



DocuSnap X - Customizing Data Entry Forms

Extending Data Entry Forms and Replicating Their Controls
for Additional Objects

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1. INTRODUCTION

This document describes how you can apply the modifications made to a data entry form to other data entry forms of different types by using the “Copy & Paste” feature for custom fields within the data entry form.

In order to implement these HowTo instructions successfully, knowledge about the customization of data entry forms and the extension of the database structure are required. The DocuSnap X Configuration Manual provides information on [DocuSnap data entry forms](#) and on [extending the database structure](#).

By copying and pasting data entry forms, you can save time and effort. What is more, you can apply the same design and field order to similar data entry forms.

1.1 LIMITATION

Copying and pasting of the controls in a data entry form as described in the document is only possible for user-defined controls. System-defined controls of a data entry form, such as the inventory number, its name, or the user associated to a system, cannot be copied and pasted to another location.

2. PREPARATION

The data entry form must already have been created. Data entry forms are used for saving or customizing information within Docusnap.

The figure below shows an example of a data entry form containing general information on a client.

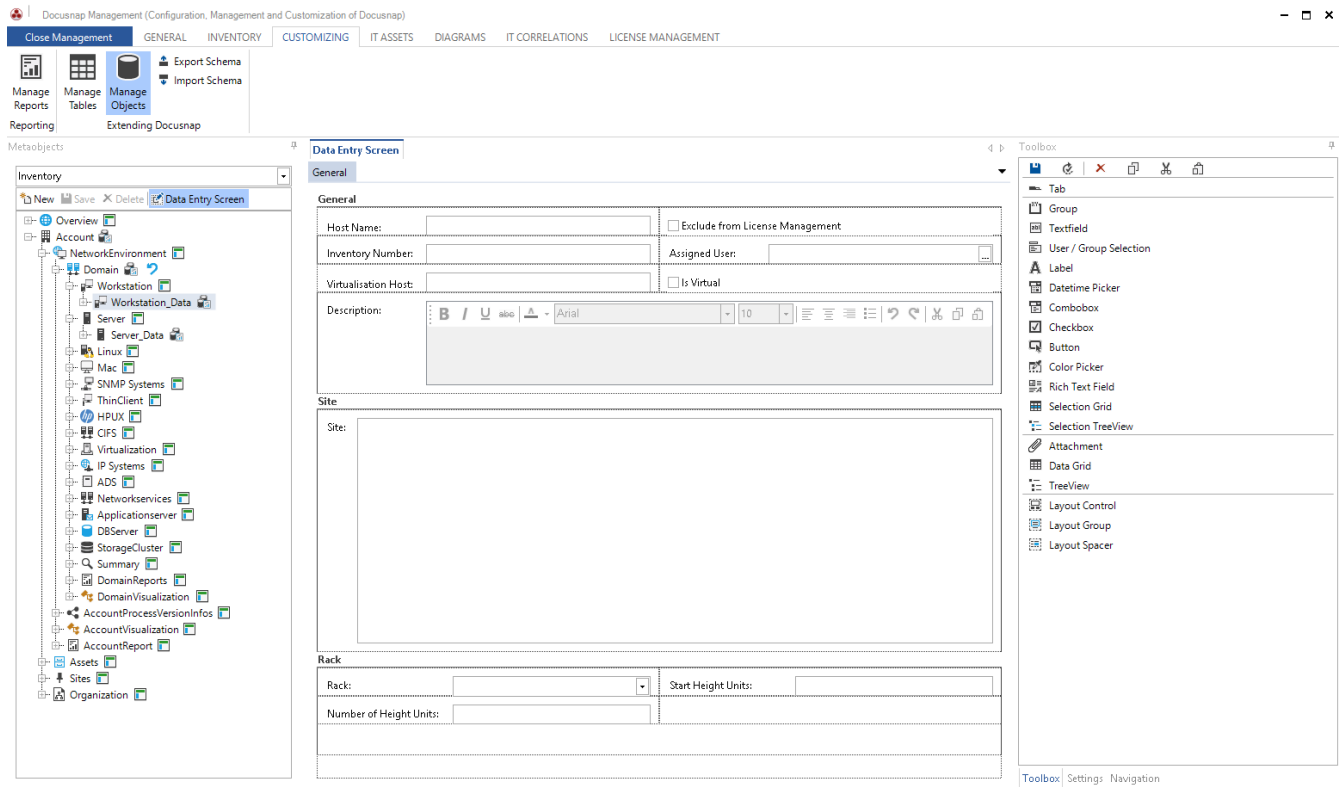


Figure 1 – Sample data entry form

You can now customize this data entry form as desired. Please note that before adding any fields to the data entry form, you need to create the corresponding database fields in the associated table.

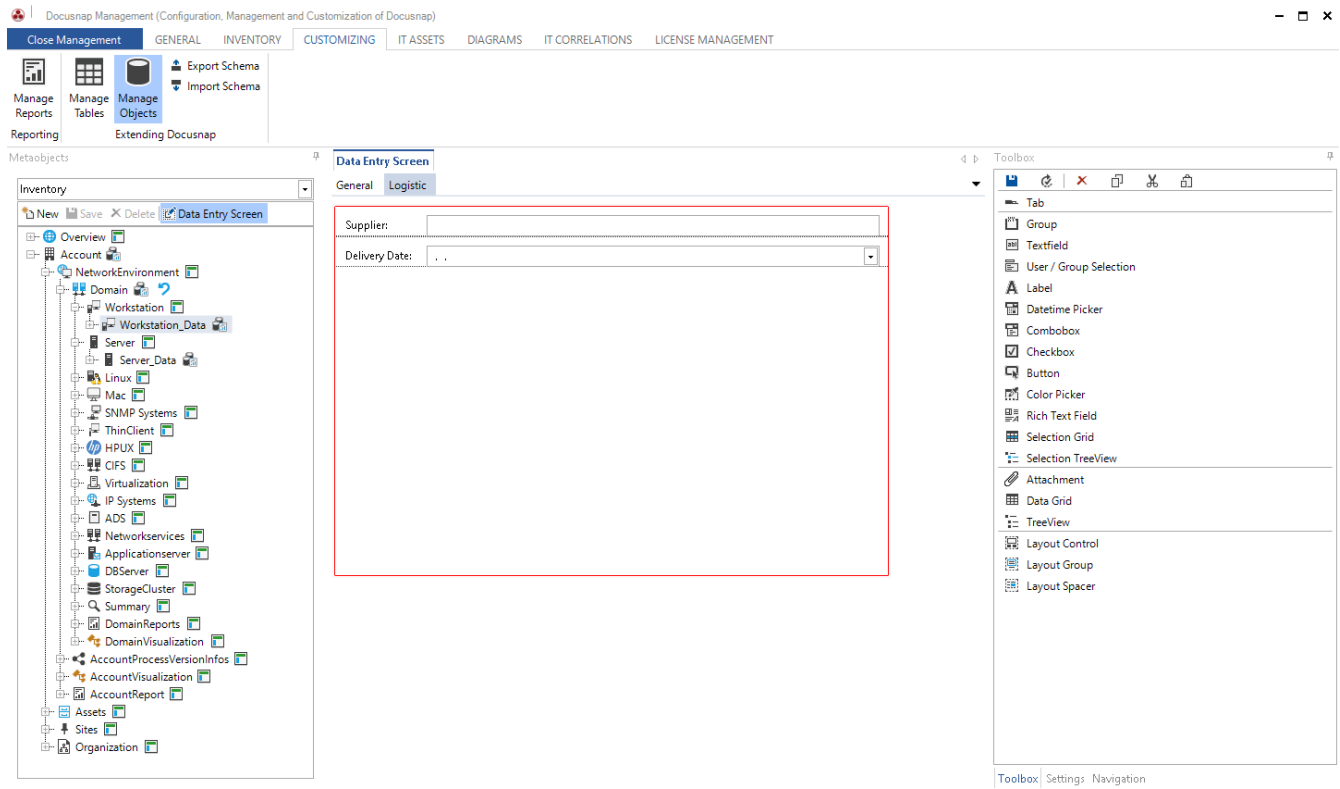


Figure 2 – Customizing the data entry form

3. APPLYING THE CUSTOMIZATIONS TO OTHER DATA ENTRY FORMS

In order to apply the modifications to another data entry form as well, you need to copy the customizations you made and paste them to the target data entry forms.

Select your user-defined fields, tabs, etc. and either press the Ctrl+C keyboard shortcut or select the corresponding button in the Toolbox at the right:

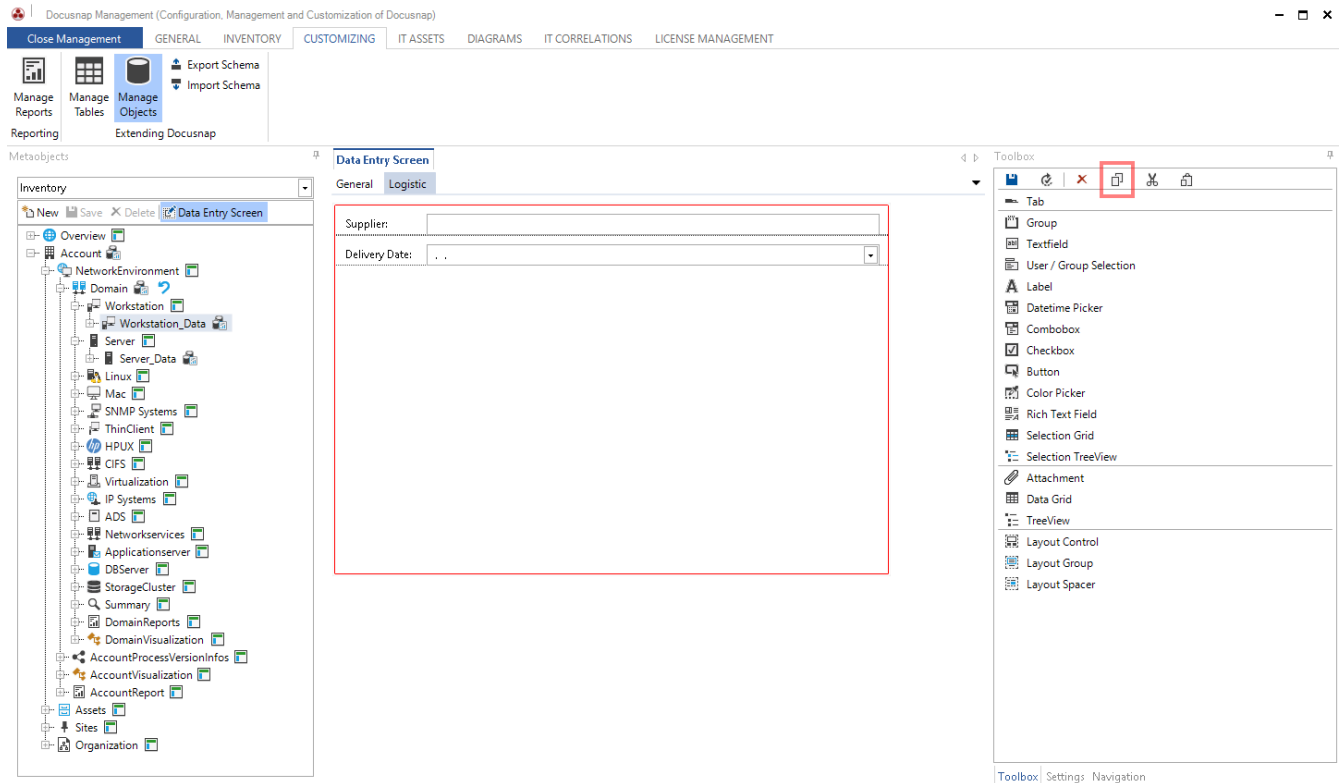


Figure 3 – Selecting and copying customizations

Now, open the target data entry form, create the tab as shown in the example, and paste the controls from the data entry form. To do so, press the Ctrl+V keyboard shortcut or select the corresponding button in the Toolbox:

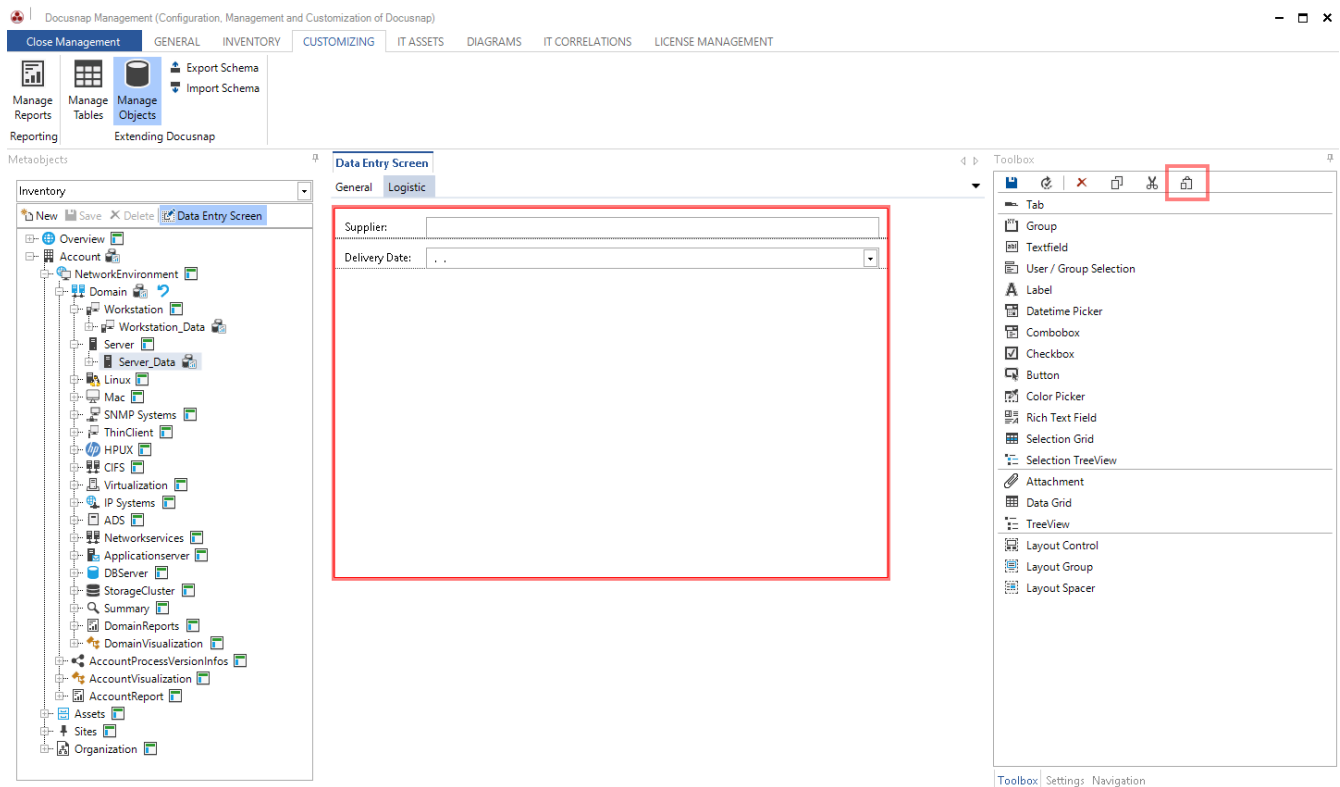


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