

Everest Advanced

Forms Designer



The only software you need to run your entire business... from bricks to clicks

User Guide



Everest Software
YOUR BUSINESS OPERATING SYSTEM

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1. Introduction

Features of Everest Forms Designer

Assumptions

Document Structure

Document Conventions

End users can easily be overwhelmed by their software. This is especially true if the screens contain numerous fields they do not use, field names that are not familiar to them, and the overall design is not efficient for their specific needs. You want the user's environment to be simple, streamlined, and contain wording that is familiar to them.

Everest currently allows users to make adjustments to their profile views, but not everyone feels comfortable or qualified to make these adjustments. In these situations, System Administrators can make customizations for the end users in advance that will be available to them when they log in to **Everest**.

Profile customization is possible with the **Everest Forms Designer** utility. The System Administrator, or an advanced user with the appropriate Forms Designer security rights, can customize profile screens and even enhance security by limiting end user access in the profile. The Forms Designer moves customization control away from the end user to the System Administrator or another individual authorized to design forms.

The customized views that are created can then be assigned to specific users or groups of users. In this way, your existing and new end users can be set up quickly and easily. These customizations can give your end users a more favorable software experience and increase their productivity at the same time.

Features of Everest Forms Designer

The **Everest Forms Designer** enables the customization of the following screens:

- Customer Profile
- Vendor Profile
- Item Profile
- Sales Documents (Sales Opportunity/Sales Quote/Sales Order/Sales Invoice)
- Sales Return Documents (Credit Quote/Credit Order/Credit Memo)
- Purchase Documents (Purchase Quote/Purchase Order/Purchase Receipt/Purchase Invoice)
- Purchase Return Documents (Debit Quote/Debit Order/Debit Memo)
- Document Aliases
- Custom Fields Profile (**Ctrl + F** from an available browser)

You can create different **Custom Fields** profiles for each browser type where it is available. Customized **Custom Field** profiles are available for a variety of browsers including Sales Documents, Purchase Documents, Customer, Vendor, User, Item, and Serial Numbers. This allows you to view extended information from the **Everest** browsers. Customized **Custom Fields** profiles created through a sales document will display when accessed from all sales document browsers. Likewise, a customized **Custom Fields** profile designed for a purchase document displays when accessed from all purchase documents.

The **Everest Forms Designer** allows the authorized user to execute the following functions:

- Create Customized Profiles
- Assign Customized Profiles to Users
- Assign Customized Profiles to Groups

- Export a Form Version
- Import a Form Version

To ensure that you will retain your previously designed forms, you can export your customized form versions prior to an upgrade and then import them, if necessary, into your new version of **Everest**. You can also import customized form versions to update the existing form version.

Assumptions

- It is assumed that the user of the Forms Designer is either a System Administrator or a user designated to perform the Form Design function. The user of the Forms Designer does not have to be a programmer.
- End users will not normally be granted the ability to customize their profiles.
- It is assumed that the **Everest** Forms Designer is already operational on your system.



To activate the Forms Designer, see [“The Forms Designer Utility” on page 105](#)

- It is assumed that the user is already familiar with **Everest Advanced Edition**.

Document Structure

This user guide is organized into four chapters as shown in the following table:

Chapter Number	Chapter Name	Description
1	Introduction	Introduces you to Everest Forms Designer , identifies the audience and lists the document conventions.
2	Working with the Forms Designer	Explains the steps for creating customized profiles and when these profiles would be necessary.
3	Working with the Forms Browser	Explains the steps for managing the created customized profiles including editing the profiles and assigning them to groups.
4	Forms Designer Security	Describes the security, events, and licensing supporting the Forms Designer.

Document Conventions

Following are the conventions used in this user guide to enable you to navigate easily through the information provided and help you accomplish your tasks quickly:

- Important information is mentioned using the “Note” symbol as seen below:



You will see the icon on the left with the information appearing alongside.

- A “Refer” symbol denotes references to other sections within the document or to other documents of the product documentation suite.



You will see the icon on the left with the text for the cross-reference appearing alongside.

- Examples have been provided to illustrate the information presented. The example is mentioned using the symbol given below:



With this convention, you will see the icon on the left with the example appearing alongside.

- Wherever there is a necessity to perform a sequence of tasks for a particular function, the “Steps” icon is used. This is indicated by the symbol given below:



You will see the icon on the left with the text appearing alongside indicating that the steps to carry out a task are listed.

- The keywords related to the software such as menu options, profile/dialog box names are highlighted in **Boldface**.
- Navigation between and through menu options is indicated by the symbol “>”.



To view the **Forms** browser, you must click **File, Setup**, and then **Forms**. This is explained in the document as follows:

From the main menu bar, select **File > Setup > Forms**.

2. Working with the Forms Designer

The Forms Designer

Create Customized Profiles

Create Sample Customized Profiles

Create Custom Field Profile Forms for Extended Information Sample

The Forms Designer

The Forms Designer allows the item, customer, vendor, and sales document profiles to be changed so that the look and feel of the profiles can be improved according to your business needs.

Access the Forms Designer

Only users with the proper security privilege and a valid license key can access the Forms Designer. On profiles that can be customized, a **Design** option displays on the **Options** menu. This option does not display on a profile that cannot be customized.

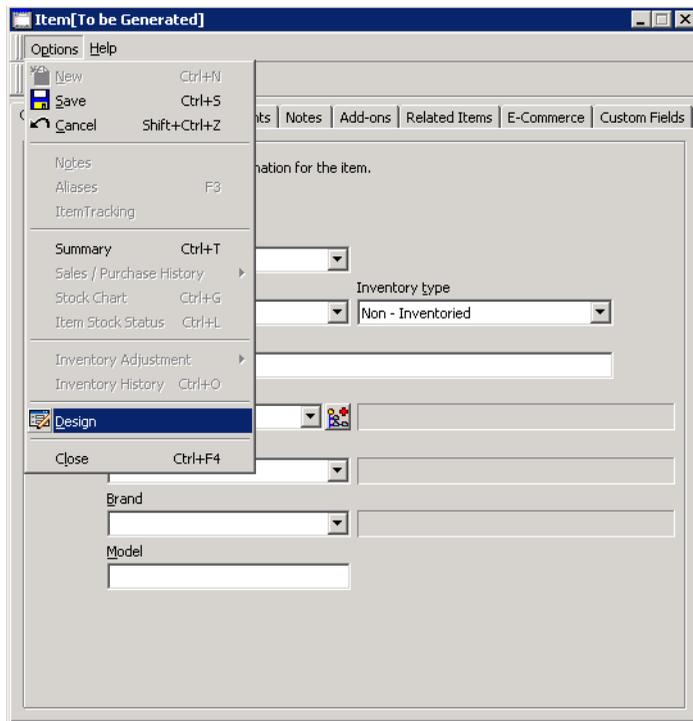


Figure 2.1: Item Profile with Design Menu Option

To access the Forms Designer, do one of the following:

- From the **Options** menu of a profile that can be customized, select **Design**.
- From the main menu bar, select **File > Setup > Forms**. Right click a profile template and select **Design**.

The **Forms Designer** displays the current form in **Design** view. Design view is indicated by "Design" next to the form title in the title bar. For example, when an **Item** profile is in design view, it is labeled **Design-Item Profile**.

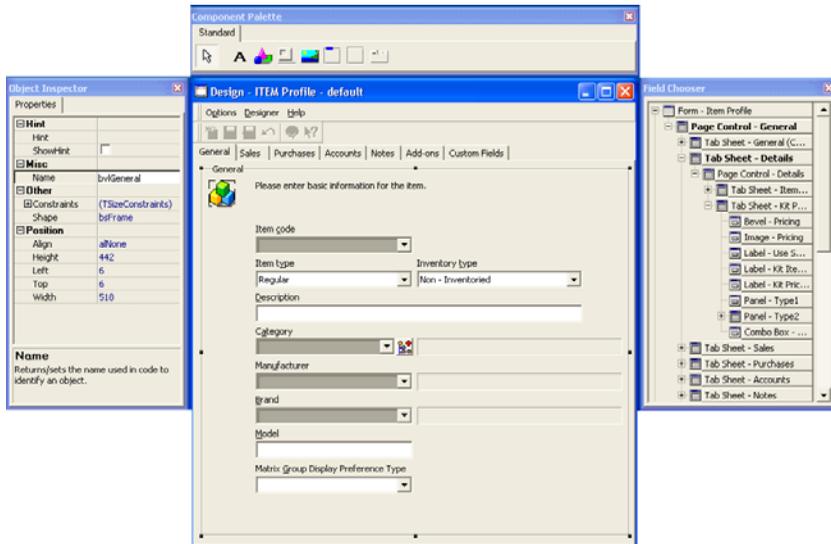


Figure 2.2: Item Profile in Design View

When the Forms Designer opens, several dialog boxes open including the following:

- **Field Chooser** - Contains fields for the profile being designed
- **Component Palette** - Toolbox used to add windows controls
- **Object Inspector** - Used to change object properties such as captions

The Standard or initial profile form loaded is called the **Template**. The version of the form that you are designing or editing is called the **Target Form**.

Field Chooser

The Field Chooser contains a tree view of all the fields available for the form. Use the Field Chooser to add tabs, groups, and controls to the target form. If you add an item that is grouped with other items, the additional items are added automatically. Each field can only be in one place on the target form. The **Field**

Chooser dialog box is re-sizable and multiple items can be selected at the same time.

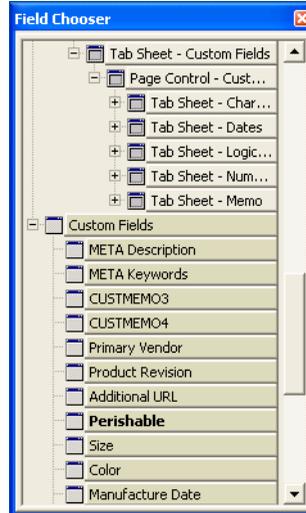


Figure 2.3: The Field Chooser Dialog Box

The following field types are located in the **Field Chooser** dialog box:

- **Missing Fields** - The Fields that are missing from the target form are highlighted in the Field Chooser.
- **Fields in Use** - The fields used on the target form are not highlighted in the Field Chooser.
- **Mandatory Fields** - Mandatory fields are in bold. If a mandatory field is highlighted, it is a missing mandatory field that must be added to the target form.

Component Palette

The Component Palette displays window controls that can be added to the target form. If the controls are in the existing form, they are usually moved using the Field Chooser.

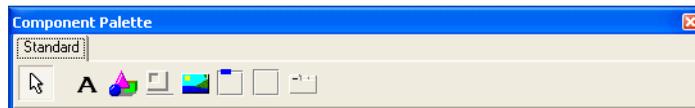


Figure 2.4: The Component Palette Dialog Box

The following are examples of controls that can be added. These controls are not a part of the non-customized form:

- **Picture Control** - Adds a picture to the form
- **Static Label Control** - Adds static text to the form

Example It adds additional text to a picture or adds help information to the screen.

- **Group Box** - Puts a box around items on the form
 - **Panel** - Puts a raised area around items on the form
-  To move groups of fields easily around a form, put the fields in a panel. A panel can also be placed in a group box.
- **Page Control** - Adds a new tab to the form
- Interactive controls, which capture and change data, cannot be added using the Component Palette.

Object Inspector

The Object Inspector allows you to change certain properties of each control or object. When you click on an item in the target form, the properties of the control or object are displayed in the **Object Inspector** dialog box near the form. Mandatory fields are also highlighted in the Object Inspector.

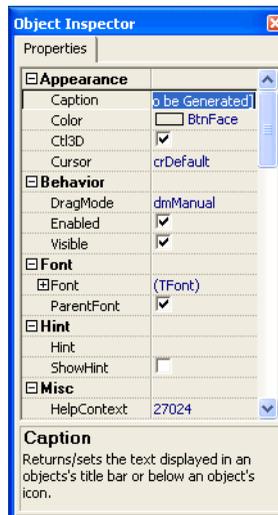


Figure 2.5: The Object Inspector Dialog Box

Here are some examples of properties that can be changed in the Object Inspector:

- Size
- Position
- Font
- Color
- Caption

Menu Options

In Design View, a **Designer** menu item is visible to use when customizing forms.



To access the Menu Options, do the following:

- From the profile (Design) menu, select **Designer**.

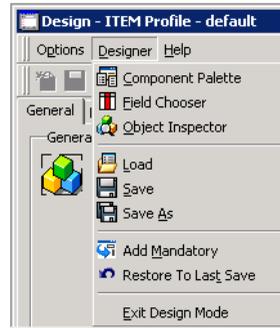


Figure 2.6: Menu Options Available from Design View

Component Palette

This option opens the **Component Palette** dialog box. Use the Component Palette to add window controls to the target form.

Field Chooser

This option opens the **Field Chooser** dialog box. Use the Field Chooser to add fields to the target form.

Object Inspector

This option opens the **Object Inspector** dialog box. Use the Object Inspector to change the properties of controls and objects, such as caption name, position, font, color, and size.

Load

This time and effort saving feature allows you to choose a previously created version as the template for your target form.

Save

Use the **Save** option to save your current work to a new form. If the Standard Version of the form is edited and saved, it is saved as a different version. The **Everest** system checks the new form being saved for errors. A new form cannot be created until the errors are resolved.

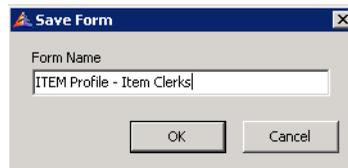


Figure 2.7: Save Form Dialog Box (Item Profile Example)

- **Form Name** - Enter a unique name for your new form in this field.

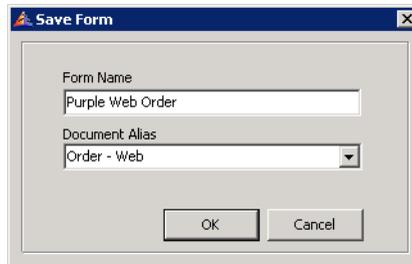


Figure 2.8: Save Form Dialog Box (Customer Document Example)

- **Document Alias** - Specify the document alias that the new form will apply to.  [“Sales and Purchase Document Form Version Assignments” on page 86](#)

Save As

Use the **Save As** option to give a version of the standard form a name or to save your current work as a previously saved version, replacing the earlier version.

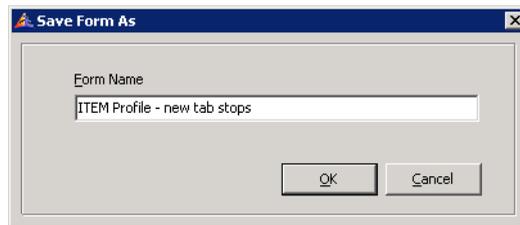


Figure 2.9: Save Form As Dialog Box (Item Profile Example)

- **Form Name** - Enter a unique name for your new form in this field or enter the name of an existing form version to overwrite that version.

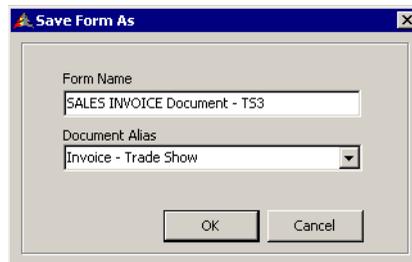


Figure 2.10: Save Form As Dialog Box (Customer Document Example)

- **Document Alias** - Specify the document alias that the new form will apply to.  [“Sales and Purchase Document Form Version Assignments” on page 86](#)

Add Mandatory

This option adds all mandatory fields to a highlighted location on a target form, making it easier to create a form with all the mandatory fields on one tab.

Restore to Last Save

This option removes all edits completed before the last save. If you were creating a new version of a profile, the target form reverts to the form it was created from.

Exit Design Mode

This function exits the Design view and returns you to the standard view. If changes were made to the current form, you will receive a dialog box concerning saving the changes.

Right Click Options

Right click on any object in the target form to display additional options. Standard windows options are available to undo, copy, cut, paste, and delete. The following standard windows options can be helpful when creating your new form design:

- Select the **Alignment** option to position an object horizontally and vertically on the target form.
- Select the **Size** option to change the size of the object on the target form.
- Select the **Tab Order** option if you need to change the order of the tabs on the target form.

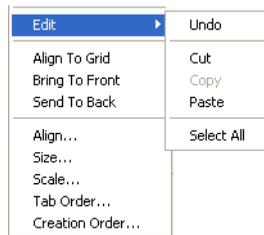


Figure 2.11: Right Click Object Context Menu

Create Customized Profiles

Create customized profiles for users when you want to simplify the user's view of the profile. The user's view can also be limited, when necessary, for security reasons.

It is important to keep in mind that you want to design the profile so it can be used efficiently. Field names can be renamed to names that the user is more familiar with. Fields can also be arranged to make it easier to key in the information. Profile menus and toolbars can also be customized.

 Once you have designed a new profile, it is a good idea to test the profile after creating it to see if any adjustments need to be made before assigning the profile to users and groups. To test the profile, assign it to one user and have the user try it. Make any necessary adjustments and reassign the profile. When you are satisfied with the profile, assign it to additional users and groups.

Managing customized profiles including assigning profiles to users and groups will be discussed in the “Working with the Forms Browser” chapter.

 [“The Forms Browser” on page 79](#)

In the section entitled “Create Sample Customized Profiles”, you can follow the steps to create sample customized profiles.

 [“Create Sample Customized Profiles” on page 36](#)

 **To create a customized profile using the standard profile template, do the following:**

- From the **Options** menu of a profile that can be customized, select **Design**.
Or
- From the main menu bar, select **File > Setup > Forms**.

- Right click a standard profile template and select **Design**.

The **Forms Designer** is displayed with the target form in **Design** view. The **Field Chooser**, **Component Palette**, and **Object Inspector** are displayed near the target form. The target form displays the standard profile template.

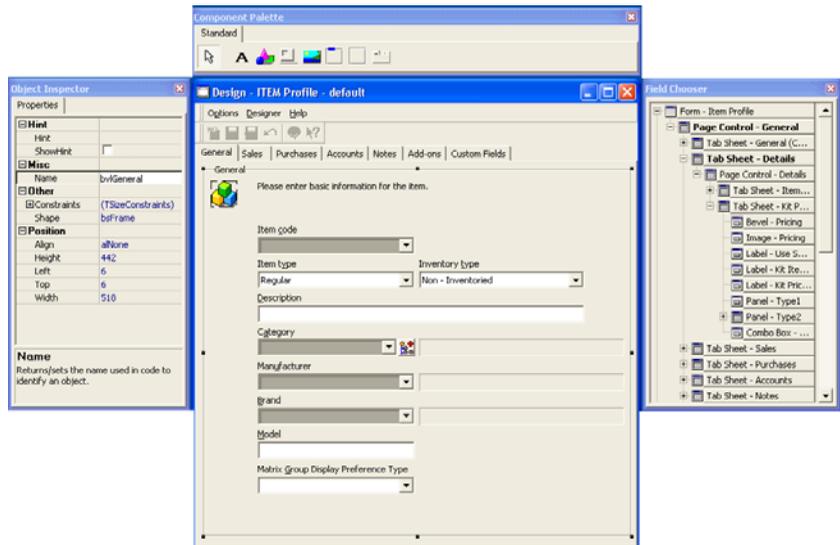


Figure 2.12: The Forms Designer

1 **2** **3** **To create a profile from an existing customized profile instead of starting with the standard profile, do the following:**

1 Skip this step if you want to start with the standard profile template.

- From the **Profile (Design)** menu, select **Designer > Load**. The **Load Form** dialog box displays a list of versions of the profile that is being designed. Versions of other profiles do not appear here.

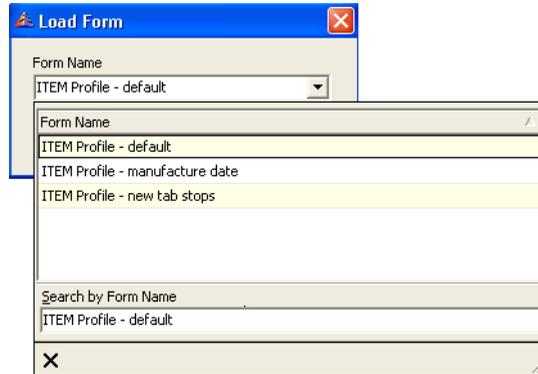


Figure 2.13: The Load Form Dialog Box.

This saves you time by using a previously created version as a starting point for creating a new version.

- Browse to select the necessary form.
- Click **OK** to load it.

Design the target form by completing any combination of the following tasks, as necessary to complete your design.

Add Fields at the Cursor Position

To add fields at the cursor position on the target form using the Field Chooser, do the following:

- Click on a field or item in the Field Chooser. You will see a **Target** icon underneath your cursor when your cursor is over a valid container for the drop. If you do not see the **Target** icon, move your cursor until the **Target** icon is in view.



Figure 2.14: Targeted Drop Cursor

- Click a location on the target form. The target icon is no longer underneath your cursor and the field or item is added to the target form.

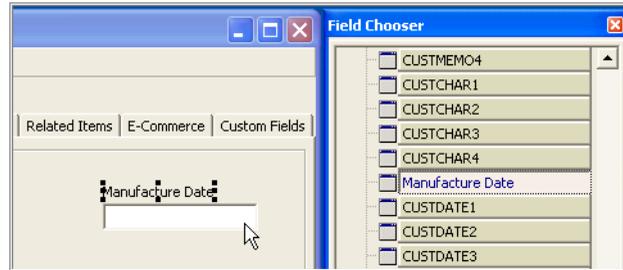


Figure 2.15: Field Added to the Target Form from the Field Chooser

- Press the **Shift** or **Ctrl** keys to select multiple items.

Add Fields to their Default Location

1 **2** **3** **To add fields to their default location on the target form, do the following:**

- Click on a field or item in the Field Chooser. You will see a **Target** icon underneath your cursor.
- Press and hold the **Alt** key. Now the **Target** icon changes to a **Handbag** icon.



Figure 2.16: Handbag Drop Cursor

- Click a location on the target form. The handbag icon is no longer underneath your cursor and the field or item is added to the target form in the default position. You must hold the **Alt** key when you click on the target for this feature to work properly.

You can cut and paste controls or objects to move them easily on the target form. The targeted drop cursor is not available with paste operations. Some controls or objects can also be copied but you will not be able to copy items that do not allow duplication. Right click any object to find these options.

Add Additional Controls

1 **2** **3** **To add additional controls using the Component Palette, do the following:**

- Click on a control in the **Component Palette**.

- Click a location on the target form. The control is added to the target form.

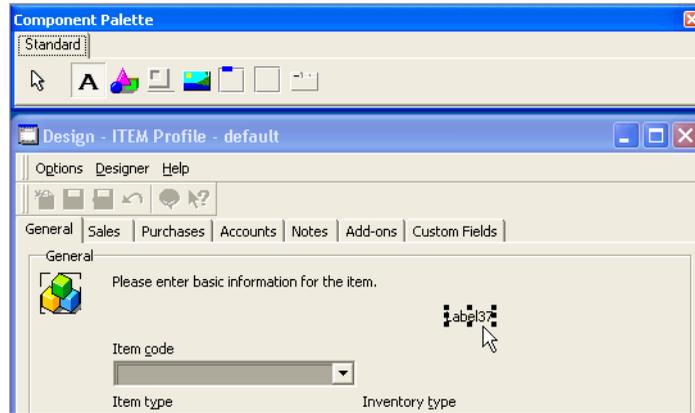


Figure 2.17: The Component Palette - Text Control added to Target Form
Modify a Control or Object

To change the properties of a control or object using the Object Inspector, do the following:

- Click on a control or object to view its properties in the **Object Inspector**.

- Make the necessary changes in the **Object Inspector**.

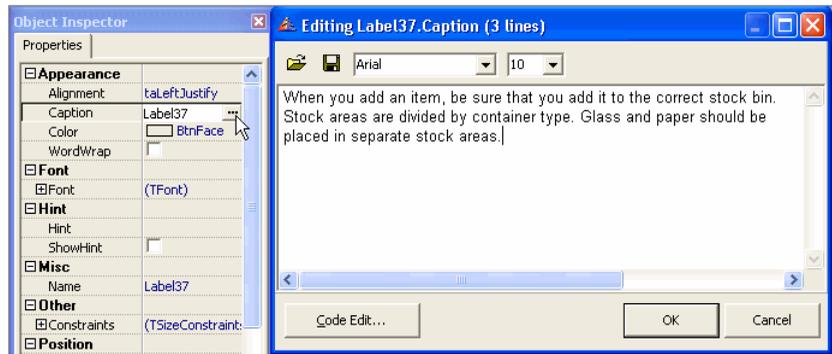


Figure 2.18: Editing the Text Control using the Object Inspector



Figure 2.19: Changes Made in the Object Inspector are shown on the Target Form

 Certain controls change dynamically during runtime based on **Everest** functionality. In this situation, the control's other properties such as Position, Font, and Color can be changed but the text comes from **Everest**. For example, you cannot change a Sales Quote caption since the text comes from **Everest**.

Tab and Page Controls

In Design mode, you can highlight fields and controls and change their properties in the Object Inspector. Tab and Page “controls” can also be selected so that you can change their properties. A **Tab Control** is a control for an entire tab. A **Page Control** is a control for the entire page which includes all of the tabs. Both controls

are indicated by black dots. The Tab Control is used to add, rename, reorder, and delete tabs.

The following figure shows the Page Control selected. It is indicated by eight black dots surrounding the page including all of the tabs.

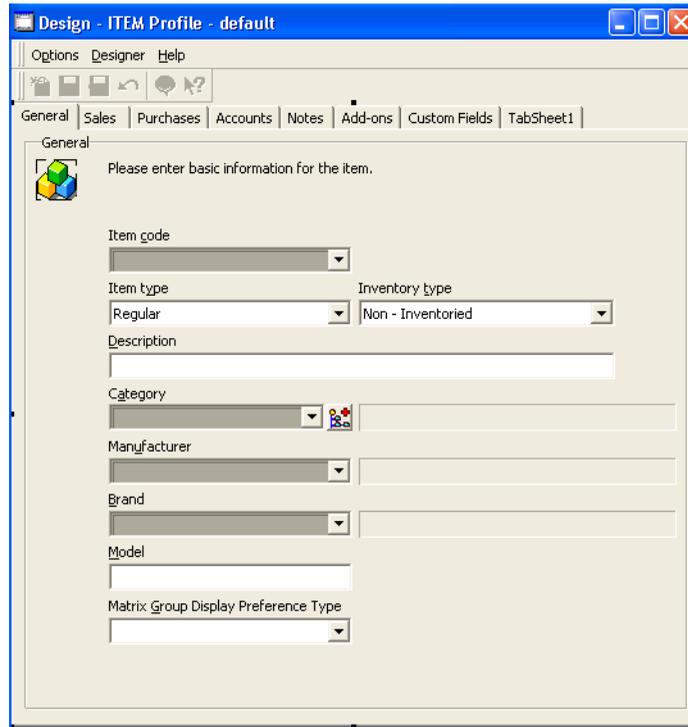


Figure 2.20: Page Control

The next figure shows the Tab Control selected. It is indicated by eight black dots surrounding an individual tab page but it does not include the tab itself.

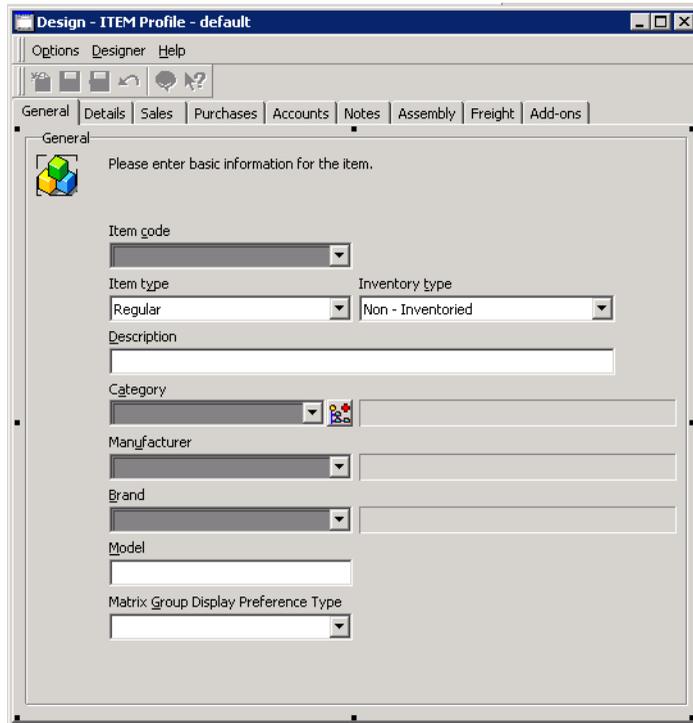


Figure 2.21: Tab Control

It is important that you learn the difference between Tab Controls and Page Controls because if you use the Page Control instead of the Tab Control when working with tabs, you will not get the intended results.

Example If you want to select a tab to delete it, select the Tab Control for that tab. If you select the Page Control by mistake and press the **Delete** key, all of the tabs will be deleted.

Select the Page Control

To select the Page Control, do the following:

- Click a field on a tab.
- Press the **Esc** key until the black dots are surrounding the page and just above the tabs. The Page Control is in focus and modifications can be made.

Select a Tab Control

To select a Tab Control, do the following:

- Click a field on the tab that you would like to modify.
- Press the **Esc** key until the black dots are surrounding only the tab page but not the tab itself. The Tab Control is in focus and modifications can be made.

Add a New Tab

1 **2** **3** → To add a new tab, do the following:

- Select the Tab Control of a tab on the same level as the tab you are adding.
- Right click the Tab Control and select **New Page**.

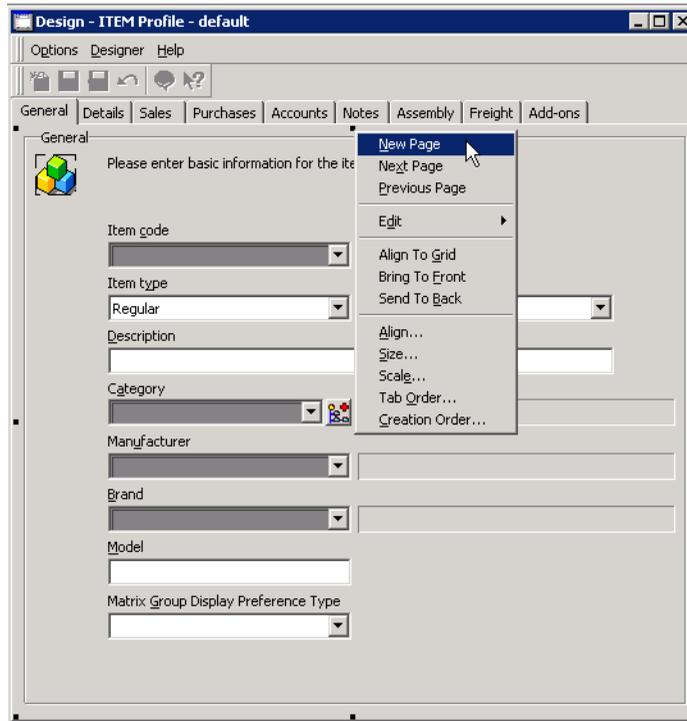


Figure 2.22: Tab Control with New Page Selected

- A new tab is added to your target form.

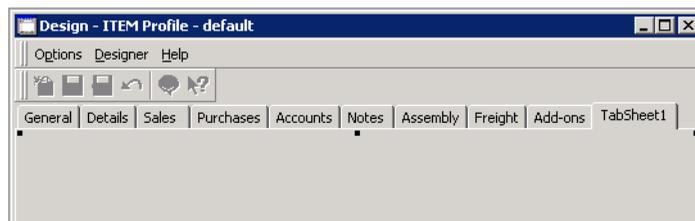


Figure 2.23: New Tab Added to the Item Profile

Add a Dynamic Tab

Use the Field Chooser to add dynamic tabs to the target form. System dynamic tabs such as E-Commerce (Item profile), Multimedia, and Related Items are

created in **Everest** at run time. While the content of these tabs cannot be designed, the tab properties can be changed.

3 To add a dynamic tab to the target form, do the following:

- Click on a dynamic tab sheet in the Field Chooser. You will see a **Target** icon underneath your cursor when your cursor is over a valid container for the drop. If you do not see the Target icon, move your cursor until the Target icon is in view.



Figure 2.24: Targeted Drop Cursor

- Click a location on the target form. The target icon is no longer underneath your cursor and the Dynamic Tab is added to the target form.

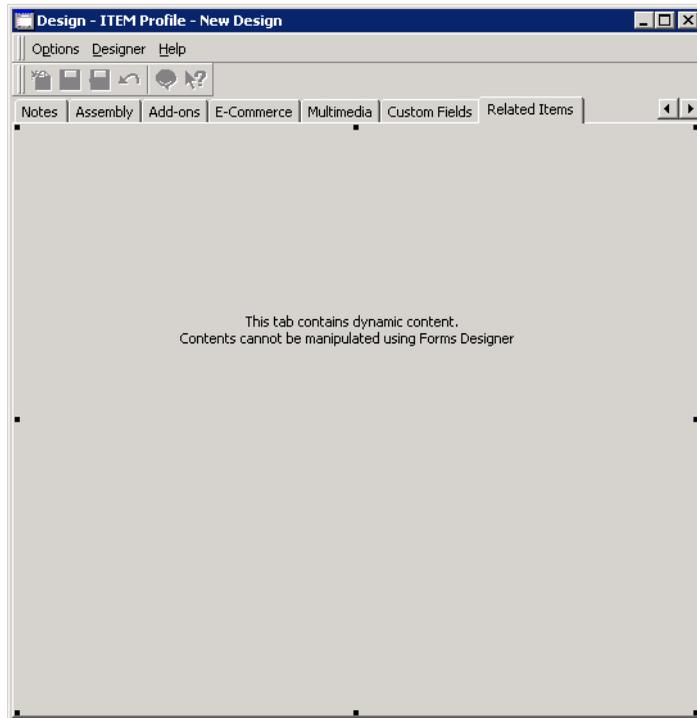


Figure 2.25: Dynamic Tab Added to the Target Form from the Field Chooser

You cannot edit objects contained within the tab control of a dynamic tab. You can only change the properties of the tab container (tab sheet). For example, you can change the name of the dynamic tab and reorder a dynamic tab on the target form. If a dynamic tab is not mandatory, the tab can be deleted. You can add it again, if necessary.



[“Add the Tasks Tab to the Customer Profile” on page 35](#)

Rename a Tab

1 **2** **3** To change the name of a tab, do the following:

- Select the Tab Control of the tab to be renamed.
- In the Object Inspector, in the **Caption** field, enter the new name for the tab. The tab is renamed to the new name entered.

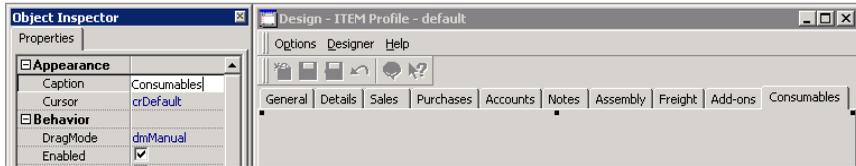


Figure 2.26: New Tab Renamed “Consumables”

Reorder Tabs

1 **2** **3** To reorder the tabs, do the following:

- Get the Tab Control in focus (select the Tab Control) for a tab you would like to reorder.

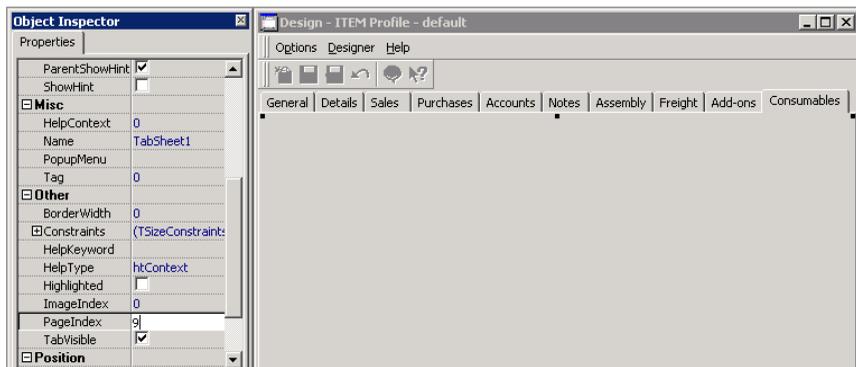


Figure 2.27: “Consumables” Tab with PageIndex 9

- In the Object Inspector, in the **PageIndex** field, change the number of the tab to reflect its new position.

The **PageIndex** field indicates the order that the tabs are displayed to the user. They are numbered starting with zero (0, 1, 2, 3, 4, 5,...).

Example To move a tab with a page index of 9 to the left, change the page index for the tab in the Object Inspector to 8.

- Click the tab on the target form to change the tab position. The tab is moved to the new position.

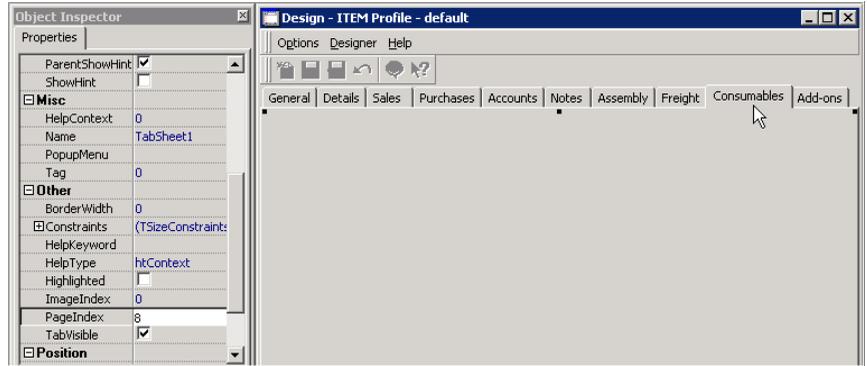


Figure 2.28: “Consumables” Tab Moved to the Left

Delete a Tab

1 2 3 → To delete a tab, do the following:

- Get the tab control of the tab to be deleted in focus. (Select the tab control of the tab you would like to delete.)
- Press the **Delete** key. The tab is removed from the profile.

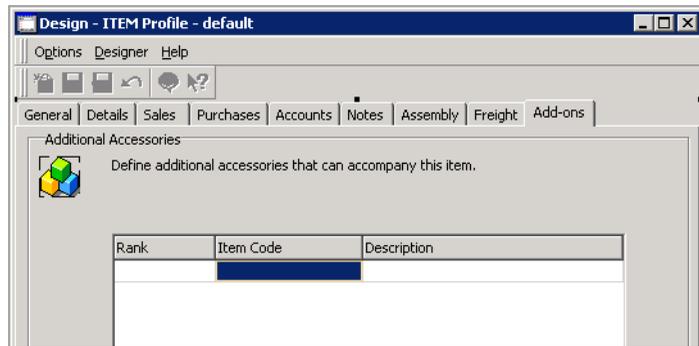


Figure 2.29: “Consumables” Tab Deleted from the Profile

Change an Object’s Position

1 2 3 → To change an object’s position, do the following:

- Highlight one or more objects on the target form. (Press and hold the **Shift** key and click on the objects you want to select. Release the **Shift** key.)

- Right click the selected objects and select **Alignment** to change the objects' horizontal and vertical position on the target form. The **Alignment** dialog box appears.

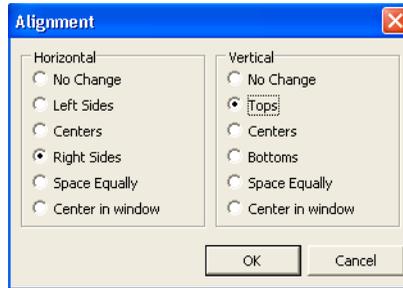


Figure 2.30: The Alignment Dialog Box

- Click a horizontal alignment choice to select it.
- Click a vertical alignment choice to select it.
- Click **OK** after you have made your selections.

Change an Object's Size

1 **2** **3** → To change an object's size, do the following:

- Highlight one or more objects on the target form. (Press and hold the **Shift** key and click on the objects you want to select. Release the **Shift** key.)
- Right click the selected objects and select **Size** to change the objects' height and width. The **Size** dialog box appears.

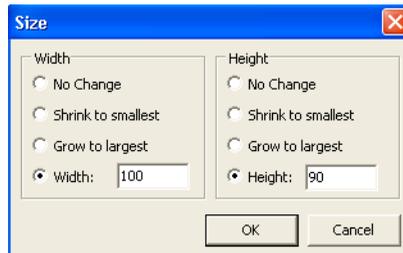


Figure 2.31: The Size Dialog Box

- In the **Width** section, select the appropriate width option.
- If you selected **Width**, enter the width in the **Width** field.
- In the **Height** section, select the appropriate height option.
- If you selected **Height**, enter the height in the **Height** field.
- Click **OK** after you have made your selections.

Change the Tab Stop Order



To change the order of the tab stops, do the following:

- Right click any object and select **Tab Order** to change the order of the tab stops. The **Tab Order** dialog box appears.

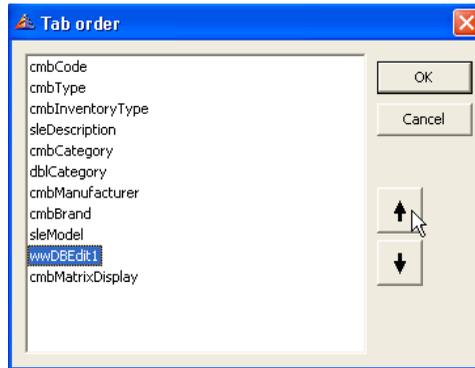


Figure 2.32: The Tab Order Dialog Box

- Use the **Up** and **Down** arrows to move the position of the tab stops.
- When you have arranged the tab stops in the appropriate order, click **OK**.



The **Tab Order** mentioned here is the tab stop order. This is the order that the fields come into focus when the end user presses the **Tab** key. This is different from the **Order of the Tabs** which is the order in which the tabs are displayed.

Make any Necessary Changes to the Menu and Toolbar



To make changes to the Menu and Toolbar, do the following:



Everest Advanced Edition User Guide > Volume I > Chapter 1 > Section - Add/Remove Toolbars

Everest Advanced Edition User Guide > Volume I > Chapter 1 > Section - Add/Remove Commands from a Toolbar

- Right click the **Profile** menu bar and select **Customize**. The **Customize** dialog box appears. Use the **Toolbars** tab to create new toolbars, rename, and delete them.

- On the **Toolbars** tab, click the **New** button. The **Custom** dialog box appears.

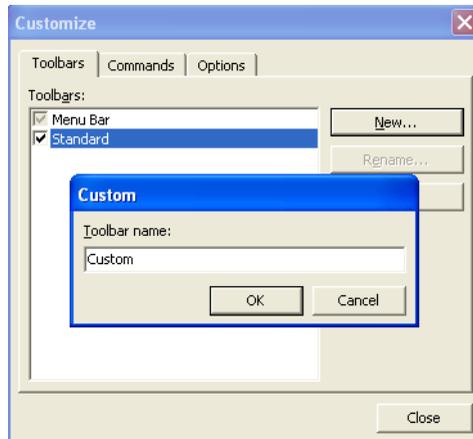


Figure 2.33: Entering a New Toolbar Name Using the Customize Dialog Box

- Enter the new toolbar name and click **OK**.
- The **Rename** and **Delete** buttons are now activated for the new toolbar created.
- Click **Close**. The new toolbar is added to the profile.
- Right click the Profile menu bar and click **Customize**. The **Customize** dialog box appears.
- Click the **Commands** tab.

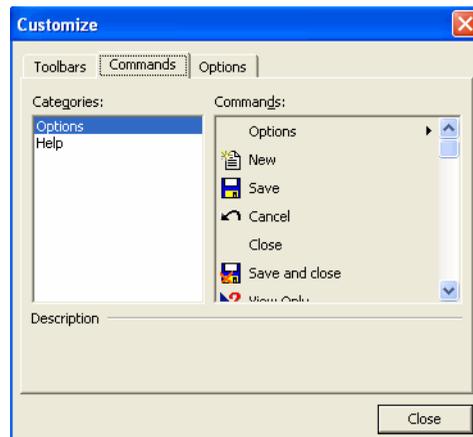


Figure 2.34: Customize Dialog Box Commands Tab

- Highlight a **Category** and drag and drop **Commands** onto the new toolbar as necessary.

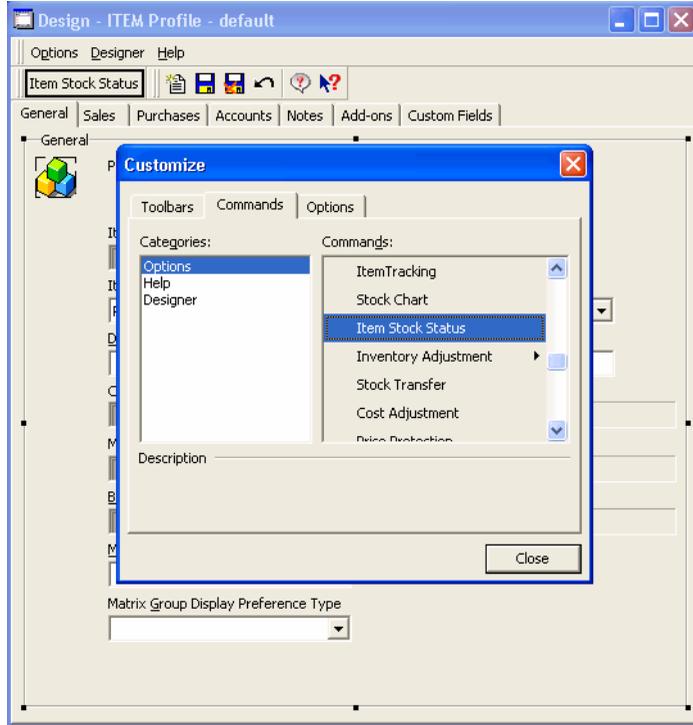


Figure 2.35: A New Command Added to the New Profile Toolbar

- Click the **Options** tab. Select any additional menu or toolbar options.

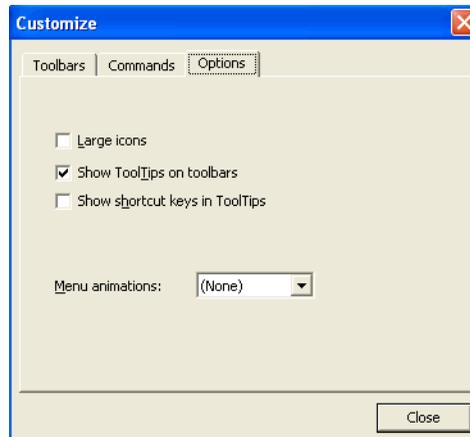


Figure 2.36: Customize Dialog Box Options tab



Click the **Large Icons** check box to increase the icon size on the toolbar making it easier for users to see them.



Everest Advanced Edition User Guide > Volume I > Chapter 1 > Section -
Resize Icons



Figure 2.37: Item Profile with Large Toolbar Icons

- Click **Close**.

Save

Once you have completed the necessary design changes to the target form, save it.



To save the changes to a design, do the following:

- From the **Forms Designer** menu, click **Designer > Save**. The newly created form is saved to the database.

The screenshot shows the 'Design - ITEM Profile - default' window with the 'General' tab selected. The window title bar includes 'Options', 'Designer', and 'Help'. Below the title bar are icons for file operations and a help icon. The 'General' tab contains the following fields and sections:

- Warning:** A red message states: "When you add an item, be sure that you add it to the correct stock bin. Stock areas are divided by container type. Glass and Paper should be placed in separate stock areas."
- Item code:** A dropdown menu.
- Item type:** A dropdown menu with 'Regular' selected.
- Inventory type:** A dropdown menu with 'Non - Inventoried' selected.
- Description:** A text input field.
- Category:** A dropdown menu with a small icon to its right.
- Manufacturer:** A dropdown menu.
- Brand:** A dropdown menu.
- Model:** A text input field.
- Matrix Group Display Preference Type:** A dropdown menu.
- Shelf Life:** A section containing:
 - Perishable:** A checkbox.
 - Manufacture Date:** A text input field.

Figure 2.38: Form Version Example

- If the version has not been previously saved, the **Save Form** dialog box appears to allow you to enter a name for the newly created form.

The screenshot shows the 'Save Form' dialog box. The title bar is blue and contains a save icon and the text 'Save Form'. The dialog box has a light gray background. It contains the following elements:

- Form Name:** A label followed by a text input field containing the text 'ITEM Profile - manufacture date'.
- Buttons:** 'OK' and 'Cancel' buttons located at the bottom of the dialog box.

Figure 2.39: The Save Form Dialog Box

- In the **Form Name** field, enter a name for your form. The name must be unique for the versions of this profile.

If the standard version is edited and saved, the changes are saved as a new version. The standard version is then always available for use in its default form.

- When finished, click **OK**. The system validates the form for errors and displays a message box alerting you to errors found.



Figure 2.40: Errors on Save Message Box

- Correct any errors displayed and repeat the **Save** process.



You cannot save the new form until all errors are corrected. All mandatory fields must be visible, enabled, and contained in the new form.

After you have corrected any errors and saved the newly designed form, the form is available to be assigned to users and groups. The new form does not become active until it is assigned.

Alternatively, you can select **Save As** when saving your newly created form. Use **Save As** if you want to give a version of the standard form a name or if you want to save your current work as a previously saved version, replacing the earlier version.

Save As

To use Save As when saving your new form version, do the following:

- 1
 - 2
 - 3
- From the **Forms Designer** menu, click **Designer > Save As**. The **Save Form As** dialog box displays the name of the form that was active when the Forms Designer was opened, the name of the last form loaded, or the name previously saved after the form was loaded.



Figure 2.41: The Save Form As Dialog Box

- Enter a unique name for the form or select an existing form to replace it with your current work.
- When finished, click **OK**. The system validates the form for errors and displays a message box alerting you to errors found.
- Correct any errors displayed and repeat the **Save As** process.

Reset Version



To reset a version back to the standard version, do the following:

- Load the standard version of the form and save it as the version that needs to be reset.



When the Forms Designer is enabled, the customizable forms do not allow menu and toolbar customization in normal mode.

Add the Tasks Tab to the Customer Profile

When designing a Customer profile form, you can add the customer **Tasks** tab to show related tasks, calls, and CRM Notes. It is not added to the target form by default.



To add the dynamic customer **Tasks** tab to the Customer profile, do the following:

- Click on the **Tasks** Tab Sheet (Tab Sheet - Tasks) in the Field Chooser. You will see a **Target** icon underneath your cursor.



Figure 2.42: Targeted Drop Cursor

- Click a location on the target form. The target icon is no longer underneath your cursor and the dynamic customer **Tasks** tab is added to the target form.

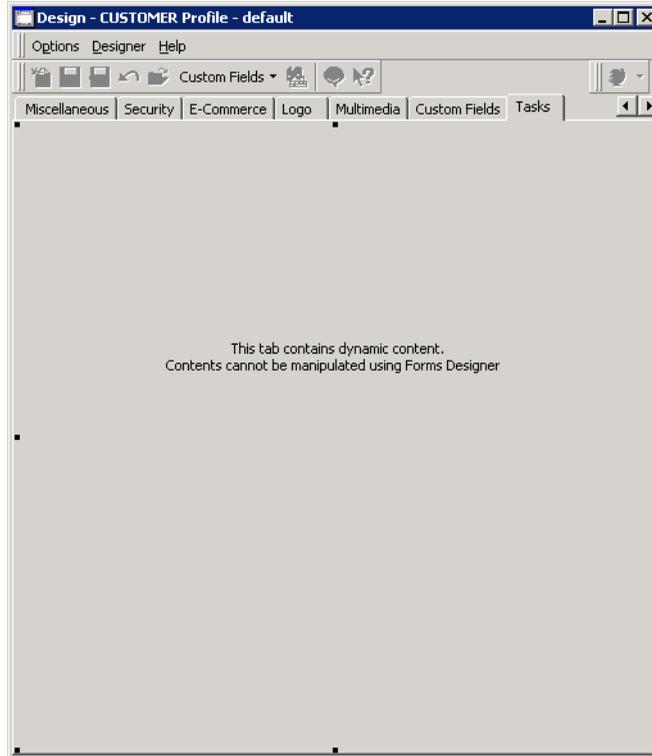


Figure 2.43: Tasks Tab Added to the Target Form from the Field Chooser

Because the customer **Tasks** tab is a system dynamic tab, you cannot change the tab contents using the Forms Designer. You are able to change the tab sheet properties, such as the name of the tab and its position on the target Customer profile form.

 ["Add a Dynamic Tab" on page 24](#)

Create Sample Customized Profiles

Example In the illustration that follows, you will create two sample customized profiles. The **Everest** software was purchased with the Forms Designer functionality and associated license key. You are logged in to the **Everest** system and your user account has permission to edit and assign custom forms.

To create a sample customized profile, you must be in Design view.

Open the Forms Designer

1 **2** **3** → To open the Forms Designer from the Item profile, do the following:

- Open the **Items** browser.
- Double-click an item to select it and open the **Item** profile.
- From the **Options** menu, select **Design**.

The **Forms Designer** appears with the target form in **Design** view. The word “**Design**” is located next to Item in the title bar. The **Field Chooser**, **Component Palette**, and **Object Inspector** are displayed near the target form. The target form displays the standard profile template.

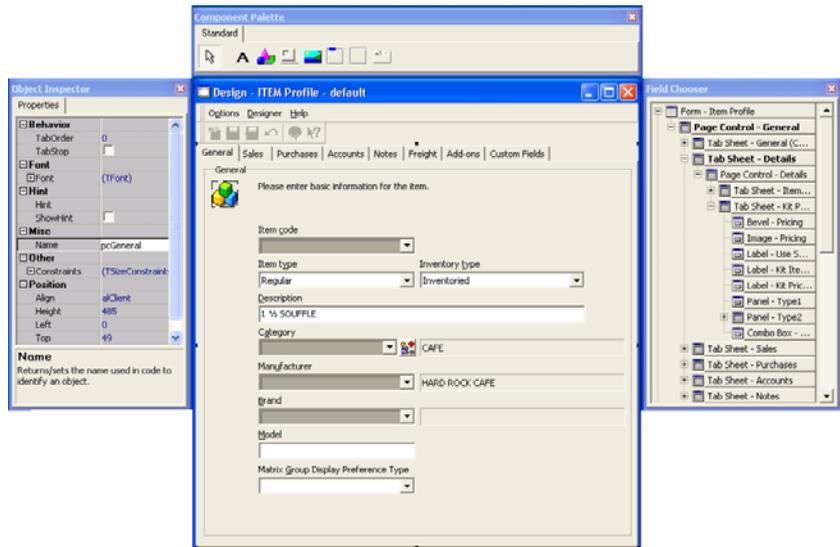


Figure 2.44: The Item Profile in Design View

You decide to close and reopen the Field Chooser, Object Inspector, and Component Palette.

Close and Reopen Dialog Boxes

1 **2** **3** → To close and reopen the dialog boxes, do the following:

- Click  in the upper right corner of the dialog boxes to close the **Field Chooser** dialog box, the **Object Inspector**, and the **Component Palette**.
- Reopen the dialog boxes. From the **Item** profile, select **Designer > Component Palette**. The **Component Palette** is displayed.
- From the **Item** profile, select **Designer > Object Inspector**. The **Object Inspector** is displayed.

- From the **Item** profile, select **Designer > Field Chooser**. The **Field Chooser** is displayed.

You decide to create a customized field and make it required. Exit the Forms Designer to do this.

Exit the Forms Designer

 To exit the Forms Designer, do the following:

From the **Item** profile, select **Designer > Exit Design Mode**. The screen refreshes to show the **Item** profile's normal view.

Create a Mandatory Custom Field

 To create a custom field and make it mandatory, do the following:

- Click on the **Custom Fields** tab.



Everest Advanced Edition User Guide > Volume I > Chapter 2 > Section - Create a Custom Field

- In the **Characters** tab, right click on the grid and select **Properties**. You will see the **Custom Field Definition** profile.
- Click the **New** icon.
- In the **Field Name** field, enter **Perishable**.
- The **Field Type** field should display **"Characters"**.

- Click in the box to select **Mandatory**.

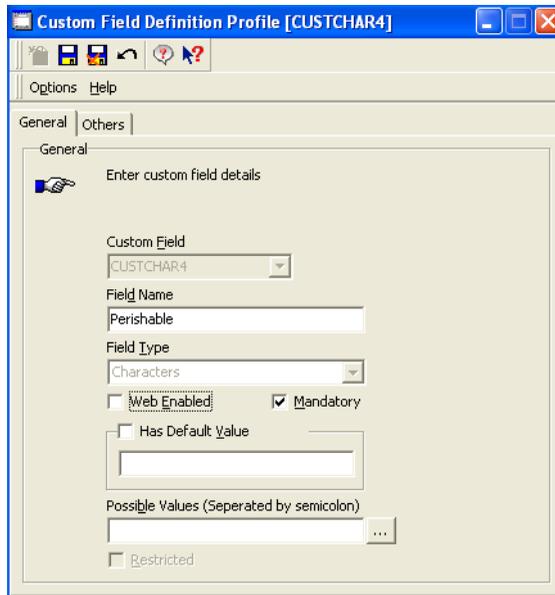


Figure 2.45: The Custom Field Definition Profile

The **Custom** field can be made to display possible values, but for this example assume that the end user will type a value in the field.

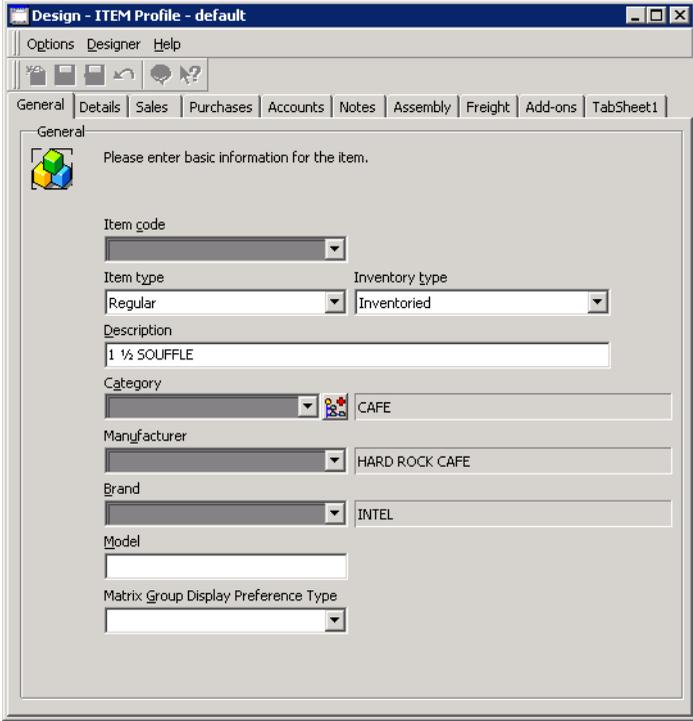
- Click **Save** to save the custom field.

Return to the Forms Designer to create a customized profile.

Return to Design View

 To return to the Design view, do the following:

- From the **Options** menu, select **Design**. The **Item** profile is displayed in the Design mode.



The screenshot shows a software window titled "Design - ITEM Profile - default". The window has a menu bar with "Options", "Designer", and "Help". Below the menu bar is a toolbar with icons for save, undo, redo, and help. The main area is divided into tabs: "General", "Details", "Sales", "Purchases", "Accounts", "Notes", "Assembly", "Freight", "Add-ons", and "TabSheet1". The "General" tab is selected and contains a form with the following fields:

- Item code**: A dropdown menu.
- Item type**: A dropdown menu with "Regular" selected.
- Inventory type**: A dropdown menu with "Inventoried" selected.
- Description**: A text box containing "1 1/2 SOUFFLE".
- Category**: A dropdown menu with "CAFE" selected.
- Manufacturer**: A dropdown menu with "HARD ROCK CAFE" selected.
- Brand**: A dropdown menu with "INTEL" selected.
- Model**: A text box.
- Matrix Group Display Preference Type**: A dropdown menu.

Figure 2.46: Item Profile in Design Mode

You decide to add your new custom field to a new tab in the **Item** profile.

Add New Custom Field to New Tab

 To create a new tab and add the new custom field to that tab, do the following:

- Click a field on the **General** tab.

- Select the Tab Control of the **General** tab. (Press the **Esc** key until the black dots are surrounding only the tab page but not the tab itself.) The Tab Control is in focus and modifications can be made.

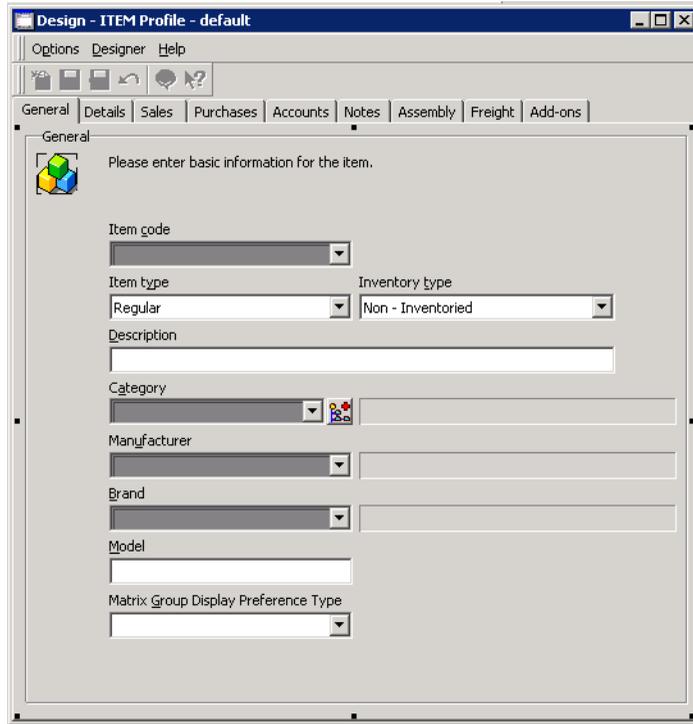


Figure 2.47: Tab Control for General Tab



["Tab and Page Controls" on page 21](#)

- Right click the Tab Control and select **New Page**. A new empty tab is added to the profile.
- In the Field Chooser, click the new **Perishable** field.

- On the target form, click the new tab to add the **Perishable** field to it.

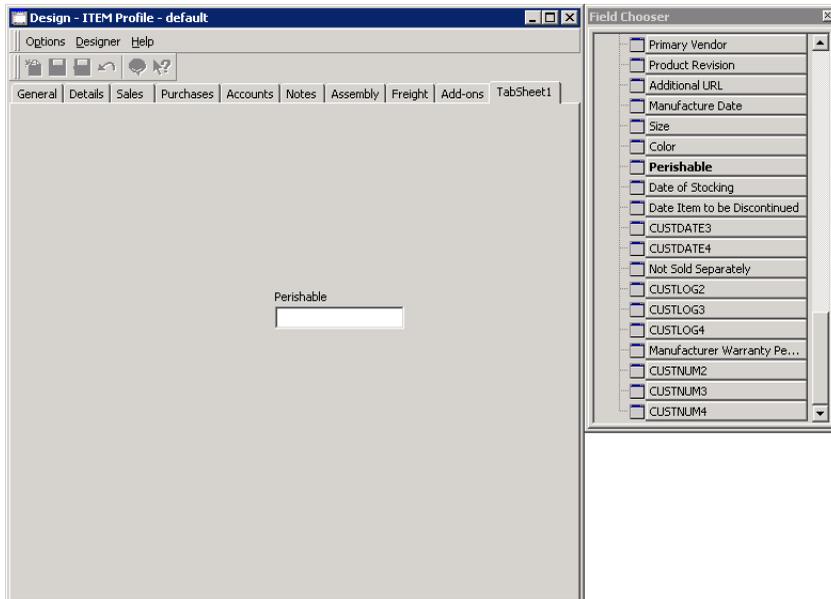


Figure 2.48: Target Form Showing New Tab and Field

Change the label on the new tab to “Items”.

Change the Label

1 **2** **3** → To change the label on the new tab, do the following:

- On the target form, click on the new tab page. Notice that the properties of this object are displayed in the **Object Inspector** dialog box.

- In the **Object Inspector** dialog box - **Caption** field, type Items. The new tab is renamed to “Items”.

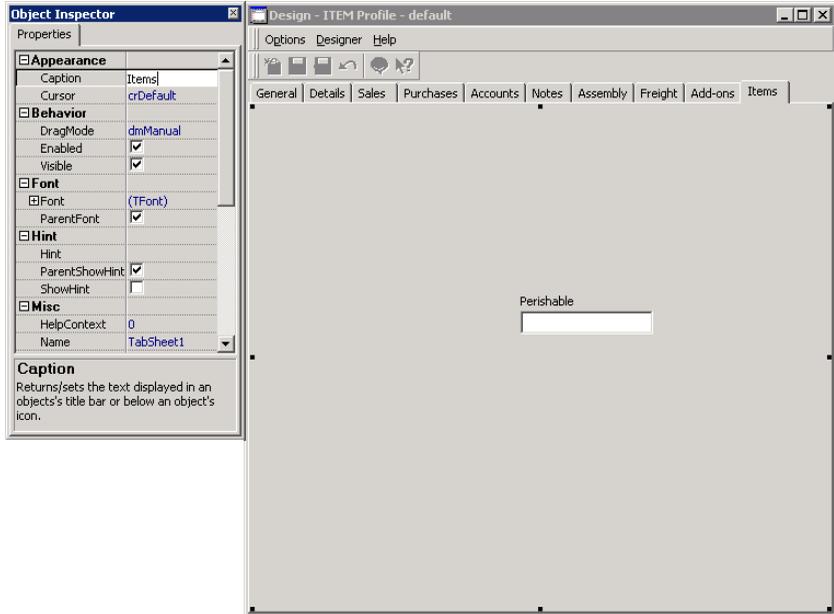


Figure 2.49: New Tab Renamed to “Items”

You decide to remove the **Perishable** field from the “Items” tab, remove all tabs except the **Items** tab, and add all mandatory fields to the target form.

Remove a Field from a Tab

1 **2** **3** → To remove the “Perishable” field from the “Items” tab, do the following:

- Click on the new “**Items**” tab and delete the **Perishable** field. (Highlight the **Perishable** field and press the **Delete** key. Highlight the **Perishable** label and press the **Delete** key.) The **Perishable** field and label are removed from the tab.

Remove Tabs

1 **2** **3** → To remove all tabs except the “Items” tab, do the following:

- Get a tab to be deleted in focus. (Select the tab control of the tab to be deleted.)



“**Tab and Page Controls**” on page 21

- Press the **Delete** key. The tab is removed from the profile.

- Repeat the above steps to delete all of the remaining tabs except the “Items” tab.

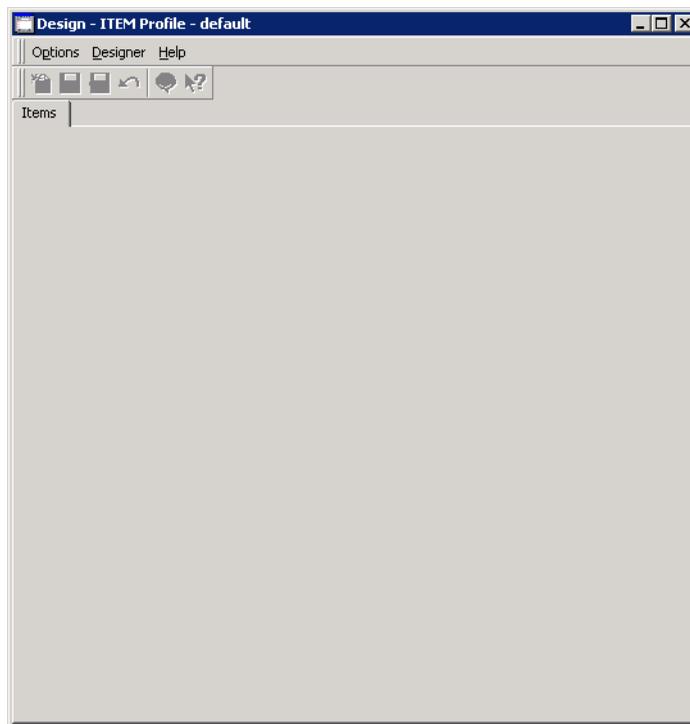


Figure 2.50: Item Profile Design Mode - All Tabs Removed except the Items Tab

Add all Mandatory Fields

 To add all mandatory fields to the target form, do the following:

- Click the new “Items” tab. (Select the Tab Control.)

- From the **Designer** menu, select **Add Mandatory**. All of the mandatory fields for the **Item** profile are added to the target form.



You must select an appropriate container, such as the Tab Control, before using the **Add Mandatory** menu option.

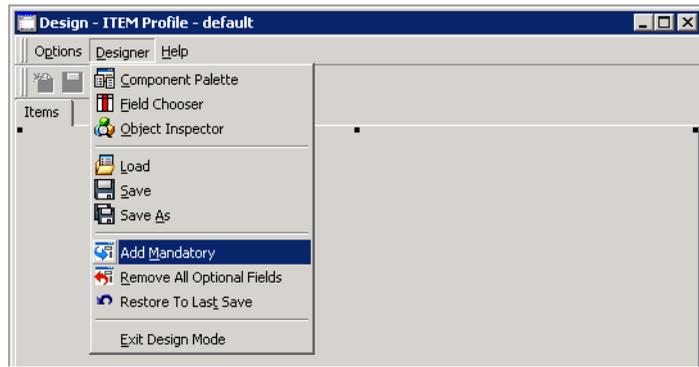


Figure 2.51: Item Profile Design Mode - Add Mandatory Option

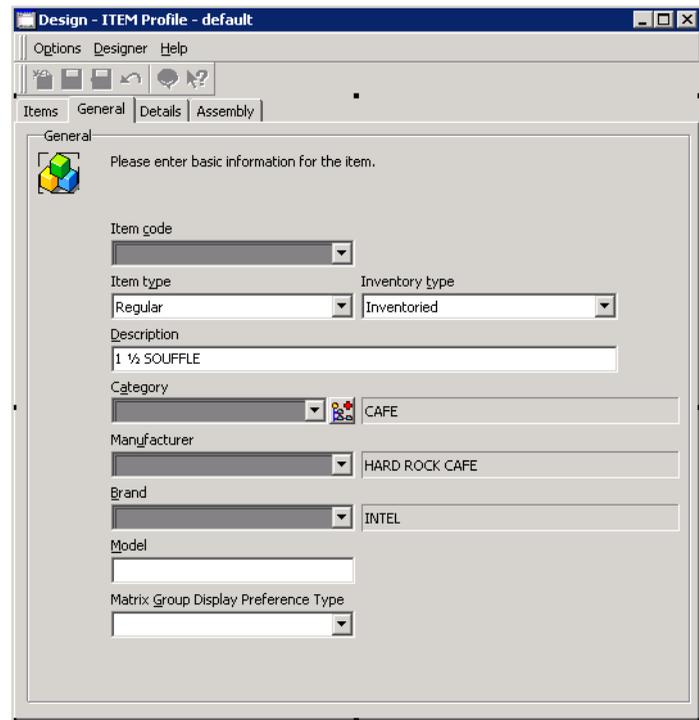


Figure 2.52: Target Form Showing All Mandatory Fields on the Target Form

Remove a Mandatory Field

 To remove a mandatory field, do the following:

- Select the mandatory **Item Code** field and label on the target form:
 - Click the **Item Code** label.
 - Press and hold the **Shift** key.
 - Click the **Item Code** field.
 - Release the **Shift** key.

Figure 2.53: Target Form - Select Mandatory Field and Label

- Press the **Delete** key. The mandatory field and label are removed from the target form.

Figure 2.54: Target Form - Mandatory Field Removed

Add a Field to a Group Box

 To add a field to a group box, do the following:

- Click the **Items** tab.
- From the **Component Palette**, click the  **Group Box** icon, and click the target form to add it to the target form.

Figure 2.55: Group Box

- Add a field from the **Field Chooser** into the **Group Box** on the target form.

- Select the **Group Box** to rename it. Change the name in the **Caption** field of the Object Inspector.

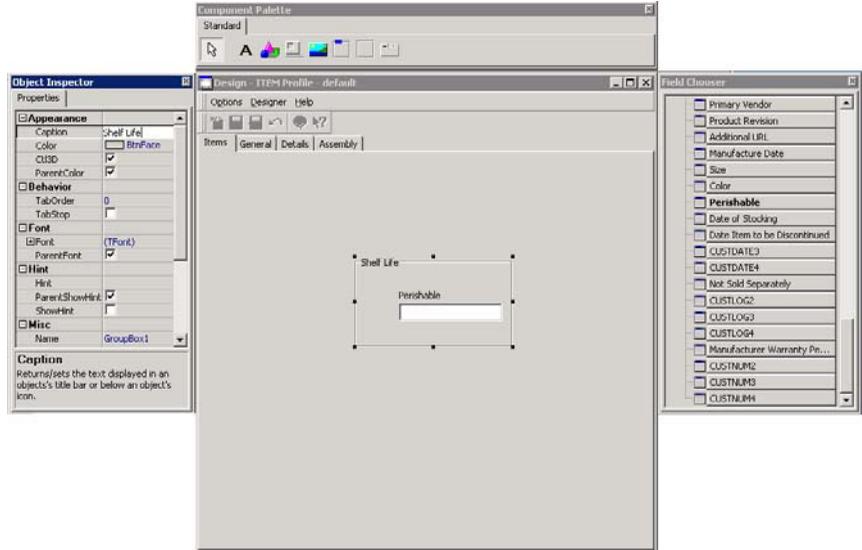
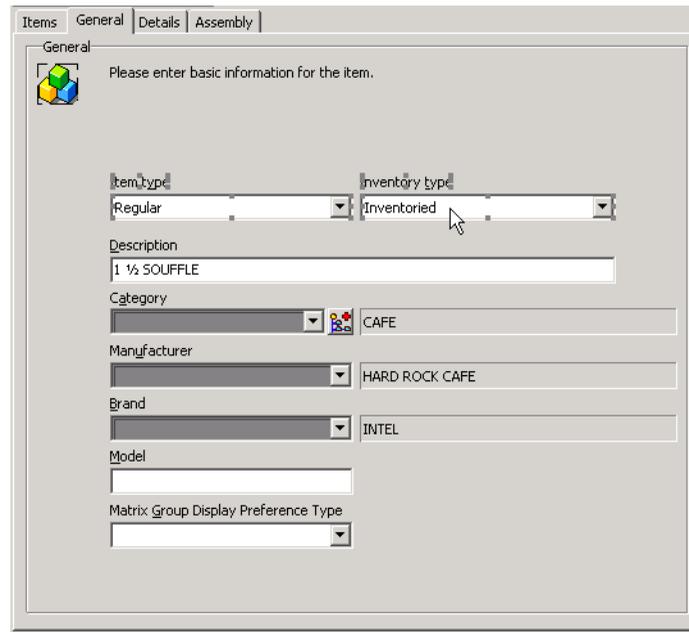


Figure 2.56: A Field Added to the New Group Box

Move Fields

1 **2** **3** → To move fields to a new location, do the following:

- Highlight several fields together and drag them to the bottom of the target form.



The screenshot shows a window titled 'Items' with tabs for 'General', 'Details', and 'Assembly'. The 'General' tab is active, displaying a form with the following fields:

- Item Type**: A dropdown menu with 'Regular' selected.
- Inventory Type**: A dropdown menu with 'Inventoried' selected.
- Description**: A text box containing '1 1/2 SOUFFLE'.
- Category**: A dropdown menu with 'CAFE' selected.
- Manufacturer**: A dropdown menu with 'HARD ROCK CAFE' selected.
- Brand**: A dropdown menu with 'INTEL' selected.
- Model**: An empty text box.
- Matrix Group Display Preference Type**: A dropdown menu.

The 'Item Type' and 'Inventory Type' fields are highlighted with a blue selection box, and a mouse cursor is positioned over the 'Inventory Type' dropdown arrow.

Figure 2.57: Target Form Showing Highlighted Fields

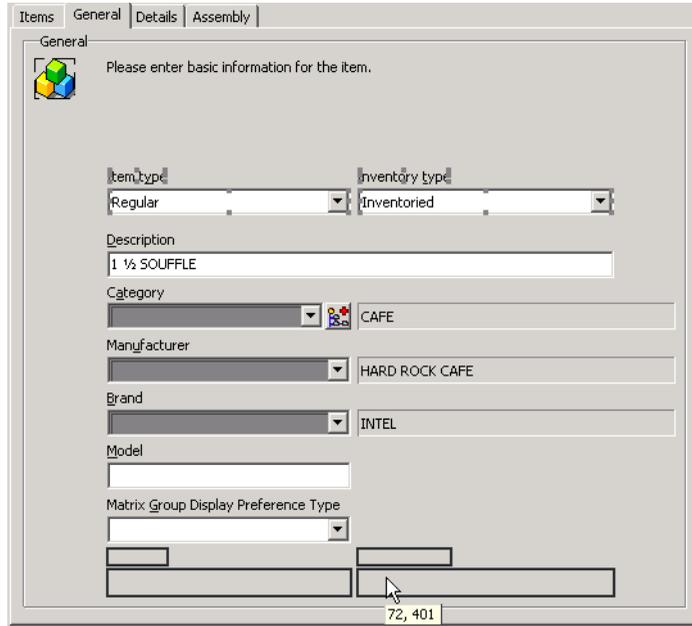


Figure 2.58: Target Form - Drag and Drop Fields

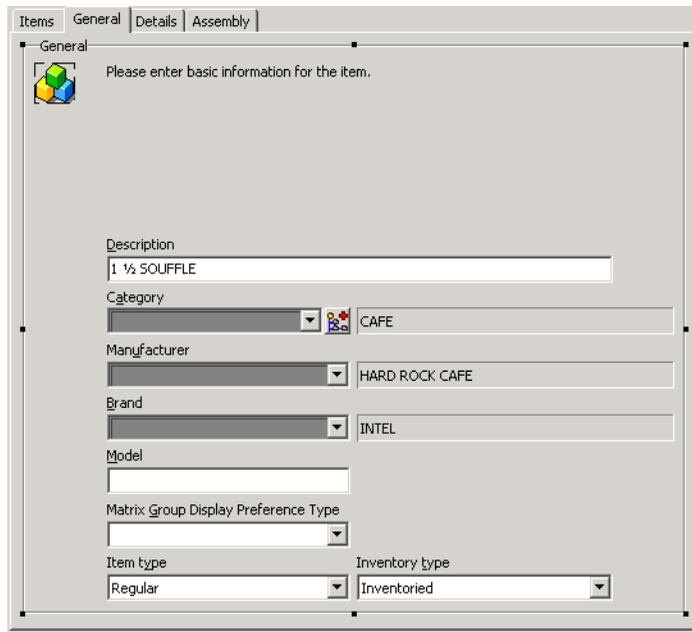


Figure 2.59: Target Form Showing Fields Moved to the Bottom of the Target Form

You are satisfied with your customization and decide to save the profile version.

Save

 To save the new profile version (with a missing mandatory field), do the following:

- From the **Designer** menu, select **Save**. A **Warning** dialog box is displayed since a mandatory field is missing.

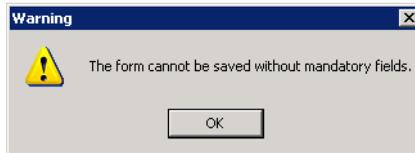


Figure 2.60: Warning Dialog Box

- Click **OK** to close the **Warning** dialog box and return to the Design View.
 - In the **Field Chooser**, look for a mandatory field that is highlighted as missing.
-  In the Field Chooser, a mandatory field is in bold. A field is highlighted if it is missing from the target form.

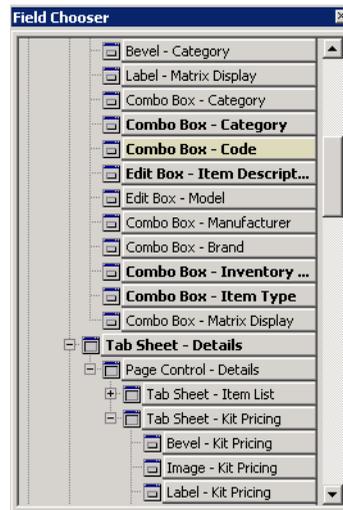


Figure 2.61: Field Chooser Showing a Mandatory Field that is Not on the Target Form

- In the Field Chooser, click the missing mandatory field. Click the new location on the target form. The missing mandatory field is now on the target form.

Figure 2.62: Missing Mandatory Field Added to Target Form

- From the **Designer** menu, select **Save**. The **Save Form** dialog box is displayed.
- In the **Form Name** field, type **Item Clerks**.

Figure 2.63: The Save Form Dialog Box (Item Clerks Entered)

- Click **OK**. The form is saved successfully.
- From the **Designer** menu, select **Exit Design Mode** to return to the normal mode. The system does not query for a save since no changes are made since the last save.
- Click **Yes** to exit the Forms Designer.

You decide to make a few changes to the newly created **Item Clerks** form to make another customized form.

Create Another Form Version

1 **2** **3** → To create another customized form version from an existing form, do the following:

- To return to Design Mode, from the **Options** menu, select **Design**.
- From the **Designer** menu, select **Load**.

- Click **Yes** to load another version of the form. The **Load Form** dialog box is displayed.

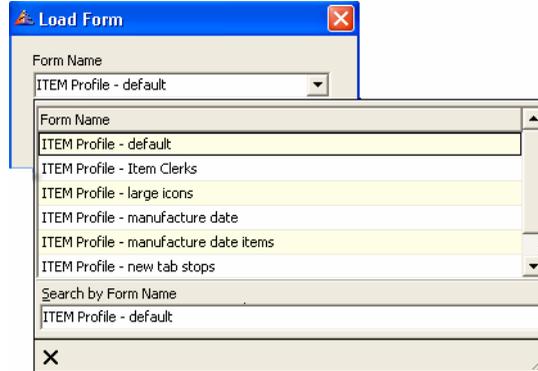


Figure 2.64: The Load Form Dialog Box

- Select the **Item Clerks** form.
- Click **OK**. The previously saved version of the **Item Clerks** form is displayed.
- Make a few changes of your choice. Do not remove any mandatory fields for this exercise.
- From the **Designer** menu, select **Save As**. The **Save Form As** dialog box is displayed.
- In the **Form Name** field, type Items Clerks Trainees.

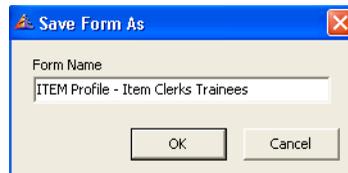


Figure 2.65: The Save Form As Dialog Box (Items Clerks Trainees Entered in Form Name Field)

- Click **OK** to save your current changes.
- Exit design mode.

You decide to add the **Notes** tab to the form.

Add Tab

1 **2** **3** → To add the **Notes** tab to the target form, do the following:

- From the **Options** menu, select **Design**. The **Item** profile is in Design Mode.
- From the **Designer** menu, select **Load**.
- Click **Yes** to load another form version. The **Load Form** dialog box appears.
- Select the **Item Clerks Trainees** form.
- Click **OK**. The previously saved version of the Item Clerks Trainees form is displayed.

- From the Field Chooser, click **Tab Sheet - Notes** and then click on the target profile. The **Notes** tab is added to the target form.

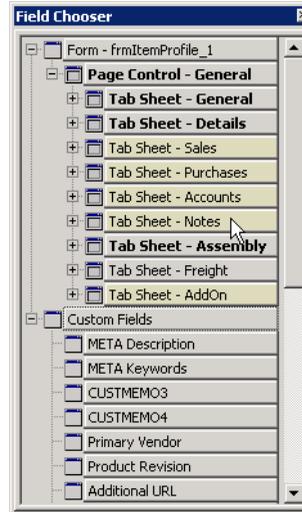


Figure 2.66: Field Chooser - Tab Sheet - Notes Selected

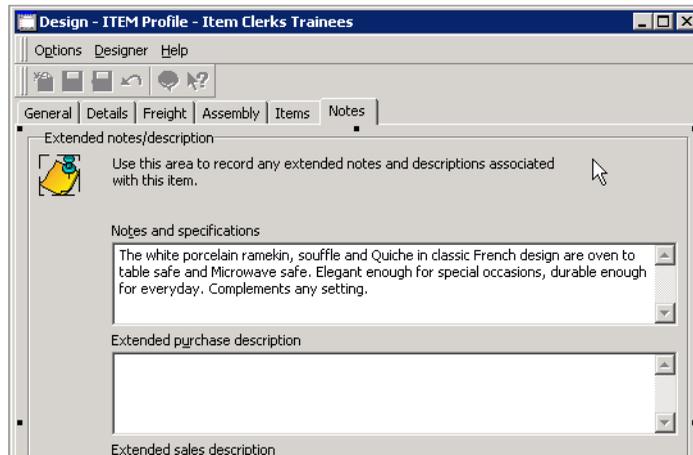


Figure 2.67: Notes Tab Added to Target Form

Make Additional Changes

Change item properties, add customizations, save the new form version, and return to normal view following the steps below.

 **To make additional changes, do the following:**

- Highlight the **Item Code** field and view the properties for the field in the Object Inspector. Notice that this is a mandatory field. The background changes color.

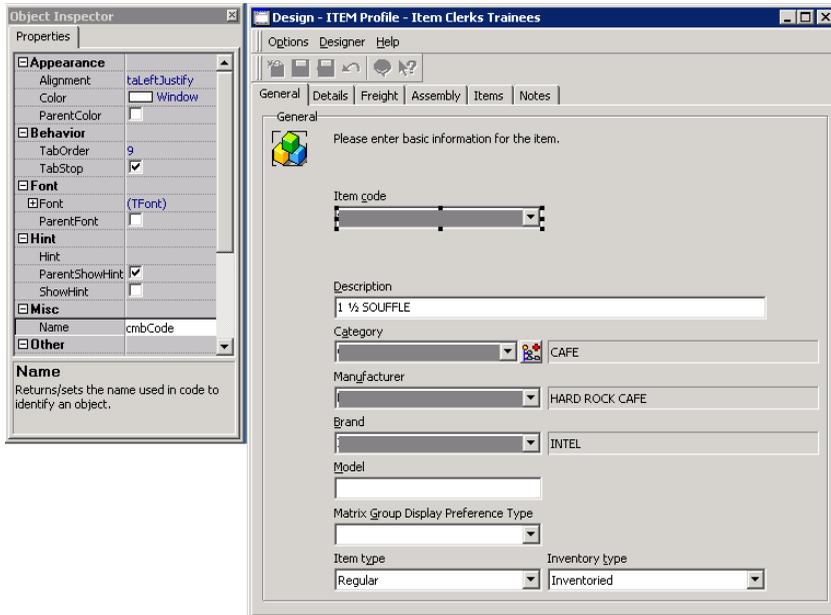


Figure 2.68: The Item Code Field Properties in the Object Inspector.

- On the target form, select the **Item Code** label and field and drag them to the right.

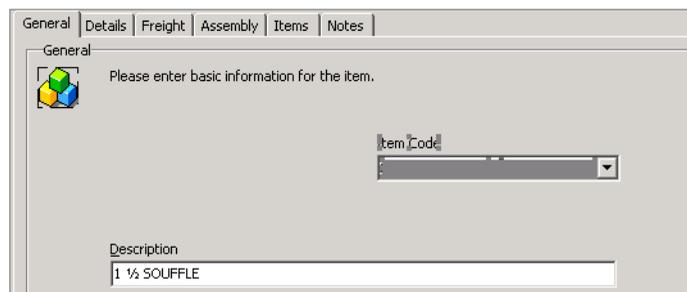


Figure 2.69: Target Form - Item Code Field Moved to the Right
You realize that you should not have moved the **Item Code** field and label.

Undo Last Change

1 **2** **3** → To undo the last change and move the Item Code field and label to their original position, do the following:

- Right click the target form and select **Edit > Undo**.



You cannot use the **Undo** function to undo a **Delete**.

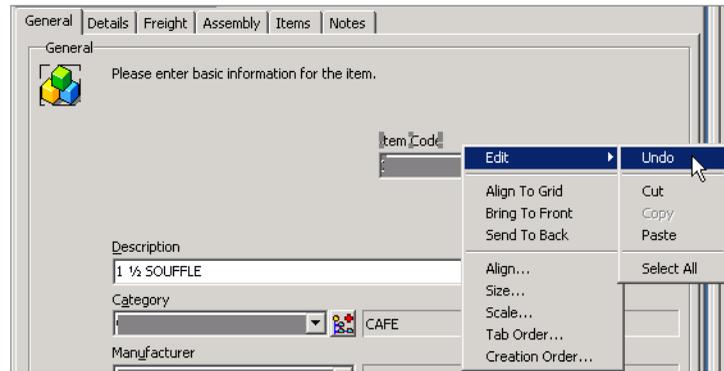


Figure 2.70: Target Form - Edit Undo

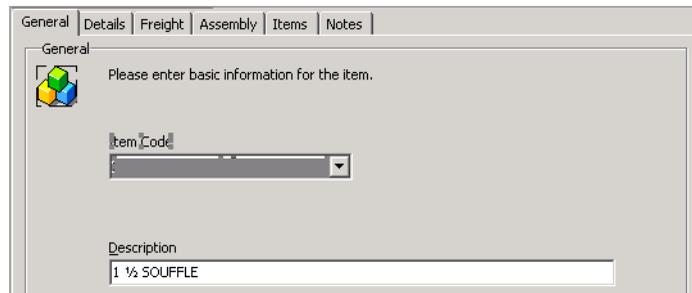


Figure 2.71: Target Form - Item Code Field in Original Position

Continue making changes to the target form.

- From the Component Palette, drag and drop one or more controls to the target form.
- Highlight any new control added and change the caption in the Object Inspector.

- Right click the Profile menu bar and select **Customize** to ensure that the menus and toolbars match. Use this feature to create and rename additional toolbars and menus, as needed.

Design - ITEM Profile - Item Clerks Trainees

Options Designer Help

General Details Freight Assembly Notes Items

General

Please enter basic information for the item.

Item Code

Be sure to enter the correct stock bin in the Stock Bin field!

Stock Bin

Description

1 1/2 SOUFFLE

Category

CAFE

Manufacturer

HARD ROCK CAFE

Brand

INTEL

Model

Matrix Group Display Preference Type

Item type

Inventory type

Regular Inventoried

Figure 2.72: Example Profile - Item Clerks Trainees Form

- Save the **Item Clerks Trainees** form. The **Item** profile is returned to the Design View.
 - Select **Designer > Exit Design Mode** to return to normal view.
- Two new custom profiles are created and are ready for use.

Create Custom Field Profile Forms for Extended Information Sample

Custom Fields profiles are accessible from various browsers including the sales documents browsers, such as the Sales Opportunity browser and the Sales Orders browser, and from the purchase document, Users, Customers, Vendors, Items, Tasks, and Serial Numbers browsers. You can access the **Custom Fields** profile from these browsers by entering **Ctrl + F** from within the browser.



The **Custom Fields** profile is also known as the **Custom Fields** dialog box.

Example

PetProducts, Inc. is a pet food manufacturer and sells a variety of Pet Food and other products. They have one marketing representative who researches and introduces new sales opportunities by visiting various wholesale dealers and distributors of pet food products.

The default Sales Opportunity profile in **Everest** displays much more information than they need to capture so they reorganized their Sales Opportunity profile using the **Everest Forms Designer** to show only Customer, Source, value, and pet food storage capabilities.

They also need to capture the number of years that the dealerships have been in operation, and, in the case of distributors, the areas of operation. They wanted to access this information from the Sales Opportunity browser as extended information.

To do this, they customized the **Custom Fields** profile which is opened from the **Sales Opportunity** browser as well as the other sales document browsers.

Open the Custom Fields Profile



To open the Custom Fields profile, do the following:

- Using the **Sales Opportunity** browser as an example, from the **Sales Opportunity** browser, select **Options > Custom Fields** or press **Ctrl + F**. The finished custom form will be accessible from all of the sales document

browsers. You will see the **Custom Fields** profile that contains the custom fields applicable to the selected browser.

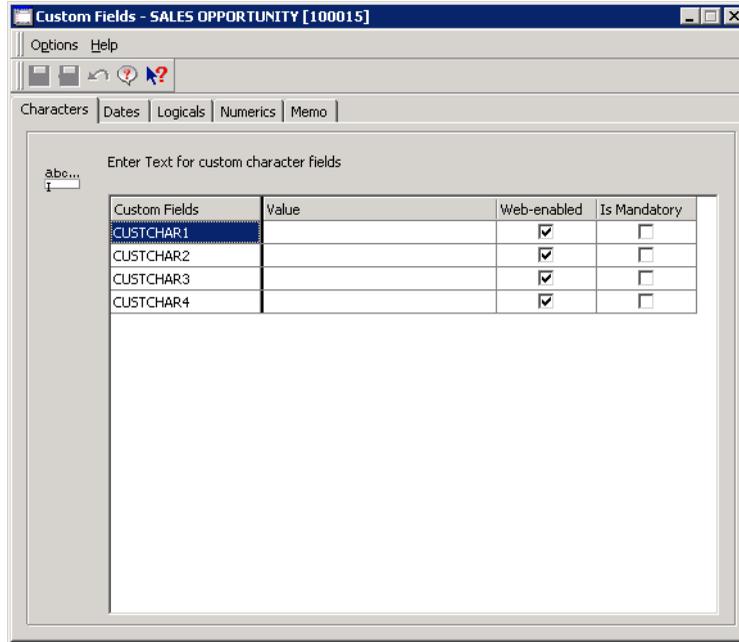


Figure 2.73: Custom Fields Profile

Create Custom Fields

1 **2** **3** → To create custom fields to use for extended information, do the following:

- Right click an existing custom field to be updated and select **Properties**. You will see the **Custom Field Definition** profile for the selected custom field. (If you do not have any default custom fields available, such as CUSTCHAR1,

from the **Custom Field Definition** profile, click the  **New** icon or press **Ctrl + N** to create a new custom field.)

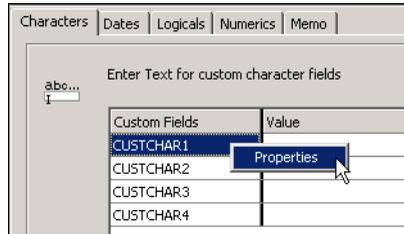


Figure 2.74: Custom Fields Profile - Select Properties

In the **Field Name** field, enter the name of the field as you want it to display in the Custom Fields profile.

Example Enter "Areas of Operation" to use for the distributors.

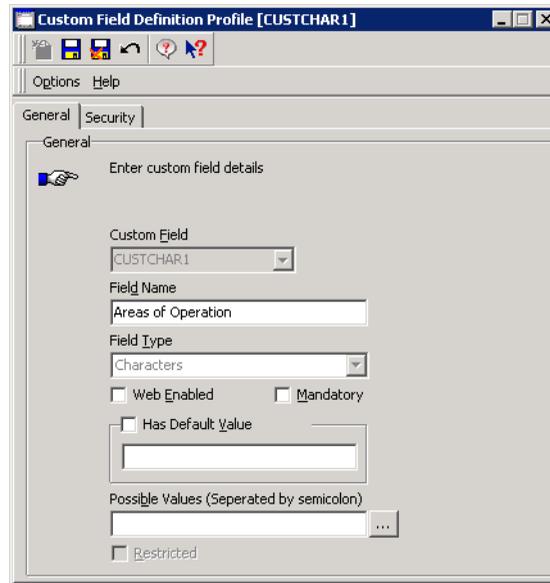


Figure 2.75: Areas of Operation Custom Field Example

- The field type defaults to the field type of the custom field selected. (If you are creating a new custom field, select the **Field Type** from the drop down list.)

Example The “Areas of Operation” custom field has the **Field Type** “Characters” to be able to enter a value for the area. The “Years in Operation” custom field has the Field Type “Numerics” to be able to add a numeric value.

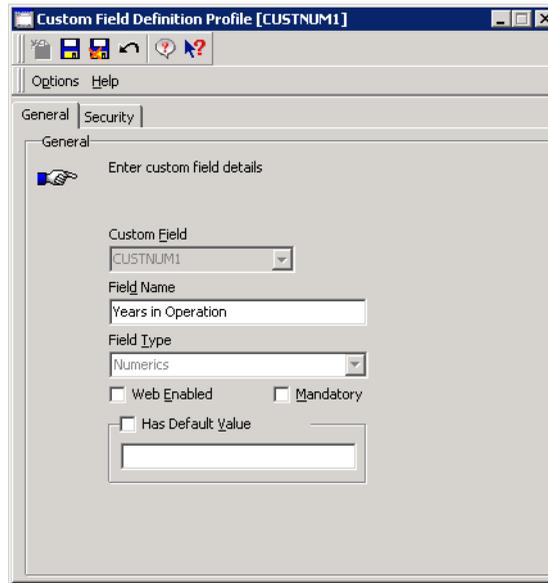


Figure 2.76: Years in Operation Custom Field Example

- Click  **Save and Exit** to save and exit the **Custom Field Definition** profile and return to the **Custom Fields** profile.
- Create additional custom fields as required.
- Close and reopen the **Custom Fields** profile to view the newly created custom fields.

Open the Custom Fields Profile in Design Mode

 To open the **Custom Fields** profile in **Design Mode**, do the following:

In the **Custom Fields** profile, from the **Options** menu, select **Design**. The **Everest Forms Designer** appears with the target form in **Design view**. The **Field Chooser**,

Component Palette, and Object Inspector are displayed near the target form. The target form displays the standard profile template.

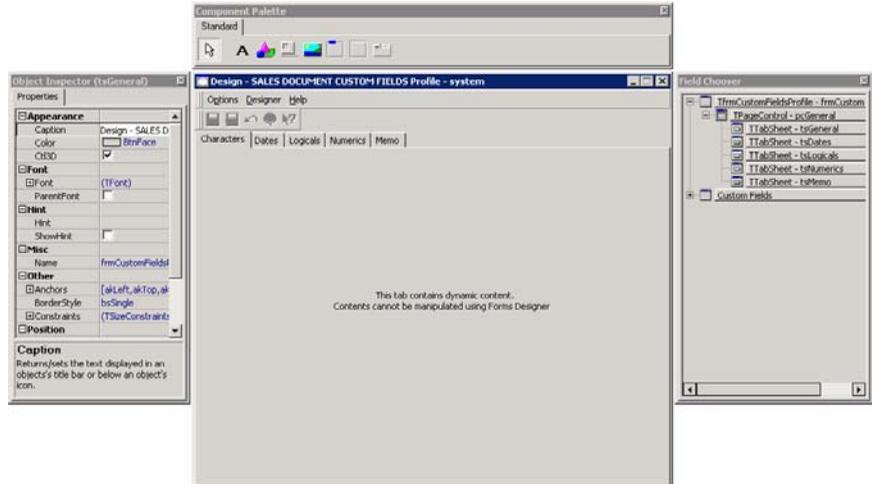


Figure 2.77: The Custom Fields Profile in Design Mode

- Rearrange the **Custom Fields** profile as needed for the extended information.

Example In the example that follows, a new "Opportunity" tab was added with sections for Wholesale Distributors and Wholesale Dealers. The custom field "Years in Operation" was added to the Wholesale Dealers section and the custom field "Areas of Operation" was added to the Wholesale Distributors section. Other tabs were removed.

See the **Create Customized Profiles** and **Create Sample Customized Profiles** section for more detailed information on customizing the profile.



["Create Customized Profiles" on page 16](#)

["Create Sample Customized Profiles" on page 36](#)

Add a New Tab to the Custom Fields Profile

1 **2** **3** → To add a new tab to the Custom Fields profile, do the following:

- Click inside the **Characters** tab. You should see eight black dots as shown below which indicate that the Tab Control is selected.

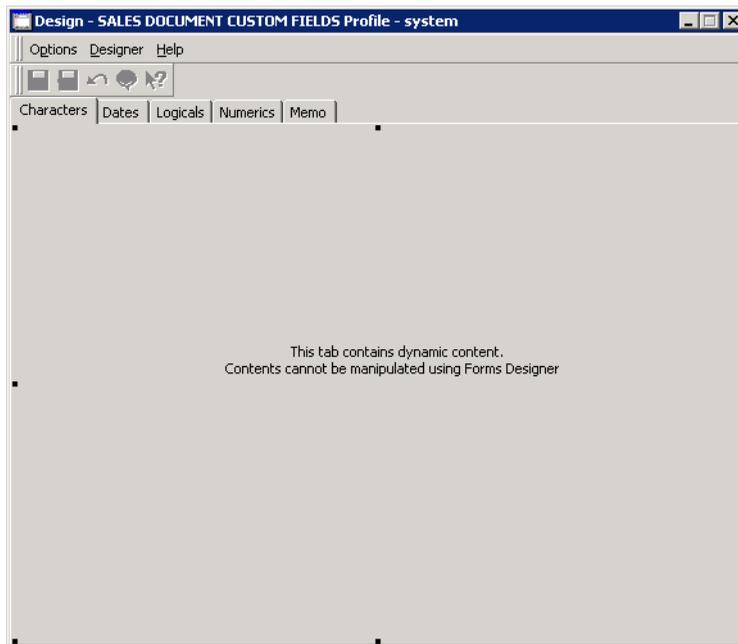


Figure 2.78: Tab Showing Tab Control Selected

- For our example, right click the Characters tab and select **New Page** to create a new tab.

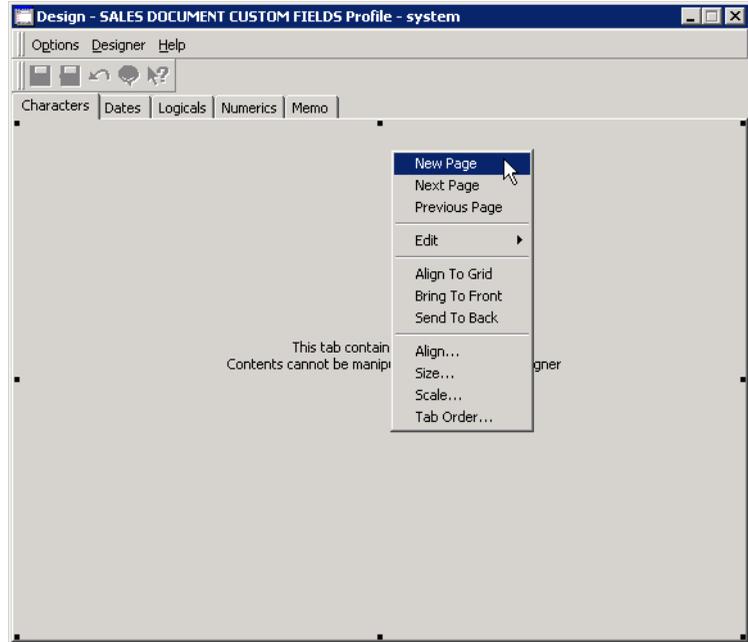


Figure 2.79: Select New Page to Create a New Tab

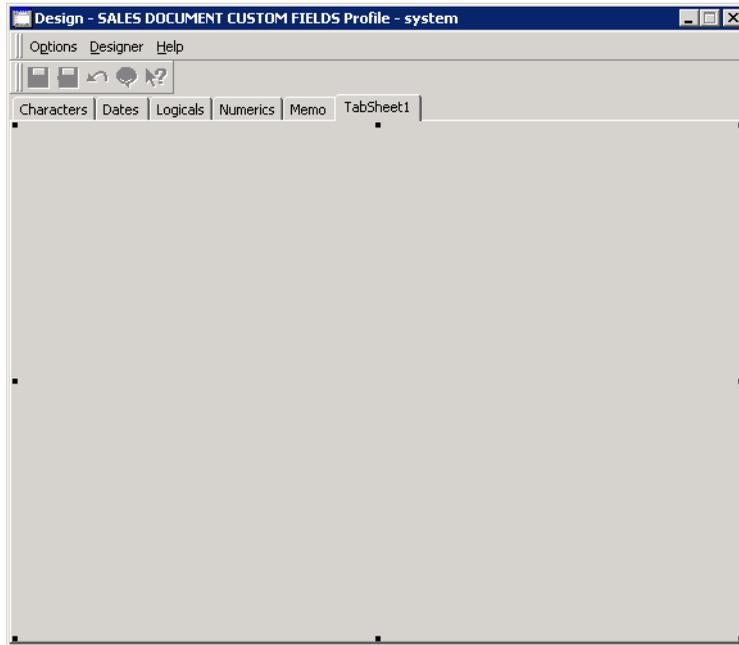


Figure 2.80: New Tab Created

Delete a Tab in the Custom Fields Profile

 To delete a tab in the Custom Fields profile, do the following:

- Click the **Characters** tab to select it. Notice that the page control is selected.

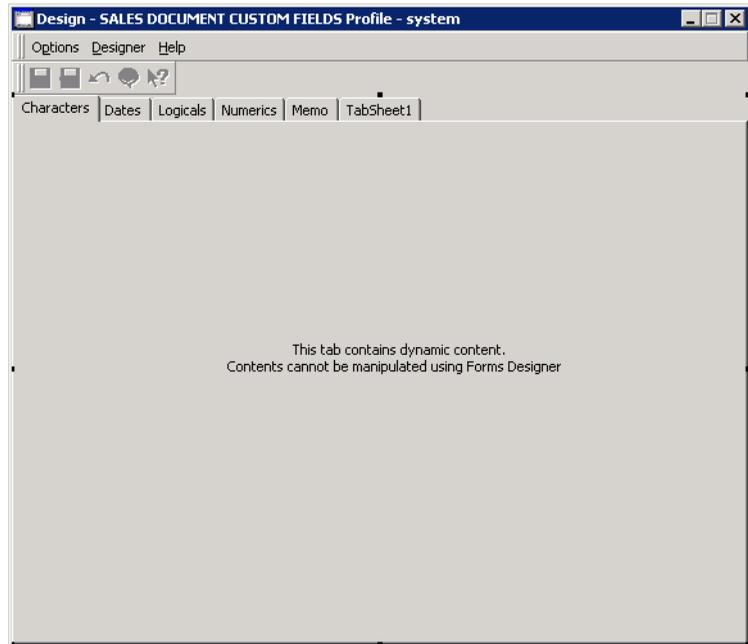


Figure 2.81: Characters Tab with Page Control Select

- Click in the center of the Characters tab to select the Tab Control. Notice that this does not include the tab itself. We are going to delete a tab and do not want to delete the entire page.

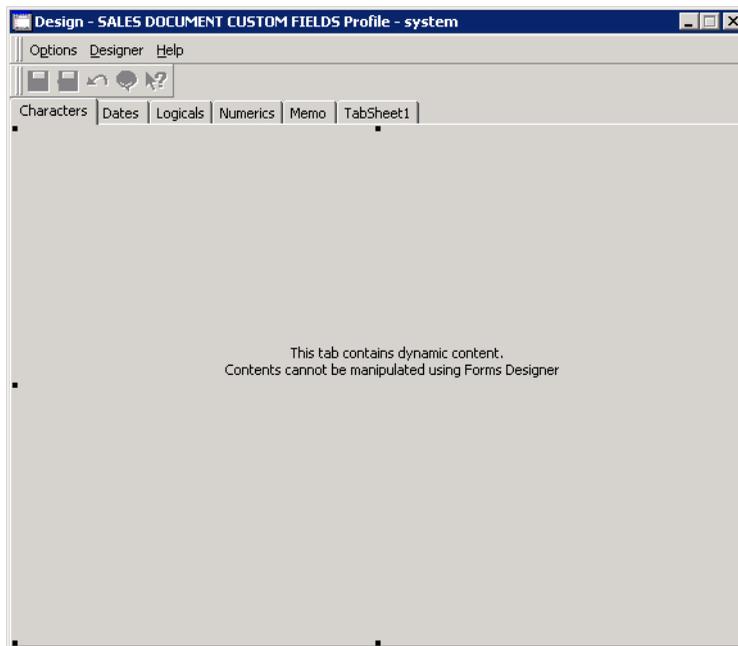


Figure 2.82: Characters Tab with Tab Control Selected.

- Press the **Delete** key to delete the tab.

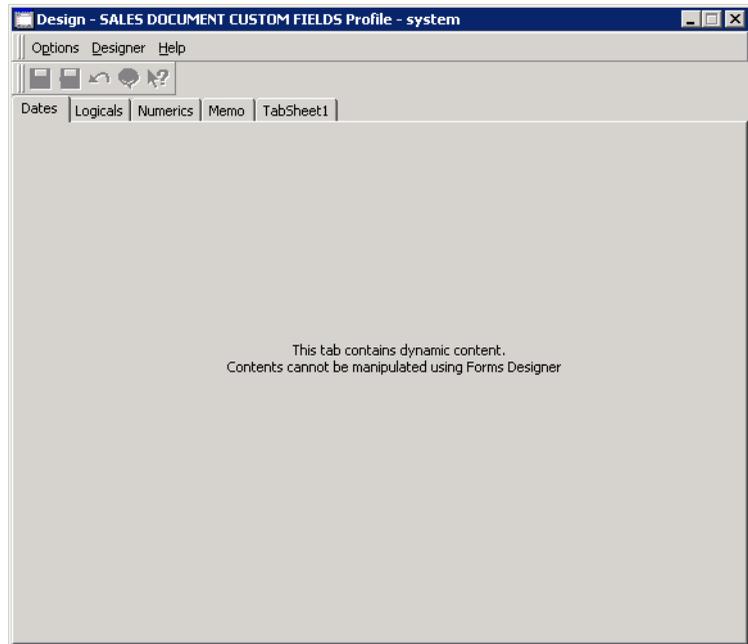


Figure 2.83: Characters Tab Deleted

Delete the Remaining Tabs in the Custom Fields Profile



To delete the remaining tabs in the Custom Fields profile except the new tab just created, do the following:

- Repeat the steps for the **Delete a Tab in the Custom Fields Profile** procedure for all of the other tabs except the new tab just created (TabSheet1).



You cannot delete tabs that contain mandatory fields.

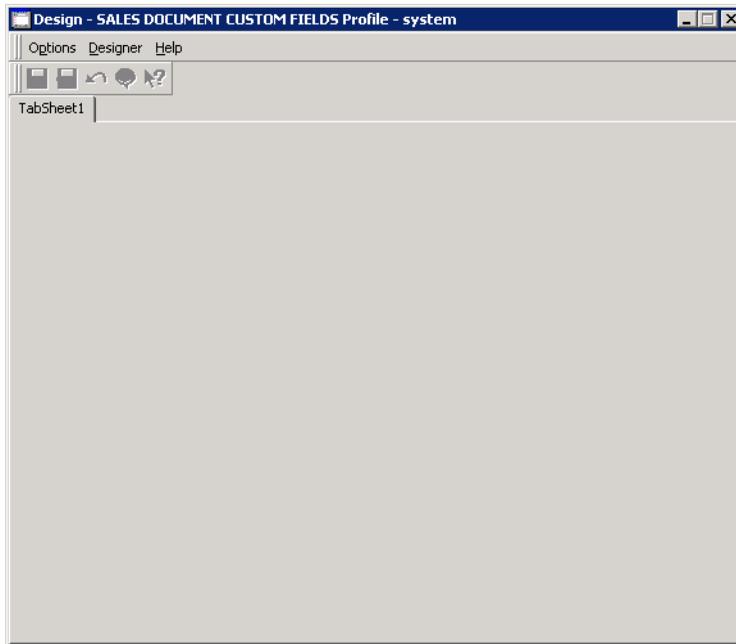


Figure 2.84: All Tabs except the New Tab Deleted

Rename a Tab in the Custom Fields Profile

1 **2** **3** → To rename the new tab in the Custom Fields profile, do the following:

- Click in the new tab and change the name in the Caption field of the Object Inspector on the left. In this example, the tab name is changed to “Opportunities”.

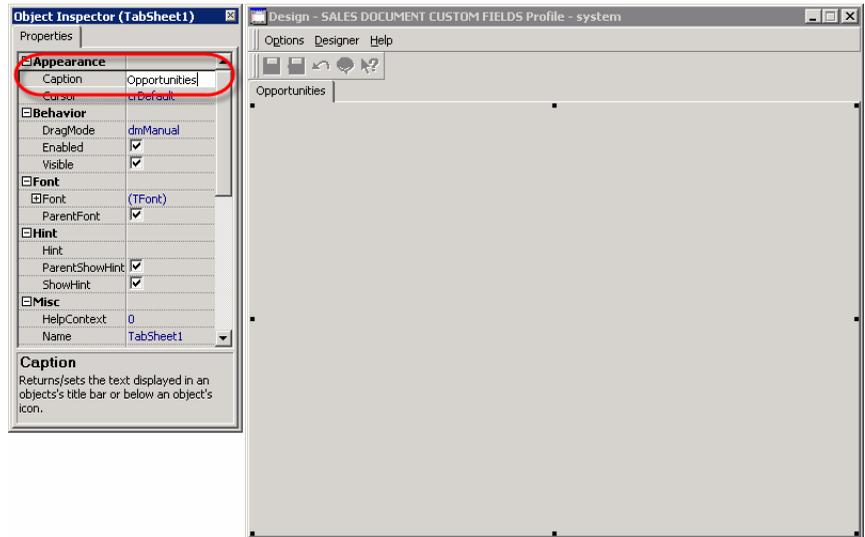


Figure 2.85: New Tab named “Opportunities”

Add Group Boxes in the Custom Fields Profile

1 **2** **3** **→** To add group boxes in the Custom Fields profile, do the following:

- Click the Group Box icon and click the location on the tab where you want it to appear as shown below. In this example, we are adding two group boxes, one for Dealerships and one for Distributors.

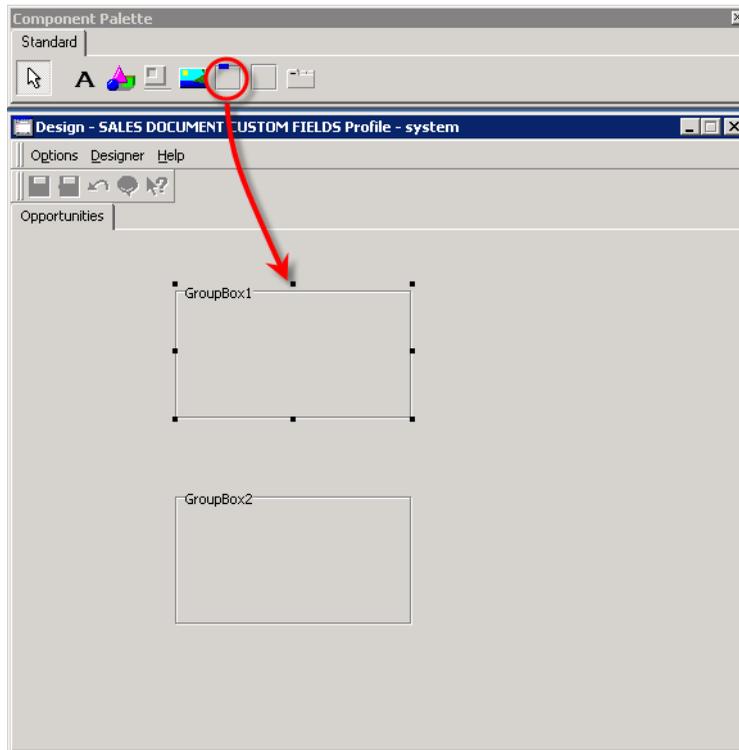


Figure 2.86: Group Boxes Added

- To rename a Group box, click a group box and change the caption name in the Object Inspector to the Left. In our example we will rename both group boxes.

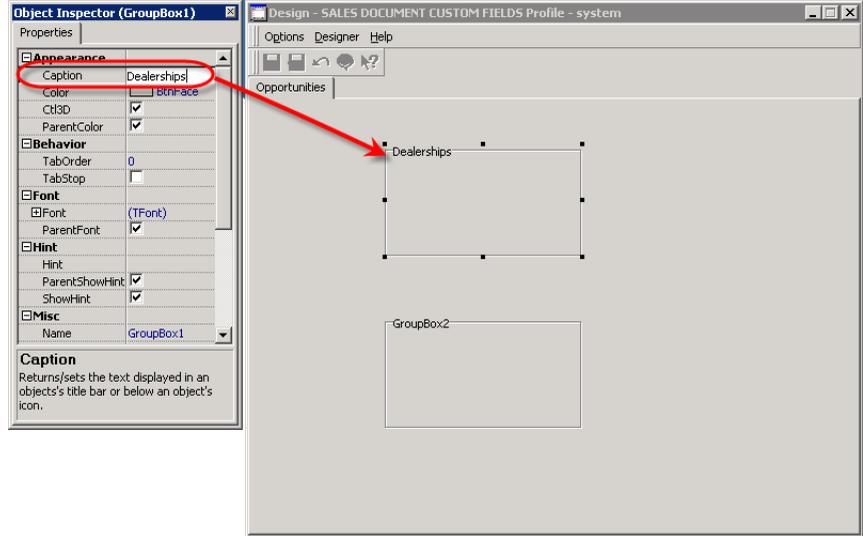


Figure 2.87: Rename Group Box (Dealerships)

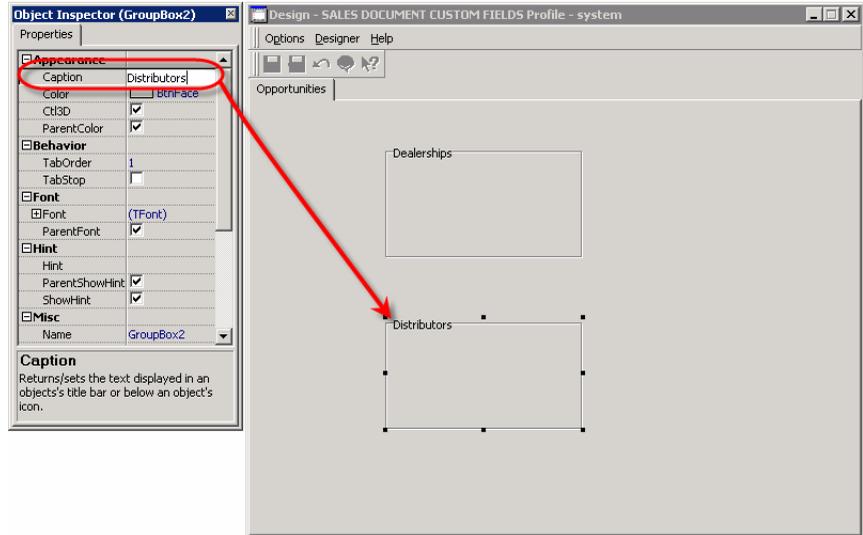


Figure 2.88: Rename Group Box (Distributors)

Add Custom Fields to the Custom Fields Profile

1 2 3 To add your custom fields to the Custom fields profile, do the following:

- Click a custom field to the right and place your cursor over the area where you would like to place the custom field. You will see a target cursor.

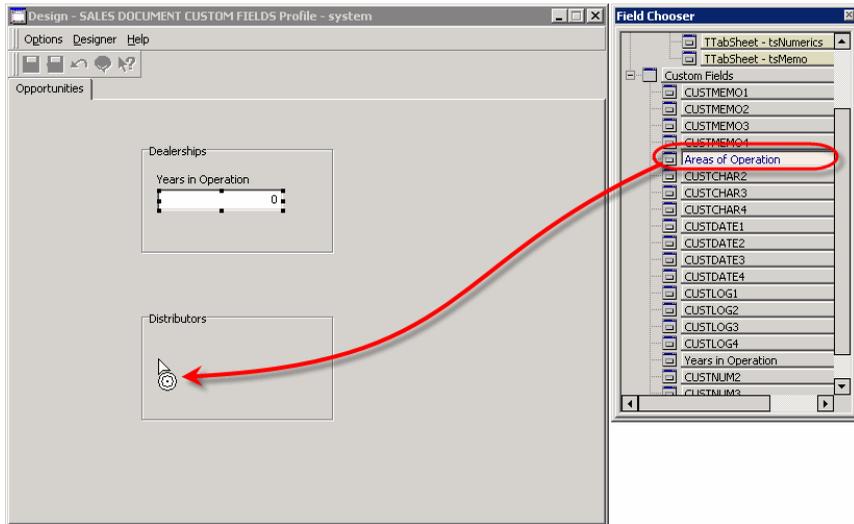


Figure 2.89: Target Form showing Target Cursor

- Click the target form in the Group Box to place the custom field on the form. Add the remaining fields.

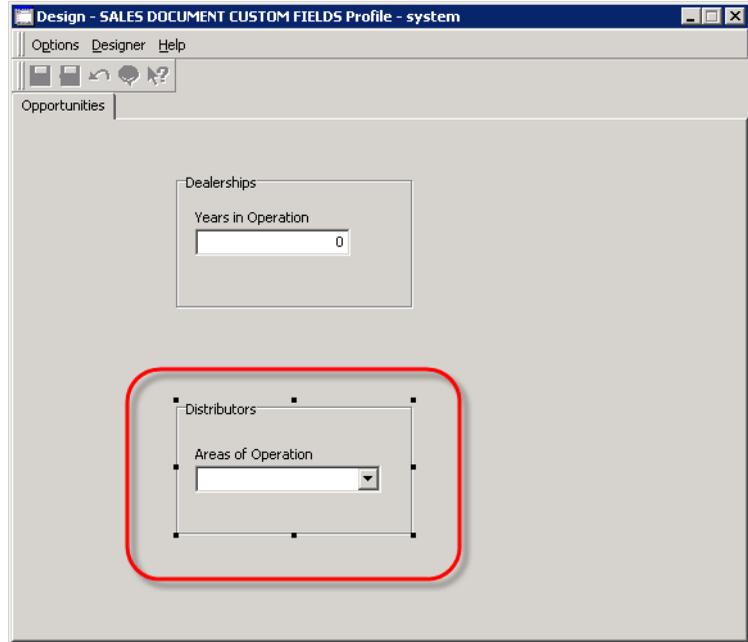


Figure 2.90: New Custom Field Added to the Target Form

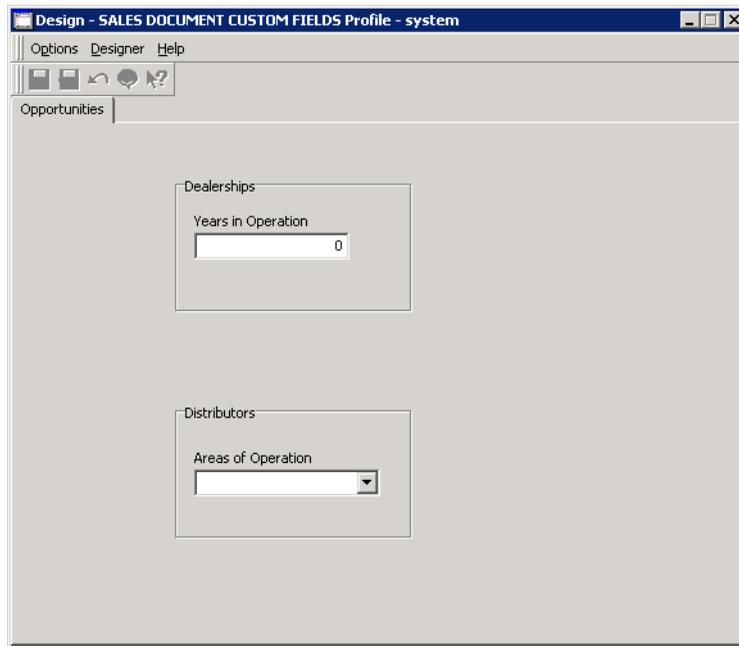


Figure 2.91: New Custom Field Profile Design

Save your New Custom Fields Profile Form

 To save your new Custom Fields form, do the following:

- From the **Designer** menu, select **Save** and give your profile version a unique name. You may want to include the associate browser in the profile version name.

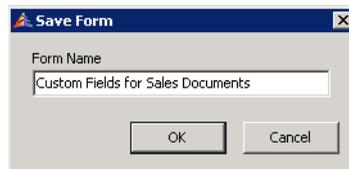


Figure 2.92: Save Form

Test and Assign your New Custom Fields Profile Form to Users and Groups

 To test and assign your new Custom Fields profile form, do the following:

- You must assign your profile version to a user or group for it to become active. See the **Assign a Profile Version to a User or Group** section for information on how to make the assignments.
- To test the form, assign it to one user first to make sure that it is working correctly. Make any necessary adjustments. After you are comfortable with the form, you can assign it to other users.

Once the profile is active, access the customized **Custom Fields** profile from the browser that you used to design it. For this example, it can be accessed from any sales document profile. You can create different **Custom Fields** profiles for each browser type where it is available.

 [“Assign a Profile Version to a User or Group” on page 82](#)

3. Working with the Forms Browser

The Forms Browser

Access the Forms Browser

Forms Browser Options

Assign a Profile Version to a User or Group

Assign a Profile Version from the Forms Browser

Managing Forms with the Forms Browser Illustrated

Assign a Profile Version from the Users and Groups Browsers

Assign a Profile Version to a Specific User or Group

Exporting a Form Version

Importing a Form Version

The Forms Browser

The **Forms** browser provides a central location to manage the customization of forms. Forms are created using the Forms Designer and managed using the **Forms** browser. The standard versions of each customizable profile are displayed in this list along with any form versions that were created using the Forms Designer. The **Forms** browser is only enabled for users with the appropriate security rights.

 [“Access to Profile Version User/Group Assignment” on page 109](#)

Access the Forms Browser

 To access the Forms Browser, do the following:

- From the main menu bar, select **File > Setup > Forms**. The **Forms** browser displays a list of all available forms.

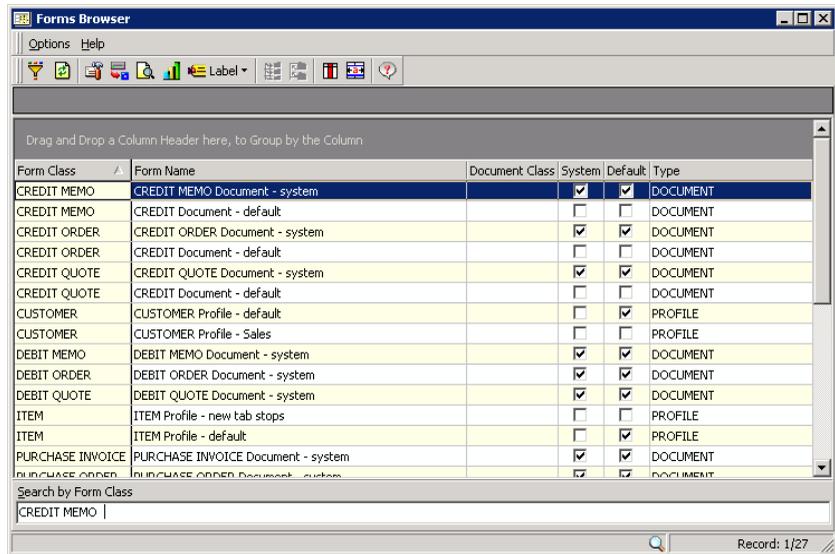


Figure 3.1: The Forms Browser

Form Class

This describes the class of the custom form version. (Example: Sales Quote, Sales Order, Sales Invoice, Credit Quote, Credit Order, and Credit Memo)

Form Name

This shows the name of the form versions available.

Document Class

This shows the name of the document class. (Example: Sales Documents and Purchase Documents)

System

The **System** form is the base form of all versions of each class and this cannot be edited or deleted. The edited system form versions can be saved in different name which enables the user to create the new form versions.



No form version can be set as a **System** form. The **system** form can be assigned to different users and groups and can be set as a **Default** form.

The **system** form is set as the default form in the absence of a version being set as default.

Default

The **Default** form is the form version displayed when you access a profile or document absent any overriding form assignments. In other words, the **Default** form is globally assigned to all users. This global assignment is overridden by a group or user assignment.



Only one version can be the **Default** form for any form class. You can view the **Default** form for each form class in the **Forms** browser. If no **Default** form is set, then the **System** form is set as the **Default** form.

The form version a user sees when opening a profile is determined by the following Cascading Form assignments:

- User's version assigned to you
- User group's version assigned to your group



If you are not assigned any form version and have multiple group assignments with different versions, then the system will choose the alphabetically first version.

- Default form assigned
- System form assigned



Authorized user with security rights can set a form version as a **Default** form. To set a form version as the **Default** form, right click on the form version and choose **Set as default**.

Type

This describes the type of the custom form versions (Example: Profile, Document etc..) available in the **Forms** browser.

Forms Browser Options

Six options are available from the **Forms** browser:

- **Design** - Opens the selected profile in design mode
- **Rename** - Opens a dialog box for renaming the version
- **Purge** - Deletes the highlighted version or versions
- **Assign Forms** - Enables user and group assignment for the selected profile form
- **Export Forms** - Enables the user to export a customized form version to an external file

- **Import Forms** - Enables the user to import customized form versions

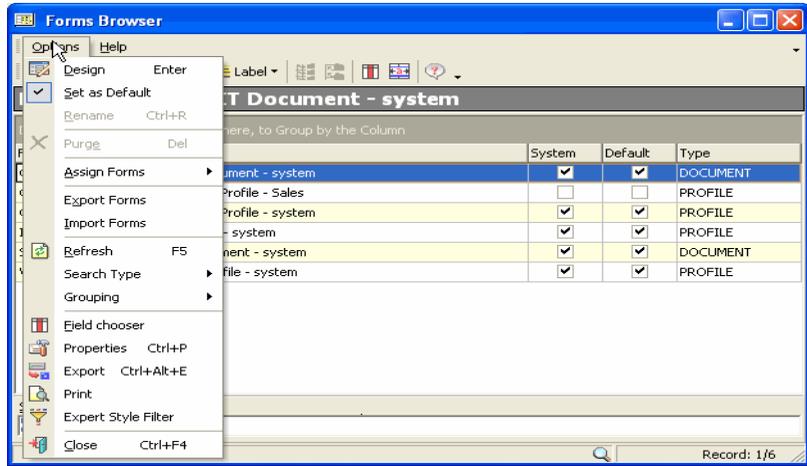


Figure 3.2: The Forms Browser with the Available Options Displayed



- When the standard versions of the profiles are the only versions available, the **Rename**, **Purge**, and **Assign** menu items are disabled.
- When a standard version is selected in the browser, **Rename** and **Purge** are disabled.

Design

This option enables you to quickly access a selected form in design mode to make any necessary changes.



["The Forms Designer" on page 9](#)

Rename

Users with the appropriate security rights can rename a version of a form in the **Forms Browser**.



["Access to Customized Profiles from a Central Location" on page 110](#)



To rename a version of a form, do the following:

- Right click the version of a form to be renamed in the **Forms** browser and select **Rename**. The **Rename Form** dialog box is displayed.



Figure 3.3: The Rename Form Dialog Box

- In the **Form Name** field, enter the new name for the form.

- Click **OK** to rename the form.



The **Rename** option is always disabled for standard versions.

Purge

Only users with the appropriate security rights can purge or remove forms from the **Forms** browser.



[“Access to Customized Profiles from a Central Location” on page 110](#)



The **Purge** option is always disabled for standard versions.



To purge one or more form versions, do the following:

- Highlight one or more rows containing form versions to be purged.
- Right click and select **Purge**. A confirmation dialog box displays a purge confirmation message.

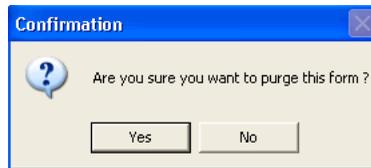


Figure 3.4: The Confirmation Dialog Box

- Click **Yes** to purge the selected forms.

Assign Forms

The **Assign Forms** option is used to assign form versions to users and groups.

Export Forms

Use the **Export Forms** option to export a customized form version to an external file.

Import Forms

Use the **Import Forms** option to import customized form versions that were created using **Export Forms** option from **Everest** database.

Assign a Profile Version to a User or Group

Once a profile form version is saved, it can be assigned to a User or Group. When a user logs in, the profile assigned to the user is displayed. User assignments take precedence over group assignments. The standard version of each customizable profile is assigned to users and groups by default if no assignments are made.



Each user can only have one version of a profile active at one time.



Users with Forms Designer security rights should only be assigned to standard profiles so that all options are available to them.

Assign a Profile Version from the Forms Browser

The **Forms** browser makes it easy to manage the customized profile forms that you create. Along with editing, renaming, and purging versions of profile forms that you create, assignments can be made and changed for users and groups from the **Forms** browser.

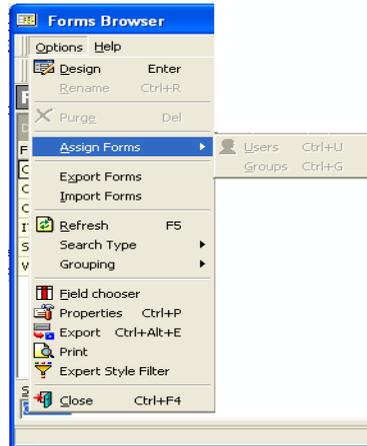


Figure 3.5: The Forms Browser Assign Forms Option



Do not assign any forms other than the standard form to the user with the Forms Designer privilege. This ensures that all necessary design options are always available to that user.

Manage User Assignments



To manage user assignments, do the following:

- Right-click the form version to be managed in the **Forms** browser.
- Select **Assign Forms** > **Users** to manage the form user assignments.

Manage Group Assignments



To manage group assignments, do the following:

- Right-click the form version to be managed in the **Forms** browser.
- Select **Assign Forms** > **Groups** to manage the form group assignments.

Assign Users to a Form Version

The **Assign Forms** dialog box for users displays the users that are assigned to the specific version of a form selected.

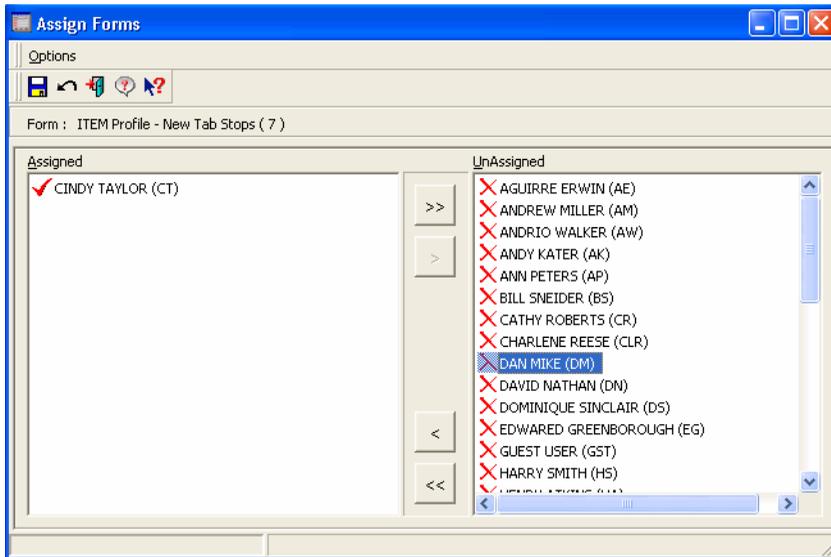


Figure 3.6: The Assign Forms Dialog Box for Users



Do not assign any forms other than the standard form to the user with the Forms Designer privilege. This ensures that all necessary design options are always available to that user.

The **Assign Forms** dialog box for users (path: **Forms Browser** > **Options** > **Assign Forms** > **Users**) contains two sections: **Assigned** and **UnAssigned**.

Assigned Section

The **Assigned** section contains a list of the users assigned to the selected form.

UnAssigned Section

The **UnAssigned** section contains a list of users that can be assigned to the selected form.



To grant users a version of a form, do the following:

- Move the user or users to be assigned from the **UnAssigned** section to the **Assigned** section using the arrow keys.

Arrow Key	Function
 Single Left Arrow	Moves a selected user to the section on the left
 Double Left Arrow	Moves all users to the section on the left

Arrow Key	Function
 Single Right Arrow	Moves a selected user to the section on the right
 Double Right Arrow	Moves all users to the section on the right

- After the appropriate users have been assigned to the customized form versions, click **Save**.

 You can also double-click an item to move it from the **UnAssigned** section to the **Assigned** section and back without using the arrows.

Assign Groups to a Form Version

The **Assign Forms** dialog box for groups displays the groups that are assigned to the specific version of a form selected.

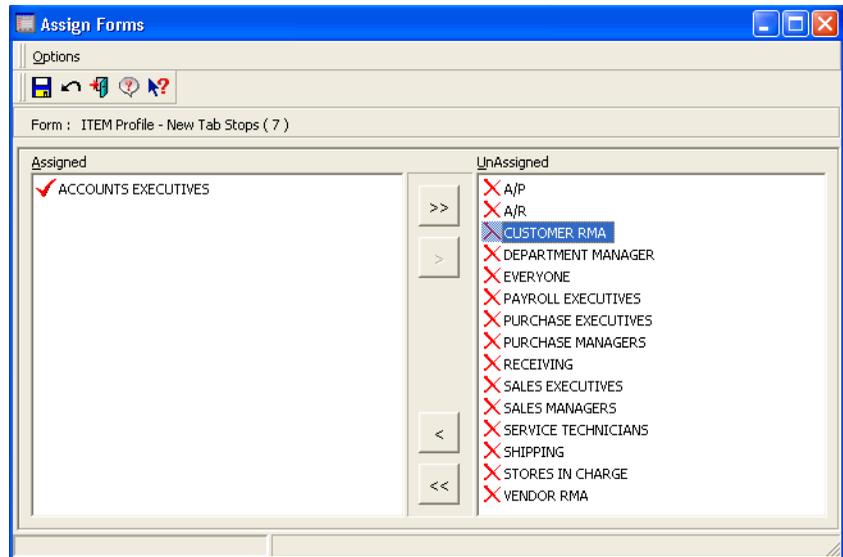


Figure 3.7: The Assign Forms Dialog Box for Groups

The **Assign Forms** dialog box for groups (path: **Forms Browser > Options > Assign Forms > Groups**) contains two sections: **Assigned** and **UnAssigned**.

Assigned Section

The **Assigned** section contains a list of the groups assigned to the selected form.

UnAssigned Section

The **UnAssigned** section contains a list of groups that can be assigned to the selected form.



To grant groups a version of a form, do the following:

- Move the group or groups to be assigned from the **UnAssigned** section to the **Assigned** section using the arrow keys.

Arrow Key	Function
 Single Left Arrow	Moves a selected group to the section on the left
 Double Left Arrow	Moves all groups to the section on the left
 Single Right Arrow	Moves a selected group to the section on the right
 Double Right Arrow	Moves all groups to the section on the right

- After the appropriate groups have been assigned to the customized form versions, click **Save**.



You can also double-click an item to move it from the **UnAssigned** section to the **Assigned** section and back without using the arrows.

Sales and Purchase Document Form Version Assignments

You can customize forms for the following Sales, Sales Return, Purchase, and Purchase Return documents (Customer and Vendor documents):

- **Document Type** - You can create customized forms for a particular document type (Sales Quote, Sales Order, Sales Invoice, Credit Quote, Credit Order, Credit Memo, Purchase Quote, Purchase Order, Purchase Receipt, Purchase Invoice, Debit Quote, Debit Order, or Debit Memo).
- **Document Alias** - You can assign custom forms for a specific document alias, such as a "Proposal" document alias for Sale Quote or a "Web Order" document alias for Sales Order.

You can create forms for the above sales and purchase document types, but you must assign your custom forms to users or groups of users before they can use them.

The following general rules apply to customized document form assignments:

- Customized document alias forms take precedence over customized document type forms assigned. For example, a "Web Order" custom document alias form assigned to a user has priority over any customized forms for the Sales Order document type.
- Custom forms assigned to a user (or group that the user belongs to) take precedence over custom forms set as a default.
- If you do not assign customized forms to users and no customized form is set as a default, users will see the **Everest** forms included with the product out of

the box. These forms are known as **System Forms** and they cannot be assigned to users.

The following decision tree shows how the system determines the form to display for a user when the user opens a document alias.

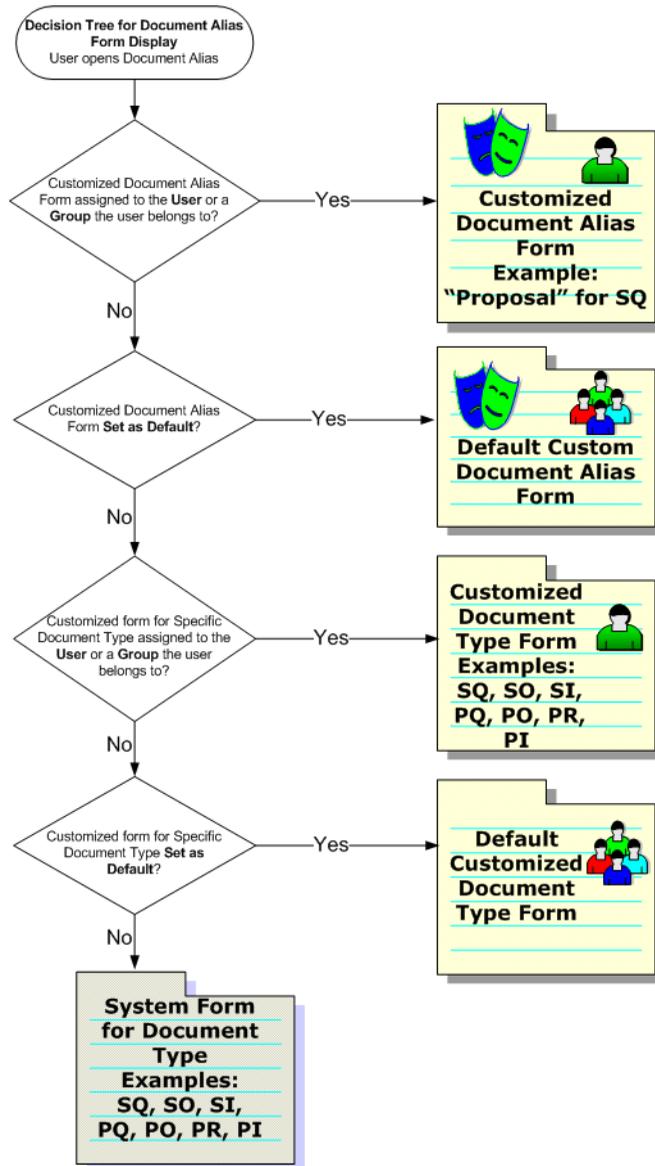


Figure 3.8: Decision Tree for Document Alias Form Display

When a user opens a document alias, if a customized document alias form is assigned to the user (or to a group that has the user as a member), the user sees

the customized document alias form. For example, the user sees a customized “proposal” document alias form.

If a customized document alias form is not directly assigned but there is a customized document alias form set as a default, the user sees the default custom document alias form.

If there is no customized document alias form set as a default, the users sees the customized form for the specific document type assigned to the user (or to a group that has the user as a member).

If a customized form for the specific document type is not assigned but there is a customized form for the specific document type set as a default, the user sees the default custom form for the specific document type. For example, the user sees the customized sales quote form that is set as the default.

If there are no customized forms assigned or set as the default, the user sees the system form for the document type, such as the system sales quote form.

Example Susan is a member of the “Telephone Sales” group. The Telephone Sales group is assigned to the customized “Proposal” document alias form. A default customized sales quote (document type) form is set as the default. When Susan opens the “Proposal” document alias, she sees the customized “Proposal” document alias form and not the customized sales quote form since the customized document alias form takes precedence over the customized sales quote form.

Managing Forms with the Forms Browser Illustrated

Example This illustration is a continuation of “Create Sample Customized Profiles” in the previous chapter. If you do not have forms available to assign and delete, you can create the sample profile form versions in “Create Sample Customized Profiles” prior to following these steps.

Several days after you created profile form versions, you added all of the users to the system. You decide to assign forms to the end users. You no longer need your Item Clerk Trainee form and decide to purge it.

 [“Create Sample Customized Profiles” on page 36](#)

Assign a Form to Users from the Forms Browser

   **To open the Forms Browser and assign a form to users from the Forms Browser, do the following:**

- From the main menu bar, select **File > Setup > Forms**. The **Forms** browser displays a list of all available forms.
- Right click the **Item Clerks** form (or another available form) and select **Assign Forms > Users** to manage the form user assignments.
- Highlight the user names to be assigned from the **UnAssigned** section and click the  button. The selected user names move to the **Assigned** section.
- Click **Save** to complete the assignment.

Delete a Form from the Forms Browser

   **To delete a form from the Forms Browser, do the following:**

- From the **Forms** browser, right-click the **Item Clerk Trainees** form (or another available form) and select **Purge**.
- Click **Yes** to purge the form. The **Item Clerk Trainees** form (or the selected form) is removed.

Assign a Profile Version from the Users and Groups Browsers

When you are managing users and groups from the Users and Groups browsers, you can easily assign and change customized form versions for them.



Do not assign any forms other than the standard form to the user with the Forms Designer privilege. This ensures that all necessary design options are always available to that user.

Access the Assign Forms Dialog Box

 To access the Assign Forms dialog box for Users, do the following:

- From the main menu bar, select **File > Setup > Assign Forms > Users**.

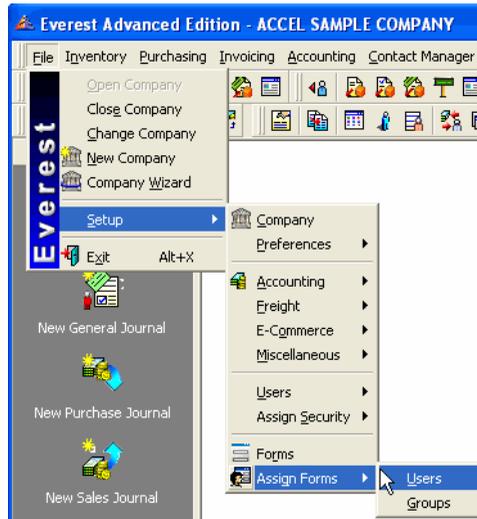


Figure 3.9: Access the Assign Forms Dialog Box (Users Highlighted)

 To access the Assign Forms dialog box for Groups, do the following:

- From the main menu bar, select **File > Setup > Assign Forms > Groups**.

Grant Users a Version of a Form

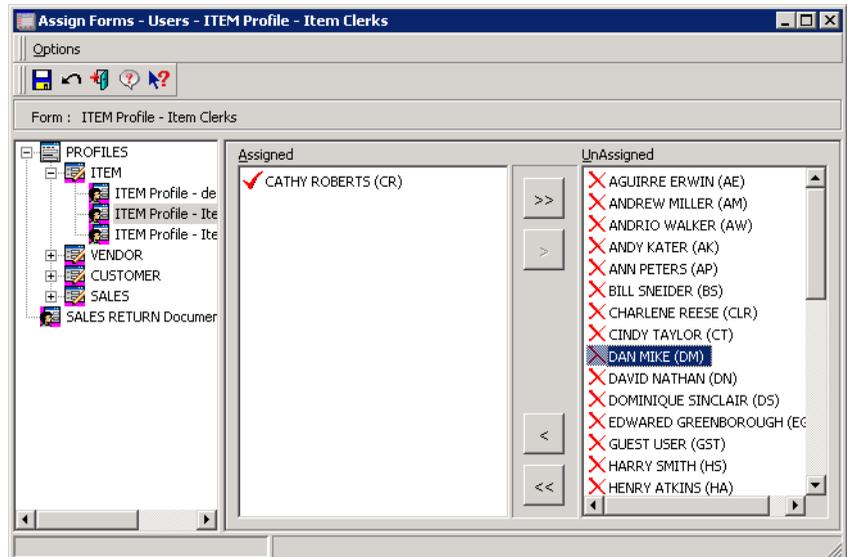


Figure 3.10: Assign Forms Dialog Box from the Users Browser

The **Assign Forms** dialog box for users (path: **File > Setup > Assign Forms > Users**) contains three sections: **Form Tree View**, **Assigned**, and **UnAssigned**.

Form

Displays the form version selected in the tree view below. This is a display only field.

Form Tree View Section

The **Form** tree view section contains a list of each customizable profile. Below those profiles in the tree view, are the customized versions of that profile that have been created in the Forms Designer.



The customized versions of the profile can have a different name than the name on the form header. The name on the form header can be customized using the Object Inspector in the Forms Designer.

Assigned Section

The **Assigned** section contains a list of the users assigned to the selected form.

UnAssigned Section

The **UnAssigned** section contains a list of users that can be assigned to the selected form.



To grant users a version of a form, do the following:

- Highlight the customized form version in the **Form** tree view section.

- Move the user or users to be assigned from the **UnAssigned** section to the **Assigned** section using the arrow keys.

Arrow Key	Function
 Single Left Arrow	Moves a selected user to the section on the left
 Double Left Arrow	Moves all users to the section on the left
 Single Right Arrow	Moves a selected user to the section on the right
 Double Right Arrow	Moves all users to the section on the right

- After the appropriate users have been assigned to the customized form versions, click **Save**.



You can also double-click an item to move it from the **UnAssigned** section to the **Assigned** section and back without using the arrows.

Grant Groups a Version of a Form

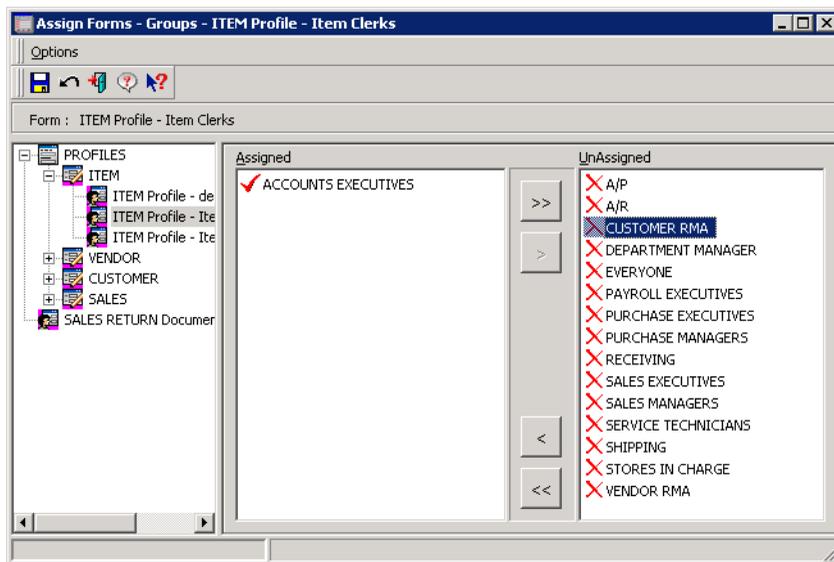


Figure 3.11: Assign Forms Dialog Box from the Groups Browser

The **Assign Forms** dialog box for groups (path: **File > Setup > Assign Forms > Groups**) contains three sections: **Form Tree View**, **Assigned**, and **UnAssigned**.

Form

Displays the form version selected in the tree view below. This is a display only field.

Form Tree View Section

The **Form** tree view section contains a list of each customizable profile. Below those profiles in the tree view, are the customized versions of that profile that have been created in the Forms Designer.

Assigned Section

The **Assigned** section contains a list of the groups assigned to the selected form.

UnAssigned Section

The **UnAssigned** section contains a list of groups that can be assigned to the selected form.



To grant groups a version of a form, do the following:

- Highlight the customized form version in the **Form** tree view section.
- Move the group or groups to be assigned from the **UnAssigned** section to the **Assigned** section using the arrow keys.

Arrow Key	Function
 Single Left Arrow	Moves a selected group to the section on the left
 Double Left Arrow	Moves all groups to the section on the left
 Single Right Arrow	Moves a selected group to the section on the right
 Double Right Arrow	Moves all groups to the section on the right

- After the appropriate groups have been assigned to the customized form versions, click **Save**.



You can also double-click an item to move it from the **UnAssigned** section to the **Assigned** section and back without using the arrows.

Assign a Profile Version to a Specific User or Group

A profile version can be assigned to an individual user from the **Users** browser and the **User** profile. A profile version can also be assigned to a specific group from the **Groups** browser and the **Group** profile.



Do not assign any forms other than the standard form to the user with the Forms Designer privilege. This ensures that all necessary design options are always available to that user.

Access the Assign Forms Dialog Box from the Users Browser



To access the Assign Forms dialog box for an individual user from the **Users** browser, do the following:

- To access the **Users** browser, select **File > Setup > Users > Users**. The **Users** browser is displayed.

- On the **Users** browser, highlight a user and select **Options > Forms**.

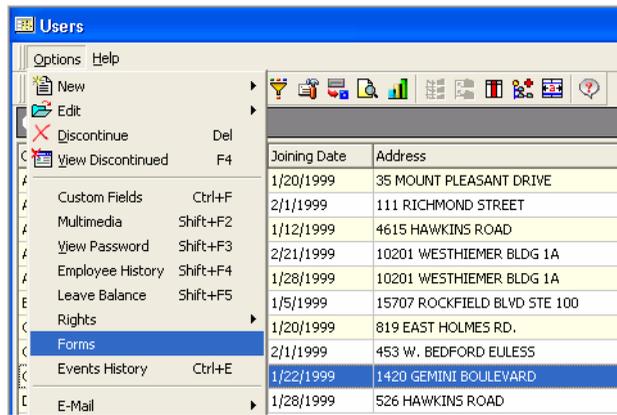


Figure 3.12: Users Browser with the Forms Option Selected

The **Assign Forms** dialog box for the selected user is displayed.

Access the Assign Forms Dialog Box from the User Profile

1 **2** **3** **→** To access the **Assign Forms** dialog box from the **User** profile, do the following:

- To access the **User** profile, select **File > Setup > Users > Users**. The **Users** browser is displayed.
- Double-click to open a **User** profile. The selected **User** profile is displayed.
- From the **User** profile, select **Options > Forms**.

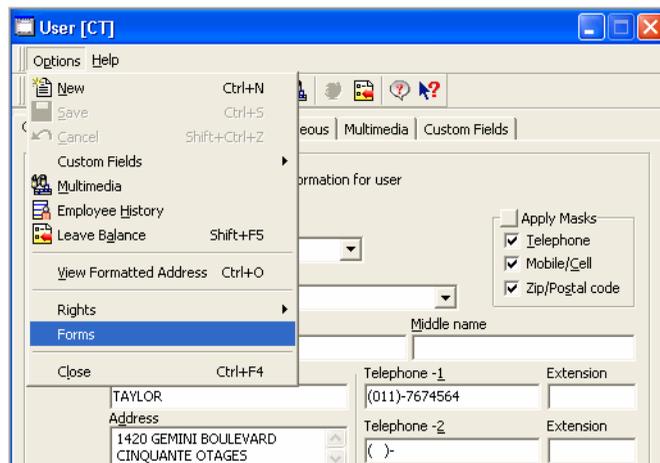


Figure 3.13: User Profile with the Forms Option Selected

The **Assign Forms** dialog box for the selected user is displayed.

Access the Assign Forms Dialog Box from the Groups Browser

1 2 3 To access the Assign Forms dialog box from the Groups browser, do the following:

- To access the **Groups** browser, select **File > Setup > Users > Groups**. The **Groups** browser is displayed.
- On the **Groups** browser, highlight a group and select **Options > Forms**.

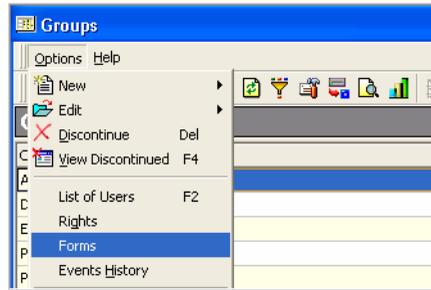


Figure 3.14: Groups Browser with the Forms Option Selected
The Assign Forms dialog box for the selected group is displayed.

Access the Assign Forms Dialog Box from the Group Profile

1 2 3 To access the Assign Forms dialog box from the Group profile, do the following:

- To access the **Group** profile, select **File > Setup > Users > Groups**. The **Groups** browser is displayed.
- Double-click to open a **Group** profile. The selected **Group** profile is displayed.
- From the **Group** profile, select **Options > Forms**.



Figure 3.15: Group Profile with the Forms Option Selected
The Assign Forms dialog box for the selected group is displayed.

Individual User Assignment

The **Assign Forms** dialog box (path: **User Browser** or **User Profile** > **Options** > **Forms**) is used to view and assign forms for a selected user.

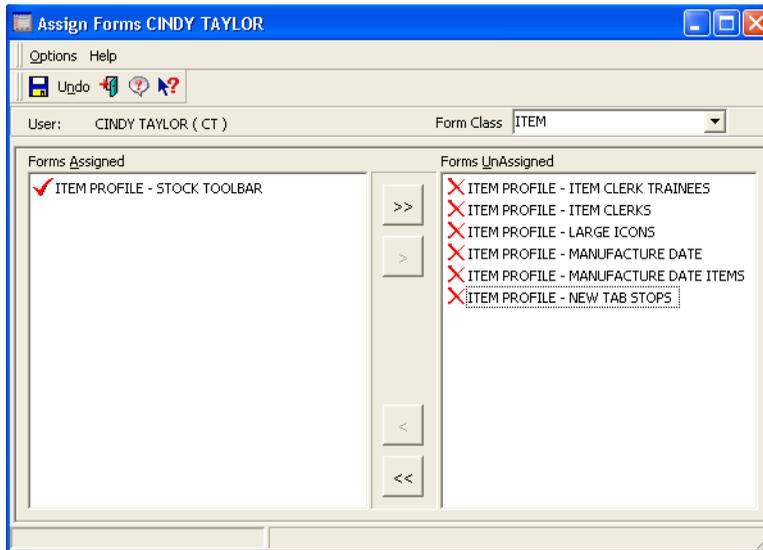


Figure 3.16: Assign Forms Dialog box for a Selected User.



Do not assign any forms other than the standard form to the user with the Forms Designer privilege. This ensures that all necessary design options are always available to that user.

The **Assign Forms** dialog box for a selected user shows all of the versions currently assigned to the user for each profile. The forms assigned could have come from a user, group, or default assignment. Users are assigned the standard profile by default. Only one version of any profile can be assigned to a user at any time.

User

The **User** field displays the selected user.

Form Class

The **Form Class** field contains a drop-down list that shows the available profiles.

Forms Assigned Section

The current form assigned to the user is displayed in the **Forms Assigned** section.

Forms UnAssigned Section

Available forms are displayed in the **Forms UnAssigned** section.



To view or edit a user assignment for a selected profile, do the following:

- From the **Assign Forms** dialog box for a selected user, select a profile from the **Form Class** drop-down list. The form assigned and the forms not assigned to that user are shown.

- Change the form assignment as appropriate using the arrow buttons.

Arrow Key	Function
 Single Left Arrow	Moves a selected form to the Forms Assigned section on the left and replaces it.
 Single Right Arrow	Moves the assigned form to the Forms UnAssigned section on the right. The Standard Form is automatically added to the Forms Assigned section.

- Click **Save** to save your changes.



You can also double-click an item to move it from the **Forms UnAssigned** section to the **Forms Assigned** section and back without using the arrows.

Specific Group Assignment

The **Assign Forms** dialog box (path: **Group Browser** or **Group Profile** > **Options** > **Forms**) is used to view and assign forms for a selected group.

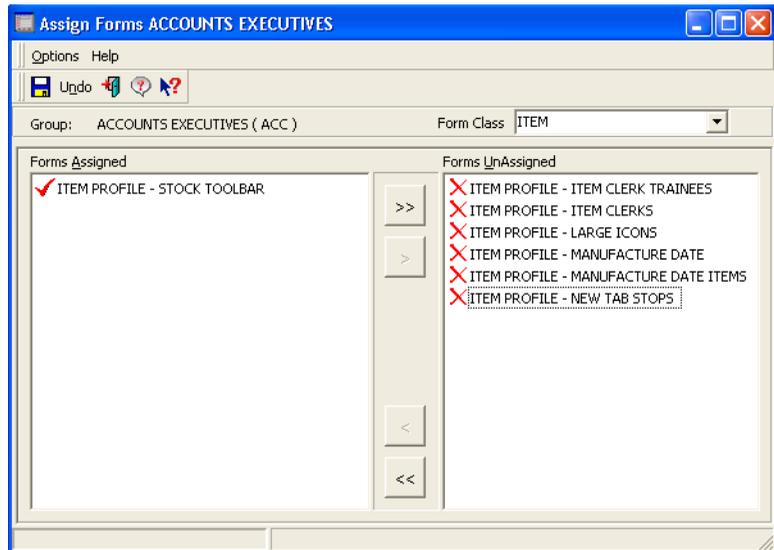


Figure 3.17: Assign Forms Dialog Box for a Selected Group.

The **Assign Forms** dialog box for a selected group shows all of the versions currently assigned to the user for each profile. The forms assigned could have come from group or default assignment. Groups are assigned the standard profile by default. Only one version of any profile can be assigned to a group at any time.

Group

The **Group** field displays the selected group.

Form Class

The **Form Class** field contains a drop-down list that shows the available profiles.

Forms Assigned Section

The current form assigned to the group displays in the **Forms Assigned** section.

Forms UnAssigned Section

Available forms display in the **Forms UnAssigned** section.

 **To view or edit a group assignment for a selected profile, do the following:**

- From the **Assign Forms** dialog box for a selected group, select a profile from the **Form Class** drop-down list. The form assigned and the forms not assigned to that user are shown.
- Change the form assignment as appropriate using the arrow buttons.

Arrow Key	Function
 Single Left Arrow	Moves a selected form to the Forms Assigned section on the left and replaces it.
 Single Right Arrow	Moves the assigned form to the Forms UnAssigned section on the right. The Standard Form is automatically added to the Forms Assigned section.

- Click **Save** to save your changes.



You can also double-click an item to move it from the **Forms UnAssigned** section to the **Forms Assigned** section and back without using the arrows.

Exporting a Form Version

Only users with the proper security privilege and a valid license key can access the Forms Designer and additional security rights are needed to view the Forms browser.



“Assign Users to a Form Version” on page 84

Use the **Export Forms** option to export a customized form version to an external file.

 **To export customized form versions, do the following:**

- From the **Forms Browser**, select the customized form versions to be exported.
- Select **Options > Export Forms**. You will see the **Export Forms Dialog –Forms Browser** dialog box.



If there are no customized form versions in **Forms Browser**, the **Export Forms** option is disabled.

Export Forms Dialog Box

Use the **Export Forms** Dialog box to specify the export options such as File name, Location and Records to export.



Figure 3.18: Export Forms Dialog Box

File Name

Specify the location and name of the output file in this field. Alternatively, you can click the Lookup  button, which displays the **Save As** dialog box.

Records to Export

Selected Records

Select this option to export only the custom form versions you selected in the browser.

You can select multiple forms by holding down the **Shift** or **Ctrl** key and clicking the required records.

Retrieved Records

Select this option to export all custom form versions in the browser. To retrieve more custom forms, click the **Get** button at the lower right corner of the browser.

- Specify the export details and click **Export** button to export the custom form versions to the desired location.

 [“Exporting a Form Version” on page 98](#)

Importing a Form Version

Use the **Import Forms** option to import customized form versions that were created using **Export Forms** option from **Everest** database.



You can use the imported custom form version to update the existing custom form version.



[“Updating Existing Forms” on page 101](#)



To import customized form versions, do the following:

- From the **Forms Browser**, select **Options > Import Forms**. Click **Import Forms**. You will see the standard windows file **Open** dialog box.
- Specify the file name to be imported and click **Open**. You will see the **Import Dialog - Forms Browser**.

Import Dialog - Forms Browser

Use the **Import Dialog-Forms browser** to select and edit the custom form versions that you import. The **Import Dialog-Forms Browser** also provides the following functionality:

- Lists the form versions being imported
- Highlights Name conflicts
- Enables version name editing
- Validates the imported form versions

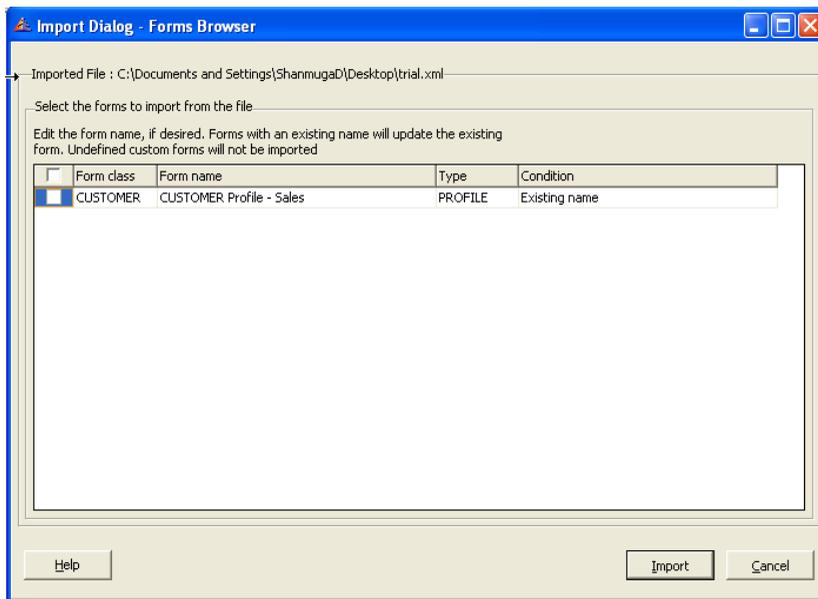


Figure 3.19: Import Forms Dialog Browser

You will see five columns in the Import Dialog - Forms Browser.

Check box

The boxes are checked if the conditions are ok with the form versions being imported and the boxes are unchecked if there is name conflict in the form version.



Checking the box on a row with a name conflict will cause the imported form version to overwrite the existing version with the same name. This provides the ability to use the import to do updates.

Form Class

This describes the class of the imported custom form version.

Form name

This shows the name of the imported form version and you may edit the name in this column.

Type

This describes the type of the custom form version being imported.

Condition

This describes the status of the custom form versions being imported. This column shows the following descriptions:

- **OK** - Displays for the Custom forms are OK to import.
- **Existing Name** - Displays if the name of the form being imported already exists.



It is necessary to check the boxes for the selected form versions. Use left corner check box to check/uncheck all the form versions.

If there is name conflict for the selected form version, you will see **Existing Name** in the condition column. To update an existing form version with an imported version of the same name, check the checkbox on the version row in the import browser. Then, Click **Import**. You will see the confirmation screen. On the confirmation screen;

- Click **Yes** to update the existing form versions. If you selected multiple form versions for update, automatically moves to next selected form version and confirms one by one.
- Click **No**, if you do not want to update. The form version will not be imported.
- Click **Yes to All** to clear all of the form update warning messages. All of the versions sharing a name with an existing form version will be updated.
- Click **No to All** to clear all of the form update warning messages. The versions sharing a name with an existing version will not be imported.

Updating Existing Forms

The **Everest** import utility can be used to update existing form version definitions. Importing a form with the same name as the existing form will cause the existing form version to be overwritten with the imported version. To do this, you must manually check the check box in the import forms browser on a row with a name conflict condition. When you press the **Import** button, a warning message will appear for each form version that will overwrite an existing version. You must say **YES** to update the form. Alternatively, you may say **YES TO ALL**.



["Importing a Form Version" on page 99](#)

4. Forms Designer Security

The Forms Designer Utility
Forms Designer Security Rights
Forms Designer Events

The Forms Designer Utility

The Forms Designer is a utility in **Everest** used to customize nine profile forms. These profile forms include the following:

- Customer Profile
- Vendor Profile
- Item Profile
- Sales Quote
- Sales Order
- Sales Invoice
- Credit Quote
- Credit Order
- Credit Memo

Because of the power of this customization tool, security features have been added to the Forms Designer to ensure that only authorized individuals can complete Forms Designer creation and management tasks. Profiles created should be consistent with the overall **Everest** implementation for a business and profiles assigned should be appropriate for the assigned users and groups.



The Supervisor has global rights and can assign these rights to another user.

Forms Designer events are logged in the **Everest** system. Each time a profile version is created, modified, removed or assigned, an entry is created in the log. The Forms Designer is a licensed utility and requires a valid key to install. After installing the Forms Designer, all of the Forms Designer features, security, and events are activated and are ready for use.

Everest can be installed with or without the Forms Designer functionality. Either way, the Forms Designer feature will be visible from the Company Setup options (path: **File > Setup > Company > Company Setup > Activation > Options**).



To activate the Forms Designer functionality with a valid license key, do the following:

- From **Company Setup** profile, select the **Activation** tab > **Options** tab.

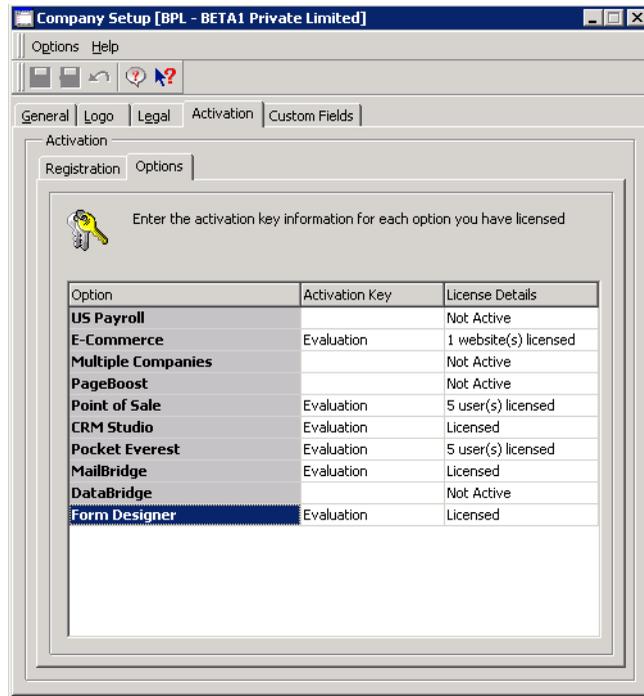


Figure 4.1: Company Setup - Activation - Options Tab

- In the **Activation Key** field, enter your valid license key number.

- Click **Options > Save**.

Everest Advanced Edition User Guide > Volume I > Chapter 2 > Section - The Company Setup Profile-Activation-Options.

The following features are only visible and activated with a valid license key:

Visible Features with License Key	Path Activated
Design menu item on customizable profiles - Opens Forms Designer	Profile > Options > Design
Forms menu item from the main menu bar - Opens Forms Browser	Options > Setup > Forms
Assign Forms setup menu item - For assignments to Users and Groups	File > Setup > Assign Forms
Forms menu item from the User Browser and User Profile	User Browser > Options > Forms
	User > Forms
Forms menu item from the Group Browser and Group Profile	Group Browser > Options > Forms
	Group > Forms

With proper activation, the user obtains access to all the Forms Designer features, security, and events.

Forms Designer Security Rights

In the Forms Designer utility, individual security rights are used to give authorized users the ability to create, rename, purge, import and export forms. Additional security rights are needed to view the **Forms** browser, assign forms to users, and assign forms to groups. These levels of security are necessary since the Forms Designer utility is a very powerful profile-customization tool and only qualified users should be able to customize profiles and assign them to other users.

Access to Forms Designer by Profile

Separate security rights are needed to create versions of each type of profile. For example, a user can be assigned rights to only create customized form versions for the Sales Quote, Sales Order, and the Sales Invoice. The user would then be restricted from creating customized form versions for the remaining customizable profiles.

Even though users have the Design item visible from the Options menu in their profiles, only users with the **Design Form** security right to the profile are able to open the Forms Designer for that profile. The user with security rights to a profile

can also open the Forms Designer for that profile using the **Forms** browser. Users without the appropriate security rights receive a security message.

The profile security rights available and the paths that they activate are listed in the following table:

Security Right	Path Activated
Item: Design Profile Form	Item > Options > Design
	Forms Browser > Design
Customer: Design Profile Form	Customer > Options > Design
	Forms Browser > Design
Vendor: Design Profile Form	Vendor > Options > Design
	Forms Browser > Design
Sales Document: Design Document Form	Sales Quote > Options > Design
	Sales Order > Options > Design
	Sales Invoice > Options > Design
	Forms Browser > Design
Credit Document: Design Document Form	Credit Quote > Options > Design
	Credit Order > Options > Design
	Credit Memo > Options > Design
	Forms Browser > Design

Access to Profile Version User/Group Assignment

After users with the appropriate security rights create customized profiles and save them, they are known as profile versions. These profile versions must be assigned to users and groups before they become active. Additional security rights are needed to assign profile versions. The security right needed to assign profile versions to users is separate from the security right needed to assign profile versions to groups.

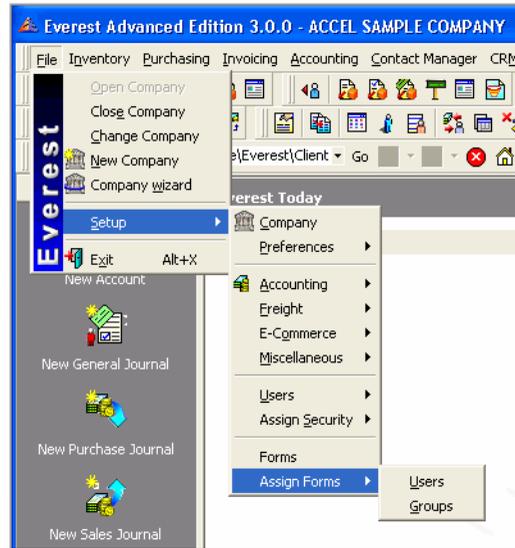


Figure 4.2: Assign Forms Browser with User and Group Options

The users with the appropriate **Assign Forms** security rights can open the assign forms options as listed in the following table:

Security Right	Path Activated
User: Assign Forms	File > Setup > Assign Forms > Users
	User Browser > Options > Forms
	User Profile > Options > Forms
	Forms Browser > Options > Assign Forms > Users
Group: Assign Forms	File > Setup > Assign Forms > Groups
	Group Browser > Options > Forms
	Group Profile > Options > Forms
	Forms Browser > Options > Assign Forms > Groups

The distinction between these Assign Forms rights is important because the user with the Assign Forms right for Groups can quickly make global changes for

groups of users. By separating these rights, the group assignment form rights can be restricted.

Access to Customized Profiles from a Central Location

The **Forms** browser is used to view and manage profile versions but not all users can open the **Forms** browser. The **Forms** browser can only be opened by a user with the **View** security right. This gives the user the ability to open and view the **Forms** browser only.

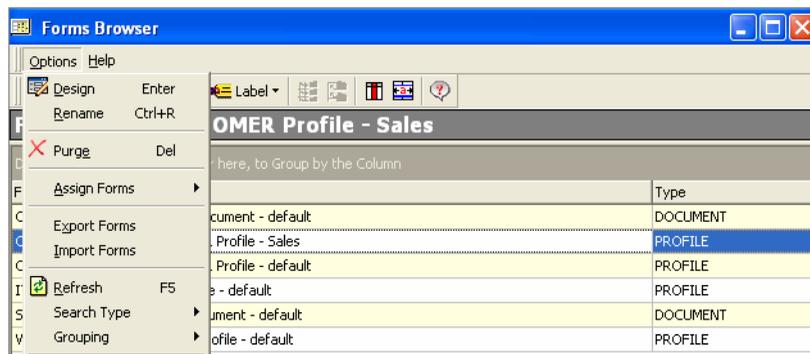


Figure 4.3: Forms Browser Options

Additional rights are needed to create, assign, rename, purge, import and export profile versions. The **Forms** browser security rights are listed in the following table:

Security Right	Path Activated
Form Browser: View	File > Setup > Forms
Form: Rename	Forms Browser > Options > Rename
Form: Purge	Forms Browser > Options > Purge
Forms Browser: Export	Forms Browser > Options > Export Forms
Forms Browser: Import	Forms Browser > Options > Import Forms
Forms Browser: Set Default Form	Forms Browser > Options > Set as Default

If users try to open the **Forms** browser without the associated security rights, the **Forms** browser will not open and they will receive a security message.

Assign a Security Right to a User

Forms Designer security rights are added to users in the same way that other security rights are assigned in **Everest**.

1 **2** **3**  To assign a Forms Designer security right to a user in Everest, do the following:

- From the main menu bar, select **File > Setup > Security Rights**. The **Security Rights** browser is displayed.
- Verify that the **Users** tab is selected.

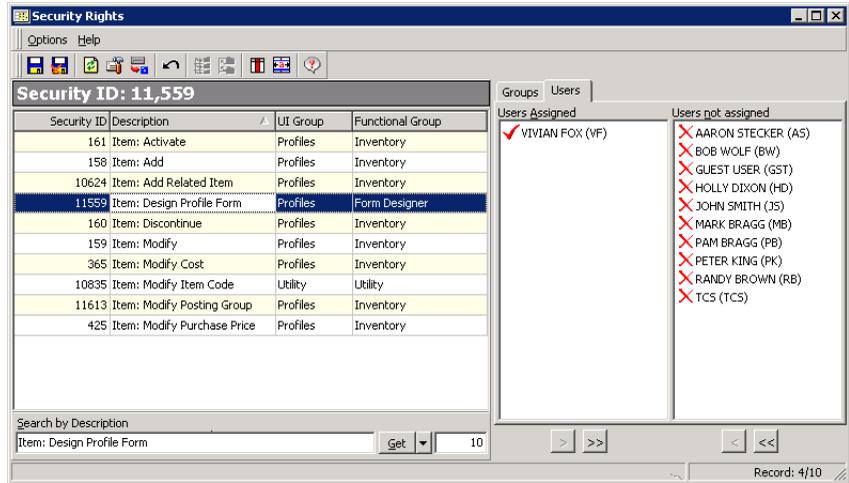


Figure 4.4: Security Rights Browser - Users Tab

- In the **Left Panel**, locate and highlight the Forms Designer security right to be assigned.
- On the **Users** tab, in the **Users Not Assigned** section, highlight the user to be assigned the selected security right and click the  button to move the user's name to the **Users Assigned** section.
- Click **Save** to save your changes and assign the selected security right to that user.
- You can also double-click an item to move it from the **Users UnAssigned** section to the **Users Assigned** section without using the arrows.
- Forms Designer security rights can similarly be assigned to groups of users using the **Security Rights** browser - **Groups** tab.



Everest Advanced Edition User Guide > Volume 1 > Chapter 1 > Section - Assigning Rights to Users

Remove a Security Right from a User

Forms Designer security rights are removed from users in the same way that other security rights are removed in **Everest**.



To remove an assigned Forms Designer security right from a user in Everest, do the following:

- From the main menu bar, select **File > Setup > Security Rights**. The **Security Rights** browser is displayed.
- Verify that the **Users** tab is selected.
- In the **Left Panel**, locate and highlight the Forms Designer security right to be removed.
- In the **Users Assigned** section, highlight the user to have the selected security right removed and click the  button to move the user's name to the **Users Not Assigned** section.
- Click **Save** to save your changes and remove the selected security right from that user.



- You can also double-click an item to move it from the **Users Assigned** section to the **Users UnAssigned** section without using the arrows.
- Forms Designer security rights can similarly be removed from groups of users using the **Security Rights** browser - **Groups** tab

Forms Designer Events

In order to ensure that the Forms Designer functionality is used properly, audit tracking is utilized to monitor activity. Management can then view the Forms Designer events in a log. Events are logged by the system when a profile version is created, modified, removed, or assigned. The following specific events are logged:

- A profile form is created
- A profile form is modified
- A profile form is deleted
- A user is assigned to a form
- A group is assigned to a form

For each event logged, the particular profile version of the form is also recorded.

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