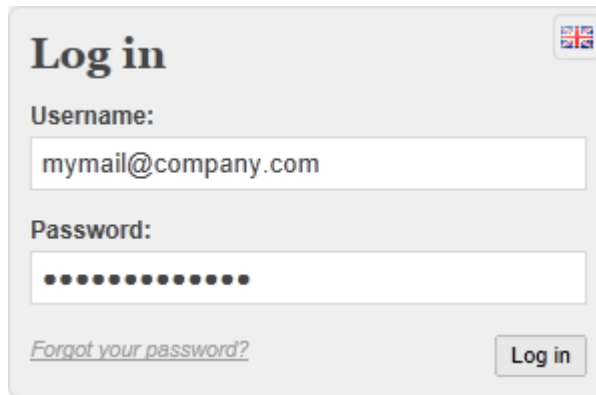



# Tutorial: Creating a new field



- In this tutorial you will learn how to add a new field to the data model and to an existing form.
- This exercise uses the "Asset manager" application that is available on all trial accounts.

# Logging in



**Log in** 

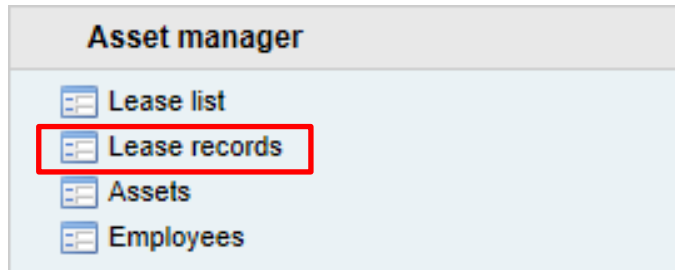
Username:

Password:

[Forgot your password?](#)

- Go to [public.istools.com](http://public.istools.com) in your web browser.
- Log in using the account credentials provided in your welcome mail.

# Navigating forms



- In the main menu, expand the "Asset manager" folder.
- Click "Lease records" to open the form we're going to add the new field to.

# Getting familiar

**Lease records**

**Leases**

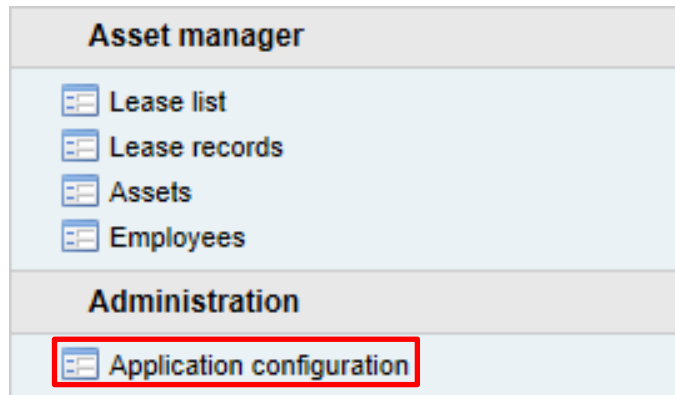
3

**Lease details**

Asset	Standard laptop (S/N 1001) - 1 <input type="button" value="x"/>
Employee	Anderson - 3 <input type="button" value="x"/>
Lease date	2013-05-09
Returned	<input checked="" type="checkbox"/>
Return date	2013-08-09

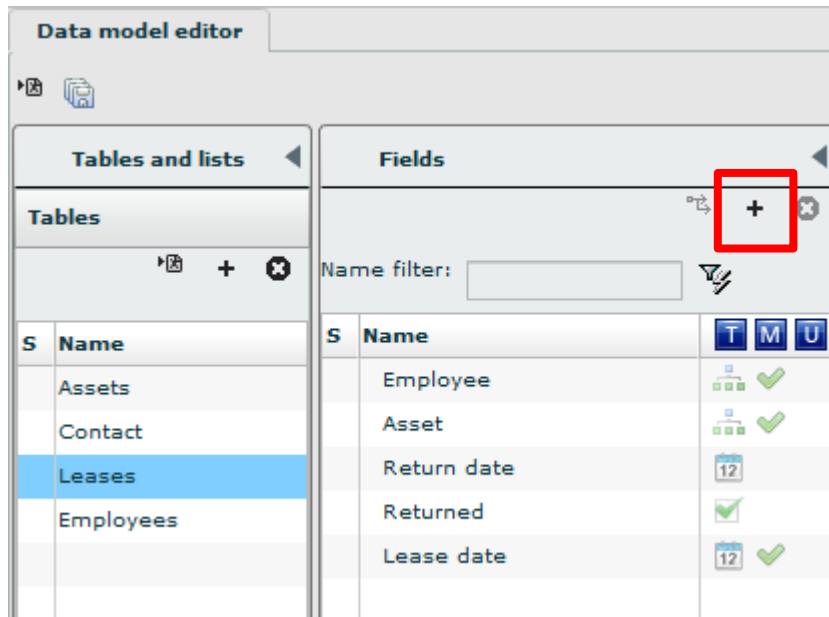
- Take a minute to familiarize yourself with the displayed form.
- In this exercise, our goal is to add a new field for comments to each lease record managed through this form.

# The data model editor



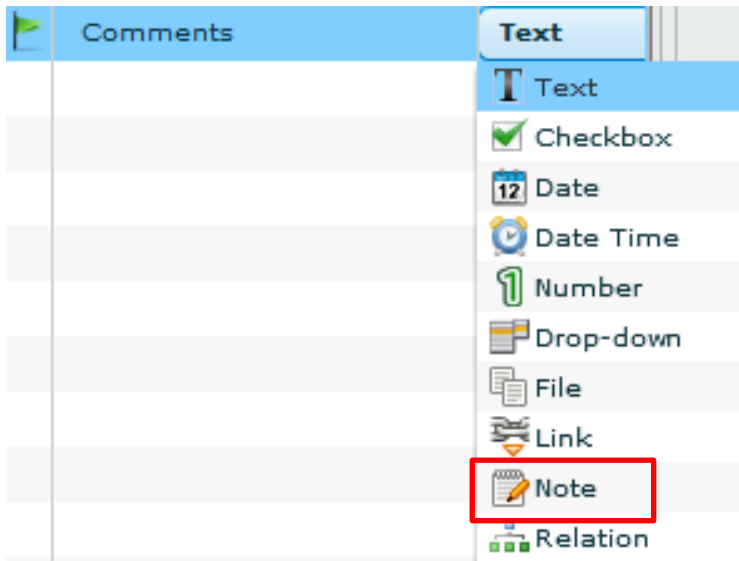
- In the main menu, expand the “Administration” folder.
- Open the data model editor by clicking “Application configuration”.

# Viewing tables and fields



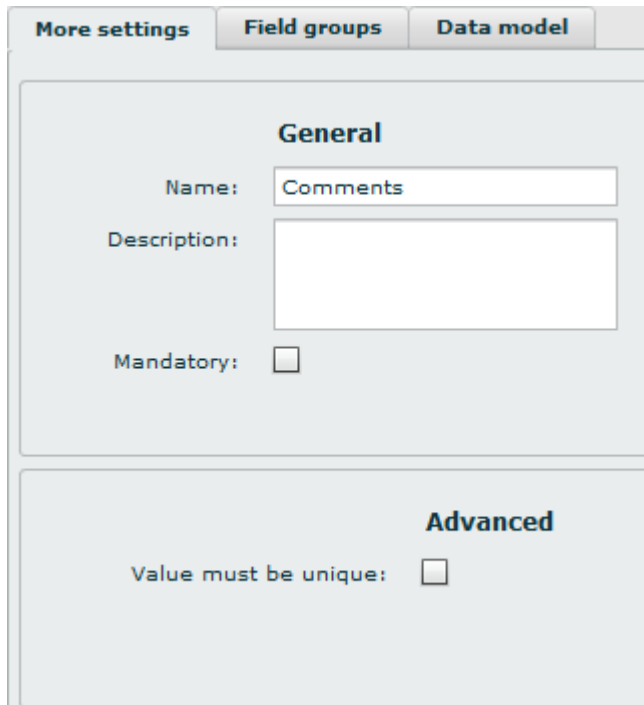
- Click the "Leases" table in the list of tables.
- All existing fields for this table are displayed.
- Add a new field by clicking the + icon in the Fields panel.

# Creating a field



- Enter "Comments" as the name for the field.
- Click the T icon next to the field's name to choose the type of field we're creating.
- Select the "Note" type.

# Field settings

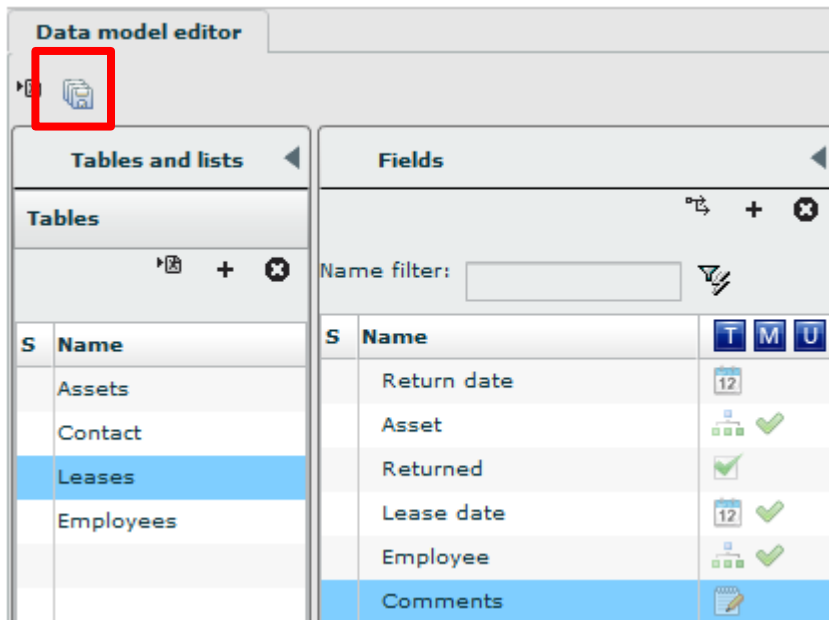


The screenshot shows a settings panel with three tabs: 'More settings', 'Field groups', and 'Data model'. The 'Field groups' tab is active. Under the 'General' section, there is a 'Name' field containing 'Comments', a 'Description' field, and a 'Mandatory' checkbox which is unchecked. Under the 'Advanced' section, there is a 'Value must be unique' checkbox which is also unchecked.

- Further settings for fields can be set in the panel to the right of the field list.
- For this exercise we'll leave them at their default settings.

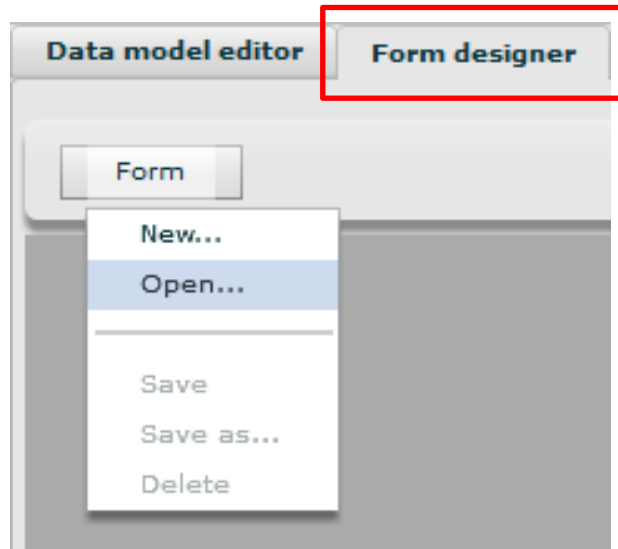


# Saving changes



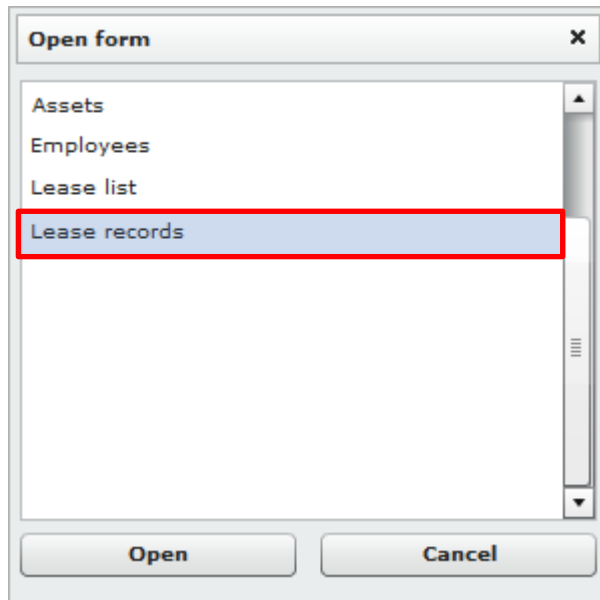
- Now that the new field is defined it can be saved in the data model.
- Save the changes by clicking the **Save** icon in the top left of the data model editor.

# The form designer



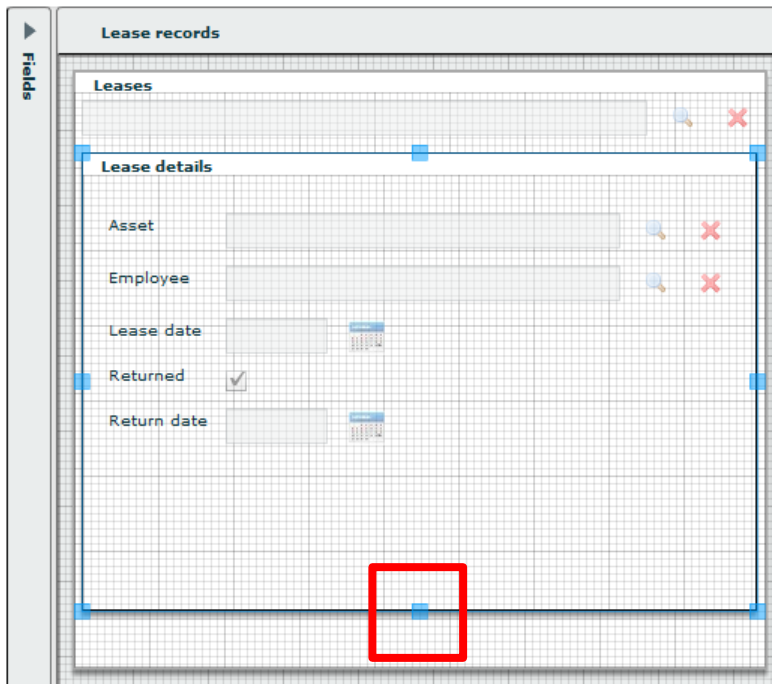
- The last step is adding the field to the "Lease records" form.
- Switch to the "Form designer" tab at the top of the screen.
- Click the "Form" button and choose "Open".

# Opening forms



- In the displayed list of forms, highlight the "Lease records" form.
- Load the form into the form designer through clicking the "Open" button.

# Using the form designer



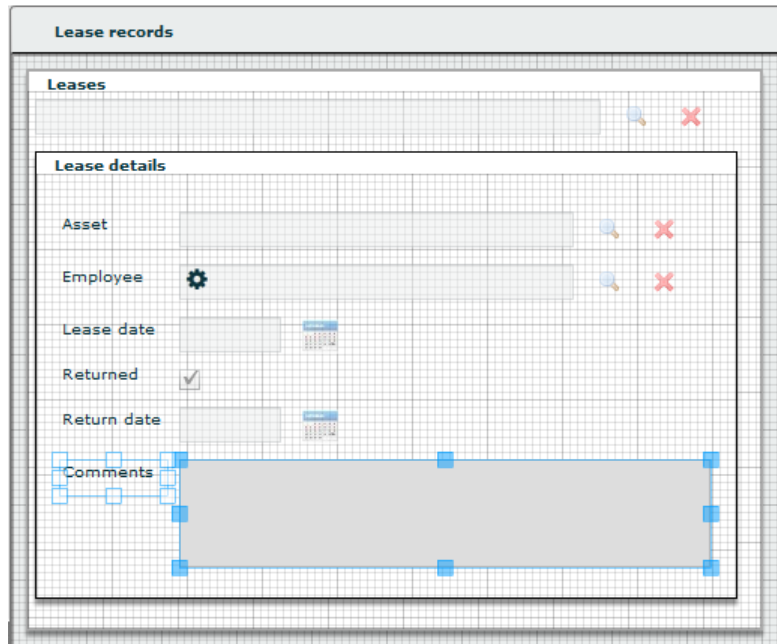
- This is the visual editor for forms.
- Clicking a panel or section of a form brings up handles (blue) that allow resizing.
- Adjust the height of the form to allow for the new comment field to be added below the already existing fields.

# Adding fields to forms

Fields	
Name	
Asset	
Return date	
Returned	
Comments	
Lease date	
Employee	
<i>Record name</i>	

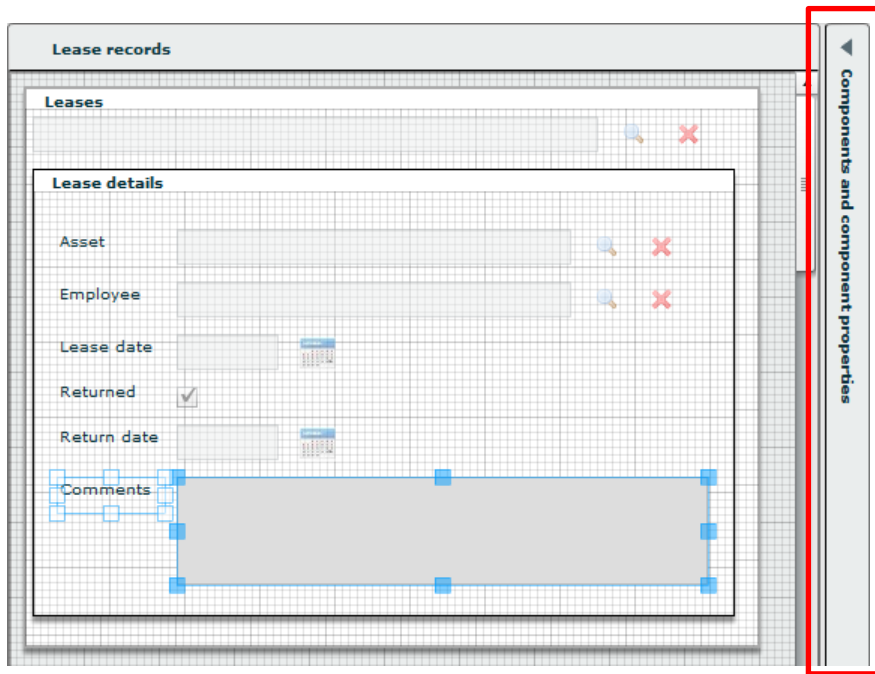
- Locate the Comments field in the Fields list to the left of the open form.
- Drag and drop it onto the empty space on the form as shown on the next slide.

# Positioning



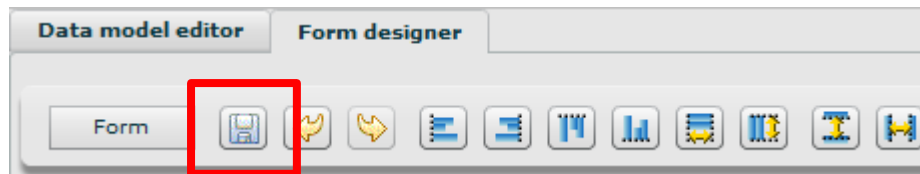
- Fields and their labels can be selected and moved around individually until they're nicely positioned.

# Positioning



- Optional: Further options and controls for the selected form items can be reached by expanding the "Components and component properties" panel.

# Saving form changes



- Once you're happy with the layout of the form, click the Save icon at the top of the screen to save the changes made.
- View the updated form by clicking "Lease records" in the application menu. It should now look similar to the form shown on the next slide!



# Congratulations, you're done!

**Lease records**

**Leases**

3

**Lease details**

Asset

Employee

Lease date

Returned

Return date

Comments

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