AWAREMANAGER

AwareManager Custom Form Designer

Tools
Administrative functions pertaining to database maintenance and setup
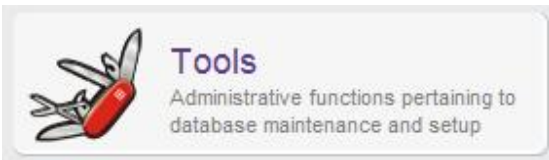
The form designer can be used as another way to fully tailor the entire system to the roles of the personnel.

The Form Designer is found on the Administration tab under **Tools > Manage Custom Forms**.

Reminder: using the Tools without the assistance of your client manager has the potential to disrupt and cause problems for your database. Consult your client manager before using the Tools menu.
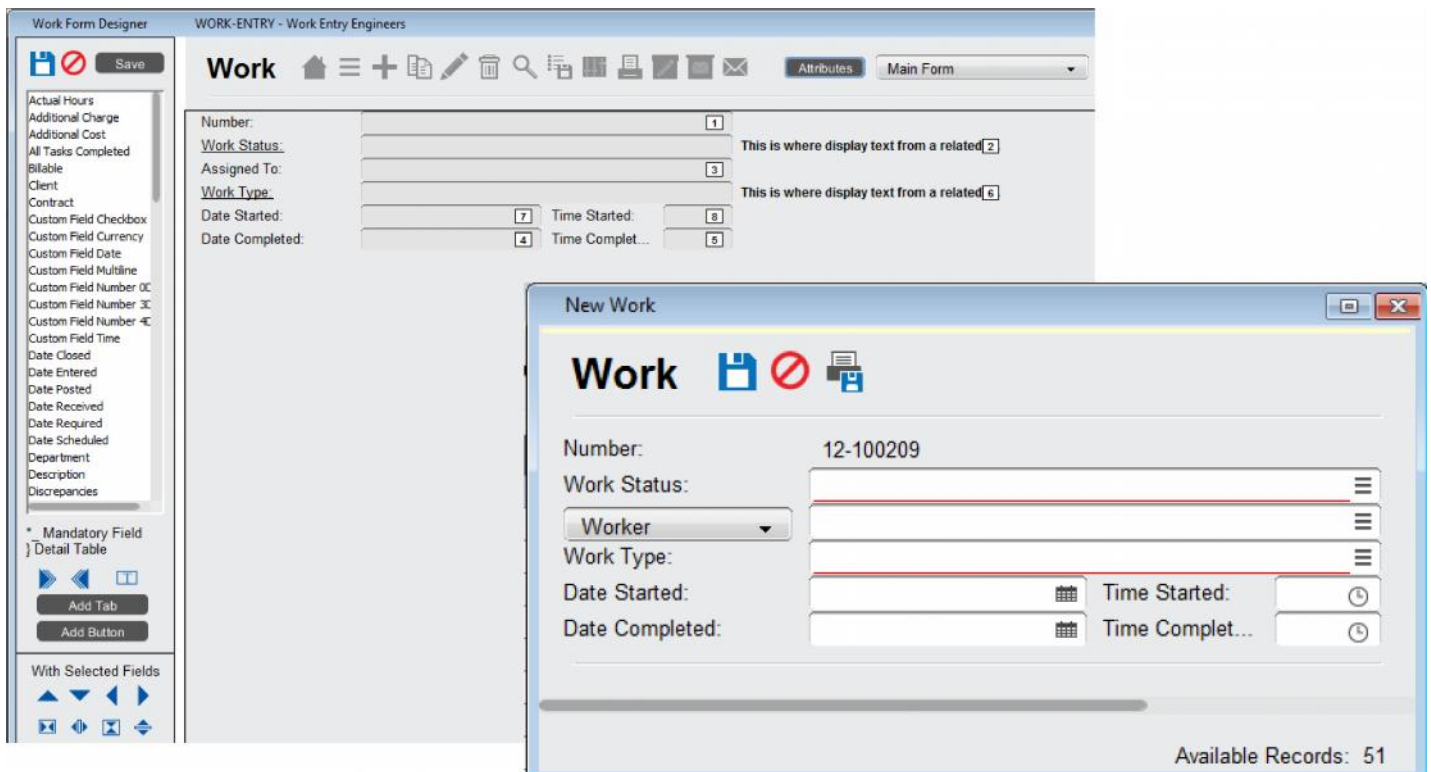
In the example above, a new Work capsule form is overlaid on top of how it appears in the designer. The Form designer can be used to create custom forms for any capsule in the system.

Creating a Custom Form

To start creating a custom form, click the plus sign. The system will prompt you to choose what **Capsule** the form will apply to, a **Code** to identify the form, and a **Description** of the form. Once the new Form has been added to the list, click the pencil icon to access the Form Designer itself and begin making changes.
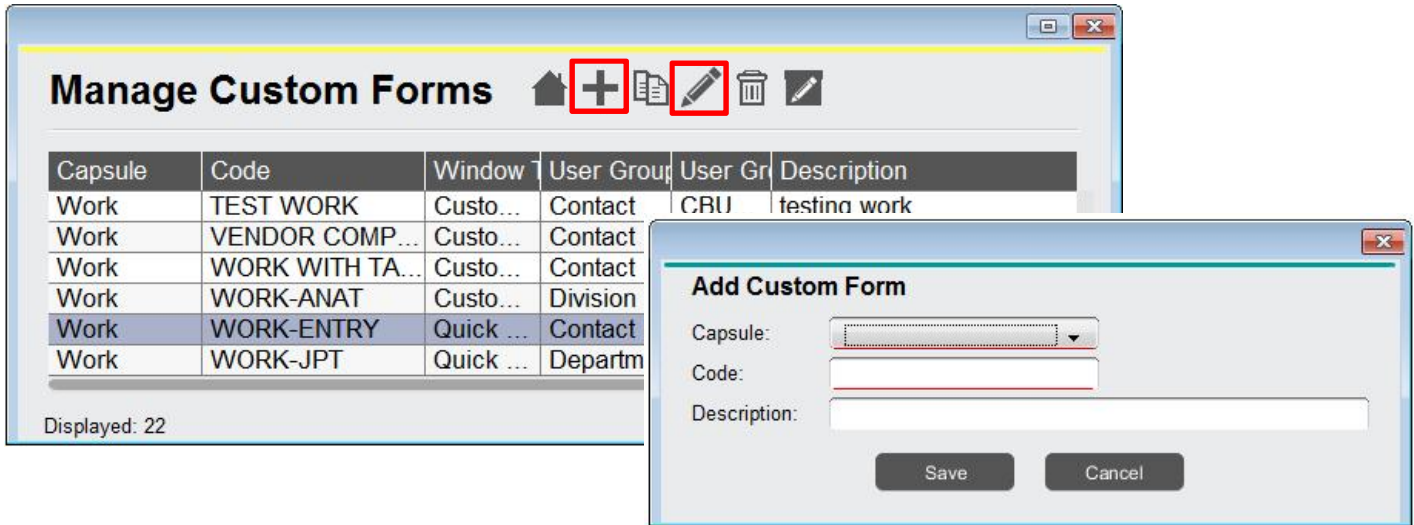

Depending on what capsule you choose to use the form in, the form designer will list all the available fields in that capsule that can be added to a form.

Fields marked with an asterisk are required and must be on the form. Fields denoted with a bracket are detail tables. For example: the Time, Materials, or Task tabs at the bottom of the standard Work form.

Note:

- On Visitor and Contact forms, you can add the Image field. This field can be resized similar to a multiline text field (see Numbers 5-7 below).
- Work Type Restrictions cannot be enforced for a Custom Form which does not have the correct fields available on the form.
- It is good practice to periodically save and check your form. This will insure that the final product looks the way you want, and that your hard work is not lost in the event your computer crashes or forces a restart while you're building your form.
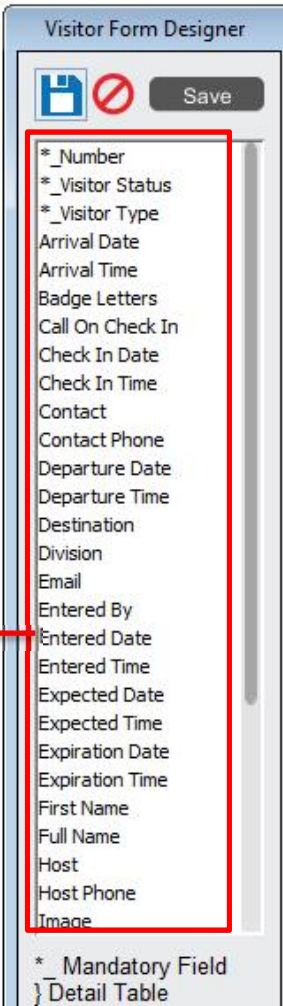
1. Highlighting a field in the list and using the Right arrow button will move that field onto the form; selecting the field and using the Left arrow will remove it.
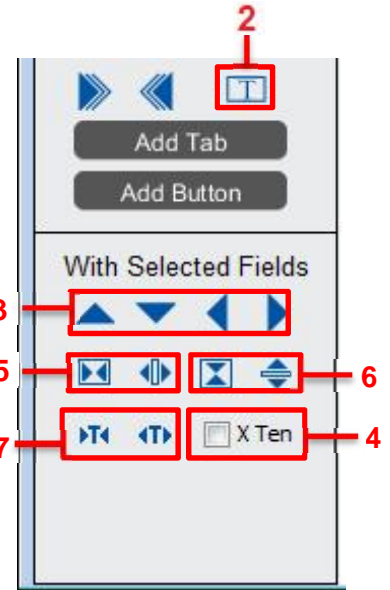
Note: On Work capsule custom forms, the Paragraph Text field (denoted by a ¶ on the list) will default from the Paragraph field on the record's Work Type and display the Paragraph's text on the Work form.

2. This button creates a Label on the form. Double-clicking on the Label will give you the ability to edit what the text says and whether it is displayed with bold, italics, or underlined fonts.

3. The blue arrow buttons are used to move the fields around on the form. The keyboard shortcuts for these are the arrow keys. Holding a key down will increase the pace at which you can move the field.

4. Checking the X Ten box will allow you to use the arrow keys to move ten spaces at a time instead of one.

5. These buttons shrink or expand the size of the grey box containing the field value. To accomplish this via the keyboard, hold down **Shift** while pressing the Left or Right arrow keys.
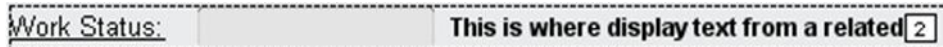
Example:

Department: This is where display text from a related 9

Department: This is where display text from a related 9

6. These buttons expand or contract the height of multiline text boxes, such as description or notes. To accomplish this via the keyboard, hold down **Shift** and use the Up or Down arrow keys.

7. These buttons control the amount of space between the field title and the grey box containing the field value. To accomplish this via the keyboard, hold down **Ctrl** and use the Left or Right arrow keys.

Work Status: This is where display text from a related 2

Work Status: This is where display text from a related 2

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Form Attributes allow you to change how the form will be used.

The **Window Type** field has three options and dictates in which situations the custom form will appear:

- **Custom Form**: The form will replace the standard form when opening via the pencil icon and the plus icon. The form icon will continue to open the standard form.

- **Quick Entry**: The custom form will be used when adding a record to the List.

- **Quick Change**: Form will only be used when selecting the pencil icon on a highlighted record in List View.

Add Tab: Allows you to add a tab at the top of the form, as seen below.
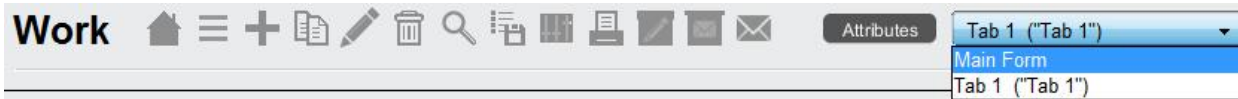
Note: Tabs *must* be added to the bottom of the form. Do not place any fields or tables below your tabs. The form will not function correctly if you do.

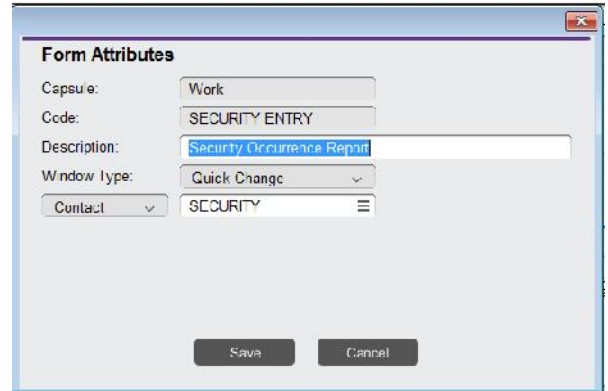**Add Button:** Allows you to add a hyperlink to the form, as seen below.
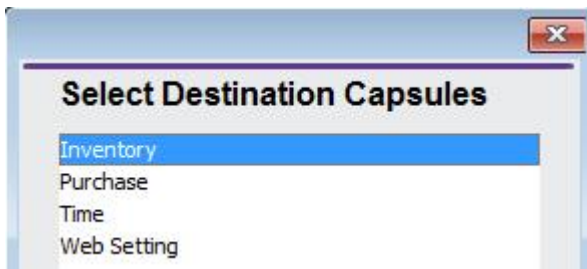
In this case, the **Time** hyperlink has already been added from the Select Destination Capsules window that pops up when you click on **Add Button**.

If **Run** were clicked now, the Inventory hyperlink would be added to the form.

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Form Attributes

In addition to defining a Capsule, Code, Description, and Window Type, Form Attributes also allows you to pick which person or group the form will apply to. You can choose a **Permission Group**, **Division**, **Department**, or **Contact**.

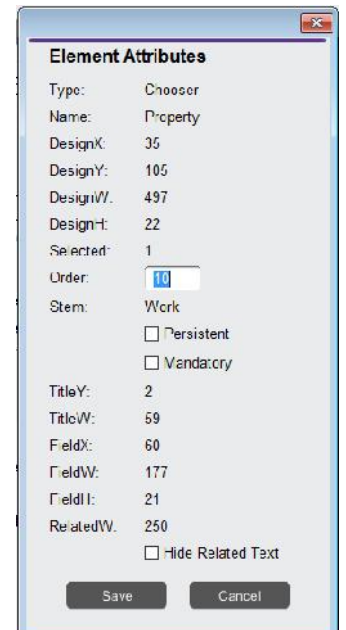You may also choose a customized Single Report title and orientation for the report.

Form Attributes

Capsule:	Work
Code:	SECURITY ENTRY
Description:	Security Occurrence Report
Window Type:	Quick Change
Contact	SECURITY

Save   Cancel

Element Attributes

Double clicking on any element in the Designer will show location information.

Order: Chooses the order of the field when tabbing through a Work order in Form View, and you can select checkboxes to control whether the field is Persistent or Mandatory.

Mandatory: Must enter a value in mandatory fields to save the record.

Persistent: The last entered value will carry over to the next new record until the value is changed.

Element Attributes

Type:	Chooser
Name:	Property
DesignX:	35
DesignY:	105
DesignW:	497
DesignH:	22
Selected:	1
Order:	10
Stem:	Work
	☐ Persistent
	☐ Mandatory
TitleY:	2
TitleW:	59
FieldX:	60
FieldW:	177
FieldH:	21
RelatedW:	250
	☐ Hide Related Text

Save   Cancel

Double clicking on any Labels gives the ability to edit the Label text and format.

Element Attributes

Type:	Label
Name:	
DesignX:	0
DesignY:	80
DesignW:	150
DesignH:	22
Selected:	1
TitleY:	2
LabelText:	Location of Occurrence
	☑ Bold
	☐ Italic
	☑ Underline

Save   Cancel