

The main features of Edit Forms: customized controls to enable effective data-entry

Orixa Edit Forms display data for one record in a Business Object data-table, and allow users to edit and insert data.

To speed up user data entry extensive customizations are possible within Edit Forms, making them more powerful and capable.

Main elements of the edit windows

A typical Edit Form

A Record displayed in the "People" data-edit window. Note the screen areas, who's function is explained below:

1. The main "toolbar" for the edit window. All actions such as adding, deleting or posting data, viewing linked data etc., are accessed from the toolbar.
2. The main "data layout" area for the edit window. The fields in the database table are displayed here and can be edited by the user.
3. The "summary data layout" area. This shows **linked data** for this record, pulled in from other tables in the database, usually lists and summaries such as total numbers of holiday-days taken by a staff-member, or the total value of unpaid invoices for a customer. This data is always read-only, and is provided to allow you to easily see key data for any record.
4. Data layout tabs. Some edit-windows show data for multiple, linked data-tables. In this example you can see "People" and "Staff" data-records have been added. Usually there is only a single tab, with the name of the database table showing here. Only "Master" entities (such as the "People" entity shown here, or the "Organisations" entity) can have multiple tabs

Shortcut Links - a toolbar showing all linked and "child" records.

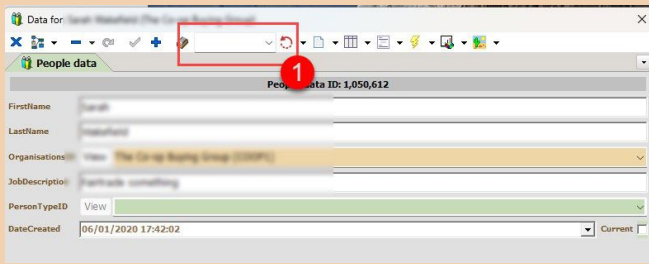
Shortcut Links bar

If a data-record is linked to other records in the database, Shortcut Link will display, as shown at 1. in the image on the left.

Links to Comments, FileNotes and Images are shown here, as well as links to other "child" BusinessObject records.

Click on any of the Shortcut Links icons to open the linked record.

Not All links are shown in Shortcut Links, to avoid overcrowding. This behaviour is controlled by the Developer of your App.

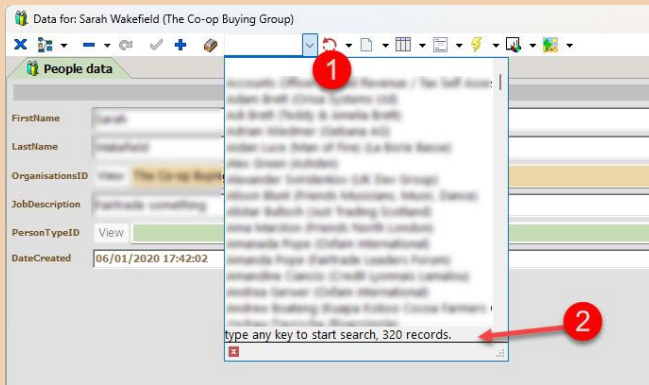


Edit Form Search Panel

The Edit Form Search Panel

If your Developer has enabled the "Edit Form Search Panel" an empty text-field will appear in the Edit Form Toolbar. (marked 1., in the image)

Use this panel to navigate to records in the data-table.

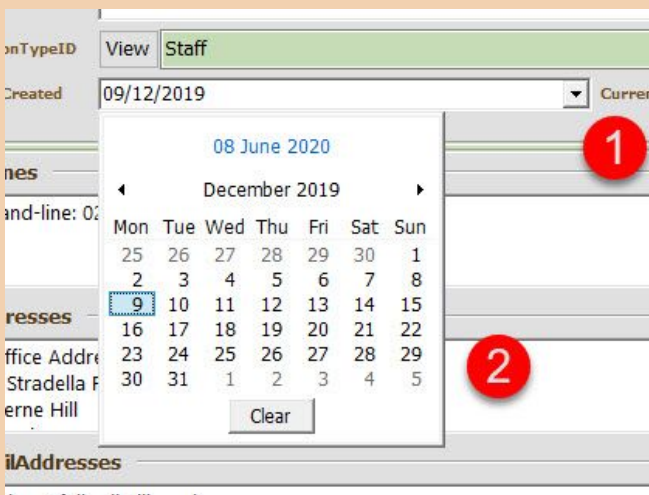


Edit Form Search Panel in Use

The Edit Form Search Panel In Use

1. Click on the Edit Form Search Panel and press "Enter" or click the "down-arrow". A list of records in the data-table will appear.
2. Start typing, and the list will narrow-down based on the text you type.

Move to the record you want to view and press "Enter" (or double click on the item with the mouse) to navigate to it.



Date Editor

Data containing Dates

Any record which contains data defined as "Date" data in the database, will automatically appear with a date-editing features.

In the image the "DateOfBirth" field is a date in the database, so clicking on 1., opens the "Date editor" shown at 2.

This date-editor allows "zooming". If you click on the main date ("November 2015" in the image) the editor will zoom out to allow selection of first months, and then years.

Data containing "Timestamps" (a date + a time of day)

If a record contains fields which are defined in the database as "Timestamps" they will display with a date editor **and** an additional "time" editor, as shown in the image.

This allows visual selection of the time of day, by clicking on the clock-face, and selecting "AM" or "PM".

DateStart 15/06/2020 10:00

DateEnd 10:00 AM

StaffID V

Memo

10:00 AM

AM PM Set

Time Editor

PersonTypeID View Staff

DateCreated 09/12/

Phones

Land-line: 020 773 343663

Customer Contact

Friends and Family

General Contact

Staff

type any key to start search, 5 records

The above list shows "type" data, remember this is only one of several possible lists that can be created by the system. Others include "Status" lists, and "Linked Record" lists, detailed below.

Most data-tables in the database include data-fields to allow grouping and classification of the records based on lists. The example on the left shows the options for "types of people".

Note that all "Type-lists" (which usually display green in the edit window) can be amended and edited, provided you have adequate security.

If the list does not contain all the items users requires, click on the "View" button to the left of the list to view the linked record. You can then edit the data and insert new records.

OrganisationsID View Orix Systems Ltd (orx)

JobDescription

PersonTypeID View

DateCreated 09/12/

Phones

Land-line: 020 7 343663

Addresses

Mountain Fruits Company (MFC)

NatWest Bank (natwb)

Ndali Vanilla (NDALI)

Orix Systems Ltd (orx)

Overseas Projects Catch-All (op)

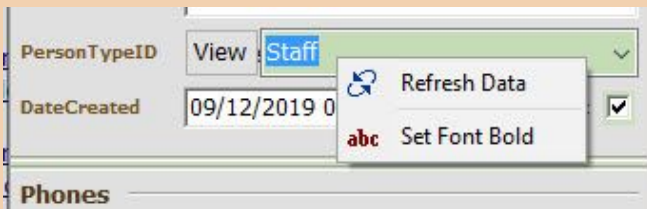
Oxfam International (oxf)

type any key to start search, 53 records

Linked Records

A key feature of Orix is its ability to link different data-tables together. In the example on the left, a person linked to the Organisation "Orix Systems Ltd".

1. Click the drop-down arrow to open the list of Organisations in the database. The drop-down list will always show a full list to choose from
2. You can View the linked record's Edit Form by clicking the "View" button. All View buttons function in the same way, so it is possible to move from record to record through all linked items in your database.
3. The list of Organisations can be searched by typing. Typing will search the list for the search-text typed by the user. Hit "Escape" at any time to cancel a search.



Refresh List

All lists in the system are "asynchronous", so new records that are added to the system after the form has been opened will not be visible immediately.

If a record is not present, to refresh a list, right click on it and select "Refresh".



ID List Editor: Linked lists of simple records

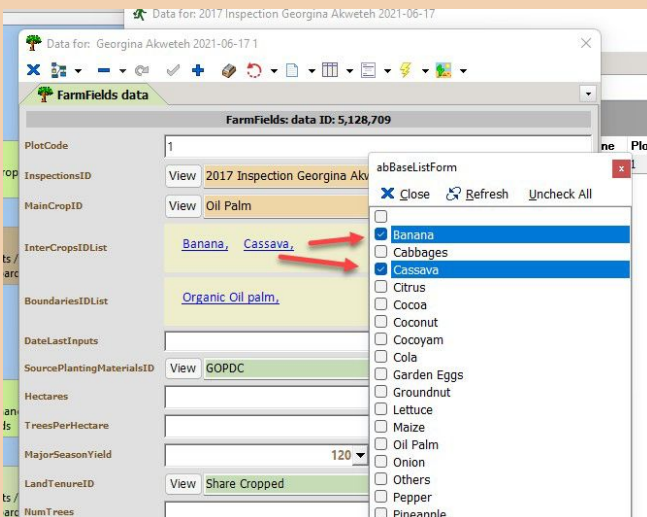
ID-Lists

Orixia includes the ability to create pick-lists from which multiple-entries can be selected.

These "ID Lists" show light-yellow marked 1. on the left.

Click on any item in the list to view the linked data. Or double-click on the light-yellow area to open the full list to pick from, as shown in the lower image on the left.

Pick-lists of records to add in an ID-List are formed from data entered elsewhere in your App, so you can control and change the list of records.

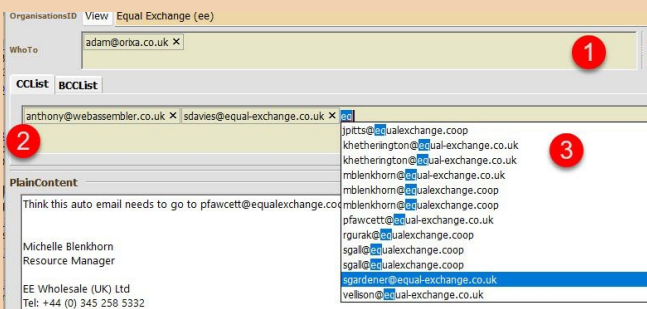


ID List showing picking form

The "Token Edit" Control

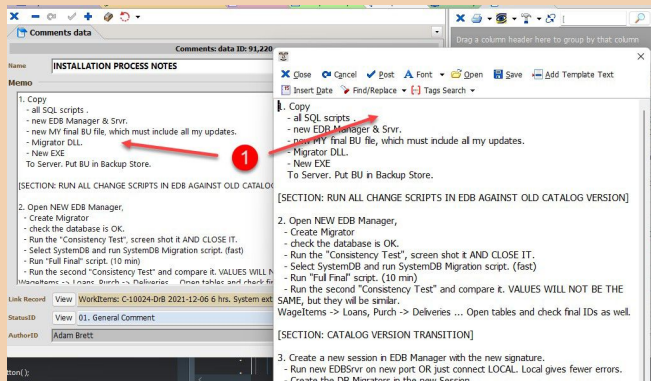
Orixia includes the ability to show "lists with x's" as shown in the image. The user can type or pick elements, and each is shown in a box, with an "x" beside it allowing deletion.

This mimicks the functionality of applications where users can type and pick things like email addresses from saved lists.



Edit Form "Token Edit" Control

1. The Token Edit.
2. Items in the list, which can be deleted by clicking the "x".
3. A list of items to pick-from.



Memo Edit

for a longer Help document about the "Memo Editor" please look at this item: [The Orixia "Memo" window](#)

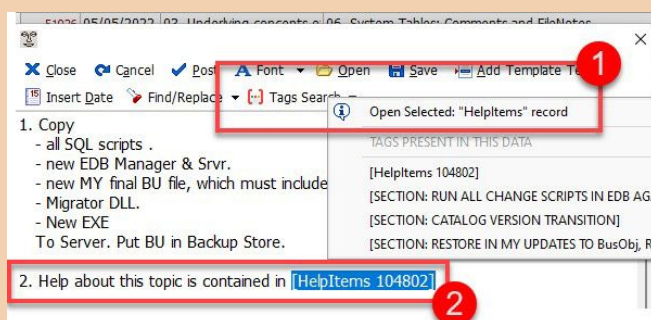
Long Text / Memo Fields

Any field which is define in the databased as a "CLOB" or "MEMO" field (which allows long sections of text to be saved) will display a long-text editor, as shown in the image.

This editor has many built-in behaviours, such as cut/copy/paste, spell-checking etc.

Double-click on the field to open a **dedicated text-editor** which can be expanded in size, and which features additional capabilities as shown in the image on the left.

- Insert any text you want into the memo-field by clicking on "Open" and selecting a suitable text-file from your computer.
- Similarly you can save text in any field to a file on-disk, by clicking on "Save".
- Find/Replace allows global searching of longer text documents, and features the windows standard "F2" and "F3" to repeat the action.
- The "Add Template Text" button opens a window of text segments the user can add to the field. The user has to add entries to this list for it to be useable.
- The "Insert Date" button simply adds the current date to the text being written.
- The ability to hear the contents of the memo spoken by your computer, using Text-to-Speech.



Tags Search link to Specific BusinessObject Record

Orixia " Tags Search" Feature

The Orixia Framework includes the capability to add "Tag-searching" to long-text / memo fields.

Tag-searching simply adds a very minimal mark-up" capability to the memo field, allowing staff to type in text enclosed in square brackets and to have these "tags" interpreted by Orixia.

This can be a really useful feature, and is discussed in more detail here:

[The Orixia Memo window](#)

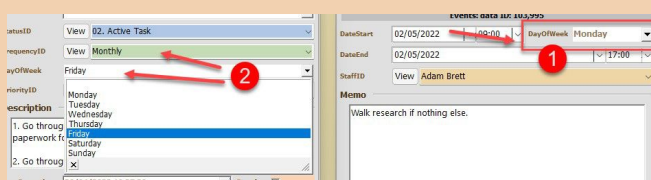


PercentUsed or PercentBar control

Percentage Completion

Specialized forms can include a "PercentBar", also called a "Progress Bar", this is used to display items with their completion-percentage.

Users usually cannot edit a "PercentBar", its value will change depending on other data in the App.



Day Of Week Edit

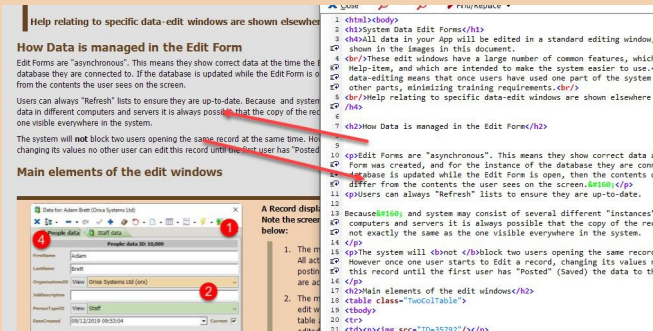
Specialized forms can include an Edit which shows a day-of-the-week, allowing users to easily pick one day, or see the day of the week for a particular date.

DayOfWeek Edit

Specialized Elements of User Interface

Orixa includes a full set of basic editors for values such as dates and numbers, to make it easy for users to reliably enter data. It also includes a set of specialized editors for managing links between the data, which are key to how Orixa works.

Finally, it includes a small number of specialized data-entry mechanisms for handling useful processes and forms of data, these are less widely used, but are still available if your App should need them.

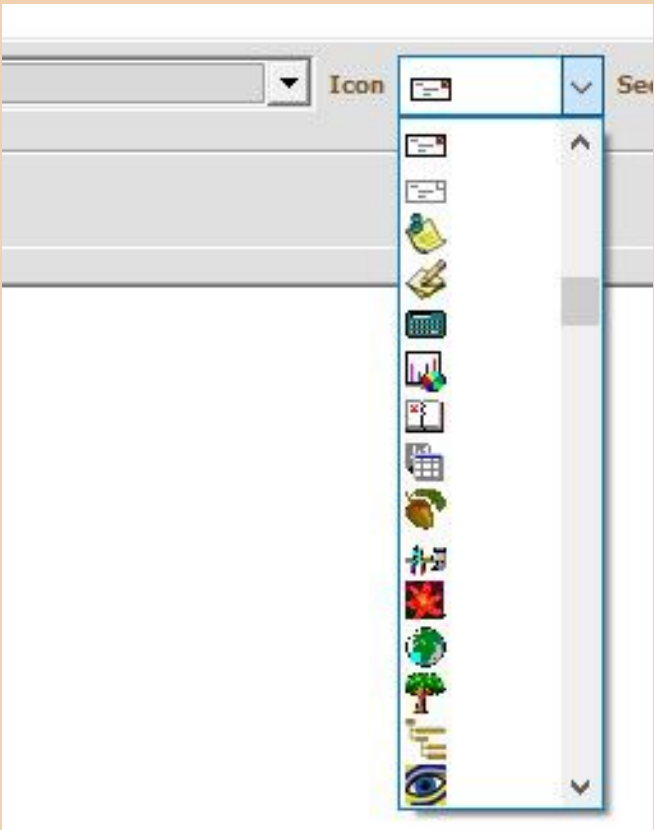


HTML Editor with Mark-up Editor open

The HTML Editor

The text you are reading right now was edited in an Orixa HTML Editor. This allows the presentation of complex data with formatting, tables, images etc. Users can review and edit the data, and it can be shown in any part of the App.

[To review HTML Editor's Features and Short-cut keys check this link](#)



Icon picker

Icon-picker

Orixa includes a short-cut to link records to tiny icon-images. This linkage is achieved by your Developer, and allows any record in any data-table to be linked to an identifying image. This can be useful if records are displayed visually.

Note that these icons can then be used in elements of your App such as the "links-list" detailed above,.

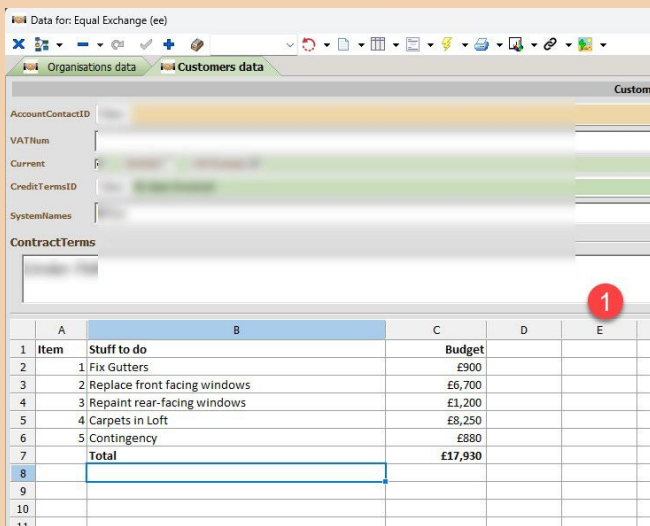
Color Picker

If it is useful to link a record to a color, your Developer can add a Color-field to a data-table in your App, and individual records can



Color Picker

be assigned a color.



Spreadsheet component within Application

Spreadsheet editor

If it is useful to link a tabular / spreadsheet data-entry process to a Business Object Edit Form, this can be done easily using Orix.

Full details of all the features of this editor are detailed in a longer help article here:

[Orix Spreadsheet Editor](#)

Adding data

All Orixa data-entry is managed within **Edit Forms**. These are standardized editing windows that format underlying data in a way that should make them easy for users to understand and use.

Wherever you are in Orixa, if you see a standard edit window you know that it is a place where you can add and edit data. Other user interface elements such as data viewers, grids, charts etc. are almost always usually read-only. This means that as you move around your Orixa system you can never change data just by viewing, opening or looking at items. To edit data an edit form must be visible.

To edit data, double click on an item that is linked to a data-record and an Edit Form will open. If you do not have adequate security to view or edit data your action might be blocked at this point. Once open the Edit Form gives access to a whole range of actions, data-views, reports and dashboards which are linked to the Business Object that creates each Edit Form.

The detailed function of the edit form, its reports, views, dashboards etc. are all dealt with in other Help documents. Every edit form will be different, and contain edit-fields based on the database table it brings data from. You will need to learn what the fields in each Edit Form are used for. Special Help should be available on each Edit Form if this is needed.

From the System Entities Screen

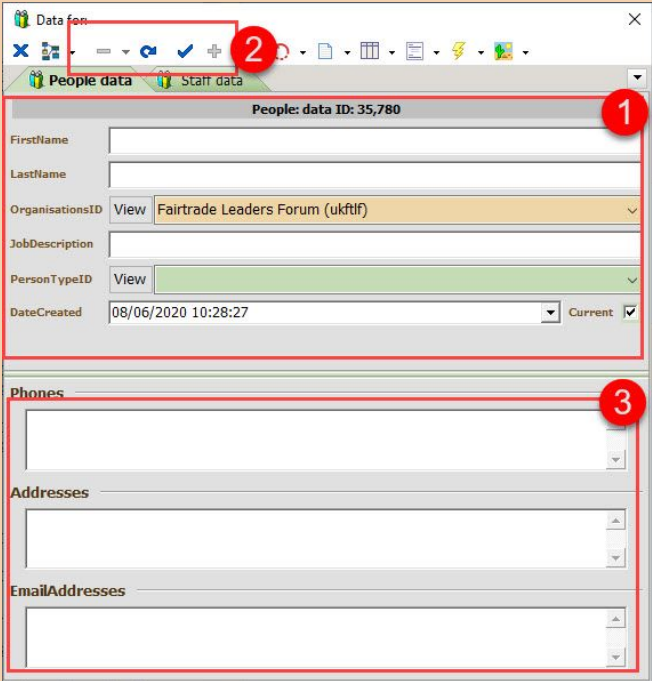


New Record

To Add Data

The first place you can add data in the system is from the System Entities screen

1. Select the entity with BusinessObject into which you want to add data, and click on the "Actions" button.
2. A list of Actions will show. The top of this list should include items "Add new xxxxx", for each BusinessObject. Click on whichever BusinessObject you want to add data to.



Edit Data

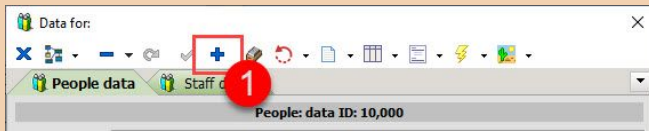
Adding data in Edit Form

Just click on the blue "+" button in the top of the window (marked 2., in the image)

For basic use:

1. Enter data for a new record into the fields provided. Each field has a clear name attached (FirstName, LastName etc. in the image).
2. Click the blue "tick" to post/save data to the database, or click the blue "undo arrow" to cancel an edit.
3. Remember that that **summary panel** does not allow editing of data. You can only edit data in the area marked "1." in the image.

Note that the summary panel is optional and will not be present in all edit-forms.



Add data

Repeatedly adding data

Once an edit form is open, if you are entering many records, just click on the blue "+" to insert each new data record.

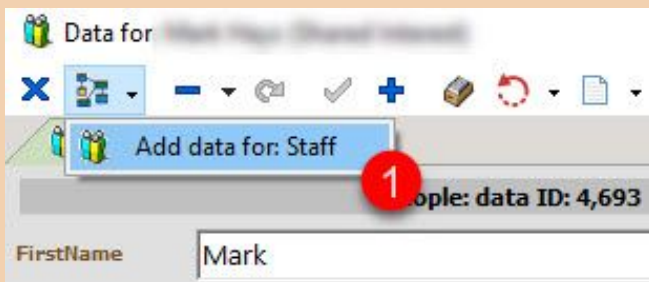
Adding Extension data to a record

Very often BusinessObjects in Orixia are segmented into parts, with each part in a separate data-table. There is a "Master" data-table, and then additional "extension" data-tables which hold pieces data that do not need to be added to every record.

For example, all Orixia systems include a standard "People" data-table. This just contains "FirstName", "LastName" and a few other simple fields. If you want to extend your system you can add extra fields to the "People" data-table. However you might be better to add an **extension** table for example "Staff", or "Farmers" which can be used to hold data for People who are also Staff or Farmers. In this way you do not need to see all the data-fields that relate to Farmers when you are editing Staff data and vice versa.

By using the **extension** model Orixia can easily scale up and hold complex data, and data can be stored efficiently. All farmers' data is stored in the "Farmers" data table, but this table does not store the farmer's names. Their names are stored in the "People" data-table. Searches for Farmers will return the People Edit Form, with a Farmers tab added. In this way you can easily search for any data, and see all the interlinked parts in one place.

An Edit Form will only allow the addition of extension data if the BusinessObjects in the database are linked together following standard Orixia framework rules.



Add Extension Record

Adding Extension data records

Find the "Extensions" button in the Edit Form (shown at 1., in the image). Click to view a list of extension data you can add, and click to add the one you want ("Add data for: Staff" is shown in the image).

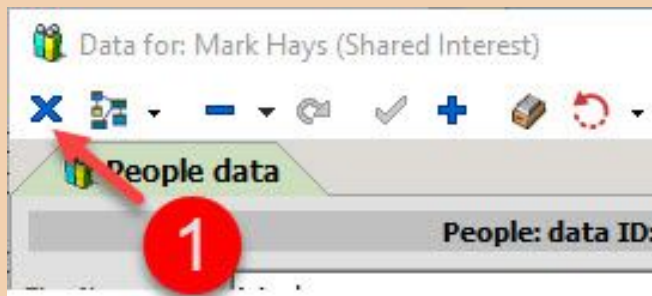
The addition of this Details record does two things:

1. It allows new fields to be stored in the database (such as a Staff member's Department, team, payroll number etc.).
2. It changes the definition of the person into a person who is also a staff member.

Becoming a staff member may "unlock" new actions you can do, for example with "Staff" you might be able to add "Wages", but with a "People" record you cannot.

The Edit Form toolbar

Throughout the system programatic actions are accessed either by clicking or right-clicking on a particular item for actions which are directly related to that item. Programatic actions (such as printing some report, opening a new part of the program etc.) are accessed via toolbars, and the toolbars always located at the top of the section of the screen occupied by the element. This is done in an attempt to standardize the the user interface and make it as simple and easy to understand as possible.

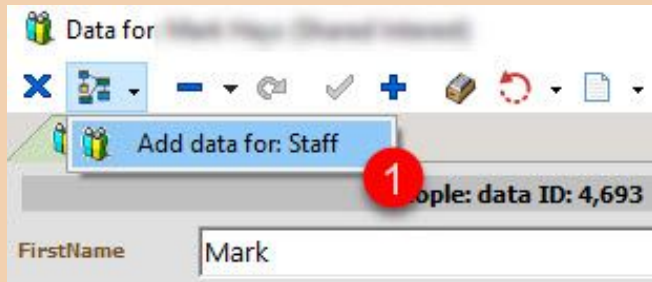


Framework Form Close Buton

The Close Button

Any part of the system which allows the user to close it, features this simple "x".

Click on it to close this part of the system



Framework Form Add Extension Record

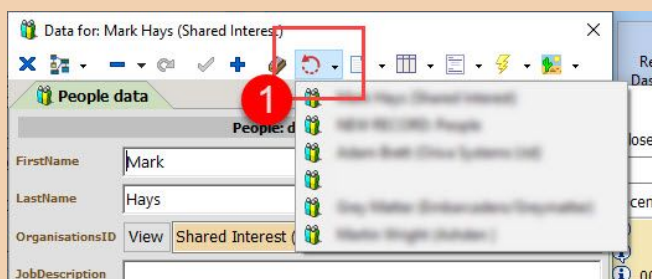
The "Add Extension Data" Button

Some data-tables in the system are linked together with "Master" data-tables (such as "People" and "Organisations") and "Extension" data-tables (such as Staff and Suppliers).

All Staff are People, and are recorded in the system with data in two data-tables, the "People" table and the "Staff" table. The People table is used to hold basic data about the person, while the Staff table "extends" this data with information specific to staff.

In this way the system can be made flexible and hold data efficiently. A person can be added to the system, and later (if they become a member of staff) Staff data can be added.

This concept is widely used to allow data to be separated into useful "chunks", and to reduce redundancy.



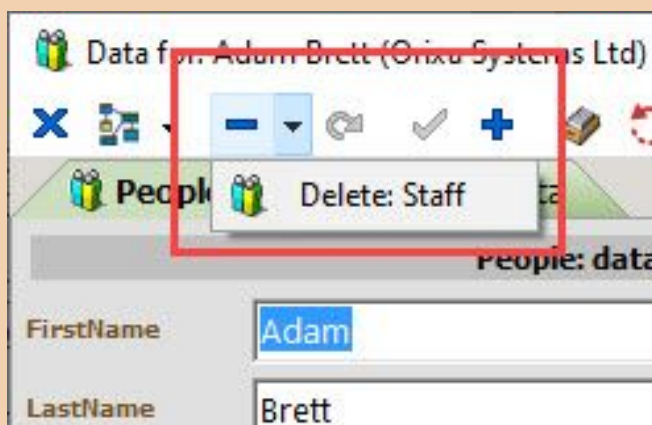
Framework Form 11 Recent List

Main Menu "Recently opened" button

This button replicates the "Recent List" shown in the Model Diagram Entity, described elsewhere in the Help.

Clicking on any item in the list will immediately show the database record for the selected record.

As a user opens different records in the system, they are automatically added to this list. The list contains up to 20 entries.



Framework Form Delete

Main Menu "Delete Record" button

Clicking on the main "minus sign" delete button will delete all delete the content of all the Tabs (Farmers, People) in an Entity one-by-one. Users will be asked to confirm deletion before each tab is deleted. If a record has only one tab, they will only be asked once.

If a user wants to delete just one tab, they should click on the down-arrow beside the "Delete" button (shown in the image on the left) and select the tab they want to delete from the list.

Note that it is often impossible to delete records in the system.

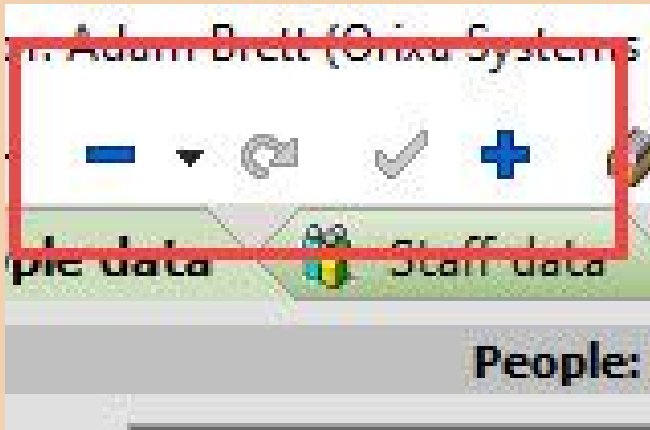
If any record is linked to other data (for example a Farmer with Purchases data, or a Staff member with Wages data) attempting to delete the record will be blocked.

This is due to the fact that deleting the record leave an "orphan" records in some other data-table. This seems like a severe

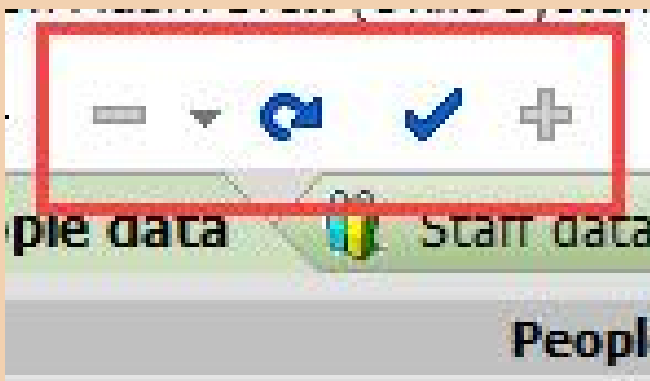
constraint until you realize that it is rarely necessary to delete records. Simply untick the "Current" field in most data-tables and they will be de-selected from view in the system.

This feature is designed to guarantee safety and integrity of the system database.

If it is necessary to completely delete data, it is possible to write system procedures to do this. These procedures will incorporate code to update or delete the "child" data for any records so that no "orphan" data is left behind.



Undo-Post-Add Buttons on a newly opened record



Undo-Post-Add Buttons once a record is being edited

Main Menu "Add, Post and Undo" buttons

The next three buttons on the menu control the main actions for editing data

"Undo" (the backwards arrow) this cancels any edits the user has made.

"Post" (the tick) this sends edits the user has made to the database, storing them for others to view.

"Add" (the "+" sign) this inserts a new record into the database.

Note how the buttons change as you start to edit data in an edit-form. This helps to indicate the state of the data.

When the "Post" button is illuminated blue, the data in the edit-form has **not** been posted to the database.

Note that when an edit window is closed if data has not been posted the system automatically posts it for you.

"Audit Trail" button

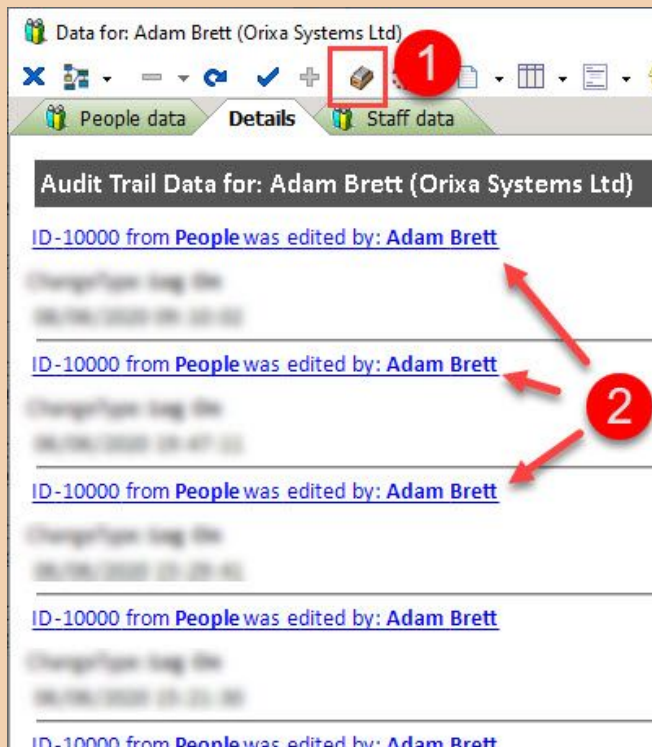
Whenever a user edits any data in the database a small "audit trail" record is added to the "EditHistory" system-table in the database.

To view details of the change, click on any blue-underlined "link" to open an Edit form with details of the changes. Note that this form is read-only.

If you want to see changes a user has made click on the "Audit Trail" button marked "1." in the image on the left. This opens a window listing changes made with the name of the user who made the change and details of the date and time the record was edited.

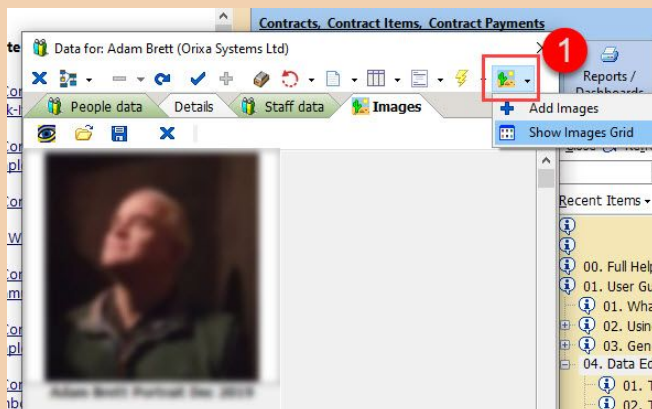
This audit list can be used to check changes made in the database, particularly to check whether users have been tampering with data or doing things wrong.

This Audit Trail is automatic for all edits of all records by all users.



Framework Form Edit History Listing

It does not store a full "change listing" (ie details of the changes that were made). Full change-listing can be done using other features in the system.



Show Images

"Show Images" Button

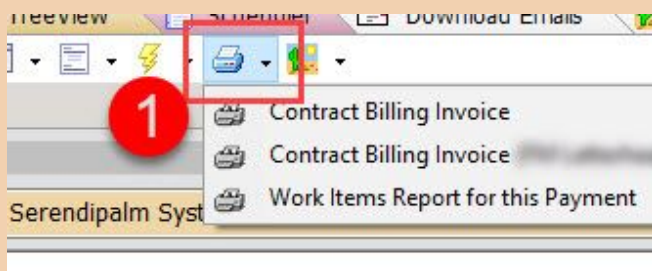
The "People" BusinessObject includes links to the Images system-table, as shown in the image. This allows any number of images to be linked to each data-record in the "People" table. These images can then be viewed, edited and used in the System.

Any BusinessObject can be linked to the Images system-table. Usually only a few actually are linked in this way.

This image-store is designed to store images while minimizing the size of picture-files in the database, and also stores "thumb" images with all generated images, allowing easy retrieval of small versions of the images.

More detail on managing images in the system can be seen here:

[The System Images Grid](#)



Edit Form Print Reports

Printed Reports Button

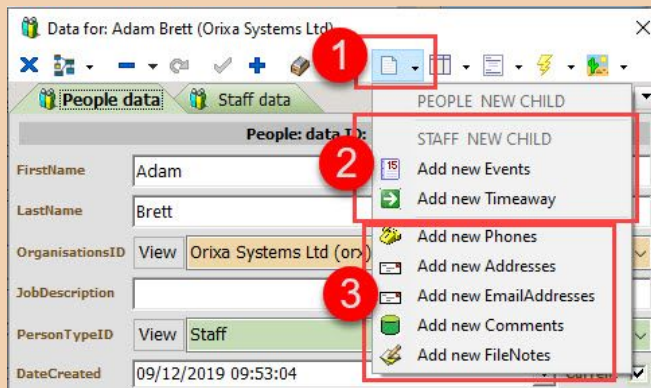
Click on this button to show a list of Reports linked to the BusinessObject.

Some reports will only be visible if you have adequate security.



"New Items", "List" and "Grid" buttons

Framework Form Items Menus



FF New Items

New Items

This lists all "child" data-tables which can be linked to the currently visible record. It is usually possible to add "Comments", other entries in this list will depend on the particular data you are looking at.

Click on any item to add a new record to the selected data-table, with a link back to the current record.

1. The "New Items" button
2. Sub-lists of new child-data that can be added are grouped together with their linkage to the Business Object.
3. Data linked by soft-links are shown at the bottom.

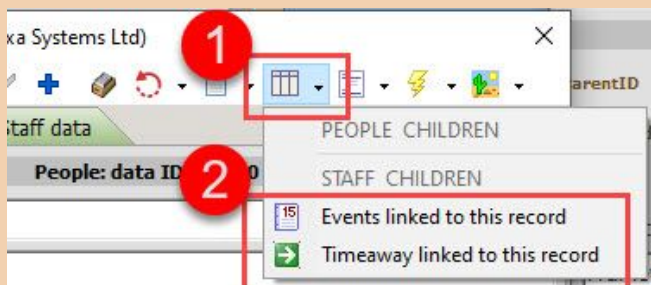


FF Linked Items

List Items

This list should contain some of the same list as the "new" list, but with the option to view any linked data.

Click on any item to see the list of linked records from each data-table.



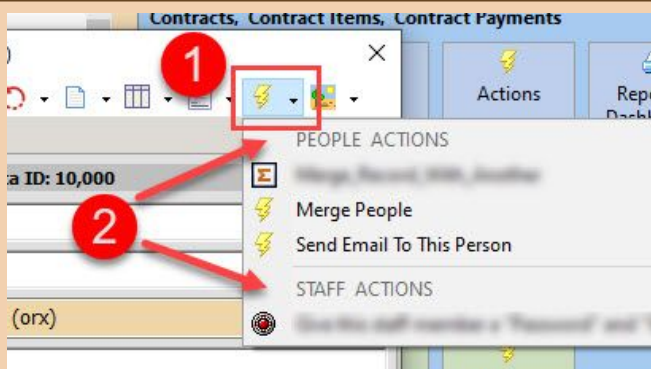
FF Child Items

Grid of child Items

This list should contain some of the same list as the "new" button, but with the option to view linked data in a "grid" format.

Click on items in this list to see the linked records.

1. Click here to access the list of child-grids.
2. Linked records are grouped according to the business-object they are linked to.



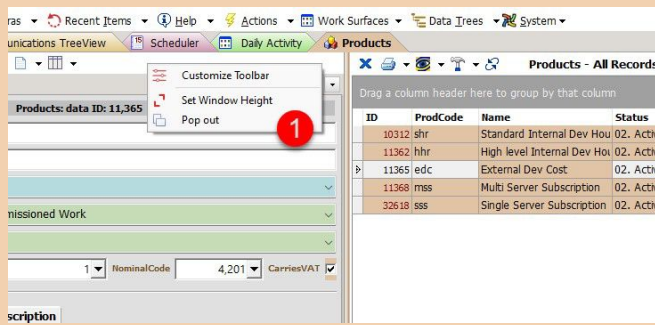
Actions Menu

Actions available for a data-record

Each Business Object may have programming added to allow actions to be triggered when the user is editing a record.

For example, sending an email to the selected person.

1. These actions are accessible from the "Actions" button.
2. The actions are segmented by Business-Object.



Toolbar Popup Menu

The toolbar contains multiple buttons with their own actions and menus. However it also contains a menu of its own. **right click** on the toolbar **away** from any other button or label and the Toolbar Popup Menu will appear.

This contains 3 items:

1. "Customize Toolbar" clicking on this item opens a window allowing the user to show and hide toolb-bar buttons.
2. "Set Window Height" Clicking on this item opens an entry screen to allow the user to set the height of the edit window. This can be easier than re-sizing it using the mouse in some situations
3. "Pop Out." If the window is "parented" within the Application screen, so it is fixed next to some other item, but you would like it to be free-floating, click on this item and the window will "pop out" so you can position it wherever you want on the screen.

Commonly used fields in Edit Forms

A typical Orixia edit-window

1. **ID and OID** fields. These are the automated reference-counting fields added by Orixia to your data. Each ID or OID is unique. Every record in the database has an ID field, and this rises for every record added. This means that ID fields are **not sequential** in one data-table, but they are sequential over the whole database. Some tables have an "OID" field. This increases within one single table, so "OID" fields **are sequential**, allowing them to be used in some situations such as accounting where an absolute order is important. Both fields can be very useful for keeping track of records
2. **StatusID**: This is a drop-down list, similar to the "type IDs" detailed above, but it includes the capability to **order** the type-list, and extend management of the records using the **Kanaban Board** concept.
3. **Tick-box fields**. These are commonly used to track the state of a data-record. Orixia allows users to add and edit these within their Business Objects, and allows for them to be set by **computation** so the value of other data may tick or untick them.
4. **DateCreated**: This is automatically set to the date/time that the record was created, and it cannot be changed. **AuthorID**: This is automatically set with the name of the last person to **edit** a record. **Complete** once ticked, users cannot edit the data in an edit-form unless they first un-tick this field. The Complete field is useful as a soft control on editing data. **Current**: Usually this box is ticked by default when a new record is created. The current field is useful to control appearance of records in lists and reports.