, you can use the **null** keyword. For more information, see Using the Null Keyword.
- To retrieve filtered criteria values in certain drop-down list fields, you can use the **Find** command on the right-click menu. For more information, see Finding a Specific Value in a Drop-Down List.

  NOTES: To refine your search, you can use as many fields as necessary. For example, you could:

- Specify all the customers in a particular set of zip codes, by entering **41*** in a **Postal Code** field.
- Further specify those customers who are past due on their payments by specifying "not null" (**<>null**) in a **Past due** field.
- Even further specify those customers who are more than $5000 in arrears, by entering **>4999** in a **Past due amount** field.

The results of this search would return the records of all customers who have a postal code beginning with the numbers 41, who are $5000 or more past due on their accounts.

Finding Records Using a Query Form

Most multiview forms have a query form associated with them. You can use these query forms to select a collection of records and return the collection to the multiview form.

CAUTION: Records retrieved by a query form replace the current collection of records in the multiview form. Be sure to save any changes you want to retain in the multiview form before you retrieve records with a query form.

To perform a typical query using a query form and return the results to the associated multiview form:

1. With a multiview form open, perform one of the following actions:
   - Press CTRL+Q.
   - From the **Actions** menu, select **Filter > By Query**.
   - Right-click on the form somewhere *other than* on a field, and then, from the context menu, select **Filter > By Query**.

   NOTE: On a form that is not associated with a query form, the **By Query** menu option is not available.
2. (Optional) Use one or both fields on the **Primary Criteria** tab to set the primary search criteria. For more information about setting primary search criteria, see Primary Criteria in Query Forms.
3. (Optional) Use the fields and buttons on the **Additional Criteria** tab to refine the search criteria further. For more information about setting addition search criteria, see Additional Criteria in Query Forms.

4 Click **Refresh**. The system returns all records that meet your search criteria.

5 (Optional) Repeat Steps 2 - 4 as desired to get the return results you need.

- To return the results of your query to the parent multiview form, click **OK**.
- When asked if you want to return the result to the mutliview form, click **Yes**.

For examples of queries, see Sample Queries.

Using the Null Keyword

You can use the **null** keyword to search for records that contain blank fields with null values. In form fields, a null value appears as an empty field in which no value has been specified.

You can use the **null** keyword in:

- Filter-in-Place mode
- Query form searches
- Saved filters

The **null** keyword cannot be used for searches of field values in a collection (**Edit > Find Value in Collection**).

To do a null keyword search:

- In Filter-in-Place mode, enter **null** in any field in which you can type characters.
- In query forms, you can use the **null** keyword in any of the primary criteria or additional criteria fields that use the **=** (equal) or **<>** (not equal) operator.

NOTES:

- To find records where a particular field is *not* blank (null), enter **<>null**
- The null keyword is not case-sensitive. This means that it does not matter whether you enter it in all lower-case letters, all upper-case letters, or any combination of both lower- and upper-case letters.
- To perform a search in which a field might contain, in whole or in part, the word "null," enclose it in asterisks (***null***).

Using Wildcard Characters

When you search for information, you can use the wildcard character to find items that contain your specified sequence of characters and that may contain additional, unspecified characters.

By default, the wildcard character is an asterisk (*), but you can change it. You would especially want to do this if you want to use the asterisk as an actual data character in fields.

You can use wildcard characters when you:

- Search for values for fields.
- Use filters and Filter-in-Place.

- Use query forms.

NOTE: Not all fields support the use of the wildcard character as might be expected. This is especially true of fields that automatically expand a field to a required number of characters. This functionality is commonly seen in order and ID number fields. In these cases, you might have to place the wildcard both before and after your search characters.

How It Works

The wildcard behaves slightly differently, depending on the context in which you are using it.

In text searches

In a text search, the wildcard represents zero or more possible missing alphanumeric characters.

EXAMPLES:

- Using the default wildcard (*****), a search using **A*** as the search string returns all items that begin with the letter **A**.

  Note that text wildcard searches are *not* case-sensitive, so this search would return *all* items beginning with the letter **A**, for example, **Anthony** and **automobile**.

- Searching for ***qui*** matches all items that contain the letters **qui**. So, items that would be returned could include **Quigley** and **requisite**.

In date fields

In a date search, the wildcard character matches the month, day of the month, or year.

EXAMPLES: In a system using the short date format *M/d/yyyy* (month/day/year):

- The search term **12/*/2008** returns records for all dates in December, 2008.
- The search term ***/*/2008** returns records for all dates in the year 2008.
- The search term **12/31/*** returns records for December 31 in all years.

NOTE: The wildcard character stands for the entire specification for a month, a day, or a year; you cannot use the wildcard in a combination such as **200*** to return all years from 2000 to 2009 or in a day specification such as **2*** to return all days of a month from 20 to 29.

Changing the Wildcard Character

If you want to enter the asterisk as actual data in a field, you must change the wildcard character.

To change the wildcard character

1. From the **View** menu, select **Settings**.
2. On the **Run Time** tab, in the **Behavior** group, the **Wildcard character** field, enter the new character you want to use as the wildcard character.

It is best to use a character that you are not likely ever to need in a data field. Good possible candidates include the tilde character (**~**), the circumflex character (**^**), and the grave accent character (`).

Understanding Filters

Understanding Filters

Before you can work with a record or a collection, you must retrieve it from the database and display it in a form. Specifications that determine which records are retrieved are referred to as *filter criteria*.

The system provides several different ways for you to use filter criteria to help locate only those records and collections you actually need.

- When you open a form and records display automatically, you see the results of a filter that has been permanently attached to the form so that it selects certain records whenever the form is opened.
- When you use Filter-in-Place to search for records, you create a temporary filter by entering search criteria in selected fields. You cannot save the filter criteria used in Filter-in-Place mode.
- When you use a query form to search for records, you create a filter by entering criteria in the query form to identify the records you want to retrieve.
- If this is a search you perform often using the same search criteria, you can save the criteria entered on a query form and create your own saved filter. You can later use this saved filter without having to re-enter all the search criteria each time.
- From a query form, you can also copy or delete filters that you have saved. Copying a filter allows you to modify and resave it without having to start from scratch.
- From the Row Authorizations form, you can set filters on IDOs so that users can only view certain data, based on the user ID under which they log in. For example, you can create a filter so that salesperson users can only view their opportunities and not those of other salespeople. Or you can create a filter so that your customers who log into this application through a portal can see only information about their orders.

To find out which filter is currently used in a form, display the form and then, from the **Help** menu, select **About This Form**.

Creating and Saving Filters

If you frequently use the same search criteria to retrieve a collection of records, you can create and save a filter that specifies the criteria. You can then use the filter to retrieve the collection without having to respecify the criteria each time.

NOTE: You can save a search filter only from a query form.

To create and save a filter

1 Open the form that you frequently use for a query.

2 If the form is in Filter-in-Place mode, press F3 to cancel the mode or F4 to execute the filter.

3 From the **Actions** menu, select **Filter > By Query**.

4 In the query form, enter your primary criteria and additional criteria.

5 From the **Actions** menu, select **Filter > Save**.

6 Enter a name for the filter.

7 Click **OK**.

You can also create a filter by copying an existing filter, editing it, and then saving it with a new name.

Using a Saved Filter

Once saved, you can easily use a search filter to perform a filter search any time you need to.

To use a saved filter:

1 Open the form for which you saved the search filter.

2 If the form is in Filter-in-Place mode, press F3 to cancel the mode or F4 to execute the filter.

3 From the **Actions** menu, select **Filter > Apply Saved Filter**.

4 Select the filter you want to apply.

5 Click **OK**.

6 In the query form, click **Refresh**.

Copying and Editing Filters

You can edit a saved filter. You can also create a new filter by opening an existing one, editing it, and saving it with a new name.

To edit a filter:

1 Open a query form.

2 From the **Actions** menu, select **Filter > Open**.

3 From the list of filters, select a filter, and then click **OK**.

4 Edit the search criteria as required.

5 From the **Actions** menu, select **Filter > Save**.

6 Do one of these:

- To save the edited filter, click **OK.** This action overwrites the existing saved filter with the changes.
- To create a new filter, including any edited criteria, type a new **Name** for the filter, and then click **OK**.

Deleting Filters

At this time, you cannot delete a saved filter.

About Caps

The maximum number of records allowed in a collection is restricted to a numerical *cap*. The maximum number of items in drop-down lists is similarly capped. The default cap on both records and list items is normally 200, but under certain conditions, these caps can be overridden (see Cap Overrides).

Caps are designed to maintain the performance of your local system and of the database server. Because data retrieved from the server resides on your local system in a collection, retrieval of a large number of records or list items can put unnecessary demands on the database server and slow system performance.

Caps and Their Use in Forms

The default caps are suitable for most data-entry tasks and information-search tasks. Still, you should be aware of options for dealing with the size of collections and lists. For more information, see Caps on Collections and Caps on Drop-down List Items.

Caps When Exporting Collections

When you export a collection of records to an external file, you usually want no limit on the number of records. You need not reset the cap on collections in this case. Instead, select the **Unlimited query** option when you export a collection.

Caps When Processing Records

When the system processes records (for example, during posting) it ignores any cap you have set and processes all records that meet the criteria. However, if the process returns a result set, a record cap could still affect how many returned records display on the form.

Cap Overrides

The default cap limits can be overridden in a couple ways:

- System administrators can use the **WinStudio Max Record Cap** process default to set the record cap to a system-wide maximum number (see Default Name, Process Defaults).
- Individual users can set the caps to their own maximum numbers or to retrieve all available records.

This is accomplished on the **Runtime Behaviors** tab of the **User Preferences** dialog box.

NOTES:

- The **WinStudio Max Record Cap** process default overrides the **User Preferences** setting.
- If the system administrator has enabled the **Disable record cap override save** process default (which is enabled by default), user preferences carry over from one session to the next. If the system administrator has disabled the **Disable record cap override save** process default, then any user preference settings last only as long as the user's current session. When the user signs off, the record caps return to the system defaults.

Caps on Collections

When retrieving records for a collection, the system uses a *cap* to limit the number of records that can be returned. You should consider this cap when you retrieve a collection for which the size might exceed the cap.

Finding the Current Cap on Collections

If you know you need to retrieve a large number of records for a collection, you can find out whether the current cap will allow you to display that number of records. For more information and the procedure, see Viewing the Current Cap on Collections.

Identifying When You Have Reached the Cap

Knowing whether you have reached the cap on records is fairly straightforward: The number of records in a collection shows in the status bar in the lower-left corner of the application window.

To determine whether a collection contains the maximum number of records allowed, compare the number of records retrieved (the second number) with the current cap on data records.

The "Go to the last object..." button navigates to the last record displayed, not necessarily the last actual record in the database. You can use this to help determine when a collection contains the maximum number of records allowed but not all potential records that match your filter criteria.

The "Get more rows in the current collection" button also provides a visual cue as to whether there are more records available. If the double arrows are blue, then there are more records available.

Retrieving Additional Records

If you have a collection that does not display all the records you need, try replacing the current collection with a collection filtered using more specific criteria. You can:

- Do a more focused Filter-in-Place query.
- Use the "Get more rows in the current collection" button to retrieve and display the next set of records.
- Use the associated query form to perform a more refined query.

In most cases, you should be able to get the collection you are looking for by one of these methods. Only if these methods do not return the collection you need in full should you increase the cap on records.

Viewing the Current Cap on Collections

If you suspect that the number of records the system is retrieving for a collection is not what it needs to be, you can view the current cap being used, to find out what it currently is.

To view the current cap on collections:

1 From the **View** menu, select **Settings**.

2 Locate the **Caps > Data records** group box.

3 The option that is selected shows the current cap on data records in collections:

NOTE: System administrators can override either the "Retrieve all" or "Use specified max" setting with a system-wide maximum record cap that is set in the Process Defaults form. So, for example, if you set the system to display up to 500 items, but the system administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250.

- **Use default** - When selected, the system uses the default cap, which is 200 records.
- **Retrieve all** - When selected, the system retrieves all records that meet the search criteria.
- **Use specified max** - When selected, the number in the box is your current cap on records. If the **Use Default** option is selected, this field displays **-1**.

4 Click **Cancel**.

Changing the Cap on Collections

If you cannot retrieve all the records you need to accomplish a task, it is possible to reset the default cap so that the system retrieves the number of records you need.

NOTES:

- Rather than having to reset the cap for collections, you can use the "Get more rows in the current collection" button on the main toolbar.
- System administrators can override either the "Retrieve all" or "Use specified max" setting with a system-wide maximum record cap. This record cap is set with the **WinStudio Max Record Cap** process default, which is set on the **Process Defaults** form.

So, for example, if you set the system to display up to 500 items, but the system administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250.

To change the cap on records in a collection:

1 From the **View** menu, select **Settings**.

2 Locate the **Caps > Data records** group box.

3 Select the option you want to specify the new cap:

- **Use default** - The system uses the system default cap, usually 200 records.
- **Retrieve all** - The system retrieves all records that meet the specified search criteria.

CAUTION: Consider carefully before selecting this option. Unlimited retrieval of a collection can degrade system performance.

- **Use specified max** - In the field to the right of this option, enter the maximum number of records you want to be able to retrieve.

Note that transferring a large number of records to your system can degrade performance.

If the **Use default** option is selected, the value **-1** appears in this field.

4 Click **OK**.

5 To refresh the collection in the current form, press **F5**.

NOTE: The cap you designate applies to all collections in all forms.

Caps on Drop-down List Items

Certain drop-down lists, particularly business-data list boxes, have caps on the number of list items they can display.

Finding the Current Cap on Drop-down List Items

If you know you need to display a large number of items in a drop-down list, you can find out whether the current cap will allow you to display that number of items. For more information and the procedure, see Viewing the Current Cap on Drop-down List Items.

Identifying When You Have Reached the Cap

Knowing whether you have reached the cap on list items is more difficult than with collections. The following tips might help:

- A list has probably reached the cap if it ends arbitrarily, for example, in the middle of the alphabet in an alphabetically sorted list.
- A list has probably reached the cap if it does not contain an item that you believe it should contain.

Retrieving Additional List Items

If you have a drop-down list that does not display all the records you need to use, you can:

- Replace the current list with a filtered list whose items match your search criteria. For more information and the procedure, see Filtering a Drop-down List.
- Use the Find feature, which is built into the drop-down list box. You can access this feature by right-clicking on the field and then selecting **Find**. For more information and the procedure, see Finding a Specific Value in a Drop-down List.

In most cases, you should be able to get the item you are looking for by one of these methods. Only if these methods do not return the list you need in full should you increase the cap on list items.

Viewing the Current Cap on Drop-Down List Items

If you suspect that the number of items the system is displaying in a drop-down list is not what it needs to be, you can view the current cap being used, to find out what it currently is.

To view the current cap on drop-down list items:

1. From the **View** menu, select **Settings**.
2. Locate the **Caps > Drop-downs** group box.
3. The option that is selected shows the current cap on list items in drop-down list boxes:

   NOTE: System administrators can override either the "Retrieve all" or "Use specified max" setting with a system-wide maximum record cap that is set in the Process Defaults form. So, for example, if you set the system to display up to 500 items, but the system administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250.

   - **Use default** - When selected, the system uses the default cap, which is 200 records.

- **Retrieve all** - When selected, the system displays all items that meet the search criteria.
- **Use specified max** - When selected, the number in the box is your current cap on list items. If the **Use Default** option is selected, this field displays **-1**.

This option applies only to business-data list boxes.

4 Click **Cancel**.

Changing the Cap on Drop-Down Lists

If you cannot display in a drop-down list all the items you need to see, it is possible to reset the default cap so that the system displays the number of items you need.

To change the cap on items displayed in a drop-down list:

1 From the **View** menu, select **Settings**.

2 Locate the **Caps > Drop-downs** group box.

3 Select the option you want to specify for the new cap:

- **Use default:** The system uses the default cap, which is 200 items.
- **Retrieve all:** The system retrieves all items that meet any specified search criteria.

  CAUTION: Consider carefully before selecting this option. Unlimited retrieval of a list of items can degrade system performance.

- **Use specified max:** In the field to the right of this option, enter the maximum number of items you want to be able to display.

  Note that transferring data for a large number of items to your system can degrade performance.

  If the **Use default** option is selected, the value **-1** appears in this field.

4 Click **OK**.

5 To refresh a list, type a wildcard character (an asterisk * by default) in the list box and then click the drop-down button.

NOTES:

- System administrators can override either the "Retrieve all" or "Use specified max" setting with a system-wide maximum record cap that is set in the Process Defaults form. So, for example, if you set the system to display up to 500 items, but the system administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250.
- The cap you designate applies only to business-data lists.
- Any change you make to the cap lasts only until you exit the application. The next time you open the application, the default cap is in effect.

Changing Focus on Collections

If a form has more than one collection of records, you can select the collection you want to work with by clicking a part of the form that displays the collection. For example, you can click a field or a box surrounding several fields. Doing so changes the focus of the form to the selected collection.

Another way is to locate the collection you want in a grid and click any cell for the record you want.

While working with a collection, keep in mind that:

- **Actions** menu commands affect only the selected collection.

  For example, the **Next** command navigates to the next record in the selected collection.
- The selected collection is displayed in relief, with highlights and shadows.
- Status bar messages change to reflect selected fields within the collection.

For more information about navigating within a form, see Keyboard Navigation and Other Navigation Tips.

Sorting Collections

When you retrieve a collection of records, you often sort them according to the contents of one field. The system lets you sort based on:

- The contents of a column in a grid, or
- The value of information displayed in a field

To sort a collection based on the contents of a grid column, double-click the column heading for the column. To toggle the sort between ascending order and descending order, repeat this action.

To sort a collection based on a field value:

1. In an open a form, display the collection you want to sort.
2. Click in the field on which you want to sort.
3. Select **Edit > Sort Collection**.
4. (Optional) By default, records are sorted on the field in the primary collection that currently has focus. If you are not sorting the primary collection, select a collection and field:
   - From the **Collection** list, select the name of the collection you want to sort. If you don't know the name of the collection, to see the name of the current collection, return to the form and click **Help > About This Form**.
   - In the **By Property** box, click the name of the field on which you want to sort.
5. (Optional) By default, records are sorted in ascending order, regardless of capitalization. To sort by descending order, select the **Descending** check box.
6. (Optional) To take into account capitalization when sorting, select the **Case-sensitive** check box.
7. Click **OK**.

Notes About Sort Order

When sorting collections, a few sort-order concepts must be kept in mind:

- Some fields that appear to be numeric (for example, **Account**) might actually be character-based. Thus, they would use text-character sort order.
- Character-based fields use text-character sorting. For example, if you attempt an ascending sort by account number, the accounts might be sorted like this:

  (blank field)

  #222

  222

  2220

  @201

  XL-64

  xl-64

This is because, in text-character (ascending) order:

- Character strings are generally sorted from left to right. That is, the first character (furthest left) is evaluated, then the second, and so on.
- A blank field comes before any other character. Thus, any blank fields always display first.
- Special characters might come before numerals, between numerals and letters, or after letters. Thus, **#222** comes *before* **222**, but **@201** comes *after* **222**.
- Numerals display in correct numeric order, regardless of size.
- Numerals display before alphabetic characters.
- Upper-case characters display before lower-case characters. Thus, **XL-64** comes before **xl-64**.
- Unicode strings typically are compared using a "word sort" technique, where all punctuation marks and other non-alphanumeric characters, except for the hyphen and the apostrophe, come before any alphanumeric character. The hyphen and the apostrophe are treated differently than the other non-alphanumeric symbols, in order to ensure that words such as "coop" and "co-op" stay together within a sorted list.

Printing Collections

Printing Records or Collections of Records

When working with the system, it is sometimes useful to be able to print out a collection of records. The system allows you not only to do this, but also to preview the collection before actually sending it to the printer. For more information, see:

- Previewing a Record or Collection Before Printing
- Printing a Record or Collection

Previewing a Record or Collection Before Printing

Often, before actually sending a record or collection that you want to print to the printer, it is a good idea to preview what will be printed.

To preview a record or a collection before printing:

1 Open a form and display the collection you want.

2 (Optional) To print a single record, select that record.

3 From the **Form** menu, select **Print Preview**.

4 In the **Print Options** dialog box, do one of the following:

- To preview the selected single record, click **Current Field Data**.
- To preview the entire collection, leave **Collection Properties** selected and from the drop-down list, select the collection you want to print.

If you do not know the name, return to the form and click the section displaying the collection. Then click **Help > About This Form** to see the name of the current collection.

5 (Optional) To sort the fields and properties listed in the **Select Fields/Properties** box alphabetically, select the **Sort Alphabetically** check box.

6 From the **Select Fields/Properties** group box, select the items you want to include in the preview:

- To select and preview all items, leave all items in the left pane.
- To exclude an item, select the item in the left pane, and then click **Exclude**.
- If you have marked an item for exclusion and then decide you want to include it, select the item in the right pane, and then click **Include**.
- To change the order, moving an item up or down in the list, use the **Up** and **Down** buttons.

7 (Optional,for collections only) To have the system place a light gray background behind alternating records, select the **Shade Alternate Detail Lines** check box.

8 (Optional) To have the system wrap record contents that go beyond the normal width of the page, select the **Word Wrap** check box.

When this check box is selected, the system is better able to present all selected fields/properties, because the system uses multiple lines for record fields/properties that do not fit within the normal page margins. If this option is not selected, any contents that do not fit within the page margins simply get cut off and are not presented at all.

9 (Optional) To change the display font, click the **Font** button.

Use the Windows **Font** dialog box to identify the font family, size, and style you want to use, and then click **OK**.

10 (Optional) To change the print setup options for the preview, click **Print Setup**.

In the **Page Setup** dialog box that opens, you can adjust the following print settings:

- Paper size and source
- Page orientation (portrait or landscape)

- Page margins
- Printer settings and options (**Printer** button)

This button opens the **Printer** dialog box, where you can select a printer and make other printer-specific settings.

11 Click **OK**.

Printing a Record or Collection

The system allows you to print selected records or collections of records. Before actually printing out a record or collection, you can also preview the output.

To print a record or a collection:

1 Open a form and display the collection you want.

2 (Optional) To print a single record, select that record.

3 From the **Form** menu, select **Print**.

4 In the **Print Options** dialog box, do one of the following:

- To print the selected (single) record, click **Current Field Data**.
- To print the entire collection, click **Collection Properties**. From the drop-down list, select the collection you want to print.

If you do not know the name of the collection, you can click the section of the form that displays the collection, and then click **Help > About This Form** to see the name of the current collection.

5 (Optional) To sort the fields and properties listed in the **Select Fields/Properties** group box alphabetically, select the **Sort alphabetically** check box.

6 From the **Select Fields/Properties** group box, select the items you want to print:

- To print all items, leave all items in the left pane.
- To exclude an item, select the item in the left pane, and then click **Exclude**.
- If you have marked an item for exclusion and then decide you want to include it, select the item in the right pane, and then click **Include**.
- To change the order, moving an item up or down in the list, use the **Up** and **Down** buttons.

7 (Optional, for collections only) To have the system place a light gray background behind alternating records, select the **Shade Alternate Detail Lines** check box.

8 (Optional) To have the system wrap record contents that go beyond the normal width of the page, select the **Word Wrap** check box.

When this check box is selected, the system is able to print all selected fields/properties, because the system uses multiple lines for record fields/properties that do not fit within the normal page margins. If this option is not selected, any contents that do not fit within the page margins simply get cut off and are not printed at all.

9 (Optional) To change the display font, click the **Font** button.

Use the Windows **Font** dialog box to identify the font family, size, and style you want to use, and then click **OK**.

10 (Optional) To change the print setup options for the preview, click **Print Setup**.

In the **Page Setup** dialog box that opens, you can adjust the following print settings:

- Paper size and source
- Page orientation (portrait or landscape)
- Page margins
- Printer settings and options (**Printer** button)

This button opens the **Printer** dialog box, where you can select a printer and make other printer-specific settings.

11 Click **OK**.

12 (Optional) In the Windows **Print** dialog box, you can select an alternate printer, set additional print options, and so on, before sending the output to the printer.

13 Click **OK**.

Using Collections Outside the System

Using Collections Outside the System

There are several ways you can use the data from a collection of records outside the system. You can:

- Export the data to an external file. For more information, see Exporting Collections to External Files.
- Copy the data from a collection to an external spreadsheet program. For more information, see Copying To/From a Spreadsheet.
- Paste data from an external spreadsheet into the collection. For more information, see see Copying To/From a Spreadsheet.
- Display the data in a graph format. For more information, see Creating and Formatting Graphs from a Collection.

Exporting Collections to External Files

You can export the data in a collection to an external file, which in turn can be imported into another application. Field values in the external file can be separated by either commas or tabs. Each record in the collection becomes a row in the exported file. Each field (property) becomes a column.

If you want to export the files to a spreadsheet, you can use the **To Excel** option instead of this process.

NOTES:

- By default, columns in the file are ordered left-to-right according to an internal property list. The order does not necessarily follow the order of columns in any grid shown on the form. However, if you use the **To Excel** menu option, and the currently selected field is either in a grid or has a related grid on the form, you can choose whether the spreadsheet should match the sequence of columns in the related grid or the order of the internal property list.
- In the spreadsheet, columns are created for the data (property) for each visible component on the form. If more than one visible component is bound to the same data (for example, a grid column and a combo box), there is just one column in the export. Columns that are hidden on the form are still included in the export if other visible components are bound to the same property.
- Rows with multi-line fields that contain carriage returns and line feeds do not export to a file in a regular way. To export such rows, you must copy the collection to a spreadsheet. For more information, see Copying Data to/from a Spreadsheet.

To export a collection to an external file:

1. Open the form and display the collection that you want to export.
2. From the **Form** menu, select **Export to File**.
3. In the **Export Collection to File** dialog box, from the **Source Collection** drop-down list, select the name of the collection you want to export. If you do not know the name, return to the form and click a section of the form that displays the collection. Then, to see the name of the current collection, click **Help > About This Form**.
4. From the **Cap Option** drop-down list, select one of these options:
   - To export only the records currently displayed in the collection, select **From data currently in the collection**.
   - To retrieve and export all records that match the current filter criteria, select **Unlimited query**.
5. From the **Output File Type** drop-down list, select one of these options:
   - **Comma-separated** with a set of double-quotes around each string item and then separated with commas, as in this example:

     "doejo",4,"",1,"john.doe@acmemfg.com","",
   - **Tab-separated**, as in this example:

     doejo	4		1	john.doe@acmemfg.com

   NOTE: Make sure that the external application in which you want to view the collection supports the format you select here.
6. In the **Output File Name** field, enter the full path and file name of the external file being created. If you do not specify a path, the system saves the file in the folder that contains the Infor tools program files or, if you opened the application with a Windows shortcut, in the **Start in** folder.
7. Click **OK**.

Copying Data To/From a Spreadsheet

There are times when it is useful to be able to use the data in a collection in a spreadsheet outside the system, or to bring data from a spreadsheet into a collection in the system. The system allows you to do both, including:

Copying from a grid to a spreadsheet

- An entire collection
- One or more selected records
- One or more selected columns
- One or more selected cells

Pasting from a spreadsheet into a collection grid

- An entire collection
- One or more selected records (rows)
- Contents of a single cell

NOTE: Numeric values represented by check boxes in grids are 0 (zero) when cleared and 1 (one) when selected. These values are transferred to and displayed in spreadsheets as **0** and **1**, respectively. So, if you plan to paste content from a spreadsheet into a grid and a check box value is included, you must enter the correct values as **0**s and **1**s in your spreadsheet.

Saving a Collection to Microsoft Excel

Use the **Actions>To Excel** menu option (or the To Excel toolbar button) to save a collection to a file and then automatically open the file in Microsoft Excel. The records are placed in the file *formname*Export*sequence*.csv in the local My Documents folder - for example, My Documents\itemsExport4.csv. If Excel is installed on your local system, it is launched and the new file is opened as a spreadsheet. If you have a different application set up to open comma-separated value (.csv) files, that application will open the file instead.

If the currently selected field is either in a grid or has a related grid on the form, you see this prompt: "Do you want to match the sequence of columns in the related grid?" Click **Yes** if the spreadsheet columns should match the order of the grid on the form. Click **No** if the spreadsheet columns should match the order of the property list in the form's IDO.

Only data displayed in the current collection is populated into the spreadsheet, and the usual export-to-file rules apply.

Some collections may not have the **To Excel** option enabled.

Copying Entire Collections to a Spreadsheet

You can copy an entire collection of records from the system to a spreadsheet using the steps below, or you can use the **To Excel** menu option.

These steps assume that you have the form open and the collection you want to copy showing.

To copy an entire collection to a spreadsheet:

1 Click the blank box in the upper-left corner of the grid. This action selects and highlights the entire collection.

2 Press CTRL+C or select **Edit > Copy**. The contents of the collection are copied to the system clipboard.

3 In your spreadsheet application, select the cell you want to be the first (most upper-left) cell of the collection. Typically, this is the first cell in the worksheet.

4 Press CTRL+V or use whatever command your spreadsheet program uses to paste in the material.

NOTES:

- Carriage returns and line feeds in a multi-line cell are removed when you copy a row to the clipboard. So, if you have multi-line cells, you must copy those cells separately or reconstruct them in the spreadsheet.
- This procedure can copy only the records that have actually been retrieved. So, if you want to copy all the records from a collection, and the cap prevents some records from being displayed, you must change the cap so that all records are retrieved. For more information, see Retrieving Collections and About Caps.
- By default, the system does not copy and paste the header row of the collection as part of this procedure. If you want to copy the header row as well as the records, do one of the following:
    - Use the **To Excel** menu option.
    - Select View>Settings and then select Include grid column headers when copying to clipboard in the Runtime - Behavior section.

Copying Selected Records to a Spreadsheet

You can copy a single record or a subset of records from a collection to a spreadsheet.

These steps assumes that the form is open and showing the collection you want to copy from.

NOTE: Carriage returns and line feeds in a multi-line cell are removed when you copy a row to the clipboard. So, if you have multi-line cells, you must copy those cells separately or reconstruct them in the spreadsheet.

To copy a single record to a spreadsheet:

1 Click in the left-most column for the record you want to copy. This action selects and highlights the entire record.

2 Press CTRL+C, or select **Edit > Copy**. This action copies the record to the system clipboard.

3 In your spreadsheet application, select the cell you want to be the first (left-most) cell of the pasted record.

4 Press CTRL+V or use the command your spreadsheet program uses to paste in the material.

To copy a subset of records from a collection to a spreadsheet:

1 Click in the left-most column for the first record you want to copy.

2 Shift-click in left-most column for the last record you want to copy. The subset of records is highlighted and selected.

   You can also select non-adjacent rows for the subset. To do this, use CTRL-click to select multiple non-adjacent rows, and then paste them into the spreadsheet as you would any other contiguous set of records.

   Alternatively, you can select the cells to copy by pressing shift-up, shift-down, shift-right, and shift-left.

3 Press CTRL+C, or select **Edit > Copy**. This action copies the selected records to the system clipboard.

4 In your spreadsheet application, select the cell you want to be the first (most upper-left) cell of the pasted records.

5 Press CTRL+V or use the command your spreadsheet program uses to paste in the material.

Copying Selected Columns to a Spreadsheet

You can copy a single column or a subset of columns from a collection to a spreadsheet.

These steps assume that you have the form open and showing the collection you want to copy from.

NOTE: Carriage returns and line feeds in a multi-line cell are removed when you copy a row to the clipboard. So, if you have multi-line cells, you must copy those cells separately or reconstruct them in the spreadsheet.

To copy a single column to a spreadsheet:

1 Click in the header row for the column you want to copy. This action selects and highlights the entire column.

2 Press CTRL+C, or select **Edit > Copy**. This action copies the contents of the column to the system clipboard.

3 In your spreadsheet application, select the cell you want to be the top (upper-most) cell of the pasted column.

4 Press CTRL+V or use the command your spreadsheet program uses to paste in the material.

To copy a subset of columns from a collection to a spreadsheet:

1 Click in the header row for the first column you want to copy.

2 Shift-click in header row for the last column you want to copy. The subset of columns is selected and highlighted.

   You cannot select non-adjacent columns for the subset. That is, you can use CTRL-click to select multiple non-adjacent columns, but when you paste them into the spreadsheet only the first column (or first set of adjacent columns) actually gets pasted into the spreadsheet.

   If you have one or more columns that are not adjacent to other columns you want to copy, you can drag non-adjacent columns to a position adjacent to the other columns you want to copy. Then select the set of columns to be copied, once they are all in a contiguous set.

Alternatively, you can select the cells to copy by pressing shift-up, shift-down, shift-right, and shift-left.

3 Press CTRL+C, or select **Edit > Copy**. This action copies the selected columns to the system clipboard.

4 In your spreadsheet application, select the cell you want to be the first (upper-most) cell for the pasted columns.

5 Press CTRL+V or use whatever command your spreadsheet program uses to paste in the material.

Copying Selected Cells to a Spreadsheet

You can copy a single cell or a block of cells from a collection to a spreadsheet.

These steps assume that you have the form open and showing the collection you want to copy from.

NOTES:

- Row labels are pasted in the spreadsheet as the first column. The labels are for reference only and should not be copied and pasted back into a grid. In the spreadsheet, you can delete the row-label column, unless you want to keep it for reference purposes.
- Carriage returns and line feeds in a multi-line cell are removed when you copy a row to the clipboard. So, if you have multi-line cells, you must copy those cells separately or reconstruct them in the spreadsheet.

To copy a single cell to a spreadsheet:

1 Click in the cell you want to copy.

2 Press CTRL+C, or select **Edit > Copy**. This action copies the contents of the cell to the system clipboard.

3 In your spreadsheet application, select the cell where you want to copy the contents.

4 Press CTRL+V or use the command your spreadsheet program uses to paste in the material.

To copy a block of cells from a collection to a spreadsheet:

1 Click in the first (upper-left) cell you want to copy.

2 Shift-click in last (lower-right) cell you want to copy. The block of cells is selected and highlighted.

You cannot select non-adjacent cells. That is, you can use CTRL-click to select multiple non-adjacent cells, but when you paste them into the spreadsheet only the first cell (or first contiguous block of cells) actually gets pasted into the spreadsheet.

Alternatively, you can select the cells to copy by pressing shift-up, shift-down, shift-right, and shift-left.

3 Press CTRL+Insert. This action copies the selected block of cells to the system clipboard.

4 In your spreadsheet program, select the cell you want to be the first (most upper-left) cell for the pasted columns.

5 Press CTRL+V or use whatever command your spreadsheet program uses to paste in the material.

Pasting Entire Collections into a Grid from a Spreadsheet

The information and procedure for copying an entire collection of records from a spreadsheet and pasting them into a grid are virtually the same as Pasting Selected Records (Rows) from a Spreadsheet.

The only real possible difference is that you select the entire collection instead of just a subset of rows.

Pasting Selected Records (Rows) from a Spreadsheet

You can paste the contents of selected records that you have worked on in a spreadsheet into a grid.

This might be useful, for instance, when you have copied a set of records from the system into a spreadsheet for editing and now you want to return the contents of the records, with the changes, to the system.

NOTES: When pasting data into a grid, keep the following in mind:

- The spreadsheet and the grid must follow the same data scheme. Some grids contain hidden columns. Columns in the spreadsheet must exactly match the visible columns in the grid. The first column in the spreadsheet must correspond to the first column in the grid; the second column in the spreadsheet must correspond to the second column in the grid; and so forth.

  Normally, if you originally copied from a grid into the spreadsheet, the data schemes are identical. However, in some cases, this is not true because the order of the grid may not match the order of the collection that was exported; in those cases, you must reorder the columns in the spreadsheet to match the grid order.

- Be careful, too, when ordering columns in the grid view. Because the paste order matches that of the spreadsheet, if you paste a value into a column that affects the value of a later column, then when the later column value is pasted, it might overwrite the desired (calculated) value with the value from the spreadsheet.
- You can insert rows from a spreadsheet as new rows in a grid, or you can overwrite existing rows in the grid with rows from the spreadsheet. The overwrite operation skips columns that are read-only, leaving the current values unmodified.

  This means you might have to take other steps to get the appropriate values into those read-only fields.

- The form might validate each cell when you paste rows into a grid. Invalid data in cells in the spreadsheet or empty cells that correspond to required fields in the grid might generate validation error messages. *Note that if you edit a cell in response to a validation message during the paste operation, the paste operation ends with the current record.* Therefore, we recommend that you respond **No** to all prompts for validation during the paste operation, and then go back after the operation is complete, to edit these fields.

- The maximum number of rows you can paste into a form at one time depends on the memory resources of your computer. Pasted rows are held in memory until you save them. You can avoid out-of-memory conditions and related errors by dividing a large number of records into smaller batches and then pasting and saving each batch separately.
- To ignore the values in some cells of the spreadsheet and replace them with the default value in the application, type **[null]** in those cells of the spreadsheet before copying the rows into the grid. Do not leave the cells blank. Be sure to include the brackets and use lowercase.

To paste selected rows into a grid:

1 Open the form into which you want to paste the records.

To paste the records into a blank grid, you can do a Filter-in-Place query that you know will retrieve no records. This puts the form in "new" mode. For more information, see Finding Records with Filter-in-Place.

2 In the spreadsheet, select the rows you want and press CTRL+C to copy them to the system clipboard.

Do not include the header row, if you have one. If you include the header, the paste operation probably will not complete successfully.

3 In the grid, click inside the field at the location where you want to copy the data.

In many cases, especially if you have a blank form in "new" mode, this is the first cell in the grid, though you can paste them in anywhere. Some tips:

- Do not create a new row; the paste action will automatically create the row.
- Do not click the row label. Instead, click inside any field on the row you want to replace or below which you want to append the new rows. If you are replacing multiple rows, the paste action will replace the row in which you clicked and each subsequent row, replacing the contents of those rows except for the read-only fields.

4 From the **Edit** menu, select one of these options:

- To insert new records at (below) the selected field, select **Paste Rows Append**.
- To overwrite the content of existing records, beginning with the selected field, select **Paste Rows Overwrite**. This option only overwrites active fields. Fields that are read-only are left unchanged.

Do not use CTRL+V to paste the rows. Doing so causes the system to write the entire contents of the source row to a single cell. Use one of the options listed above.

Pasting the Contents of a Single Cell from a Spreadsheet

You can paste the contents of selected records that you have worked on in a spreadsheet into a grid.

This might be useful, for instance, when you have copied a set of records from the system into a spreadsheet for editing, made minor changes in a few records, and now want to copy those changes back to the grid without having to copy and paste the entire collection.

NOTE: This does not work for blocks of cells. If you attempt to copy and paste blocks of cells, the system attempts to write the contents of all source cells to a single cell in the destination grid.

The type of contents in the source cell must match the expected type for the contents of the grid cell.

For example, if the grid is expecting an alphanumeric character string, the cell in the spreadsheet must contain alphanumeric character content. If the grid cell expects a numeral input, the source cell must contain only numeric content.

Furthermore, if the grid can accept only certain values, (for instance, **Active**, **Disabled**, or **Locked**), then the source cell can contain only those values. Otherwise, the paste operation will fail.

To paste the contents of a single cell from a spreadsheet into a grid cell:

1. Open the form where you want to paste the content.
2. In the spreadsheet, select the cell you want and then press CTRL+C to copy the content to the system clipboard.

   To avoid problems when copying content from Microsoft Excel spreadsheets, select (but do not copy) the cell, and then copy only the cell contents in the formula bar field. If you select the entire cell, certain hidden formatting content gets copied that can cause problems in the grid.
3. In the grid, click inside the field where you want to copy the data.
4. Press CTRL+V, or select **Edit > Paste**.

This action overwrites any content that was previously in the field.

Creating and Formatting Graphs from a Collection

Note: This topic applies to the graphing tool, which is supported for backward compatibility. We recommend that, if you want to add charts or gauges to a form, use the newer FusionCharts tool instead.

There are at least two ways you can redisplay data from a collection of records using a graph format:

- If you have copied the data to a spreadsheet, you can use the graphing capabilities of the spreadsheet program. For more information, see the documentation for your spreadsheet application.
- You can redisplay the data in graph format within the system, using the built-in graphing capabilities. For more information, continue with the rest of this topic.

To create a graph using the system graphing capabilities, you identify what information is to be used to construct the graph and what type of graph is to be drawn, such as a bar graph or a line graph. After the graph is displayed, you can adjust it, including changing the information included, changing the type of graph, and adjusting the labels. When you're satisfied with the online display, you can handle the results by saving, copying, or printing the graph.

Creating a Graph

To create a graph for the current collection:

1. Open a form and display the collection of records you want to graph.

If you do not want to see the graphs for all records in the collection, you can either filter the collection to display only the records you do want to see, or (especially if you want to view the graph for one particular record) select the record you want to start with in the grid view.

1 From the **Actions** menu, select **Graph**.

2 In the first page of the **Graph Collection** dialog box (**Select properties to graph from *collection***, where *collection* is the collection you are working with), select the information you want to include in the graph. In the list, click one or more properties (field names) that identify the information you want to graph.

   The system uses a different color in the graph for each property you include.

3 Click **Next**.

4 In the second page (**Select property for data label, or none**), select the information to appear in the horizontal axis labels.

   If you do not want any labels for the horizontal axis, do not select anything from this page.

5 Click **Next**. The system displays a preliminary view of the graph. By default, the graph is a 2D column chart with 8 columns.

Editing or Reformattng a Graph

To edit or reformat the graph:

- To change the type of graph, select a different option in the **Type** drop-down list and then click **Refresh**.
- To change the number of items that display at one time, type a number in the **Scroll By** box and then click **Refresh**.
- To resize the graph so you can see detailed labels and scaling, verify that the **Lock Objects** check box is cleared.

  Then, when you click an editable area of the graph, a frame with handles displays. To resize the area, use these handles. To move the editable area, click-and-drag inside the frame.
- To navigate through the records displayed in graph views, click the **<< Previous** and/or **Next >>** buttons below the graph.

Handling the Graph Results

When you move your pointer over the graph area, the three buttons appear in the upper right corner of the graph. These buttons allow you to print the graph, copy the graph to the system clipboard, or save the graph to a file.

Printing

To print the graph:

1 Generate and modify the graph using the procedures as described in the previous sections.

2 Click the Print Chart button.

The system opens the standard Print dialog box, where you can select a printer and set printer options. When you click **OK**, the system prints the graph using the selected printer and settings.

Copying

To copy the graph to the system clipboard:

1. Generate and modify the graph using the procedures as described in the previous sections.
2. Click the Copy Chart to Clipboard button.

The system copies the graph to the system clipboard. From there, you can paste it into a document or file such as a Word document, a PowerPoint presentation, or an Excel spreadsheet. You can also paste it into a graphics editing program for further touchup.

Saving

To save the graph to a file:

1. Generate and modify the graph using the procedures as described in the previous sections.
2. Click the Copy Chart to File button.

When saving, you can save the graph file in any of the following graphics formats:

- Bitmap (*.bmp)
- JPEG (*.jpg)
- GIF (*.gif)
- TIFF (*.tif)
- PNG (*.png)
- Enhanced Metafile (*.emf)

Working with Records

A *record* is a group of related pieces of data or information. On most forms, each piece of information displays in a separate field on the form. Taken together, these pieces of information constitute one record. On forms that display collections of records in grids, each row represents a single record.

In most of your day-to-day operations, you will be dealing with records. Thus, knowing how to locate, modify, and manage records is essential.

In this section of the documentation, you can find information on the following topics:

- Locating Specific Information in Records
- About Row Labels
- Printing (and Previewing) Records and Collections of Records
- About Adding, Changing, and Deleting Records

Locating Specific Information in Records

Often, when working with a collection of records, you need to find a particular record or piece of information within that record. There are a number of ways you can do this.

- With drop-down list boxes of the business-data type, you can search for valid values and retrieve a selected value into the field. For more information, see Finding a Specific Value in a Drop-Down List.
- On most drop-down lists, you can filter for designated values, to limit the number of items you must look through to find the ones you want.
- For more information, see Filtering a Drop-down List.
- On most drop-down fields, you can also search the items for specific values.
- For more information, see Finding a Value in a Collection of Records.

For other suggestions on how to locate the records you are looking for, see Tips for Finding Records.

Finding a Specific Value in a Drop-Down List

With drop-down list boxes of the business-data type, you can search for valid values and retrieve a selected value into the field.

To find and retrieve a specific value from a drop-down list:

1 Click in a drop-down list box.

2 To select the Find feature, place the focus on the field for which you want to find a value and then from the **Edit** menu, select **Find Value for Current Field**.

  NOTE: The Find feature is not available for all fields.

3 The system opens one of these forms:

  - The query form associated with the form from which you initiated the Find. If this form opens:
    - Specify any primary criteria for your search.
    - Specify any additional criteria.
    - Click **Refresh**.
    - Select a record in the **Results** pane that contains the field value you want.
    - Click **OK**.
    - At the prompt, click **Yes**. The system returns to the original form and inserts the value you selected in the field.
  - The form in which values for the field are defined. If this form opens:
    - Select the record containing the value you want.
    - From the **Form** menu, select **Close and Save Changes**.
    - At the prompt, click **Yes**. The system returns to the original form and inserts the value you selected in the field.

Filtering a Drop-Down List

When searching within a drop-down list for a particular value, it can often be a good idea to limit the contents of the list to make it easier to find the desired value. WinStudio makes it possible to filter the list, thus reducing the number of values presented.

To filter a drop-down list:

1 Click in a drop-down list box.

2 If there is a value in the box, delete it.

3 Type the characters you want to match. You can type one or more instances of the wildcard character to broaden or narrow your search. For more information, see Using Wildcard Characters).

4 Click the drop-down arrow.

The system displays a list consisting of items that match your criteria. The number of items displayed is limited to the current cap on lists.

NOTES:

- You can filter only on drop-down lists for business-data list boxes.
- Comparison operators are not supported in filtering drop-down lists.
- Validators do not run in Filter-In-Place mode.
- In two-column lists, which show an identification number in the left column and a name or description in the right column, filter criteria apply only to the left column. Also, the left column may contain leading spaces and thus require a preceding wildcard when you enter filter criteria.

For example, to find ID numbers starting with '3' in a two-column list, you may need to enter ***3***.

To filter on data in the right column, use the Find feature (if available) to open a query form.

Finding a Value in a Collection of Records

You can search the records in a collection for a specific value in a field. For example, suppose you wanted to locate the records for all customers located in the state of Indiana. Using the **Customers** form, you would search on the **State/Prov** field for the abbreviation **IN**. The Find Value in Collection feature locates the first record for the state of Indiana. You can then repeat the Find action until you locate the particular customer you want.

NOTE: This search applies only to a collection that has been retrieved and does not query the database. Thus, it is limited by the cap on records retrieved. For more information, see About Caps.

To find a specific field value in a collection of records:

1 In an open form, display the collection you want to search.

2 Click in the field or grid column you want to search.

3 From the **Edit** menu, select **Find Value in Collection**.

4 In the **Find** dialog box, **Find** field, type the value you want to find, such as a word or number.

The Find Value feature uses an "implied wildcard" search. For more information, see Implied Wildcards.

By default, the Find Value feature searches the field in the primary collection that currently has focus. If you do not want to search the primary collection, you can select a different collection and field:

- From the **In Collection** drop-down list, select the name of the collection you want to search. If you do not know the name, return to the form and click **About This Form** on the **Help** menu to see the name of the current collection.
- From the **In Property** drop-down list, select the name of the field you want to search.

5 To find records that have the exact capitalization you typed, select the **Case Sensitive** check box.

6 To find the first record that contains the value for which you are searching, click **OK**.

7 To find the next record that contain the value, press CTRL+F2; or, from the **Edit** menu, select **Repeat Find**.

Tips for Finding Records

If you cannot find the record you want in a collection, consider these possibilities:

Are you looking in the correct collection?

Try changing the focus of the form, to make sure you are focused on the correct collection. You can tell which collection currently has the focus by noting where the cursor is and/or which fields are highlighted.

Are the correct records retrieved?

To identify the current filter being used to retrieve records, from the **Help** menu, select **About This Form**.

If necessary, use Filter-in-Place or a query form to retrieve the collection you need. For more information, see one of the following topics:

- Finding Records with Filter-in-Place
- Finding Records Using a Query Form

Have you overlooked the record?

Try sorting the collection. On the **Edit** menu, click **Sort Collection**. For more information, see Sorting Collections.

You can also search for a specific value in a field in a collection. From the **Edit** menu, select **Find Value in Collection**. For more information, see Finding a Value in a Collection of Records.

Do you retrieve the same collection of records every time you use a form?

You may want to save your search criteria as a filter so that you can reuse it instead of having to re-enter it every time. For more information, see Creating and Saving Filters.

About Row Labels

Row labels appear in the far left column of a grid form. These labels show the numerical order of records in a collection and provide indicators about the current state of each record, whether it is saved, new, modified, or marked for deletion. Row labels also show whether unsaved records contain validation errors that must be corrected before the records can be saved.

Understanding Row Label Indicators

Use this table to interpret the row label indicators that display in the first column of grids:

Indicator	Meaning of the Indicator
	Indicates the current (selected) record in the collection. In a multiview form, this is the record that displays in the detail view.
	Indicates that the record is new and contains no validation errors. It has not yet been saved.
	Indicates that the record has been modified and contains no validation errors. It has not yet been saved. A modification is considered to occur whenever there is a change to a value in any field.
	Indicates a record marked for deletion. The record is removed from the database when you save the record or the collection containing it.
	Indicates at least one validation error for a new record, modified record, or record marked for deletion. The indicator is added to the row label when you navigate away from the record, receive a validation error message concerning the record, and do not correct the error. When you subsequently try to save the record, or the entire collection containing the record, the system repeats the validation error message, and you cannot save it until the error has been corrected.

Replacing a Value in a Record

You can search a collection for records that contain certain field values and replace them with new values.

To replace a field value in a collection:

1 Open the form and display the collection you want.

2 Place the cursor in the field for which you want to replace values.

3 From the **Edit** menu, select **Replace Value in Collection**.

4 In the **Replace** dialog box, **Replace** field, type the value you want to find and change.

The Replace Value feature uses what is known as an "implied wildcard" search. For more information, see Implied Wildcards.

5 In the **With** field, type the new value you want to use.

6 (Optional) From the **In Collection** drop-down list, select the name of the collection you want to search.

If you placed the cursor in the desired field before starting, the correct collection should already be selected.

If you do not know the name of the collection, return to the form and click the section displaying the collection. Then click **Help > About This form** to see the name of the current collection.

7 (Optional) From the **In Property** drop-down list, select the name of the field in which you want to make replacements.

If you placed the cursor in the desired field before starting, the correct property should already be selected.

8 To find and replace a value only if it has the exact capitalization as you typed it, select the **Case Sensitive** check box.

9 To replace the value in this field regardless of the current value, select the **All Values** check box. The **Replace** field is deactivated, indicating that any value in the field will be replaced.

10 Click **OK**.

11 When prompted, click one of these buttons:

- To replace only the currently selected and displayed field value, click **Yes**.
- To skip the currently selected and displayed field value and move to the next one, click **No**.
- To cancel the operation and make no replacements, click **Cancel**.
- To replace all values for this field in the collection, click **Yes to all**.

Printing Records

Printing Records or Collections of Records

When working with the system, it is sometimes useful to be able to print out a collection of records. The system allows you not only to do this, but also to preview the collection before actually sending it to the printer.

Previewing a Record or Collection Before Printing

Often, before actually sending a record or collection that you want to print to the printer, it is a good idea to preview what will be printed.

To preview a record or a collection before printing:

1. Open a form and display the collection you want.
2. (Optional) To print a single record, select that record.
3. From the **Form** menu, select **Print Preview**.
4. In the **Print Options** dialog box, do one of the following:
   - To preview the selected single record, click **Current Field Data**.
   - To preview the entire collection, leave **Collection Properties** selected and from the drop-down list, select the collection you want to print.

   If you do not know the name, return to the form and click the section displaying the collection. Then click **Help > About This Form** to see the name of the current collection.
5. (Optional) To sort the fields and properties listed in the **Select Fields/Properties** box alphabetically, select the **Sort Alphabetically** check box.
6. From the **Select Fields/Properties** group box, select the items you want to include in the preview:
   - To select and preview all items, leave all items in the left pane.
   - To exclude an item, select the item in the left pane, and then click **Exclude**.
   - If you have marked an item for exclusion and then decide you want to include it, select the item in the right pane, and then click **Include**.
   - To change the order, moving an item up or down in the list, use the **Up** and **Down** buttons.
7. (Optional,for collections only) To have the system place a light gray background behind alternating records, select the **Shade Alternate Detail Lines** check box.
8. (Optional) To have the system wrap record contents that go beyond the normal width of the page, select the **Word Wrap** check box.

   When this check box is selected, the system is better able to present all selected fields/properties, because the system uses multiple lines for record fields/properties that do not fit within the normal page margins. If this option is not selected, any contents that do not fit within the page margins simply get cut off and are not presented at all.
9. (Optional) To change the display font, click the **Font** button.

   Use the Windows **Font** dialog box to identify the font family, size, and style you want to use, and then click **OK**.
10. (Optional) To change the print setup options for the preview, click **Print Setup**.

    In the **Page Setup** dialog box that opens, you can adjust the following print settings:
    - Paper size and source
    - Page orientation (portrait or landscape)
    - Page margins
    - Printer settings and options (**Printer** button)

This button opens the **Printer** dialog box, where you can select a printer and make other printer-specific settings.

11 Click **OK**.

Printing a Record or Collection

The system allows you to print selected records or collections of records. Before actually printing out a record or collection, you can also preview the output.

To print a record or a collection:

1 Open a form and display the collection you want.

2 (Optional) To print a single record, select that record.

3 From the **Form** menu, select **Print**.

4 In the **Print Options** dialog box, do one of the following:

- To print the selected (single) record, click **Current Field Data**.
- To print the entire collection, click **Collection Properties**. From the drop-down list, select the collection you want to print.

If you do not know the name of the collection, you can click the section of the form that displays the collection, and then click **Help > About This Form** to see the name of the current collection.

5 (Optional) To sort the fields and properties listed in the **Select Fields/Properties** group box alphabetically, select the **Sort alphabetically** check box.

6 From the **Select Fields/Properties** group box, select the items you want to print:

- To print all items, leave all items in the left pane.
- To exclude an item, select the item in the left pane, and then click **Exclude**.
- If you have marked an item for exclusion and then decide you want to include it, select the item in the right pane, and then click **Include**.
- To change the order, moving an item up or down in the list, use the **Up** and **Down** buttons.

7 (Optional, for collections only) To have the system place a light gray background behind alternating records, select the **Shade Alternate Detail Lines** check box.

8 (Optional) To have the system wrap record contents that go beyond the normal width of the page, select the **Word Wrap** check box.

When this check box is selected, the system is able to print all selected fields/properties, because the system uses multiple lines for record fields/properties that do not fit within the normal page margins. If this option is not selected, any contents that do not fit within the page margins simply get cut off and are not printed at all.

9 (Optional) To change the display font, click the **Font** button.

Use the Windows **Font** dialog box to identify the font family, size, and style you want to use, and then click **OK**.

10 (Optional) To change the print setup options for the preview, click **Print Setup**.

In the **Page Setup** dialog box that opens, you can adjust the following print settings:

- Paper size and source
- Page orientation (portrait or landscape)
- Page margins
- Printer settings and options (**Printer** button)

This button opens the **Printer** dialog box, where you can select a printer and make other printer-specific settings.

11 Click **OK**.

12 (Optional) In the Windows **Print** dialog box, you can select an alternate printer, set additional print options, and so on, before sending the output to the printer.

13 Click **OK**.

About Adding, Changing, and Deleting Records

After you add a new record or change an existing record, you have the option of saving it immediately or saving it later. If you do not save it immediately, the record is marked as new or modified in its row label.

Similarly, when you delete a record, it is labeled as deleted but the deletion is not committed to the database until you save the record.

Before you save your changes, you can undo them, singly or in a batch. You can then make further changes, remove a new record, or restore a record you have marked for deletion.

When you save the changes, they are transferred to the database for permanent storage and the status labels are removed.

Within a collection of records, you can:

- Add a new record
- Copy a record
- Check for and correct errors
- Save records, either singly or all at once
- Delete records
- Undo deletion of records
- Undo changes to a record
- Undo all changes and deletions in a collection of records
- Copy records to or paste records from a spreadsheet

Adding Records

With most forms that display records in grids, you can add (new) records to the collection. When you do so, the new record is added after whichever record is currently selected.

To add a record:

1 Locate and select the record in a collection after which you want to add the record.

If you want to add the record after the current last record in the collection, you can simply select the last row in the grid, which has the asterisk in the row label.

2 From the **Actions** menu, select **New**.

3 Complete the fields as needed.

4 Save the record.

Copying Records

Copying a record, rather than creating a new one, and then modifying it, can often save time in repetitive data-entry tasks.

To copy a record:

1 Select the record to copy.

2 Do one of the following:

- From the **Actions** menu, select **Copy**.
- Right-click the row and then, from the context menu, select **Copy**.

A copy of the selected record is inserted as the next record.

3 Edit the record as needed.

4 Save the record.

NOTES:

- If the record contains a field with a number that is automatically assigned and cannot be manually changed, the system assigns the next available number to the copied record when you save it.
- If the record contains a field with a number that is automatically assigned but which can be changed manually, the number is duplicated in the copied record. You can update the value manually before you save the record. To allow the system to assign the next available number automatically, make the field blank before you save the record.

Checking for and Correcting Errors

Checking for Errors

Most forms validate new and modified records and report *validation errors*. The system displays messages about any field that contains an invalid value or about any field that requires a value but does not contain one.

EXAMPLE: One such validation error is a faulty date entered in a date field. If the field requires a date after today's date and you enter an earlier date, the system displays an error message.

The validation procedure occurs, and any error messages display, when you:

- Navigate away from a new or modified record.
- Attempt to save new or modified records.
- Select **Validate** from the **Actions** menu.

To check records for errors, perform any of these actions.

Some fields are set to validate immediately and not wait until you perform one of these actions. In these cases, validation occurs as soon as you attempt to move the focus to another field in the same record.

Validation Error Messages and Correcting Errors

When you perform an action, other than an action to save all records, that triggers validation, the system displays an error message for the first *field* in the *current record* that contains an error. If there are multiple errors, the system then cycles through each field with an error.

If you attempt to save a form that has multiple records with errors, the system reports which *records* in the *current collection* contain errors. You cannot save the form until all errors have been corrected.

To correct the current record:

1. When the system presents the error message and prompts you to respond, click **Yes**.

   The insertion point moves automatically to the field containing the error.
2. Enter a valid value.
3. From the **Actions** menu, select **Validate**.
4. If the system displays an error message, repeat steps 1 and 2 until no field in the record contains an invalid value.

To correct records in the collection:

1. Note the record numbers in the error message. They correspond to row labels in the grid form.
2. Navigate to a record indicated by a row number.
3. From the **Actions** menu, select **Validate**.
4. Note the name of the field reported in the error message.
5. Move the insertion point to the field named in the error message.
6. Enter a valid value.
7. Repeat steps 3 through 6 until all fields in the current record are valid.

Repeat the entire procedure until you have corrected all records indicated in the error message from the save operation.

Other Warning and Informational Messages

Some forms are designed to report warnings and other information in a dialog box. The dialog box opens when you attempt to save records. Use the dialog box to troubleshoot and correct the problems:

- To move from the dialog box to the associated record in the form, double-click the message.
- If a record is associated with several messages, you can expand the display to see them all. Select the message and click the **Expand Selection** button.
- You can close the dialog box and redisplay it later.

To close it, Click **Done**.

To reopen it, from the **View** menu, select **Warning Messages**. The messages remain available for viewing until you refresh the collection or perform another save operation.

Saving Records

When saving records, you have two options: You can save a single record, or you can save all records at one time.

You can selectively save new or modified records in a collection. Similarly, you can selectively commit single deletions to the database.

Alternatively, if you have made multiple changes in a form, for instance, if you have added new records in a form, modified them, or marked them for deletion, you can save all changes to the records in a single step.

To save a single record, select the record and select **Actions > Save current** from the menu.

To save all records, select **Actions > Save**.

Deleting Records

You can delete a single record or a group of adjacent records from a collection.

To delete a record:

1. Select the record you want to delete.
2. From the **Actions** menu, select **Delete**.
3. When the system notifies you that the record will be permanently deleted after a Save action, click **OK**.
4. To delete the records permanently from the database, save the collection.

To delete a group of records:

1. Click the row label for the first record in the group you want to delete.
2. Hold down SHIFT and click the row label of the last record you want to delete.
3. From the **Actions** menu, select **Delete**.
4. When the system notifies you that the records will be permanently deleted after a save action, click **OK**.
5. To delete the records permanently from the database, save the collection.

NOTE: The system does not actually delete a record from the database until you save your changes. If you make a mistake or change your mind about deleting records, you can unmark those records. For more information, see these topics:

- Undoing Deletion of Records
- Undoing Changes to All Records

Undoing Deletion of Records

A record is not permanently deleted from the database until you save it. Before you save the record (thus deleting it permanently), you can undo the deletion.

Note that after you save a record or a collection that has records marked for deletion, you cannot undo the deletions.

To undo deletion of a record:

1. Select the record marked for deletion that you want to unmark.

   Records marked for deletion have a **(d)** in the row label.

2. From the **Actions** menu, select **Delete**.

Notice that the system unmarks the record for deletion, and the **(d)** no longer appears in the row label.

To undo deletion of a group of records:

1. Click the row label for the first record marked for deletion in the group.
2. Hold down SHIFT and click the row label of the last record marked for deletion in the group.
3. Do one of the following actions:
4. From the **Actions** menu, select **Delete**.

Undoing Changes to a Record

If you have made changes to a record but not saved the record or the form, you can undo your changes and restore its original values. In a record marked for deletion, this procedure removes the deletion mark as well as undoing any changes to field values.

> **CAUTION:** Note that, after you save a record or form that has records that have been changed, you cannot undo the changes.

To undo changes to a record:

1. Select the record for which you want to undo the changes.

   Records that have been changed have **(m)** in the row label.

2. From the **Actions** menu, select **Refresh Current**.

Notice that the system restores any changes made to their original values, and the **(m)** no longer appears in the row label.

Undoing All Changes to Records

If you have made changes to multiple records or marked multiple records for deletion, but you have not saved the records or the form, you can undo your changes and restore records to their original values. In records marked for deletion, this procedure removes the deletion marks as well as undoing any changes to field values.

> **CAUTION:** Note that, after you save a record or form that had records that had been changed or marked for deletion, you cannot undo the changes.

To undo all changes to records:

1. From the **Actions** menu, select **Refresh**.
2. When asked if you want to save changes, click **No**.

Notice that the system restores any changes made to their original values, and change indicators no longer display in the row labels.

Working with Fields

The system displays each piece of information in a record in a different field (in a detail view) or column (in a grid view). Taken together, all the related fields on a form typically constitute one record. *Fields* represent the most basic bit of information in a record.

In this section, you can find the following information about fields:

- Types of Fields
- The significance of background colors in fields
- About Drop-down Lists
- Date fields
- Changing or deleting specific field values
- Use of graphics or other binary objects in fields

About Editable Field Types and Colors

The foreground (font) and background colors of certain components can be used to indicate whether values for those fields:

- Are required or are optional
- Can be updated or are read-only
- Can be (optionally) generated by the system (To Be Determined – TBD)

The default colors for these fields are preset in the system, though your system administrator can change them for your system, using themes.

These are the four basic types of fields that can be controlled in this way:

Type of field	Description/Comments
Required	Indicates that you must enter a value for a record before you can save the record. NOTE: A required field that is part of an optional subcollection is required only if you create a record in the subcollection. For example, when you add a new user on the Users form, you can optionally enter group information for the user, but it is not required. However, if you do create a group record, the Group Name and Primary Group fields on that record must be filled in. Optionally, the system can be set to use, in place of or in addition to a set of colors, a red asterisk in front of the field name. System administrators can set this using a theme. To change the colors for required fields, use the Required Foreground and Required Background color options in the Theme Editor.
Optional	Indicates that the field does not require a value for the form to be saved. To change the colors for optional fields, use the Foreground and Background color options in the Theme Editor.
Read-only	Indicates that the value in the field cannot be changed by the end user. To change the colors for read-only fields, change the Read-Only Foreground and Read-Only Background color settings in the Theme Editor.
To Be Determined (TBD)	Indicates that the value will be generated by the system at the time the record is saved, if no other value has been specified. In this type of field, you have the option to enter your own value. If you do not enter a value, the system generates a value for the field automatically when you save the record. Optionally, the system can be set to use, in place of or in addition to a set of colors, a green asterisk in front of the field. System administrators can set this using a theme. To change the colors for TBD fields, change the TBD Foreground and TBD Background color settings in the Theme Editor.

The components that can be controlled using these settings include:

- Check boxes
- Combo boxes
- Date pickers
- Drop-down lists
- Edit fields

- Grids and grid columns
- Option (radio) buttons
- Vertical grids and vertical grid elements

Types of Fields

WinStudio uses a variety of field types to present options and information. It is at the field level that changes to records take place, so it is a good idea to understand the different types of fields.

Types of Fields

Type	Description
Input fields	Input fields allow you to enter information to be saved with the record. The type of input (whether alphabetic only, numeric only, alphanumeric, or other) depends on how the field is defined. For more information about a particular input field, see the online help for that field. The background color of the field indicates how you are intended to use it. For more information, see About Field Types and Background Colors
Drop-down lists	Drop-down lists are intended primarily to allow you to select an item from a list that is displayed when you click the drop-down arrow. However, in many drop-down lists, you can type in particular values you want or values to use as the basis for a Find operation. Drop-down lists come in two types: Business-data lists and option lists. For more information about these list types and how to use them, see About Drop-down Lists.
Check boxes	Check boxes typically represent an on/off option. When selected, a check mark appears inside the box (as in the example here), and the option is considered "on." When it is cleared (that is, the check box is empty), the option is considered "off." Check boxes are often presented in groups where several related options can all be either selected or not.
Option buttons	Option buttons (sometimes known as "radio buttons") are typically used for a group of mutually exclusive options. In these cases, only one option can be selected. In most cases, all options are not selected until you actually select one. In grid columns, the cell displays the selected option, if any.

Using the Question Mark Character

In fields that have a green background (generated fields), you can use the question mark (?) character to fill in and increment after a prefix. For example, if you enter “JB?”, in a Job Number field on a Job Orders form that uses this functionality and then save, the system expands it to “JB00000001”. If you add another record with “JB?”, it increments it to “JB00000002”, etc.

About Drop-down Lists

The system uses two basic drop-down list types: business-data lists and option lists.

Business-Data Lists

The drop-down list for a *business-data list* displays information added to the database by system users using data-input forms.

Filtering Lists

You can filter to reduce the number of items returned and displayed in the drop-down list. For more information, see Filtering a Drop-down List.

Right-click Context Menus

Right-clicking a business-data list field brings up a context menu that usually presents the **Add**, **Details**, **Find**, and **Help** commands. These commands, along with other features for using business-data lists, are basic aids to finding and entering information in the system. For more information, see:

- Finding a Specific Value in a Drop-Down List
- Adding a New Field Value
- Finding Details about a Value in a Drop-down List
- Getting Help

Refreshing Lists

While you are viewing a form containing a business data drop-down list, you or another user might edit the records in the original form from which the list is derived. Any new or removed records are not reflected in the list, unless you refresh it.

To refresh the list:

Perform one of the following actions:

- With the cursor in the list field, press F2.
- Type one wildcard character (usually *****) in the list field, and then click the drop-down arrow.

Option Lists

The drop-down list for an *option list* displays a fixed set of options. These options are built-in to the system, rather than being created and stored in the database. You cannot usually change the options in these lists, and they usually have fewer than ten items.

The three statement cycle options **Weekly**, **Monthly**, and **Quarterly** are built-in to the system and cannot be changed or added to.

Right-click Context Menus

The right-click context menu for option-lists usually presents only the **Help** command. For more information, see Getting Help.

Finding a Specific Value in a Drop-Down List

With drop-down list boxes of the business-data type, you can search for valid values and retrieve a selected value into the field.

To find and retrieve a specific value from a drop-down list:

1. Click in a drop-down list box.
2. To select the Find feature, place the focus on the field for which you want to find a value and then from the **Edit** menu, select **Find Value for Current Field**.

   NOTE: The Find feature is not available for all fields.
3. The system opens one of these forms:
   - The query form associated with the form from which you initiated the Find. If this form opens:
     - Specify any primary criteria for your search.
     - Specify any additional criteria.
     - Click **Refresh**.
     - Select a record in the **Results** pane that contains the field value you want.
     - Click **OK**.
     - At the prompt, click **Yes**. The system returns to the original form and inserts the value you selected in the field.
   - The form in which values for the field are defined. If this form opens:
     - Select the record containing the value you want.
     - From the **Form** menu, select **Close and Save Changes**.
     - At the prompt, click **Yes**. The system returns to the original form and inserts the value you selected in the field.

Filtering a Drop-Down List

When searching within a drop-down list for a particular value, it can often be a good idea to limit the contents of the list to make it easier to find the desired value. WinStudio makes it possible to filter the list, thus reducing the number of values presented.

To filter a drop-down list:

1 Click in a drop-down list box.

2 If there is a value in the box, delete it.

3 Type the characters you want to match. You can type one or more instances of the wildcard character to broaden or narrow your search. For more information, see Using Wildcard Characters).

4 Click the drop-down arrow.

The system displays a list consisting of items that match your criteria. The number of items displayed is limited to the current cap on lists.

NOTES:

- You can filter only on drop-down lists for business-data list boxes.
- Comparison operators are not supported in filtering drop-down lists.
- Validators do not run in Filter-In-Place mode.
- In two-column lists, which show an identification number in the left column and a name or description in the right column, filter criteria apply only to the left column. Also, the left column may contain leading spaces and thus require a preceding wildcard when you enter filter criteria.

For example, to find ID numbers starting with '3' in a two-column list, you may need to enter ***3***.

To filter on data in the right column, use the Find feature (if available) to open a query form.

Adding a New Field Value

If a value does not exist in a drop-down list, and you need it, you can add the new value and insert it into the field.

To add a new value and insert it in a field:

1 Open a form and display the record you want to add the field value to.

2 Click in the field you want.

3 From the **Edit** menu, select **Add Value for Current Field**.

   The Add feature is available only for business-data list fields.

   The system displays the form used to maintain the values (records) for this field and inserts a new record automatically.

4 Complete the fields for the new record.

5 From the **Form** menu, select **Close and Save Changes**.

The system returns to the original form and inserts the new value into the field.

Finding Details About a Value in a Drop-Down List

At times, when looking for a particular item in a business-data list, you might want to know more about an item before you select it, perhaps to verify that it is the correct one. Most business-data lists allow you to search for details using a right-click menu option.

To find details on a particular list item, with the cursor in the field

1 Select the drop-down list for which you want to find details.

   NOTE: Not all drop-down lists have this option available. Generally, only business-data lists offer this option.

2 From the **Edit** menu, select **Details for Current Field**.

3 When you are finished, close the dialog box.

Changing the Cap on Drop-Down Lists

If you cannot display in a drop-down list all the items you need to see, it is possible to reset the default cap so that the system displays the number of items you need.

To change the cap on items displayed in a drop-down list:

1 From the **View** menu, select **Settings**.

2 Locate the **Caps > Drop-downs** group box.

3 Select the option you want to specify for the new cap:

   - **Use default:** The system uses the default cap, which is 200 items.
   - **Retrieve all:** The system retrieves all items that meet any specified search criteria.

     CAUTION: Consider carefully before selecting this option. Unlimited retrieval of a list of items can degrade system performance.

   - **Use specified max:** In the field to the right of this option, enter the maximum number of items you want to be able to display.

   Note that transferring data for a large number of items to your system can degrade performance.

   If the **Use default** option is selected, the value **-1** appears in this field.

4 Click **OK**.

5 To refresh a list, type a wildcard character (an asterisk * by default) in the list box and then click the drop-down button.

NOTES:

- System administrators can override either the "Retrieve all" or "Use specified max" setting with a system-wide maximum record cap that is set in the Process Defaults form. So, for example, if you set the system to display up to 500 items, but the system administrator has set a system-wide maximum of 250, the greatest number of items you can actually display is 250.
- The cap you designate applies only to business-data lists.

- Any change you make to the cap lasts only until you exit the application. The next time you open the application, the default cap is in effect.

Entering Dates

To select a date from a pop-up calendar:

1. In the date field, click the drop-down arrow.

   The system displays a pop-up calendar with the current date selected.

2. Use the calendar to select the date you want:
   - Click a date in the calendar to enter it in the field.
   - To change the month, click the forward or back arrows at the top of the calendar.

If the system converts the date to the appropriate format when you exit the field, the input is accepted.

To type a date manually:

1. Place the cursor in the date field.
2. Type the date in the field, using any valid date format.

Changing or Deleting Field Values

You can change or delete a value in a field's drop-down list.

NOTE: These steps apply only to business-data lists.

To change or delete a field value:

1. Open a form and display the record for which you want to change a field value.
2. Select the value you want to change, and leave the cursor in the field.
3. From the **Edit** menu, select **Details for Current Field**.

   The system displays the form used to maintain the values (records) for this field and automatically selects the value you selected.

4. Make your changes or delete the record.
5. Save your changes and close the form.

   The system returns to the original form. The field you selected reflects the changes.

   NOTE: You might have to refresh the collection to see the changes. From the **Actions** menu, select **Refresh**.

Graphics and Other Binary Objects in Fields

If you can use graphics or other types of binary objects in a field, commands on the **Edit** menu are enabled so you can work with the object.

To view the graphics file or object:

1. Click inside the field.
2. From the **Edit** menu, select **View Binary Data for Current Field**.

The system opens the program associated with the file type and displays the object.

> **EXAMPLE:** If the file is a bitmap (.bmp) image, and you have your system to open bitmap objects with Microsoft Paint by default, the system opens Paint and displays the bitmap image.

To insert a graphics file or other binary object:

1. Click inside the field.
2. From the **Edit** menu, select **Import Binary Data for Current Field**.
3. In the dialog box, identify the file you want to use.

The dialog box lists only the types of files appropriate for the field.

To delete a graphics file or other binary object from a field:

1. Click inside the field that contains the object.
2. From the **Edit** menu, select **Delete Binary Data for Current Field**.

To export the graphics file or other object to an external file (so you can use it elsewhere):

1. Click inside the field that contains the object.
2. From the **Edit** menu, select **Export Binary Data for Current Field**.
3. In the dialog box, enter the name to be assigned to the exported file.

The dialog box lists only the file types appropriate for the object you are exporting.

About Charts on Forms

Some forms include an area that displays important information from the fields on the form as a chart, to help comprehension. The values in the chart change depending on which record is selected.

Adding and Viewing User Tasks

Creating a Task

You can create user tasks, similar to those in Microsoft Outlook, to help you keep track of important dates, tasks, notes to yourself, and so on. If you set a reminder date, the system reminds you when the task is due.

In addition, authorized system administrators can also create tasks and assign them to you.

To create a task:

1. To access the Create User Task form, select **View > Task**.
2. In the **Task Name** field, specify a name for the task.
3. In the **Remind Date** field, specify a reminder date and, optionally, time.
   To specify both a date and time, enter the date/time manually, in the format *DD/MM/YY HH:MM:SS AM|PM*.
4. (If you are a system administrator creating a task for another user) In the **User Name** field, specify the user for whom you are creating the task.
5. If you want the task to be deleted after the reminder date has passed, select **Delete After Reminder**.
6. (Optional) Use the **Description** field to specify any additional information about the task.
7. Click **OK**.

Setting a Notification Sound and Icon

When a task reminder date and time is reached, the system sends a notification message and places it in the Inbox form.

In the **View > Settings** window, you can set prompts that occur when a notification message is received in your **Inbox**:

- Play a sound.
- Display an envelope icon in the notification area of the taskbar.

Viewing the Task List

To see the complete list of tasks that you currently have, open the Task List form. To open this form, use the standard methods such as **Form > Open**, or click **My Tasks** on the **Create User Tasks** form.

Authorized system administrators can select the **Show All** check box on the **Task List** form to view all tasks created by all users. After you select **Show All**, you must reapply the Filter-in-Place.

Viewing Notification Messages

To see and delete notification messages in the **Inbox** form, select **View > Inbox**.

Deleting a Task

You can define tasks so that the system automatically deletes them after it sends the reminder. To do this, select **Delete After Reminder** on the **Create User Tasks** form or the **Task List** form.

You can also manually delete a task from the **Task List** form.

Creating Workflows with the Wizard

Users such as purchasing managers or executives can use the **New Workflow Wizard** to quickly create workflows (event handlers and actions) for some basic notification scenarios. For example, a purchasing manager can build a workflow to "Notify me when a PO line is created for more than $1000."

As you make simple choices in the wizard, behind the scenes the system is creating event handler and event actions metadata that can later be viewed or edited in the standard Application Event System (AES) forms.

Building a Workflow

To build a simple notification workflow:

1. On the first page of the **New Workflow Wizard**, specify one of these options:
   - **Notify Me When:** Select this option to receive a notification in your Mongoose **Inbox** when the change you specify in the following pages is made to the system
   - **Notify You When:** Select this option if the person who makes the specified change should receive a notification in their Mongoose **Inbox.**
   - **Build from Scratch:** Select this option and click **Finish** to exit the workbench and use the standard AES forms to build the workflow.
2. Select **Customize Resulting Workflow** if you want to open the event handler you created in the standard AES forms when you finish building the workflow through the wizard. This option is enabled only if you selected one of the Notify options.
3. Click **Next**. On the second page of the wizard, specify these options:
   - Specify a description of the workflow. You can change the description on later pages.
   - Specify the IDO and/or form that you want the system to track. You must identify the IDO. In addition, you can further restrict the triggering condition by specifying the form where the changes are made. See the Examples below.

   Note: If you select a form name and then click in the **IDO** field, the IDO is automatically filled in (this can be helpful if you know the form but not the IDO). If you specify an IDO name, and you want the workflow to apply to all forms that use that IDO, you can either leave the **Form Name** field blank or select **All Forms**. If you want the workflow to apply to all IDOs associated with the specified form, select **All IDOs**.

   - Specify the type of operation on that IDO (**Additions**, **Changes**, or **Deletions**) that will trigger the notification.
4. Click **Next**. On the third page of the wizard, specify these options:

- Specify **All Rows** to trigger the notification on any change to the IDO, or select **Where** and specify property and value filter criteria if you only want a notification triggered when the change is for a row that matches the filter criteria.
- To specify multiple filter clauses, specify whether to use **And** or **Or** to join the new clause with the preceding one, and click **Add**.
- For each clause, you can specify one of these options:
  - Property, operator, and value
  - Property, operator, and another property, with an optional date-time adjustment
  - Property, operator, and the date/time when the workflow runs, with an optional adjustment.

See the Examples below.

5 Click **Finish** to complete the workflow. (The Next button on this page is reserved for future use.) If you selected **Customize Resulting Workflow**, the **Event Handlers** form is launched for this workflow's event handler.

Example 1: PO Line Cost Greater than $1000

To create a workflow that sends a notification to your Inbox when a new purchase order line is added where the cost is more than $1000:

1 In the first page of the New Workflow Wizard, select **Notify Me When**.

2 In the second page of the wizard, specify the description as **Notify me when new PO line cost is > $1000**.

3 For **Apply To**, select the **PurchaseOrderLines** form and click in the **IDO** field to display the appropriate IDO (**SLPoItems**) and caption (Purchase Order Items).

4 For **What to Track**, specify **Additions**.

5 In the third page, specify the filter criteria:

- Select **Where**. The caption for the IDO you selected on the previous page is displayed (Purchase Order Items).
- Select the appropriate property, **DerExtItemCostConv**, from the drop-down list. Note that the field label associated with the property is displayed in the drop-down list where possible, to help you find the property you want. In this case, DerExtItemCostConv has the field label Extended Cost, which is what you want to compare to your maximum amount.
- Specify the operator, in this case "greater than" (>).
- Specify the value to compare to, in this case **1000**. Do not specify separators or currency symbols.
- Click **Add This Clause** to add your filter to the workflow.

6 Click **Finish** to complete the workflow.

7 To test the workflow, ask another user to add a new PO line for more than $1000. You should receive a notification in your Inbox.

Example 2: PO Line Promise Date Later Than Due Date

To create a workflow that sends a notification to your Inbox when a PO line change occurs and the Promise Date is later than the Due Date:

1 Follow steps 1-3 from the first example.

2 For **What to Track**, specify **Changes**.

3 In the third page, specify the filter criteria:

- Select **Where**. The caption for the IDO you selected on the previous page is displayed (Purchase Order Items).
- Select the appropriate property, **PromiseDate**, from the drop-down list.
- Specify the operator, in this case **Is after**.
- Specify the other property to compare to, in this case **PurchaseOrderItems.DueDate**.
- Click **Add This Clause** to add your filter to the workflow.

4 Click **Finish** to complete the workflow.

5 Test the workflow.

Viewing Your Finished Workflows

After you finish creating your workflow, you can view it in the **My Workflows** form. If you want to further customize a workflow, you can use the editors on the **Event Handlers** form.

Event Handlers cannot be deleted. You can, however, edit the Event Handler and mark it as Obsolete.

Utilities and Activities

Utility and activity forms process multiple records in one operation. They typically perform tasks such as purging records, updating values, posting transactions, or changing the status of records. The **Delete Audit Logs** form, for example, deletes all audit logs created between specified dates for specified message types.

To use a utility or activity, you specify criteria to select information to be processed and you select options to define the processing task. The form then processes information that meets the criteria. In certain forms, you can preview results of the process before you save them in the database.

For the **Change Vendor Contract Price Status Utility**, which is used to mass update a range of vendor contract price records from a status of pending to approved, if there is already an approved record for one of the records in the results set, this utility overwrites the existing approved contract break quantities and prices with data from the pending record.

Previewing and Saving Results in Utilities and Activities

Utility and activity forms that display a grid provide an option to preview the results of processing data without actually changing records in the application database. You can use this feature to assess your selection criteria and task options. You can adjust them as needed before you save the changes. You can also use the results as you would use information in a spreadsheet, searching columns for values, sorting rows, and so forth.

Results display in the grid at the bottom of the form.

Previewing the Results of Running a Utility or Activity

1. Specify your processing criteria on the form.
2. Select **Preview**.
3. Click **Process**.

Saving the Results of Running a Utility or Activity

1. Specify your processing criteria on the form.
2. Select **Commit**.
3. Click **Process**. Modified records are stored in the application database.

Specifying Selection Criteria in Utilities and Activities

In many utilities and activities, you select items to process by defining a range of values or several ranges of values. *Range fields* are pairs of fields with which you specify a starting value and an ending value.

Range fields can apply to identification numbers (such as purchase order numbers or line numbers), dates, names, and most other types of information.

To select:

- **One item** - enter the same value in both the Starting field and the Ending field.
- **All items** - leave both the Starting field and the Ending field blank.
- **Items between and including two values** - enter the lower value in the Starting field and the higher value in the Ending field.
- **Items from the lowest value through a specified value** - leave the Starting field blank and enter the cutoff value in the Ending field.
- **Items from a specified value through the highest value** - enter the specified value in the Starting field and leave the Ending field blank.

Using Results from Utilities and Activities

Utility and activity forms that contain a grid allow you to use the results of a process as you might use data in a spreadsheet. The result set displayed in the grid is similar to other collections of records in the application.

Finding values in results

Sorting rows in results

Copying results to a spreadsheet

Exporting results

Printing results

Scheduling Background Tasks

Many utilities, reports, and some activities can be scheduled to run daily, weekly, or monthly. Once scheduled, the process runs automatically in the background at a set time, using your selection criteria and option settings.

NOTE: Forms that can be scheduled to run in the background have the command **Background** in the **Actions** menu.

Scheduling a Process to Run in the Background

1. In a utility or activity form, set your selection criteria and task options.
2. On the **Actions** menu, select **Background**. This displays the **Background Queue** form.
3. In the **Frequency** field, select an interval to use as a time unit in scheduling. If you select **Weekly**, for example, you can subsequently specify that the process runs every third week. To run a process once, select **Daily**.
4. Set times and dates based on the frequency.
   - **Daily** - To run the process once, select **Occurs once at** and enter a time and date.

   To run the process periodically, select **Occurs every** and specify an interval (for example, specify 24 Hours to run a process once a day) and a starting time.

   - **Weekly** - Specify the number of weeks in the interval, the day of the week on which to start the process, and the time of day.
   - **Monthly** - To run the process on a specified date of the month, select **Occurs on day.** To run the process on a specified day of the week, select **Occurs on**. Enter the number of months in the interval, the date or the day of the week on which to start the process, and the time of day.
5. Click **OK**.

One Time Only Tasks

To run a task one time only:

1. On the left side of the form, select **Daily**.
2. On the right side of the form, select **Occurs once at**.
3. Specify the time and date.

Recurring Tasks

To schedule a task to run on a daily, weekly, or monthly basis, select that option from the left side. Then specify the occurrence information on the right side.

Checking whether the Task is Running

You can see which tasks are currently running by opening the **Active Background Tasks** form.

The task name should be the same as the report or utility's form name. If the task's status is WAITING, it is waiting for its scheduling requirements to occur. You can delete a WAITING task from the list.

Viewing Details about the Completed Task

Once the task has run, even if it fails, you can view details about its execution on the **Background Task History** form. Details include:

- Task description
- Return status
- User who submitted the task
- Messages triggered by the task

About Printing Records and Collections

You can print records or collections or records from any form that handles records or collections. Such printing is handled on your computer (as opposed to the system server).

If you print a single record, fields are listed alphabetically opposite their values.

If you print an entire collection of records, field labels become column headings, and each record becomes a row in the printed table.

Working with Reports

Reports Overview

The system includes a number of forms dedicated to generating reports. These report forms cover a wide spectrum of reportable data and can be customized to meet your business needs. You can also create and generate your own custom reports. For more information on creating and customizing reports, see the guide, *Creating and Customizing Reports*, available from our support site.

Reports can be generated in several formats, which can then be delivered to printers, e-mail addresses, or fax machines. Most reports also allow you to set various options and preview the output before actually generating it.

To better understand reports and how to generate them, see these topics:

- Generating Reports
  - Previewing Reports
  - Printing Reports
  - E-mailing Reports
  - Faxing Reports
- Setting Report Options
- Setting Ranges
- Printing Notes
- Determining Fonts and Languages
- Assigning Date and Number Formats
- Getting E-mail Notifications
- List of Core Reports (with descriptions)
- Troubleshooting Reports

Generating Reports

To *generate* a report means to output it to a printer, to an e-mail recipient, or to a fax destination. When you click the **Print** button on a report form, you generate the report.

When you generate a report, the report is sent to the background task queue, where it is then routed to the report generator. From there, it is routed either to a printer, to an e-mail recipient, or to a fax destination, depending on the options for that report as set on the **Report Options** form.

Previewing Reports

Most reports allow you to preview the output before generating it. Report previews behave the same as generated reports, with the following exceptions:

- Previews are not sent to a printer.
- Previews cannot be configured using the **Report Options** form. Previews use global settings defined on the **Intranets** form.
- PDF is the default preview format. If you must use Chrome, Safari, or Firefox as your browser, you must set the format to PDF.
- Previews are displayed on screen automatically after the preview file is created.
- E-mail notification is not needed or supported.

To preview a report:

1 Open a report form and define the report parameters.

2 Click **Preview**. When the processing required to create the preview is complete, the preview displays on the screen.

After you click the **Preview** button, a preview window displays. Closing the preview window will close the message window and prevent the preview from opening. However, the preview background task continues to run and preview files are generated. If you believe there is a problem with a preview, and you would like to cancel the background task, contact your system administrator.

Printing Reports

When you print a report, the report data is first sent to the report generator and then to the printer. The system uses printing options as set on the **Report Options** form or the **Intranets** form. You have the option to select a printer other than your default printer. You can also preview the report before you actually print it.

To print a report:

NOTE: Before reports can be printed, TaskMan must be set up as described in the *System Administration Guide*.

1 (Optional) Verify that the **Report Options** form has been set up for the report you are running.

Make sure the **Output Format** field for this report is set to **Printer**.

If no option record exists for your report, the report output defaults to the format as set on the **Intranets** form. The default output format on the **Intranets** form is **Acrobat Format** (PDF).

NOTE: If you do not select **Printer** as the output format on either the **Report Options** form or the **Intranets** form, the output does not go to a printer.

2 (Optional) To be notified by e-mail that the report has been printed, verify that:

- On the **Report Options** form, the **E-mail Notification** field is set to **Yes** for your user ID or for the report you are printing, or both.
- Your e-mail address is on the **Users** form.
- On the **Intranets** form, the **Send E-mail Notification** field is selected.

3 Open the report form and define the report parameters.

4 (Optional) To send output to a printer other than your default printer:

   a Click Select Printer.

   b The system opens the **Report Options** form.

   NOTE: If you do this step, the **Report Options** form opens with limited functionality. This functionality is restricted to allow you only to select a printer. To make other changes to the report options for this report, you must perform Step 1.

   c In the **Report Options** form, if necessary, scroll to the right to locate the **Printer Name** column.

   d Specify the printer you want from the drop-down list.

   e Save and close the **Report Options** form.

   NOTE:

   You can select different printers for successive print jobs, but you must be careful: TaskMan uses whatever printer you have designated at the time it runs the print job.

   Suppose, for example, that you queue up one print job to use Printer A and then a second print job to use Printer B. If TaskMan already had a queue and did not pick up the first job before you switched printers for the second job, then TaskMan uses Printer B for both print jobs.

   To be safe, it is best to let one print job finish, if possible, before initiating the second print job.

5 (Optional) Preview the report output.

   For more information, see Previewing Reports.

6 Click **Print**.

E-Mailing Reports

When you send the report as an e-mail, the system sends it to the e-mail address entered on the **Report Options** form, or the **Intranets** form (if none is used on the **Report Options** form).

To e-mail a report:

NOTE: Before reports can be printed, TaskMan must be set up as described in the *System Administration Guide*.

1 (Optional) Verify that the **Report Options** form has been set up for the report you are running:

- Make sure the **Output Format** field for this report is set to anything *other than* **Printer**.

NOTE: If no option record exists for your report on the **Report Options** form, the report output defaults to the format as set on the **Intranets** form. The default output format on the **Intranets** form is **Acrobat Format** (PDF).

- Verify that the **E-mail Notification** and **Attach Report** fields are both set to **Yes**.

  If you do not want to attach a copy of the report to your e-mail notification, you can leave the **Attach Report** field set to **No**. If you later want to view the report, you can find the output file at: ***TaskMan path*\Report\Output Files*YourUserID***

2 Open the report form and define the report parameters.

3 (Optional) Preview the report output. For more information, see Previewing Reports.

4 Click **Print**.

Changing Fonts in Reports

NOTE: This topic applies only to reports generated with Crystal Reports 2008 or prior versions.

To change the font for a report output:

1 Open the Language IDs form.

2 In the row representing the language in which you will print reports, select a font in the **Font Descriptor** field.

3 Click **Actions > Save**.

Remarks

Font names in the **Font Descriptor** list represent fonts installed on your local client workstation. To ensure that reports print in the selected font, the font must be installed also on the TaskMan server, the utility server, and the print server.

NOTE: Barcode type fonts do not need to be installed on the client workstation if they are not going to be previewed there.

The font setting does not apply to barcodes or currency amounts in checks. To change fonts for these objects, edit the objects in the report source file.

Faxing Reports

FAX Configurations

The system supports several configurations for faxing reports.

Windows Fax

By default, the system uses the Fax capability built into the Windows operating system. Windows Fax runs on the TaskMan machine and uses a standard fax modem. The TaskMan service calls an executable that initiates faxing of a report through the modem. This configuration is recommended for light-duty faxing.

See Configuring Windows Fax.

Infor Framework Fax Service

The Infor Framework Fax Service can be installed on a fax server machine rather than the TaskMan machine (see the Infor Mongoose Installation Guide for instructions). The Infor Framework Fax Service monitors a directory on the TaskMan machine and initiates faxing through the built-in Windows Fax capability on the fax server, which is configured with a standard fax modem. This configuration may be preferable to the Windows Fax configuration where fax loads are higher.

See Configuring Infor Framework Fax Service.

Third-Party Fax Services

The system supports some third-party fax services. A fax service can be installed on a separate fax server machine with an appropriate modem or fax board. The service monitors a directory on the fax server, which is shared with the TaskMan machine.

See Configuring a Third-Party Fax Service.

Configurations and Report Options

A fax configuration applies to all reports that can be faxed and to all users. Administrators can override configuration options for a specific report or user.

Configuring Windows FAX

To configure Windows Fax:

1. Open the **Intranets** form and select the **Reports/TaskMan** tab.
2. Leave the **Fax Server** field blank.
3. Leave the **Fax Directory** field blank.

4 In the **Fax Header** field, specify this header template:

-d "BG~OUTPUTFILE~" -n BG~FAXNUM~ -f "BG~ERRFILE~"

5 Clear the **Use Fax Control File** check box.

6 In the **Fax Format** list, select Acrobat Format or Rich Text Format. These two formats are recommended starting points.

7 Save the record.

Configuring Infor Framework FAX Service

For instructions on installing Infor Framework Fax Service, see the Infor Mongoose Installation Guide.

To configure Infor Framework Fax Service:

1 Open the **Intranets** form and select the **Reports/TaskMan** tab.

2 In the **Fax Server** field, type the name of your fax server machine.

3 In the **Fax Directory** field, specify the directory on the Infor Framework TaskMan machine that was created in the installation of Infor Framework Fax Service:

TaskMan_directory\Report\Fax

In your path, replace TaskMan_directory with the path to Taskman.exe, which is normally C:\Program Files\Infor\AppName\TaskMan. The directory must exist.

4 In the **Fax Header** field, specify this header template:

SendFax.exe -d "BG~OUTPUTFILE~" -n BG~FAXNUM~ -f "BG~ERRFILE~"

5 Select the **Use Fax Control File** check box.

6 In the **Fax Format** list, select Acrobat Format or Rich Text Format. These two formats are recommended starting points.

7 Save the record.

8 On the TaskMan machine, share the fax directory (specified in step 3) with your fax server (specified in step 2).

Configuring a Third-Party FAX Service

To configure a third-party fax service:

1 Open the Intranets form.

2 Select the **Reports/TaskMan** tab.

3 Select a Fax Format.

4 Select or clear the Use Fax Control File check box.

5 Specify a Fax Directory.

6 Specify a Fax Header.

7 Save the record.

Setting FAX Properties for a Specific Report or User

You can override system defaults for faxing, which are set on the **Intranets** form. You can change fax properties for a particular user, a particular report, or a combination of the two.

To set fax properties for a specific report or user:

1. Open the **Report Options** form.
2. To set fax properties for a specific user, select a user ID in the **User** field.
   - To apply properties to all faxes created by the user, leave the **Task Name** blank.
   - To apply properties to a specific report created by the user, select the report task in the **Task Name** field.
3. To set fax properties for a specific report, select a report task in the **Task Name** field.
   - To apply properties to faxes of this report created by all users, leave the **User** field blank.
   - To apply properties to faxes of this report created by a specific user, select a user ID in the **User** field.
4. Which properties you can override is determined by the type of fax service installed on your system. You may be able to override the following:
   - Use Fax Control File
   - Fax Directory
   - Fax Output Format
   - Fax Header
5. Save the record.

Setting Report Options

There are two basic ways to set report options:

- To set the report options for individual reports, use the **Report Options** form.
- To save, retrieve, and manage commonly-used report settings, you can use the **Store Options**, **Get Options**, and **Options Defaults** forms (if available).

Setting Report Ranges

When selecting report parameters using the range fields, use the following rules:

- To begin the range at the first record in the system, leave the **Starting** field blank.
- To end the range at the last record in the system, leave the **Ending** field blank.
- To include all records in the system, leave both **Starting** and **Ending** fields blank.
- To include a selected range of records, enter both starting and ending record numbers, or select the desired start range value and end range value from the drop-down lists.
- To set the **Starting** field value as the default **Ending** field value, select **Set Default Ending Value to Starting Value** on the form or the **System Parameters** form.

Sending E-Mail Notification

Using the **Report Options** form, you can send a notification e-mail to yourself when a report that you initiated is complete. To do this, enter **Yes** in the **E-mail Notification** field.

You can also attach a copy of the report to the e-mail message. To do this, enter **Yes** in the **Attach Report** field.

For more information, see E-mailing Reports.

Working with Notes

You can annotate a record or a collection of records by attaching one or more notes.

The See Also link at the top of this page points to other topics that explain how to create, view, and attach/detach notes.

Object and Class Notes

The system allows you to create:

- **Notes for a single record (Object Notes)**: These notes are attached to the currently selected record. Object notes can be internal or external. You can create a note specifically for that record, or you can attach a reusable note.
- **Notes for all records in a collection (Class Notes)**: These notes are attached to every record in a collection. For example, if you attach a class note to one customer record, it is automatically attached to all customer records. Class notes can be internal or external. You can only attach reusable notes as class notes. Also, class notes do not print on reports.

You can attach multiple notes, of either type, to a record. Once you attach a note of any type to a record, all other users of the system can read the note.

When you attach a note, the status bar displays the word **NOTES**, and the **Actions** menu displays a check mark next to the **Notes for Current** option (for single-record notes) or next to the **Notes for All** option (for notes attached to the whole collection).

Creating and Attaching Notes

On many forms, you can create notes to be attached to records or collections of records. For information about note types and classifications, see Working with Notes.

Creating a Single-Use Note for a Specific Record

To create a note that applies only to the current record and that will be used only once in the system, follow the steps below.

1. Open a form and select a record where you want to add a note.
2. Select **Actions>Notes for Current** to open the **Object Notes** form.
3. In the **Subject** field, specify an appropriate subject identifier. This subject line does not print on reports. It is used only to distinguish this note from other notes.

4 Specify whether the note should be classified as internal. For more information about external and internal notes, see "Internal/External Notes" in Working with Notes.

5 If you want to attach an external file, click **Attach File**. In the dialog box that opens, browse to the file you want to attach and click **Open**. The filename and path displays in the Note field. For more information, see "More About Attaching External Files," below.

6 In the Note field (if you did not attach a file), enter the text that constitutes the actual content of the note. This is the text that can be printed as part of reports.

7 Save the note record and close the form. This also attaches the note to the current record in the original form.

Creating Class Notes for a Collection of Records

Class notes, which are attached to all records in a collection, can only be reusable notes. Thus, follow the steps under "Creating or Selecting Reusable Notes," below.

Creating or Selecting Reusable Notes

To create a note (or select an existing note) that can be reused again for other records:

1 Open a form and select a record where you want to add a note.

2 Select either:

- **Actions>Notes for Current** to open the **Object Notes** form, for notes attached to a single record, or
- **Actions>Notes for All** to open the **Class Notes** form, for notes attached to all records in a collection.

3 On either the Object Notes or Class Notes form, click Attach/Detach Reusable to display the System/User Notes form.

4 Decide which kind of note you want to create or select, and then use the fields under that heading:

- System note - can be viewed/selected by all system users, printable in some cases
- User note - can be viewed/selected only by the user who created it, never printable

5 To use an existing note, just select the **Attach** check box next to that note and click **OK** to return to the previous Notes form.

6 To create a new reusable note:

- Specify an appropriate subject identifier. This does not print on reports. It is used only to distinguish this note from other notes.
- If you want to attach an external file, click **Attach File**. In the dialog box that opens, browse to the file you want to attach and click **Open**. The filename and path displays in the Note field. For more information, see "More About Attaching External Files," below.

- In the Note field (if you did not attach a file), type the text that constitutes the actual content of the note. For system notes, this is the text that may be printable as part of reports.
- Select the **Attach** check box and click **OK** to return to the previous form.

7 If you return to the **Object Notes** form, specify whether the new note is Internal (see the explanation of "Internal/External Notes" in Working with Notes) and then save the note record. This also attaches the note to the current record in the original form.

8 If you return to the **Class Notes** form, click **OK** to save the note on all records in the collection and close the form.

More About Attaching External Files

As described in the steps above, you can use notes to attach files created in other applications. These files can include any type of file that your work environment supports. For example, you can attach files that represent text documents, spreadsheets, graphics, even multimedia files.

You can attach a file to a new note or an existing note. The file must already exist in a location that is accessible to any users who might access it from the note.

CAUTION: Attaching a file to an existing note replaces any text content the note may have with the path and file name for the attached file. If you have note text that you want to preserve, either copy the text to another note, or attach the file to a new note.

Once a file has been attached to a note, you and others can open the attached file by clicking on the **Open Attachment** button.

Notes that have files attached do not print in reports and other printing utilities.

Reading and Modifying Notes

You can read notes that are attached to a record or a collection. In many cases, you can also modify notes.

Reading/Modifying Notes Attached to a Record or Collection

1 Open a form and select a record that has notes attached. You can tell which records have notes attached by checking for one of the following:

- In the toolbar, the Notes button is highlighted when a record has an object note (notes for current record) attached.
- The status bar for a record with a note attached displays the word **NOTES**.
- The **Actions** menu for records with a note attached displays a check mark before the **Notes for Current** and/or **Notes for All** option.

2 To open the appropriate notes form:

- For single-record notes, use **Actions>Notes for Current** to open the **Object Notes** form.

- For class notes (notes for all records in a collection), use **Actions>Notes for All** to open the **Class Notes** form.

3 In the notes grid, select the note you want to read or modify. The subject identifier and note text display. If these fields are inactive, the note is a reusable note - click **Attach/Detach Reusable** if you need to modify it. If the note includes an attached file, you can view the attachment by clicking **Open Attachment**. If no notes are displayed, but the Actions menu has a check mark indicating that a note exists for the record, then the note is a private (non-system) user note added by another user.

4 (Optional) Modify the subject and note text as required.

5 When you are finished, you can save your changes, if any. To do this, either click **OK** or save the notes record.

Reading and Modifying System/User Notes

You can also directly read and modify reusable system or user notes without having to open a form that the notes attached to records.

To do this, select **View>System Notes**. This opens the **System/User Notes** form where you can read and modify notes as described in the previous section.

Deleting Notes

If you no longer need a note, you can delete it from the system. The way you delete a note is determined by the type of note it is.

For information about note types and classifications, see Working with Notes.

If the note you want to delete includes an attached external file, you do not need to delete the attached file. You just remove the connection between the application and the file by detaching it.

Deleting a Single-Record Note

1 Go to the form and record where the note exists.

2 Select from the notes grid the note you want to delete.

3 Use the **Delete** option on the main toolbar or right-click menu.

NOTE: If you delete a reusable note in the **Object Notes** form, you only detach the note from the record; you do not delete the note. To actually delete a reusable note, you must be in the **System/User Notes** form - see below.

4 Save the record.

Deleting a Class Note (Notes for All Records in a Collection)

1 Go to the form and record where the note exists.

2 Select from the notes grid the note you want to delete.

3 Use the **Delete** option on the main toolbar or right-click menu.

 NOTE: If you delete a reusable note in the **Object Notes** form, you only detach the note from the records in the current collection; you do not delete the note. To actually delete a reusable note, you must be in the **System/User Notes** form - see below.

4 Click **OK** to save the change and exit the form.

Detaching Notes and Files

If you no longer want a note or external file attached to a particular record or collection, but you want to keep the note for later reuse, you can detach it.

For single-record (object) notes, there is no way to detach a single-record note. You simply delete it.

For information about note types and classifications, see Working with Notes.

Detaching a Reusable Note

1 Go to the form and record where the note exists.

2 Select the option for the appropriate note type:

- Actions>Notes for All to display the Class Notes form, or
- Actions>Notes for Current to display the Object Notes form.

3 Click Attach/Detach Reusable.

4 On the System/User Notes form, clear the Attach check box for the note you want to detach from the record.

5 Click OK to save the change and close the System/User Notes form.

6 Do one of the following:

- If you return to the **Class Notes** form, click **OK** to save the changes and close the form.
- If you return to the **Object Notes** form, save the record and then close the form.

Detaching an External File Attached to a Object Note

For more information about external files attached to notes, see Creating and Attaching Notes.

1 Go to the form and record where the note exists.

2 Select the option for the appropriate note type:

- Actions>Notes for All to display the Class Notes form, or
- Actions>Notes for Current to display the Object Notes form; then click Attach/Detach Reusable to display the System/User Notes form.

3 Select the note where you want to detach an external file.

4 Click **Delete**.

NOTE: Although you click the **Delete** button, this step does not delete the attached file. It deletes the note and *detaches* the attached external file, but the attached file is not deleted from the system.

5 Save and close the Notes forms as appropriate:

- From the **Object Notes** form, save the record and close the form.
- From the **System/User Notes** form, click **OK** to save and close the form.

If you attempt to delete a reusable note that is attached to one or more records, when you try to close the **System/User Notes** form, the system displays an error and does not delete the note. You must detach it from all records before deleting it.

- From the **Class Notes** form, click **OK** to save and close the form.

Printing Associated Notes

Many reports offer options to print associated notes. These notes are created by you or other people on your system. The following general principles govern the printing of notes:

- You can print notes attached to individual records (also known as **object notes**), including reusable system notes but not user notes.
- In certain cases, you can choose to print notes tagged as "internal," "external," or both.
- Notes tagged as **Class Notes** (also known as **Notes for All)** do not print with reports.
- Attachments to notes do not print with reports.

For more information, see Working with Notes and Creating and Attaching Notes.

Working with Document (File) Attachments

You can augment records for many forms by attaching documents (files) that are related to specific records. You can also import documents that can then be attached by other users to records.

About Document Types

Before a document can be imported into the system and attached to a record, an authorized system administrator must first create one or more *document types*, if they do not already exist. The **Document Types** form is used to create document types.

When a document is then imported or attached, the document type is assigned to the document. Because documents can be filtered based on document type, we recommend that you plan carefully when you set up your document types. Do not make your types too generic--"Text files," for example. Rather, cast your types according to the intended use for the document type--"Customer POs," for example.

When a document type is created, a default file extension is assigned to it. This file extension is overwritten if the document you import actually has a different file extension.

Importing and Attaching Documents

Only authorized users can import documents and attach them to records. Authorized users can import, export, view, or delete documents with the **Documents** form. Within a form that allows document attachments, they can also click the Display Docs icon on the toolbar, which opens the **Attached Documents** form in a linked window. From within this form, they can import a new document, or they can link to a document that has already been imported into the system. For more information, see the "How To" related topics.

Availability of Attached Documents for Viewing and Reuse

Once a document has been approved, either by the person who submitted it or by another authorized approver, it is then available for viewing by other individuals who are authorized to view these documents. It is also available to other users for reuse or reattachment to other records. This means that a single document can be attached to multiple records.

To view a list of and access all imported documents, use the **Documents** form. To view a list of and access documents attached to specific records within a collection, use the **Actions > Documents for Current** menu item to open the **Attached Documents** form populated for that record.

Using the Application Event System to Attach and Manipulate Documents

Another option for attaching documents to records is to use an application event and event handler. There are two ways to do this:

- Include documents attached to records when initiating those records for processing using the application event system.
- Use the application event system to attach, link, or detach documents to records during the course of processing in the application event system.

For more information and sample scenarios, see Using the Application Event System for Document (File) Attachments and the *Guide to the Application Event System*.

Using the Application Event System for Document (File) Attachments

The application event system provides two basic means to work with document attachments. You can:

- Include documents attached to records when initiating those records for processing using the application event system.
- Use the application event system to attach, link, or detach documents to records during the course of processing in the application event system.

Including Documents Attached to Records

If you plan to use application events and event handlers with collections and records that can already have document attachments, and you want to include those attached documents in whatever action is taking place through the event handling, you can use the Attach event action parameter in conjunction with a Notify, Prompt, or Send E-mail event action. This option allows you to include all documents, only internal documents, all document *other than* internal documents, or specified individual documents from the record being processed. You can also *exclude* all document attachments from an event handler action.

Using the application event system capabilities, you can update (modify) or detach documents already attached to records and included in such actions.

For more information and sample scenarios, see the *Guide to the Application Event System*.

Using the Application Event System to Process Document Attachments

You can use the application event system to attach, link, update, or detach documents during the processing of an event handler. For these types of actions, use the Attach event action type as part of the handler sequence.

For more information and sample scenarios, see the *Guide to the Application Event System*.

Reference

This section of the Help is designed to provide quick references for many of the common features and functions of the WinStudio interface. In this section, you can find information about:

- Keyboard Shortcuts - Arranged by functions and by key combinations
- Menus and Menu Options - Also offering equivalent keyboard shortcuts and toolbar options
- Toolbars and Toolbar Options - Also offering equivalent keyboard shortcuts and menu options

Keyboard Shortcuts

Many people prefer to use keyboard shortcuts to accomplish tasks whenever possible, because it is often faster and easier than using a pointing device, such as a mouse.

The following tables list and describe the keyboard shortcuts available in this system:

- Form shortcuts - Shortcuts designed to help you at the form level, such as opening and saving forms.
- Editing shortcuts - Shortcuts designed to help with editing actions and functions.
- Record/Collection shortcuts - Shortcuts designed to help you work with data in records.
- Navigation shortcuts - Shortcuts designed to help you navigate on and between forms.

There is also a table that presents all keyboard shortcuts grouped according to key combinations.

Form shortcuts

To do this	Press	Comments
Open a form.	Ctrl + O	Opens the Select Form dialog box, which you can use to locate and select the form you want to open. For more information, see Finding and Opening Forms Using the Select Form Dialog Box.
Save a form.	Ctrl + S	Saves any changes, but does not close the form. Any records that have been modified or marked for deletion are permanently modified or deleted when this shortcut is used.
Close a form.	Ctrl + F4	Closes the current form window. If you have made changes to any records, or if you have marked

		any records for deletion, the system asks whether you want to save the changes before closing the form window.
Get help with the current field.	F1	Brings up the online help in a separate window. If the focus is on an active field, this opens the help for the current field. If the focus is not on an active field, this opens the help for the form.
Toggle Design Mode on/off.	Ctrl + E	Available only if you have the required editing permissions. Use this key combination to enter or exit Design Mode for the active form.
Regenerate the form.	Ctrl + G	Used in Design Mode only.
Unload all global form objects.	Ctrl + U	Used in Design Mode only.

Editing shortcuts

To do this	Press	Comments
Undo an editing operation.	Ctrl + Z	Works only for editing operations (cut/copy/paste). There is no multiple undo, and you can only undo the operation while you are still in the field where you performed it. Once you move out of the field, this shortcut no longer works. To undo changes made after you move out of the field, use Ctrl + F5.
Cut text from a field.	Ctrl + X	As is common in most Windows programs, removes selected text from a field, but keeps a copy of it on the system clipboard. This allows you to paste the deleted text somewhere else.
Copy text from a field or contents of grid cells.	Ctrl + C	As is common in most Windows programs, copies any selected text to the system clipboard. This allows you to paste the copied text somewhere else. NOTE: If you are copying groups of cells within a grid and the last-selected cell is an editable field, this menu option and keyboard shortcut do not work. Instead, you must use the Ctrl + Insert key

		combination to copy the selected cells to the system clipboard.
Paste text into a field.	Ctrl + V	As is common in most Windows programs, pastes the contents of the system clipboard into the field where the cursor is. You can use this option only in fields that allow you to enter text.

Record/Collection shortcuts

To do this	Press	Comments
Search for records using Filter-in-Place.	F4	Performs a Filter-in-Place search based on any filter criteria you entered into one or more fields. If you left all fields blank, the search retrieves all available records up to the cap. For more information, see Finding Records with Filter-in-Place.
Clear a form so a new search can be performed.	F4	If a form is displaying a collection, this option cancels the current filter-in-place and clears the form so you can perform a new search. The only fields that do not get cleared are the ones you last used to perform a query.
Cancel Filter-in-Place.	F3	Available only if a form is not displaying a collection. Cancels the current filter-in-place and returns the collection that was previously displayed. If no collection has yet been displayed, this key displays the form in normal mode, but with no records displayed. For more information, see Finding Records with Filter-in-Place.
Clear filter criteria.	F5	Available only when a form is not displaying a collection. By default, when you clear the form (using F4), the system displays the filter criteria used for the previous search. This option allows you to clear all filter criteria that either you or the system previously entered. For more information, see Finding Records with Filter-in-Place.
Search for records using Filter By Query.	Ctrl + Q	(Available only from multiview forms.) Opens the query form associated with the multiview form. For more information, see Finding Records Using a Query Form.

Move the focus to the next collection.	Ctrl + F8	In forms that display multiple collections, moves the focus to the next collection.
Create a record.	Ctrl + N	Works only in collections. Inserts a new, blank record below whichever record is currently selected.
Delete a record.	Ctrl + D	Works only in collections. Marks a record for deletion. (The record is not actually deleted until you do a save operation.)
Refresh a single record.	Ctrl + F5	Reverts the selected record to its original value and removes any change or deletion indicators. Use this to effectively undo a change or "undelete" a record.
Refresh the collection.	F5	Available only when a collection is displayed. Refreshes the entire collection. If you have made changes to any records, or if you have marked any records for deletion, the system asks whether you want to save the changes before refreshing the collection. If you answer Yes, the changes are saved and deletions are made permanent. If you answer No, all values on the form revert to their original values.
Find a value for a drop-down field.	Ctrl + F	For more information about finding specific values for fields, see Finding a Specific Value in a Drop-down List.
Repeat the Find.	Ctrl + F2	Use this key combination to repeat a Find operation. This locates the next entry in the field that matches the specified criteria without having to re-enter the criteria.
Find details for a value in a drop-down field.	Ctrl + L	For more information about finding details for field values, see Finding Details about a Value in a Drop-down List.
Add a new value to a field.	Ctrl + A	Allows you to create a new value for a drop-down field, and then have that new value returned to the field. When you use this key combination, the system opens the associated form. To see an abbreviated summary of the list value, without having to open the associated form, press F2.

		For more information about adding new values to fields, see Adding a New Field Value.
Delete text in a field.	DEL	With the cursor in a field and text selected, you can use this key to delete the selected text. This key works on any field in which you can enter input. NOTE: The text is not permanently deleted until you save the form. So, if you need to undo the deletion before saving the form, you can return the field to its original value by pressing Ctrl + F5.
Print a record or collection of records.	Ctrl + P	For more information about printing records and collections of records, see Printing Records or Collections of Records.
Toggle detail-only view on/off.	Ctrl +Shift + 1	Works only with multiview forms, query forms, or other forms in which there are split views. If both views (split view) or only the grid view is displayed, this keypress combination displays only the detail view. If only the detail view is displayed, this keypress combination displays the split view.
Toggle grid-only view on/off.	Ctrl + Shift + 2	Works only with multiview forms, query forms, or other forms in which there are split views. If both views (split view) or only the detail view is displayed, this keypress combination displays only the grid view. If only the grid view is displayed, this keypress combination displays the split view.
Get help with the current field.	F1	Brings up the online help for the selected field in a separate window.

Navigation shortcuts

To do this	Press	Comments
Activate the next collection.	Ctrl + F8	In forms that display multiple collections, this keypress combination moves the focus to the next collection.

Move to next record.	F8 or Down arrow	Works only when a record is selected in a collection. Moves the focus to the next record in the collection.
Move to the previous record.	F7 or Up arrow	Works only when a record is selected in a collection. Moves the focus to the previous record in the collection.
Move the cursor to the beginning of a field.	Home	Works whether the field is editable or not.
Move the cursor to the beginning of a record.	Ctrl + Home	Wherever the focus is, this keypress combination moves the focus to the first editable field for a record. On a multiview form, this moves the focus to the first active field (column) in the grid view.
Shift the focus on the form.	F6	Works with multiview forms only. If the focus is on the grid side, shifts the focus to the detail side. If the focus is on the detail side, shifts the focus to the grid side.
Switch between open forms.	Ctrl + Tab OR Ctrl + F6	These key combinations "cycle through" the open forms, moving the focus from one to the next.

Shortcuts Grouped by Key Combinations

- Function (F) keys and key combinations
- Ctrl + key combinations
- Miscellaneous other keys

Function (F) keys and key combinations

Key Combination	Action	Comments
F1	Get help with the current field or form.	Brings up the online Help in a separate window. If the focus is on an active field, this opens the Help for the current field. If the focus is not on an active field, this opens the Help for the form.
Ctrl + F2	Repeats a Find operation.	Locates the next entry in the field that matches the specified criteria without having to re-enter the criteria.
F3	Cancels a Filter-in-Place search.	Available only if a form is displaying a collection. Cancels the current filter-in-place and clears the form so you can perform a new search.
F4	Begins or executes a Filter-in-Place search.	If a form is displaying a collection, cancels the current filter-in-place and clears the form so you can perform a new search. If the form has already been cleared, performs a Filter-in-Place search based on any values you entered into one or more fields. If you left all fields blank, the search retrieves all available records up to the cap. For more information, see Finding Records with Filter-in-Place.
Ctrl + F4	Closes the current form window.	If changes have been made to any records, or if any records have been marked for deletion, the system asks whether you want to save the changes before closing the form window.
F5	Refreshes the entire collection; OR Clears the filter criteria.	If a collection is being displayed and you have made changes to any records, or if you have marked any records for deletion, the system asks whether you want to save the changes before refreshing the collection. If you answer Yes, the changes are saved and deletions are made permanent. If you answer No, all values on the form revert to their original values. If no collection is being displayed, clears any filter criteria that have been entered into the fields.

Ctrl + F5	Refreshes a single record.	Reverts the selected record to its original value and removes any change or deletion indicators. Use this to effectively undo a change or "undelete" a record.
F6	Shifts the focus on the form.	Works with multiview forms only. If the focus is on the grid side, shifts the focus to the detail side. If the focus is on the detail side, shifts the focus to the grid side.
Ctrl + F6	Switches between open forms.	"Cycles through" the open forms, moving the focus from one to the next.
F7	Moves to the previous record.	Works only when a record is selected in a collection. Moves the focus to the previous record in the collection.
F8	Moves to next record.	Works only when a record is selected in a collection. Moves the focus to the next record in the collection.
Ctrl + F8	Moves to the next collection.	In forms that display multiple collections, moves the focus to the next collection.

Ctrl + key combinations

Key Combination	Action	Comments
Ctrl + 1	Toggles detail-only view on/off.	Works only with multiview forms, query forms, or other forms in which there are split views. If both views (split view) or only the grid view is displayed, this keypress combination displays only the detail view. If only the detail view is displayed, this keypress combination displays the split view.
Ctrl + 2	Toggles grid-only view on/off.	Works only with multiview forms, query forms, or other forms in which there are split views. If both views (split view) or only the detail view is displayed,

		this keypress combination displays only the grid view. If only the grid view is displayed, this keypress combination displays the split view.
Ctrl + F2	Repeats a Find operation.	Locates the next entry in the field that matches the specified criteria without having to re-enter the criteria.
Ctrl + F4	Closes the current form window.	If changes have been made to any records, or if any records have been marked for deletion, the system asks whether you want to save the changes before closing the form window.
Ctrl + F5	Refreshes a single record.	Reverts the selected record to its original value and removes any change or deletion indicators. Use this to effectively undo a change or "undelete" a record.
Ctrl + F6	Switches between open forms.	"Cycles through" the open forms, moving the focus from one to the next.
Ctrl + F8	Moves to the next collection.	In forms that display multiple collections, moves the focus to the next collection.
Ctrl + A	Adds a new value to a field.	Allows you to create a new value for a drop-down field, and then have that new value returned to the field. For more information about adding new values to fields, see Adding a New Field Value.
Ctrl + C Ctrl + Insert (Alternative for grid cells)	Copies text from a field or contents of a grid cell.	As is common in most Windows programs, copies any selected text to the system clipboard. This allows you to paste the copied text somewhere else. NOTE: If you are copying groups of cells within a grid and the last-selected cell is an editable field, the Ctrl + C keyboard shortcut does not work. Instead, you must use the Ctrl + Insert key combination to copy the selected cells to the system clipboard.
Ctrl + D	Marks a record for deletion.	Works only in collections. The record is not actually deleted until you do a save operation.
Ctrl + E	Toggles	Available only if you have the correct editing permissions.

	Design Mode on/off.	Use this key combination to enter or exit Design Mode for the active form.
Ctrl + F	Initiates a search for a specific value for a field.	For more information about finding specific values for fields, see Finding a Specific Value in a Drop-down List.
Ctrl + G	Regenerates the form.	Used in Design Mode only.
Ctrl + L	Finds details for a value in a drop-down field. When you use this key combination, the system opens the associated form. To see an abbreviated summary of the list value, without having to open the associated form, press F2.	For more information about finding details for field values, see Finding Details about a Value in a Drop-down List.
Ctrl + N	Creates a record.	Works only in collections. Inserts a new, blank record below whichever record is currently selected.
Ctrl + O	Opens a form.	Opens the Select Form dialog box, which you can use to locate and select the form you want to open. For more information, see Finding and Opening Forms Using the Select Form Dialog Box.
Ctrl + P	Prints a record or	For more information about printing records and collections of

	collection of records.	records, see Printing Records or Collections of Records.
Ctrl + Q	Allows you to search for records using Filter By Query.	(Available only from multiview forms) Opens the query form associated with the multiview form. For more information, see Finding Records Using a Query Form.
Ctrl + S	Saves a form.	Saves any changes, but does not close the form. Any records that have been modified or marked for deletion are permanently modified or deleted when this shortcut is used.
Ctrl + U	Unloads all global form objects.	Used in Design Mode only.
Ctrl + V	Pastes text into a field.	As is common in most Windows programs, pastes the contents of the system clipboard into the field where the cursor is. You can use this option only in fields that allow you to enter text.
Ctrl + X	Cuts text from a field.	As is common in most Windows programs, removes selected text from a field, but keeps a copy of it on the system clipboard. This allows you to paste the deleted text somewhere else.
Ctrl + Z	Undoes an editing operation.	Works only for editing operations (cut/copy/paste). There is no multiple undo, and you can only undo the operation while you are still in the field where you performed it. Once you move out of the field, this shortcut no longer works. To undo changes made after you move out of the field, use Ctrl + F5.
Ctrl + Home	Moves the cursor to the beginning of a record.	Wherever the focus is, this keypress combination moves the focus to the first editable field for a record. On a multiview form, this moves the focus to the first active field (column) in the grid view.
Ctrl + Tab	Switches between open forms.	"Cycles through" the open forms, moving the focus from one to the next.

Miscellaneous other keys

Key Combination	Action	Comments
Up Arrow	Moves to the previous record.	With focus in a collection and a record selected, moves the focus to the previous record in the collection. In a drop-down list, when you tab into the list field, or with the list showing, selects the previous item in the list. In a date field, with the calendar drop-down showing, regresses the date by one week. In a text field, behaves like the Left Arrow key.
Down Arrow	Moves to next record.	With focus in a collection and a record selected, moves the focus to the next record in the collection. In a drop-down list, when you tab into the list field, or with the list showing, selects the next item in the list. In a date field, with the calendar drop-down showing, advances the date by one week. In a text field, behaves like the Right Arrow key.
Left Arrow	Moves to previous field or character.	In a grid, moves the focus to the previous field in the record. In a date field, with the calendar drop-down showing, regresses the date by one day. In a text or other input field, moves the cursor to the left one character position.
Right Arrow	Moves to next field or character.	In a grid, moves the focus to the next field in the record. In a date field, with the calendar drop-down showing, advances the date by one day. In a text or other input field, moves the cursor to the right one character position.
Delete	Marks selected text or a record for deletion.	In fields, deletes the selected text. Works only for fields in which you can make changes and select input. The text is not permanently deleted until you save the form. So, if you need to undo the deletion before saving the form, you can return the field to its original value by pressing Ctrl + F5. In collections, marks the selected record for deletion. The record is not actually deleted until you do a save operation. In Design Mode, deletes the selected component.

Home	Moves the cursor to the beginning of a field or record.	In an editable field, moves the cursor to the beginning of a field. In a display-only field, moves the cursor to the first column in the grid. In conjunction with the CTRL key (Ctrl + Home), if in a grid, moves the cursor to the first active column in the record (in which you can make a change). In a detail view or other type of form, moves the cursor (and the focus) to the first active field in the form.
Page Down	Advances the records displayed by one set.	Works only in grids. If all available records fit in one view, moves to the last record.
Page Up	Regresses the records displayed by one set.	Works only in grids. If all available records fit in one view, moves to the first record.

Menus

Most of the tasks you need to accomplish can be done by using one or more of the menus. The placement of these menus depends on what *theme* you are using (see About Themes).

These topics provide information about each of the standard menus, in table format, to help you more quickly locate and use the option you need:

- The **Form** menu includes options for working with forms, including opening, closing, creating, editing, and saving forms.
- The **Actions** menu provides options that deal mostly with records and collections of records.
- The **Edit** menu provides options for editing content in forms as well as for editing the forms themselves.
- The **View** menu includes a number of options for showing or hiding various elements of the user interface.
- The **Window** menu includes options for working with windows when you have multiple forms open.
- The **Help** menu provides a number of options for accessing the online help, as well as for getting information about the system software and any form you might have open.

Form Menu

The **Form** menu includes options for working with forms, including opening, closing, editing, and saving forms. Some options are available only if you have a form open.

Menu option	Submenu option	Action	Keyboard shortcut
Open		Opens the Select Form dialog box, which you can use to locate and select the form you want to open. For more information, see Finding and Opening Forms Using the Select Form Dialog Box. For an alternate way of opening forms, see Finding and Opening Forms Using the Explorer.	Ctrl + O
Print		Opens the Print Options dialog box, from which you can print a record or a collection of records. For more information, see Printing Records or Collections of Records. Not available in the web client.	Ctrl + P
Print Preview		Opens both the Print Options dialog box and the Print Preview dialog box. Use these dialog boxes to generate a preview before actually printing. For more information, see Previewing a Record or Collection Before Printing. Not available in the web client.	n/a
Print Setup		Opens the Page Setup dialog box, which allows you to set printer options before printing. Not available in the web client.	n/a
Export to File		Opens the Export Collection to File dialog box. Use this option to export data from a collection to an external file that can be used in another program, such as a spreadsheet.	n/a

		For more information, see Exporting Collections to External Files. Not available in the web client.	
Close and Save Changes		Saves any changes made and then closes the form. If any records were marked for deletion, permanently deletes those records.	n/a
Close and Cancel Changes		Closes the form without saving changes. Any records that have been changed revert to their original values. Any records marked for deletion are not deleted and are no longer marked for deletion.	n/a
Definition Most of these options are for Design mode and can be used only if you have appropriate editing permissions.	New	Opens a wizard in which you can create a new form. Active only in Design mode.	n/a
	Design	Available only if you have the required editing permissions. Use this command to select and open a form you want to edit.	n/a
	Save	Save changes to forms and global objects. Active only in Design mode.	Ctrl + S
	Delete	Delete the current form that is open in Design mode. If a form is not open in Design mode, the command opens a dialog box in which you can select the form you want to delete. Active only in Design mode.	n/a
	Copy	Use this command to make a copy of a form. Active only in Design mode.	n/a
	Edit Template	Use this command to select a form template to edit. Active only in Design mode.	n/a

	Copy Template	Use this command to make a copy of a form template. Active only in Design mode.	n/a
	Unload All Global Form Objects	Available only if you have the required editing permissions. The action can be performed in either runtime or design mode. If you have changed your editing scope, you can use this command to clear forms and global form objects from memory. Otherwise, you might access forms and global form objects that pertain to your previous editing scope instead of your new one. The command can clear the IDO metadata cache. Clearing the cache is useful in IDO development. To enable this option, select Unload IDO metadata along with global objects in the Settings window (on the View menu, click Settings, and then click Run Time).	Ctrl + U
	Site Developer Impersonation	Available only if you have site developer editing permissions. Use this command to specify whether you are creating user versions, group versions, or site versions of forms and global objects.	n/a
Workspaces		Opens the Workspaces dialog box, which you can use to define, save, change, and delete workspaces. For more information, see Using Workspaces. Not available in the web client.	n/a
New Sign In		Opens the Sign In dialog box with the current user ID and configuration filled in. You can sign in to a different configuration from the current configuration. You may also sign in with a different user ID. In the web client, this option displays as	n/a

	"Sign Out".	
Exit WinStudio	Exits the system, closing the software and all forms. Not available in the web client.	n/a
Recent forms	Displays a list of most recently opened forms, arranged in reverse chronological order. To re-open these forms quickly, without having to search for them again, click the form you want to open.	n/a

Actions Menu

The **Actions** menu provides options that deal mostly with records and collections of records. It includes entries for locating records, navigating through collections, and other features related to records.

This menu is available only if you have at least one form open.

NOTE: The keyboard shortcuts are functional only in the WinStudio smart client.

Menu item	Submenu item	Action	Keyboard shortcut
Refresh		Redisplays the selected collection using the current filtering criteria. This option reverses any changes made to records in the collection and restores fields to their original values. Any records marked for deletion are unmarked and revert to their original values. To avoid refreshing the wrong collection or subcollection when multiple collections are displayed, make sure the cursor focus is on the collection or subcollection you want to refresh before selecting this option.	F5
Refresh Current		Redisplays the selected record and restores the field to its original value. To avoid refreshing the wrong record, make sure the cursor focus is on the record you want to refresh before selecting this option.	Ctrl + F5

Filter	By Query	Opens the query form associated with the current multiview form, which allows you to perform an advanced search for forms. For more information, see Finding Records Using a Query Form.	Ctrl + Q
	Begin in Place	When a collection is being displayed, this option is used to clear the form so you can define the criteria for a new search. For more information, see Finding Records with Filter-in-Place.	F4
	Execute in Place	When no collection is being displayed on the form, this option is used to start a search based on the specified filter criteria. The system displays the records that match the specified criteria as the current collection. For more information, see Finding Records with Filter-in-Place.	F4
	Cancel in Place	When no collection has yet been displayed, this option places the form in Filter-in-Place mode, in effect displaying the active form with no collection displayed. When a collection has been displayed and then the form cleared using the Begin in Place (F4) option, this option returns the previously displayed collection without requerying the database.	F3
	Clear in Place	When setting up for an initial search, you can use this option to clear any filter criteria you might have entered and start over. When a collection has been previously displayed and then cleared using the Begin in Place (F4) option, the system by default displays the filter criteria used for the previous search. This option clears all filter criteria so you can initiate a new set of filter criteria.	F5
	Apply Saved Filter	Opens the Select Filter dialog box, which allows you to select a saved filter to apply to the current form. For more information about saving filters and using them, see Understanding Filters.	n/a
	Open	(Available only with query forms) Opens the Select Filter dialog box, from which you can select the filter you want to	n/a

		open. When the filter "opens" it simply populates the query form with the saved search criteria. Once open, you can change search criteria and resave, either by saving over the old one (using the same name) or saving it as a new filter.	
	Save	(Available only with query forms) Opens the Specify Filter Name dialog box, in which you assign a name to the filter you are saving.	n/a
	Delete	(Available only with query forms) Opens the Select Filter dialog box, from which you can select the filter you want to delete.	n/a
Next		Moves the focus to the next record in the current collection.	F8
Previous		Moves the focus to the previous record in the current collection.	F7
First		Moves the focus to the first record in the current collection.	n/a
Last		Moves the focus to the last record in the current collection.	n/a
Get More Rows		Retrieves the next set, or "bunch," of records in the collection. The size of the bunch is determined by the data record cap settings.	Ctrl + M
New		Creates a new, blank record below the currently selected record. For more information, see Adding Records.	Ctrl + N
Copy		Makes a copy of the current record and inserts it immediately below that record. Marks it as a new record (n).	n/a
Save		Saves any changes to the current collection without closing the form. Any records marked for deletion are permanently deleted and removed from the collection.	Ctrl + S

Save Current	Saves only changes made to the currently selected record. If the record is marked for deletion, deletes the record permanently and removes it from the collection.	n/a
Delete	Marks the selected record for deletion. Note that the record is not actually deleted and removed from the database until you save the form or save the current record.	Ctrl + D
Validate	Checks all fields in the currently selected record to make sure they contain valid values. If invalid values are found, the system presents a message that tells you which field contains an error and displays an (e) in the row label. Once all values are found to be valid, the (e) indicator no longer displays in the row label.	n/a
Notes for All	Opens the Class Notes form, from which you can view, attach, or detach notes that pertain to the entire collection of records. For more information, see Working with Notes.	n/a
Documents for Current	Opens the Attached Documents form, which allows you to view, attach, and remove file attachments for the current record. For more information, see Working with File Attachments.	n/a
Notes for Current	Opens the Object Notes form, which allows you to view, create, attach, and detach notes for the current record. For more information, see Working with Notes.	---
Graph	Opens the first page of the Graph Collection wizard, which you can use to generate a graph based on data from the current collection. For more information, see Creating and Formatting Graphs from a Collection.	n/a
To Excel	Opens a Microsoft Excel worksheet (or other application set to open .csv files) containing data exported from the current collection. For more information, see Saving a Collection to Microsoft Excel.	n/a

To Form DataView	Sends the current data collection to a DataView, displayed on the DataView Form Results form. For more information, see About DataViews.	n/a
View Event Status	Opens the Event Status form for collections that have the InWorkflow property set to "1". The InWorkflow property gets set when an event handler executes against an update or deletion of an object with the Suspend option enabled.	n/a
Get Options	(Available only with some report, activity, and utility forms) Opens the Get Options dialog box, which allows you to apply a set of stored criteria for record retrieval to the form. For example, suppose you have a particular report that you run on a daily basis, using the same criteria for record retrieval. Rather than have to set up the same criteria every time you want to run the report, you can set it up once, and then, before running it, store the options (see next menu item, Store Options). Then, use this option to apply the same set of search criteria to the form the next time you want to run the report.	n/a
Store Options	(Available only with some report, activity, and utility forms) Opens the Store Options dialog box, which allows you to save a set of search or retrieval criteria. For example, suppose you have a particular report that you run on a daily basis, using the same criteria for record retrieval. Rather than have to set up the same criteria every time you want to run the report, you can set it up once, and then, before running it, select this option. Then, to apply it, use the Get Options option (see previous menu item).	n/a
Background	(Available only with some report, activity, and utility forms) Opens the Background Queue dialog box, which you can use to schedule the report, activity, or utility to run automatically. For example, suppose you have a particular report that you run on a daily basis, using the same criteria for record retrieval. Rather than have to run the report manually every day, you can use this option to schedule the report	n/a

	to run automatically at the time you designate. For more information, see Background Queue.	
Where Used	(Available only with certain grid forms) Opens a linked Where Used form that shows where a particular value from the grid form is used elsewhere in the system.	n/a
View Amounts	(Available only on some utilities) Generates a report preview that shows the total value of the selected invoices.	n/a
View Workflows	Opens the My Workflows form, which you can use to create and edit saved workflows. For more information, see Creating Workflows with the Wizard.	n/a
New Workflow	Open the New Workflow Wizard, which you can use to create simple notification workflows. For more information, see Creating Workflows with the Wizard.	n/a

Edit Menu

The **Edit** menu provides options for editing content in forms as well as for editing the forms themselves.

NOTES:

- Many form editing options are accessible to you only if you have the appropriate editing permissions.
- Forms cannot be edited from the Web client version.

Menu item	Submenu item	Action	Keyboard shortcut
Undo		Undoes the last editing change you made. Works only for editing operations (cut/copy/paste). There is no multiple undo, and you can only undo the operation while you are still in the field where you performed it. Once you move out of the field, this option no longer works. To undo changes	Ctrl + Z

	made after you move out of the field, use Refresh, Ctrl + F5. Not available in the web client.	
Cut	Cuts text from a field. As is common in most Windows programs, removes selected text from a field, but keeps a copy of it on the system clipboard. This allows you to paste the deleted text somewhere else. Not available in the web client.	Ctrl + X
Copy	Copies the contents of the selected field. As is common in most Windows programs, copies any selected text to the system clipboard. This allows you to paste the copied text somewhere else. NOTE: If you are copying groups of cells within a grid and the last-selected cell is an editable field, this menu option and keyboard shortcut do not work. Instead, you must use the Ctrl + Insert key combination to copy the selected cells to the system clipboard. Not available in the web client.	Ctrl + C
Paste	Pastes text into a field. As is common in most Windows programs, pastes the contents of the system clipboard into the field where the cursor is. You can use this option only in fields that allow you to enter text. Not available in the web client.	Ctrl + V
Paste Rows Append	Pastes records (rows) from the system clipboard, inserting them just below the currently selected record. For more information about pasting records from external files, see Copying Data To/From a Spreadsheet. Active only in Runtime Mode.	n/a
Paste Rows Overwrite	Pastes records (rows) from the system clipboard into the collection, overwriting existing records	n/a

	starting with the currently selected record. For example, if you are pasting in three rows worth data, and your currently selected row is the fourth row, this option overwrites the records currently existing in rows 4, 5, and 6. For more information about pasting records from external files, see Copying Data To/From a Spreadsheet. Active only in Runtime Mode.	
Find Value in Collection	Opens the Find dialog box, which allows you to search through a collection for a specified value in a particular field. For more information, see Finding a Value in a Collection of Records. Active only in Runtime Mode.	n/a
Repeat Find	Repeats the search as performed in Find Value in Collection (see previous menu item). Active only in Runtime Mode.	Ctrl + F2
Replace Value in Collection	Opens the Replace dialog box, which allows you to search through a collection for a specified value in a particular field and then replace the current value with a new value that you provide. For more information, see Replacing a Value in a Record. Active only in Runtime Mode.	n/a
Sort Collection	Opens the Sort dialog box, which allows you to sort a collection according to criteria you specify in this dialog box. For more information, see Sorting Collections. Active only in Runtime Mode.	n/a
Find Value for Current Field	Allows you to perform a search for a specified value in a particular field and, optionally, return that value to the original field. For more information, see Finding a Specific Value in a Drop-Down List. Active only in Runtime Mode. Not available in the web client.	Ctrl + F

Add Value for Current Field	Allows you to create a new value for a particular field and, optionally, return that value to the original field. For more information, see Adding a New Field Value. Active only in Runtime Mode. Not available in the web client.	Ctrl + A
Details for Current Field	Allows you to view details about the value in a particular field. For more information, see Finding Details about a Value in a Drop-down List. Active only in Runtime Mode. Not available in the web client.	Ctrl + L
Import Binary Data for Current Field	When active, allows you to import a graphics file or other binary data object into the field. For more information, see Graphics and Other Binary Objects in Fields. Active only in Runtime Mode, for fields which can contain graphics or other binary data objects.	n/a
Export Binary Data from Current Field	When active, allows you to export a graphics file or other binary data object from the field. For more information, see Graphics and Other Binary Objects in Fields. Active only in Runtime Mode, for fields which can contain graphics or other binary data objects.	n/a
Delete Binary Data from Current Field	When active, allows you to delete a graphics file or other binary data object from the field. For more information, see Graphics and Other Binary Objects in Fields. Active only in Runtime Mode, for fields which can contain graphics or other binary data objects.	n/a
View Binary Data for Current Field	When active, allows you to view a graphics file or other binary data object using the operating system program designated to view files of that format. For more information, see Graphics and Other Binary Objects in Fields. Active only in Runtime Mode, for fields which can	n/a

		contain graphics or other binary data objects.	
Design Mode		Enters or exits Design Mode. What you can do in Design Mode depends on your editing permissions. Available only if you have the required editing permissions. Not available in the web client.	n/a
Revert Form Definition		Cancels changes to the form and any associated global form objects and restores another version according to the following hierarchy: A user version reverts to a group version (if one exists). A group version reverts to a site version (if one exists). A site version reverts to the default version.	n/a
Regenerate Form		Saves the form, including any changes made, closes the form, and then automatically reopens the form so that the changes are reflected and displayed. Active only in Design Mode. Not available in the web client.	Ctrl + G
Create Form Template from This Form		Creates a form template based on the current form. This template can then be used repeatedly to create similar new forms. Not available in the web client.	n/a
Component Active only in Design Mode.	Delete Selected	Deletes the selected component. If the component contains any objects or other components within it, these are also deleted.	n/a
	List	Opens the Form Component List dialog box, which allows you to view, edit, and delete information about all the components associated with the active form.	n/a
	Set Current Form Page	Makes this form page the current one for this form.	n/a

	Tab Order	Toggles on/off the view in which you can set the order in which fields should receive focus as the user navigates through the forms using the TAB key.	n/a
	Tab Order at	Resets the tab order beginning with the selected component. Any components that already have a tab order ahead of the selected component are not changes.	n/a
	Adjust Grid	Adjusts all grids in the current form so that the right-most grid column fits within the specified grid dimensions. This adjustment eliminates extra space and any unnecessary horizontal scroll bars.	n/a
Background Color		Opens the Edit Color dialog box, which allows you to define background colors to be used in forms and components. Active only in Design Mode.	n/a
Component Class		Opens the Component Class dialog box, which allows you to select, view, add, modify, and delete component classes. Active only in Design Mode.	n/a
Event Handlers		Opens the Event Handlers dialog box, which allows you to select, view, add, modify, and delete event handlers. Active only in Design Mode.	n/a
Image		Opens the Images dialog box, which allows you to select, view, add, import, export, and delete graphics images. These images become part of the Mongoose-based application. Active only in Design Mode.	n/a
Property Class Extension		Opens the Property Class Extension dialog box, which allows you to select, view, add, modify, and delete property class extensions. Active only in Design Mode.	n/a
Script		Opens the Script dialog box, which allows you to select, view, add, modify, and delete scripts.	n/a

		Active only in Design Mode.	
Shortcut Menu		Opens the Shortcut Menu dialog box, which allows you to select, view, add, modify, and delete shortcut menus. Active only in Design Mode.	n/a
String		Opens the Strings dialog box, which allows you to select, view, add, modify, and delete character strings. Active only in Design Mode.	n/a
Theme		Opens the Themes dialog box, which allows you to copy, edit, or delete a theme. You can also create a new theme. You can only delete user-created themes. The Theme Editor is displayed for some functions. Active only in Design Mode.	n/a
Validator		Opens the Validators dialog box, which allows you to select, view, add, modify, and delete validators. Active only in Design Mode.	n/a
Variable		Opens the Variables dialog box, which allows you to select, view, add, modify, and delete variables. Active only in Design Mode.	
Filter Active only in Design Mode.	Edit	Opens the Select Filter dialog box, which allows you to select a filter to edit.	n/a
	Edit Current	Opens the Edit Filter dialog box, which allows you to edit the saved filter for the form you are working with.	n/a
Script Editor		Opens the Edit Form Script dialog box, allowing you to edit the code associated with the current form or object. If you have Visual Studio installed on your computer, and you have the appropriate Visual Studio option selected in the Settings window, this option opens the Visual Studio application. Otherwise, if the WinStudio option is selected in the Settings window, the WinStudio native script	n/a

	editor window opens. Active only in Design Mode. Not available in the web client.	
Web User Control Assets	Opens the Edit Web User Control Assets dialog box, which allows you to select, create, edit, import, or delete web user controls and web user control elements. Active only in Design Mode. Not available in the web client.	n/a

View Menu

The **View** menu includes a number of options for showing or hiding various elements of the user interface.

Menu item	Action	Keyboard shortcut
Explorer	Opens and closes the Explorer window, which is used to access forms. For more information, see Using the Explorer. Not available in the web client.	n/a
User Preferences	Opens the User Preferences window. NOTE: You cannot use this option to close the User Preferences display. To close the User Preferences window, you must use the Close (x) button in the upper-right corner of the main workspace. This is where you can set your own user preferences. This window also includes options for setting editing and diagnostics preferences. For more information, see Setting User Preferences in the WinStudio Client or Setting User Preferences in a Web Client.	n/a
Inbox	If the Inbox form is not open, this option opens it. If the form is open, this option brings it to the top and refreshes the display. This menu option generates a standard event,	n/a

	StdAppLaunchInbox. Developer users can generate or intercept this event. Not available in the web client.	
Tasks	If the Create User Task form is not open, this option opens it. If the form is open, this option brings it to the top. This menu option generates a standard event, StdAppLaunchTask. Developer users can generate or intercept this event. Not available in the web client.	n/a
System Notes	Opens the System User Notes form, which allows you to create, read, and maintain reusable notes. For more information, see Working with Notes. Not available in the web client.	n/a
Toolbox	Active only in Design Mode. When selected, displays the Toolbox for components in Design Mode. The Toolbox displays in a panel on the left side of the workspace, in the same space as the Object Viewer, if displayed.	n/a
Object Viewer	Active only in Design Mode. When selected, displays the Object Viewer in Design Mode. The Object Viewer displays in a panel on the left side of the workspace, in the same space as the Toolbox, if displayed.	n/a
Form Properties	Active only in Design Mode. When selected, indicates that the Form Properties sheet is displayed. This and the other properties sheets display in a panel on the right side of the workspace.	n/a
Component Properties	Active only in Design Mode. When selected, indicates that the Component Properties sheet is displayed. This and the other properties sheets display in a panel on the right side of the workspace.	n/a
Object Properties	Active only in Design Mode. When selected, indicates that the Object Properties sheet is displayed. This and the other properties sheets display in a panel on the right side of the workspace.	n/a
Diagnostics	Opens and closes the Diagnostics window, which is used for debugging and other analytic tasks.	n/a

	Not available in the web client.	
Status Bar	Shows or hides the status bar. The messages on the status bar display information about your current actions. For example, if the form you opened has a note, the status bar displays NOTES. Not available in the web client.	n/a
Toolbar	Shows or hides the main toolbar. Not available in the web client.	n/a
Activate Next Collection	In forms that display multiple collections, this option moves the focus from one collection to the next. Not available in the web client.	CTRL+F8
Home Cursor	In a grid, moves the cursor to the first active column in the record (in which you can make a change). In a detail view or other type of form, moves the cursor (and the focus) to the first active field in the form. Not available in the web client.	CTRL+HOME
Default Size	Active only in Design Mode. To set the current size of a form in Design Mode as the default size for any new forms to be created, click this option. Not available in the web client.	n/a
Hide/Show 1st Splitter Pane	Toggles the grid view on/off. This option works only with multiview forms, query forms, or other forms in which there are both grid views and detail views.	Ctrl+Shift+1 Does not work in the web client
Hide/Show 2nd Splitter Pane	Toggles the detail view on/off. This option works only with multiview forms, query forms, or other forms in which there are both grid views and detail views.	Ctrl+Shift+2 Does not work in the web client
Activate Next Pane	Moves the focus from wherever the pointer currently is to the other pane. This option works only with multiview forms, query forms, or other forms in which there are both grid views and detail views. Not available in the web client.	F6

Warnings	Opens the Warning Messages dialog box, which allows you to view active warning messages for a form and correct problems before saving and closing the form. Not available in the web client.	n/a
Explorer Editor	When selected, displays the Explorer Editor, which is a read-only display of the Mongoose Explorer. Available only in the web client.	n/a

Window Menu

The **Window** menu includes options for working with windows when you have multiple forms open. These options affect only form windows, and not the system windows, such as the **Explorer**, **Settings**, and **Diagnostics** windows.

NOTE: The web client has no **Window** menu.

Menu item	Action
Cascade	Arranges all open form windows in a typical cascade arrangement.
Tile	Arranges all open form windows in a tiled arrangement. The system attempts to space all windows evenly, first horizontally, then vertically.
Close All	Closes all form windows, including those that are minimized. The system prompts you to save or cancel any changed data. If a form is open to find, add, or filter records into a parent form, the system gives you the option to return values to the parent form or not to return them.
Open form list	At the bottom of this menu, the system displays a list of all the forms currently open, in the order in which they were opened. The current active form (that has the focus) has a check mark in front of it. You can use this list to quickly select the form you want.

Help Menu

The **Help** menu provides a number of options for accessing the online help, as well as for getting information about the system software and any form you might have open.

NOTE: All help topics display in the default Web browser for your system.

Menu option	Description/Comments
Contents and Index	Opens the online help in its own browser window, displaying the Contents in the left pane and the initial help topic in the right pane This can be especially useful when you want to: Browse help topics for general learning purposes Use the Index or Search functions to find information about a specific topic or feature
Current Form	Opens the online help to the topic for the currently active form
Current Field	Opens the online help to the topic for the currently selected field or other component
About Application	Opens an informational window that presents information for the application you are using: Copyright notice Database configurations Your user login ID and editing permissions Optionally, a custom message created by a system administrator
About This Form	Opens the About This Form information window, which presents this information for the currently active form: The name and original caption of the form The version of the form The name of the parent form, if any Which collection is currently selected The name of any permanent or user-defined filters in use

Toolbars

The system interface has two toolbars available:

- The main toolbar includes options (and buttons) for performing many of the most common actions.
- The alignment toolbar is available only in Design mode and includes options for placing components on forms.

Main Toolbar

The main toolbar includes tools to help you accomplish the most common tasks.

This toolbar displays just underneath the menu bar. You can choose to display the toolbar or not.

This table lists and describes the main toolbar options.

Icon tooltip	Description/Comments	Menu equivalent	Keyboard shortcut
Open a form	Opens the Select Form dialog box, which you can use to locate and select the form you want to open. For more information, see Finding and Opening Forms Using the Select Form Dialog Box. For an alternate way of opening forms, see Finding and Opening Forms Using the Explorer.	Form > Open	Ctrl + O
Save	Saves the form and any changes you have made to the form, but does not close the form.	Form > Definition > Save OR Actions > Save	Ctrl + S
Save modified data and close form (OK)	Saves any changes made and then closes the form. If any records were marked for deletion, permanently deletes those records.	Form > Close and Save Changes	n/a
Close form, canceling unsaved changes	Closes the form without saving changes. Any records that have been modified revert to their original values. Any records marked for deletion are not deleted and are no longer marked for deletion.	Form > Close and Cancel Changes	n/a
Create a new object in the current collection	Creates a new, blank record below the currently selected record. For more information, see Adding Records.	Actions > New	Ctrl + N
Delete an object in the current collection	Marks the selected record for deletion. Note that the record is not actually deleted and removed from the database until you save the form or save the current record.	Actions > Delete	Ctrl + D

Refresh the current collection	Requeries and displays the selected collection using the current filtering criteria. This option reverses any changes made to records in the collection and restores fields to their original values. Any records marked for deletion are unmarked and revert to their original values. To avoid refreshing the wrong collection or subcollection when multiple collections are displayed, make sure the cursor focus is on the collection or subcollection you want to refresh before selecting this option.	Actions > Refresh	F5
Discard changes for the current object, and reload original values	Reverts the selected record to its original value. To avoid refreshing the wrong record, make sure the cursor focus is on the record you want to refresh before selecting this option.	Actions > Refresh Current	Ctrl + F5
Filter In Place	When on, opens the current form with Filter-in-Place, which allows you to filter for specific forms. This option clears them, so you can define a new search. For more information, see Finding Records with Filter-in-Place. After you use Filter-in-Place to identify the records you want to locate, use this option to start the search. The system displays the records that match the specified criteria as the current collection. For more information, see Finding Records with Filter-in-Place.	Actions > Filter > Begin in Place OR Actions > Filter > Execute in Place	F4
View event status	When enabled, opens the Event Status form, which allows you to check the current status of events that are running, among other things.	Action > View Event Status	n/a
Go to the first object in the current collection	Moves the focus to the first record in the current collection.	Actions > First	n/a
Go to the previous object	Moves the focus to the previous record in	Actions >	F7

in the current collection	the collection.	Previous	
Go to the next object in the current collection	Moves the focus to the next record in the collection.	Actions > Next	F8
Go to the last object in the current collection	Moves the focus to the last record currently displayed in the collection.	Actions > Last	n/a
Get more rows in the current collection	Retrieves the next set of records in the collection. The size of the set is determined by the data record cap settings. For example, if the record cap is set to 200, then a query returns only the first 200 records in the collection. Clicking this icon retrieves the next 200 records, and so on.	Actions > Get More Rows	Ctrl + M
Perform find for the current field's value	Allows you to perform a search for a specified value in a particular field and, optionally, return that value to the original field. For more information, see Finding a Specific Value in a Drop-Down List.	Edit > Find Value for Current Field	Ctrl + F
Perform add for the current field's value	Allows you to create a new value for a particular field and, optionally, return that value to the original field. For more information, see Adding a New Field Value.	Edit > Add Value for Current Field	Ctrl + A
Perform details for the current field's value	Allows you to view details about the value in a particular field. For more information, see Finding Details about a Value in a Drop-down List.	Edit > Details for Current Field	Ctrl + L
Display notes for the current object	Opens the Object Notes form, which allows you to view, create, attach, and detach notes for the current record. For more information, see Working with Notes.	Actions > Notes for Current	n/a

Display documents for the current object	Opens the Attached Documents form, which allows you to view, attach, and remove file attachments for the current record. For more information, see Working with File Attachments.	Actions > Documents for Current	n/a
Export the data in the current collection to Excel	Opens a Microsoft Excel worksheet (or other application set to open .csv files) containing selected data exported from the current collection. For more information, see Saving a Collection to Microsoft Excel.	Actions > To Excel	n/a
Send the data in the current collection to a DataView	Opens the DataView Form Results form, with the data from the current collection displayed. For more information, see About DataViews.	Actions > To Form DataView	n/a
Run DataSearch	Opens the DataSearch form, which allows you to search for specific data within all records in the current collection. For more information, see Searching the System with DataSearch.	n/a	n/a
Revert runtime changes...	Closes the current form, reverts any run-time changes made to that form, and reopens the form.	Edit > Revert runtime changes	n/a
Enter or exit Design Mode on this form	Toggles back and forth between Design Mode and Runtime Mode. You must be in Design Mode to customize and develop forms.	Edit > Design Mode	Ctrl + E
Regenerate form: Save form definition, close form, and re-open it	Active only in Design mode. Saves the form definition, including any changes made, closes the form, and then automatically reopens the form so that the changes are reflected and displayed.	Edit > Regenerate Form	Ctrl + G
Get help on the current form	Opens the online help to the topic for the currently active form	Help > Current Form	F1 (with the focus not in a field or other

	component)

Alignment Toolbar (Design Mode)

This toolbar is available only in Design Mode. It includes options for aligning form components, both with respect to other components and to the form itself.

The following table shows and describes the main toolbar options.

Action	Description/Comments
Snap to grid	Adjusts the size of the current component to the nearest grid dimensions that match the grid size settings. The grid size settings are made on the Design Time tab of the Settings window. For more information, see Design Time Settings.
Align left	Aligns all selected components so that their left edges line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align center	Aligns all selected components so that their horizontal centers line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align right	Aligns all selected components so that their right edges line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up

	with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align top	Aligns all selected components so that their top edges line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align middle	Aligns all selected components so that their vertical middles line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align bottom	Aligns all selected components so that their bottom edges line up. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components line up with whichever component has solid black squares for handles. To select the component which the other components should line up with, after selecting all components to be aligned (by CTRL-clicking them), click the one you want the others to line up with. The handles of this component should be solid black, and all others should be black-outlined handles.
Align width	Resizes all selected components so that they are the same width. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components resize to whichever component has solid black squares for handles. To select the component which the other components should resize to, after selecting all components to be resized (by CTRL-clicking them), click the one you want the others to resize to. The handles of this component should be solid black, and all others should be black-outlined handles.

Align height	Resizes all selected components so that they are the same height. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components resize to whichever component has solid black squares for handles. To select the component which the other components should resize to, after selecting all components to be resized (by CTRL-clicking them), click the one you want the others to resize to. The handles of this component should be solid black, and all others should be black-outlined handles.
Same size	Resizes all selected components so that they are the same size. This option is available only when multiple components are selected. To select multiple components, CTRL-click the components you want to align. Components resize to whichever component has solid black squares for handles. To select the component which the other components should resize to, after selecting all components to be resized (by CTRL-clicking them), click the one you want the others to resize to. The handles of this component should be solid black, and all others should be black-outlined handles.
Space horizontally	Moves selected components so that they are evenly spaced within the horizontal boundaries. This option uses the left edge of the left-most component and the right edge of the right-most component as the horizontal boundaries. It moves only the inner components, leaving the outer two components where they are. This option works only when three or more components are selected. To select multiple components, CTRL-click the components you want to align.
Space vertically	Moves selected components so that they are evenly spaced within the vertical boundaries. This option uses the top edge of the top-most component and the bottom edge of the bottom-most component as the vertical boundaries. It moves only the inner components, leaving the outer two components where they are. This option works only when three or more components are selected. To select multiple components, CTRL-click the components you want to align.
Arrange vertically	Arranges all selected components, stacking them vertically.
Arrange horizontally	Arranges all selected components horizontally.
Bring to front	Brings the selected components to the front, effectively placing them on top of other, overlapping components. This ensures that the selected components can be seen.

Send to back	Sends the selected components to the back, effectively placing them underneath other, overlapping components. This means that all or part of the selected components might be hidden.
Tab order	Allows you to set the tab order for the components on the form. This option resets all components selected, starting with order number 0.
Tab order at	Allows you to set the tab order for components from a selected component on. This option resets only the components starting with the first one you select. The order of all components to that point does not change.
Undo	Undoes the previous design action. To undo multiple actions, click this button repeatedly.
Redo	Repeats a design action that has been undone. To redo multiple actions, click this button repeatedly.

About Themes

At their most basic level, themes affect the look and feel of your Mongoose-based application. You can create your own themes or use one of the two system themes that are supplied.

NOTE: There are significant differences in the way themes are handled in the WinStudio smart client and in the web clients. Most of this topic addresses the WinStudio client. The web clients recognize only theme settings related to foreground colors, background colors, fonts, and required field indicators. They do *not* recognize settings pertaining to the Explorer, tabbed layout, group boxes, notebook tabs, or the display of the main menus.

You can change the look of these components:

- Button
- CheckBox
- ComboBox
- CriticalNumber
- DataView
- DatePicker
- DropList
- Edit
- Grid
- GridColumn
- GroupBox
- HyperLinkButton
- ListBox
- Notebook
- RadioButton
- Static
- TreeControl
- VerticalGrid
- VerticalGridElement

What can be changed for each component is different, and you can see what can be changed in the Theme Editor. Attributes that can be changed include but are not limited to text and background color and font family, size and style.

In the **Theme Editor**, you can also determine the Explorer style, the group box style, the notebook style, and whether there is a required field indicator.

System Themes

The Mongoose application ships with these themes:

- **Infor:** This theme is the more current of the two themes. Notable aspects include just three menu choices in the menu bar and required fields that are identified with a red asterisk. Menus that were located in the menu bar in previous versions are now listed under the **System** menu.
- **Classic:** This theme provides the look and feel of previous versions. More menu choices are available in the menu bar, and required fields have a yellow background.

You can edit these themes, but you cannot delete them.

Theme Editor

Use the **Theme Editor** to create new themes or edit existing ones. You can also copy an existing theme.

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