priority™

Form Design Script

Video Link: http://www.priority-software.com/eshbel.com/Movie_Search/Form_Design_Clip.htm
Note: Yellow highlights indicate action instructions.

Hi,
I'm _____ from Priority Software.

Introduction (0:00 - 0:28)
In this video we'll see how to design a form, which allows you to work more efficiently with the system. The **Form Design** tool covers three aspects of design: Form Columns and Tabs, Sub-Level Forms, and Direct Activations. The Form Design Tool also allows you to reorganize, rename and hide fields, and to create new tabs.

System Permissions (0:28 - 1:16)
Before we begin, we need to ensure that we have the necessary permissions for document and menu design. To do so, we'll enter the **Users** form, through menu path: **System Management > System Maintenance > Users** , retrieve our username and navigate to the **User Permissions** sub-level form. In the **Permissions** tab, we'll flag the **Form and Menu Design** column.

The design changes we will make during this video only affect the user making them; users without personalized design settings are assigned the settings of their group leader. If the users have no group leader, they are assigned the design settings of the System Manager. Other design options are available to the System Manager; you can read more about them in the **User Interface Guide**.

Font Size (1:16 - 1:31)
Let's personalize the design of the **Sales Order** form . First, we'll change the font size in the form. To do so, we'll right-click on any column in the form, click **Change Font Size** and select the desired size .

Display Modes (1:32 - 2:09)
Forms have two different display formats, which you can toggle between at the touch of a button. The **Sales Orders** form opens in Full-Record Display Mode, where you can only see one record at a time. Press **F4** to move to Multi-Record Display Mode, which displays several records simultaneously.
The various design options are defined separately for each display format. We'll start our design in Full-Record Display Mode. In this display mode the form fields are arranged within tabs, which make it easier to find your way around the form.

Organize Fields: Full-Record Display (02:09 - 02:52)

To personalize fields in the form, we'll use the **Form Design Tool**. To access the tool, right-click on any column in the form, click **Design** and then select **Organize Fields**. Alongside **Organize Fields**, we see the keyboard shortcut **Ctrl+B**. You can also access the **Form Design** tool by pressing these keys. The **Form Design – Sales Orders** window that opens includes all tabs currently defined in the form. When we click the plus icon beside a tab, a list will open containing all columns in the tab. When we click the three-dotted icon, a menu opens with several design options:

Hide (02:53 - 03:40)

Let's start by hiding a single field in a tab. To hide the **Storage Zone** column, we'll locate it in the **Shipment** tab . Click the three-dotted icon and select **Hide**, **Hide in this form only**. The field moves to the end of the list and now appears in a light gray, with an icon of an eye beside it, indicating that the column is hidden from sight. Click **Save** and the **Storage Zone column** disappears from the screen. You can also use this method to hide the entire **Shipment** tab. Click **Save** and the **Shipment** tab disappears from the screen! To restore it, go back to the design window and click **Restore Defaults**, the **Sales Orders Form** will revert to the original form design.

Move Columns (03:40 - 04:50)

If we want to move fields and tabs, we can do so by clicking on the arrow buttons at the top of the window. To move the **Scheduling** tab so it appears second in the list of tabs, all we need to do is click the **Scheduling** tab and click the up arrow button as many times as needed until it reaches the desired position. Once the tab is positioned where we want it, we can open it by clicking the plus icon. Fields can also be reorganized in the same way. We can use the same methods we learned for columns to hide and rearrange sub-level forms and direct activations. Simply select a sub-level form or direct activation, click the three-dotted icon and the desired action.

An option that is only available in the columns section is moving between tabs. To move the **Assigned to** field from the **Scheduling** tab to the **Main Columns** tab, we'll click the three-dotted icon and select **Move to**. From the list of tabs, we'll select **Main Columns** and then click **Save**. As you can see, the field has been moved.

Rename (04:50 - 05:22)

If you want to rename a field, all you have to do is enter the **Form Design** window, click the three-dotted icon, and select **Rename**. Then record the desired name and press **Enter**.

You can hide, rename columns, and move fields up and down in both display modes.

Remember: No matter which display mode you are in, you can undo the form design for that display mode and revert back to the original form design by selecting **Restore Defaults**.

Add Space between Columns (05:23 - 06:16)

Now let's see how to add or remove a space between columns. To add a space between the **Total Before Discount** and **Overall Discount (%)** columns in the **Price** tab , we'll open the **Form Design Tool** , expand the **Price** tab, click the three-dotted icon to the right of **Overall Discount** (%), and then, click **Add Space**. An arrow will appear to the left of **Overall Discount (%)**, indicating that it is the "First column in block." Click **Save** to see the results.We can now see that a space has been added between the **Total Before Discount** and **Overall Discount (%)** columns. To remove the space, we'll re-open the **Form Design Tool**, click the **Price** tab, click the three-dotted icon to the right of **Overall Discount** (%), and select **Merge Blocks.** The space that we added has been removed.

My Tab (06:17 - 07:21)

You can also create your own personalized tab in the form and move any fields that you want to this tab. Begin by clicking on **New tab** at the bottom of the window. A new tab is added to the bottom of the design window; let's rename it **My Tab**.Now let's move any fields we want to this tab. First we'll open the **References** tab, select **Sales Rep**, and move it to **My Tab**. Then, we'll click on **Save**. We'll re-open the design tool, click on the **Project** tab, and move all fields to **My Tab**.To move **My Tab** to the top of the window, all we have to do is click on **My Tab** and then on the **Move to Top** arrow button. **My Tab** moves to the top, appearing right below **Main Columns**. Click **Save** to see the results.Note that the empty **Project** tab no longer appears in the form. It will also no longer appear in the list of tabs in the **Form Design** tool.

Split Line (07:22 - 08:20)

Look at the line for **Sales Rep** in **My Tab**. Notice that it's actually made up of two parts: the sales rep number and the sales rep name. We can split the line into its parts, so that the number and name appear on separate lines. In the **Form Design** form, click on **My Tab**. The line for **Sales Rep** has an icon beside it that looks like a chain. We can see that the column below, **Sales Rep Name**, also has a chain icon. This indicates that these columns are attached to one another. To split the two into separate lines, click the three-dotted icon beside **Sales Rep** and select **Split Columns**. The chain icon has disappeared from both columns. We can also merge two fields into a single line. Let's do that for **Project Number** and **Project Description**. Now, let's click **Save** to see what **My Tab** looks like.

Multi-Record: Freeze Pane (08:21 - 08:56)

Now let's see what options we have in Multi-Record Display Mode. Here, there are no tabs; instead, the fields are arranged as columns. As you scroll through them, you'll see that the **Customer No.** always remains visible thanks to the pin that "freezes" panes in place. You can freeze additional columns — such as **Customer Name** and **Contact** — so that they'll stay open as well. Simply drag the pin to the last column you want to freeze — in our case, **Contact**. Now, the first three form columns are frozen as you scroll through the record.

Changing the Column Width (08:58 - 09:30)

When in Multi-Record Display Mode, you can't always see all the data in a given column. If you want a given column to be wider, you can <mark>move the cursor to the column and press the</mark> <mark>Shift</mark> key. The column remains expanded until you <mark>move to a different column</mark>. For a more permanent change, simply <mark>place the cursor on the edge of the column title, and drag it</mark> <mark>open</mark>. Or if a column is too wide, <mark>drag it so that it becomes narrower</mark>. This definition is maintained even after you exit the form.

Color-Coding Form Columns and Records (09:32 – 10:53)

You can also color-code different groups of form records, according to a value or range of values. For example, we can use color-coding to color all sales orders being handled by a particular sales rep in the color red. To do so, we'll <mark>move the cursor to the **Sales Rep**</mark> <mark>**Number** column and retrieve any sales orders recorded for the sales rep in question</mark>. We'll then <mark>right-click the column and select **Record Color**</mark>, <mark>**Define Record Color**</mark>. Finally, we'll <mark>select the color red and click **OK**</mark>. <mark>We can see that all other sales orders retrieved for this</mark> <mark>sales rep appear in the chosen color.</mark> This option can also be accessed via the upper **Design** menu.

Another option provided in the upper Design menu is **Highlight Mandatory/Read-Only**, which marks important columns with a red asterisk and leaves read-only columns in gray. The **Highlight Mandatory/Read-Only** option is flagged by default; however, you can <mark>remove the check mark</mark> if desired.

Both of the color-coding options we've mentioned are applied regardless of the current display mode being used.

This concludes our explanation of form design features. Thank you for watching.