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User Reference

# Lite Editor v10x (ADF)

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

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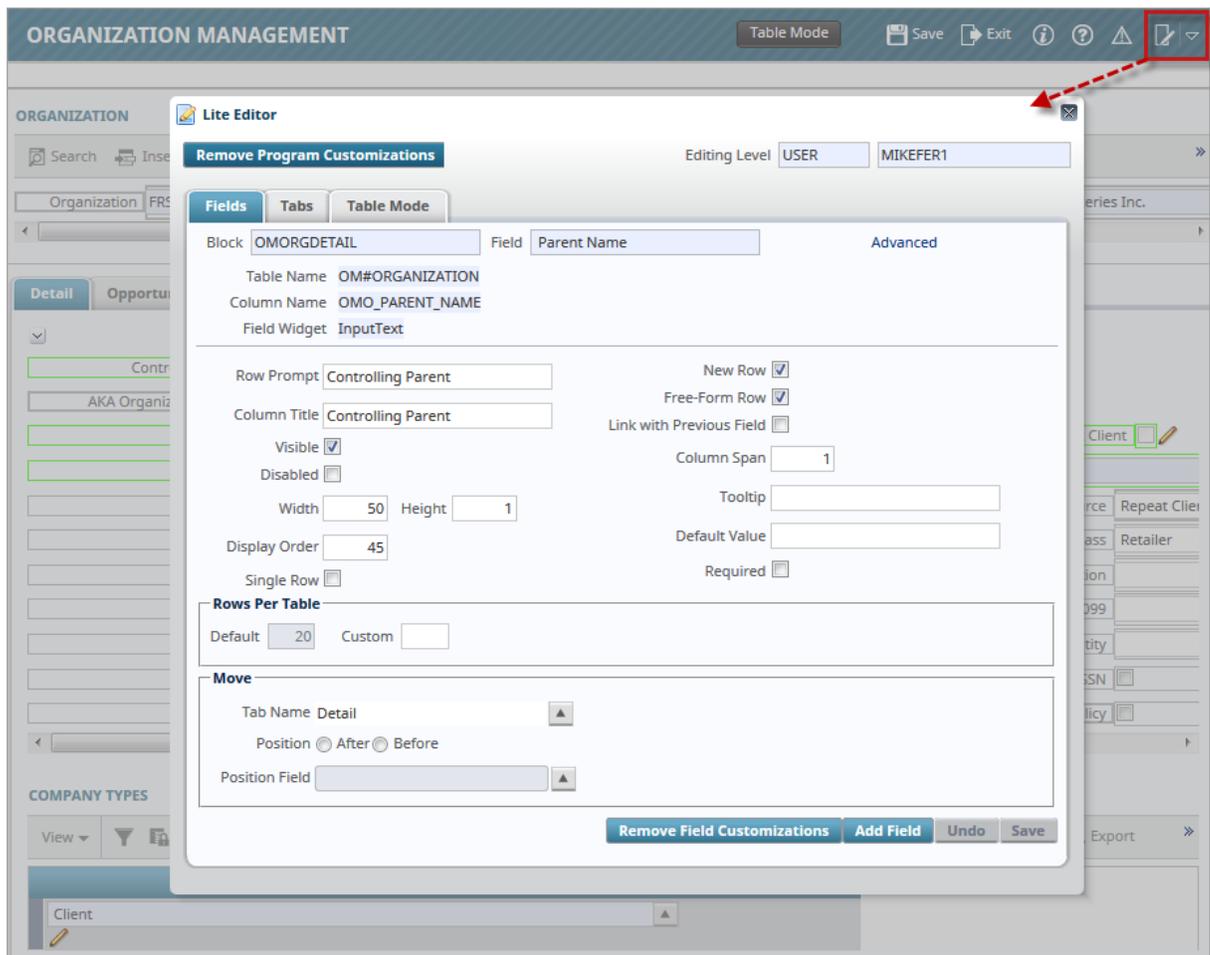
# Contents

- LITE EDITOR (ADF) – V10X TOOL.....1**
- OVERVIEW – LITE EDITOR .....1
- SAVING & LAUNCHING CUSTOMIZED SCREENS.....2
- Overview – Saving and & Launching Customized Screens* .....2
- Saving Customized Screens* .....2
- Loading Screens at Site, Group or User Level*.....2
- Customizing Screens as Administrator*.....3
- LAUNCHING LITE EDITOR FOR CUSTOMIZATIONS.....4
- FREE FORM ROWS, GRID ROWS & GRID COLUMNS .....5
- LITE EDITOR – SCREEN .....7**
- MAIN SCREEN CONTROLS .....7
- FIELDS – TAB .....8
- [Valid Data] – Button*.....11
- [Remove Field Customizations] – Button*.....11
- [Add Field] – Button*.....12
- [Undo] – Button*.....18
- [Save] – Button*.....18
- Advanced – Link*.....18
- TABS – TAB.....21
- TABLE MODE – TAB .....22
- SETUP .....24**
- SECURITY.....24
- User Configuration Privileges for Lite Editor*.....24
- UIC GROUP MAINTENANCE .....27
- INDEX .....29**



# Lite Editor (ADF) – v10x Tool

## Overview – Lite Editor



CMiC's Lite Editor is used to create customized versions of screens for particular users and UIC Groups. Via the editor, various properties of a screen's fields and tabs can be modified, new tabs and fields can be added to screen, and the screen's startup mode (Table Mode or Form Mode) can be altered.

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# Saving & Launching Customized Screens

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## Overview – Saving and & Launching Customized Screens

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The way in which customized versions of a screen are created via the Lite Editor is similar to the way customized versions of an Enterprise Console are created via the UI Console v10x Tool, and similar to the way customized versions of an Enterprise Treeview is created via the Treeview Builder v10x Tool.

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## Saving Customized Screens

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When a customized version of a screen is saved in the Lite Editor, it is saved for the customization level and level object for which the Lite Editor was launched. For instance, if the Lite Editor was launched at the Group Level (customization level) for a UIC Group (level object), customizations will be saved at the Group Level for the UIC Group.

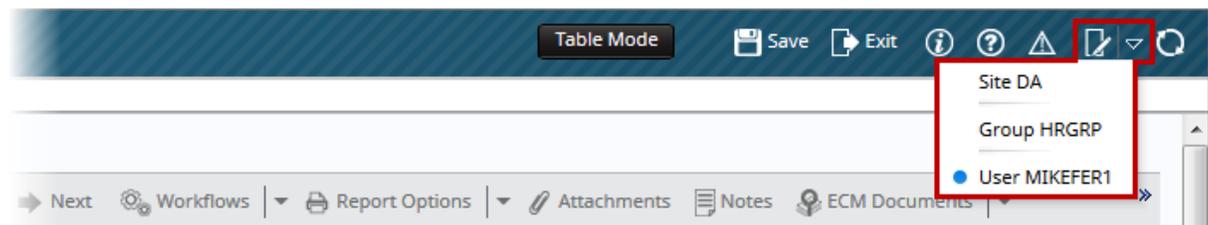
The following table provides details about the customization levels, their objects (Site, UIC Groups, and User IDs), and the availability of customized screens for users:

Customization Level (Edit Privilege Level)	Level Objects	Availability of Customization
Site Level (System/Client Level)	Site: CMiC Enterprise system	All CMiC Enterprise users.
Group Level	UI Configuration Groups	Members of UIC Group for which the customization was saved.
User Level	User IDs	User for which the customization was saved.

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## Loading Screens at Site, Group or User Level

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*Sample of Lite Editor’s drop-down menu, from which different versions of screen are loaded; blue dot indicates which version of screen is currently loaded.*

In loading an ADF screen for a user, the system determines what customization levels the user has privileges for, and it checks if there are customized versions of the screen at those levels.

By default, the User Level version is initially loaded, as long as the user has edit privileges at the User Level. Otherwise, if the user has Group Level edit privileges, the Group Level version is initially loaded. If the user only has edit privileges at the Site Level, then the Site Level version is initially loaded.

As an example, in the above screenshot, the user has privileges for all 3 levels: Site, Group, and User; and the user belongs to the “HRGRP” UIC Group. It must be noted, however, users always have access to all of the customization levels for which they have privileges, even if the screens at those levels have not been customized. This is to allow users the ability to load the screen at any level for which they have privileges, so they can customize it via the Lite Editor, should the need arise.

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**NOTE:** For all users, only one customizable version of the screen is available for each customization level.

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To switch between the variant versions of a screen, click the down-arrow on the Lite Editor icon , which causes a list of the customizable versions of the screen available to you to be displayed (as shown in above screenshot), then select the desired version. The blue dot indicates which version of the screen is displayed.

The following provides details about how the system determines what versions of the screen are to be made available in the Lite Editor for the user:

### **Site Level**

Checks if user has edit privilege for the Site Level, and if so, the Site Level version of the screen is made available to the user for the Lite Editor (as shown in above screenshot), even if the Site Level version has not been customized (made available so that it can be selected for customization, should the need arise).

### **Group Level**

Checks if user has edit privilege for the Group Level, and checks if the user belongs to a UIC Group. If the user has the Group Level edit privilege, and the user belongs to a UIC Group, the version of the screen for the UIC Group is made available to the user via the Lite Editor, even if the UIC Group version has not been customized (made available so that it can be selected for customization, should the need arise).

### **User Level**

Checks if user has edit privilege for the User Level, and if so, the User Level version of the screen is made available to the user for the Lite Editor (as shown in above screenshot), even if it has not been customized (made available so that it can be selected for customization, should the need arise).

## **Customizing Screens as Administrator**

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Since an administrator can also have customized versions of screens, at the User or Group Level, a rule can be established and followed to ensure that when an administrator sets out to load a User or Group Level screen in order to edit it or create a customized version from it for other users, the selected screen is the expected version and not a customized version for the administrator at the User or Group Level.

To avoid the situation in which an administrator loads a screen believed to be un-customized, but is in fact a customized version for the administrator, adopt either one of the following rules:

### **Rule 1 – No Custom Consoles for Administrator**

The administrator cannot have any customizations of screens at the User or Group level.

### **Rule 2 – Administrator Uses Second User ID to Manage Consoles**

A second User ID can be used by the administrator for the sole purpose of customizing screens, which would have no customized screens.

## **Customizing Screens for UIC Groups as Administrator**

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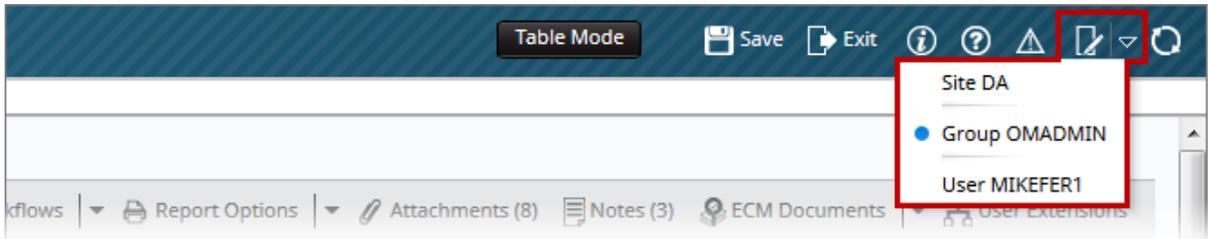
In order for an administrator to load and save a customized screen for a UIC Group, the administrator must belong to that UIC Group.

A user can only belong to one UIC Group at a time, so, if the administrator belongs to a different UIC Group, the first step is to remove the administrator from that UIC Group. With the administrator not belonging to any UIC Group, add the administrator to the UIC Group for which the screen is to be modified.

After the administrator saves the modified screen for the UIC Group, the administrator can be removed from the UIC Group for which the modification was made, and added back to their actual UIC Group.

# Launching Lite Editor for Customizations

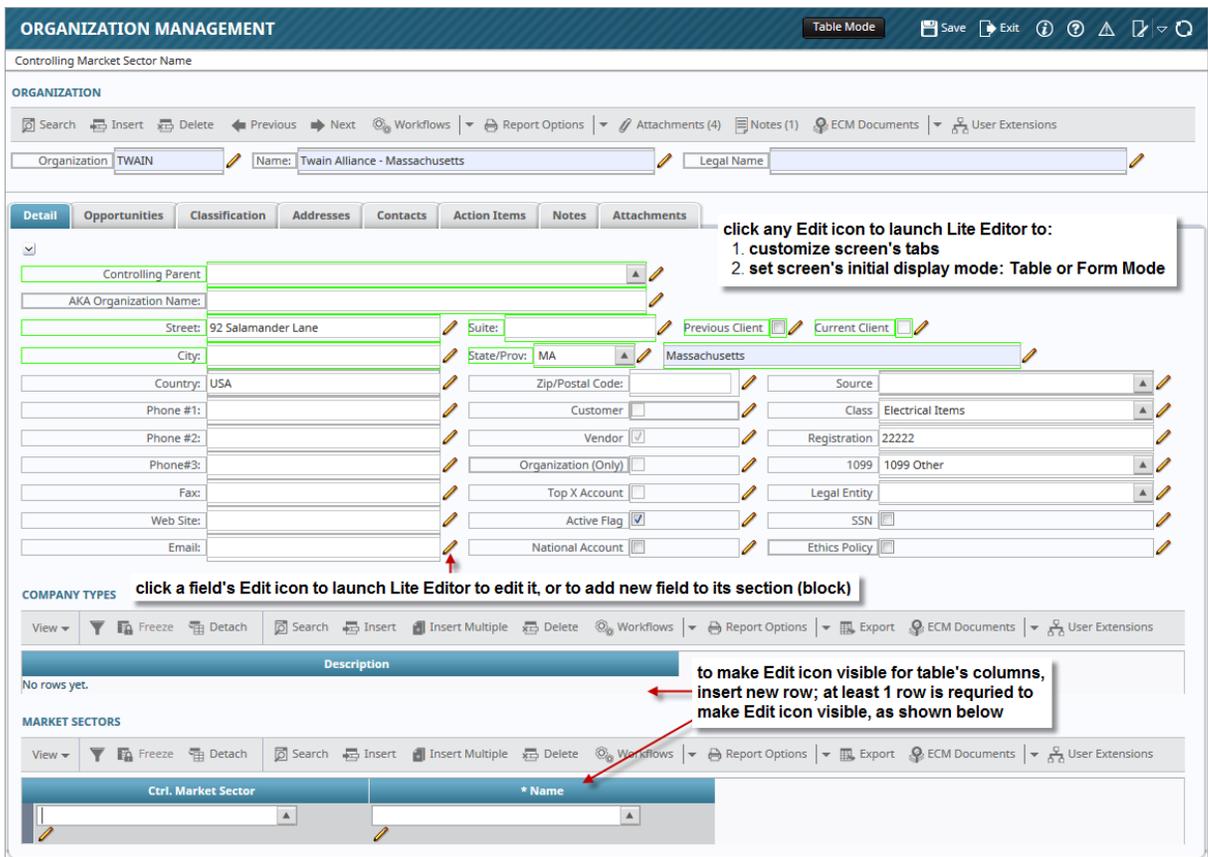
## Step 1: Load Screen at Level to Customize Screen



The first step in launching the Lite Editor to customize a screen is to load the screen at the level you wish to customize it.

This is done by clicking the down-arrow on the Lite Editor icon , which causes a list of the customizable versions of the screen available to you to be displayed (as shown in above screenshot). Via the list, select the desired version. The blue dot indicates which version of the screen is displayed.

## Step 2: Switch Screen to Edit Mode & Click Relevant Edit Icon



Once the screen is loaded at the level it is to be customized, for the target user or UIC Group if at the User or Group Level, it can be switched to Edit Mode via the Lite Editor.

To switch the screen to Edit Mode, as shown above, click the Lite Editor icon . Then, to launch the Lite Editor, click the relevant Edit icon . Below are details about how to click the relevant Edit icon:

### Customize Existing Fields

To customize an existing field, click the field's corresponding Edit icon.

### Customize Table's Columns

To customize a table's column, click the column's corresponding Edit icon.

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**NOTE:** The Edit icon will only be available if the table has at least 1 row. As shown in the above screenshot, if a table has no rows, click the table's **[Insert]** button to insert a row and make the Edit icon available.

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### Add New Field

New fields can only be added to sections with existing fields. They cannot be added to tables or any area in which there are no other fields.

To add a new field, click the field which will be before or after the new field.

### Customize Tabs: Add New Tab

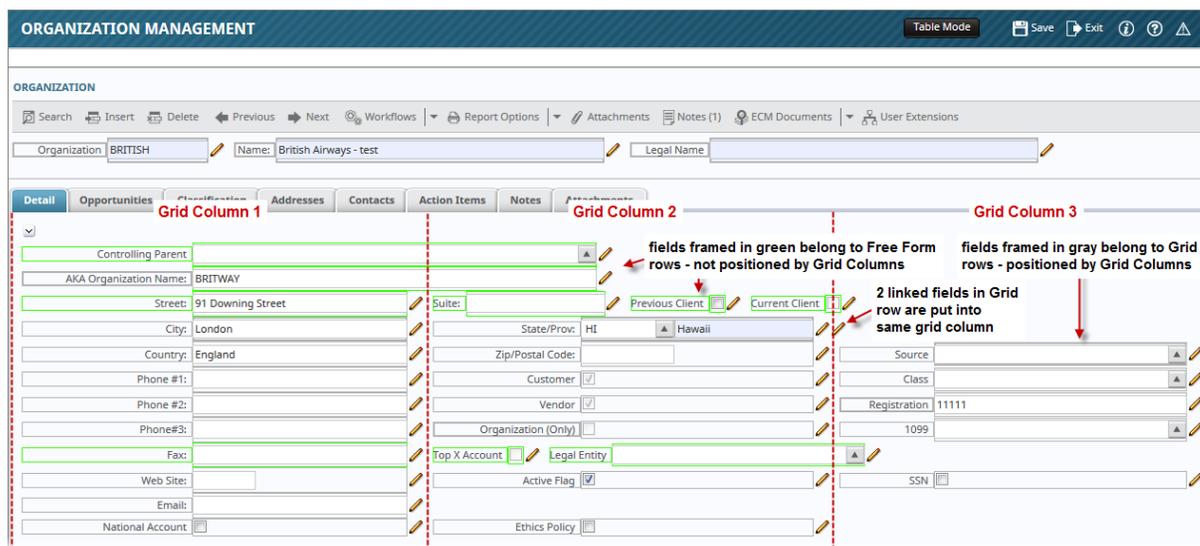
To customize or add new tabs, click any Edit icon.

### Set Screen's Initial Display Mode: Table Mode or Form Mode

To set a screen's initial display mode, click any Edit icon.

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## Free Form Rows, Grid Rows & Grid Columns



ORGANIZATION MANAGEMENT

Table Mode Save Exit ? ? ?

ORGANIZATION

Search Insert Delete Previous Next Workflows Report Options Attachments Notes (1) ECM Documents User Extensions

Organization BRITISH Name: British Airways - test Legal Name

Detail Opportunities Classification Addresses Contacts Action Items Notes Attachments

Grid Column 1 Grid Column 2 Grid Column 3

fields framed in green belong to Free Form rows - not positioned by Grid Columns fields framed in gray belong to Grid rows - positioned by Grid Columns

2 linked fields in Grid row are put into same grid column

Controlling Parent

AKA Organization Name: BRITWAY

Street: 91 Downing Street Suite: Previous Client Current Client

City: London State/Prov: HI Hawaii

Country: England Zip/Postal Code: Customer

Phone #1: Vendor

Phone #2: Organization (Only)

Phone #3: Top X Account Legal Entity

Fax: Active Flag

Web Site: Ethics Policy

Email: SSN

National Account

As shown in the above screenshot, there are 2 types of rows on a screen: Free-Form and Grid rows. Fields in Free-Form rows are framed in green, and fields in Grid rows are framed in gray.

## Free-Form Rows

The screenshot shows the 'Fields' tab in the Lite Editor. The 'Block' is 'OMORGDETAIL' and the 'Field' is 'Ethics Policy'. The 'Table Name' is 'OM#ORGANIZATION', the 'Column Name' is 'OMO\_ETHICS\_POLICY', and the 'Field Widget' is 'CheckBox'. The 'Row Prompt' is 'Ethics Policy' and the 'Column Title' is 'Ethics Policy'. The 'Visible' checkbox is checked. The 'Free-Form Row' checkbox is highlighted with a red box. Other options include 'New Row', 'Link with Previous Field', and 'Column Span' (set to 1).

Fields in Free-Form rows are placed next to each other with a space between them, without regards to Grid Columns.

A row is set to Free-Form by clicking its first field's Edit icon, then checking its **Free-Form Row** checkbox, as shown in the above screenshot.

## Grid Rows & Grid Columns

The screenshot shows the 'Fields' tab in the Lite Editor. The 'Block' is 'OMORGDETAIL' and the 'Field' is 'Ethics Policy'. The 'Table Name' is 'OM#ORGANIZATION', the 'Column Name' is 'OMO\_ETHICS\_POLICY', and the 'Field Widget' is 'CheckBox'. The 'Row Prompt' is 'Ethics Policy' and the 'Column Title' is 'Ethics Policy'. The 'Visible' checkbox is checked. The 'Free-Form Row' checkbox is unchecked, and the 'Link with Previous Field' checkbox is checked. A red box highlights the 'Free-Form Row' and 'Link with Previous Field' checkboxes. Other options include 'New Row' and 'Column Span' (set to 1).

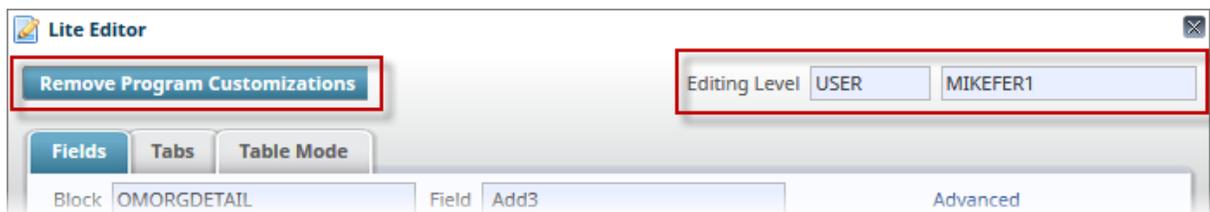
Each field in a Grid row is placed in one Grid Column, except link fields (linked via **Link with Previous Field** checkbox in Lite Editor, shown above), which are placed in the same Grid Column (as shown in this sections first screenshot). The width of a Grid Column is determined by the widest field or linked fields in the columns.

A row is set to a Grid row clicking its first field's Edit icon, then unchecking its **Free-Form Row** checkbox, as shown in the above screenshot.

# Lite Editor – Screen

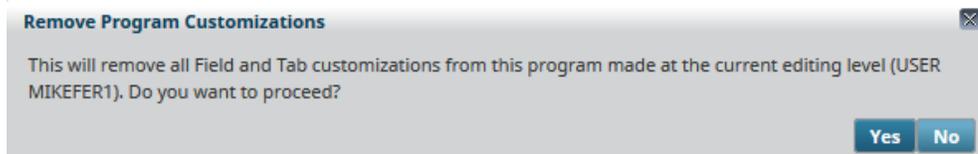
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## Main Screen Controls



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### [Remove Program Customizations] – Button



Click to remove the screen's customizations at the current editing level.

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### Editing Level – Display-Only Fields

The first display-only field displays the user's editing level: Site (Client), Group, or User. The second display-only field displays the object (i.e. Site, Configuration Group, or User ID) for which the screen is and can be customized.

## Fields – Tab

**NOTE:** If you wish to save modifications, but the [Save] button is disabled, tab away from the current field to trigger the enabling of the [Save] button.

The following provides details about the fields and buttons on this tab:

Field	Description
<b>Block</b>	Display only; displays name of block (section) that field is in.
<b>Field</b>	Display only; Field's label.
<b>Table Name</b>	Display only; Table in which field's value is stored.
<b>Column Name</b>	Display only; Name of table's column in which field's value is stored.
<b>Field Widget</b>	Display only; displays field's type: CheckBox, InputText, CommandButton, SelectManyDropDownList.
<b>Row Prompt</b>	Label of field when screen is in Form Mode, showing a single record (not applicable to titles of columns in tables).
<b>Column Title</b>	Label of field, as a column header, when screen is in Table Mode, showing multiple records.
<b>Visible - Checkbox</b>	If checked, field is visible, otherwise, field is hidden.

**Disabled -**  
**Checkbox** If checked, field is visible, but disabled.

**Width** Width of field.

**Height** Height of field.

**Display**  
**Order** Order field is displayed in relation to the other fields.

**Single Row -**  
**Checkbox**

The screenshot shows the 'PRINT WAIVER' application window. At the top, there are navigation icons for Save, Exit, and help. Below that, the 'SELECTION CRITERIA' section includes a dropdown for 'Company' (CCC) and a text field for 'CMIC Test Construction Company'. The 'Document' dropdown is set to 'SC Waiver on Laser Printer'. The 'SELECTION' section features a toolbar with icons for View, Freeze, Detach, Search, Workflows, Report Options, Export, and ECM Documents. A table with 7 columns (Contract, Chg, Invoice, Invoice Amount, Job, Vendor, Final) is displayed. The selected row (Contract 12345-3, Invoice 12345-3-1) has its details shown in fields below: Job Name 'Project 12345 - Forecasting PMJSP' and Vendor 'A1 FLOOR MAKER'. A callout box points to these fields with the text: 'table's Single Row fields, displaying values for selected record in table - Single Row checkbox checked in Lite Editor'.

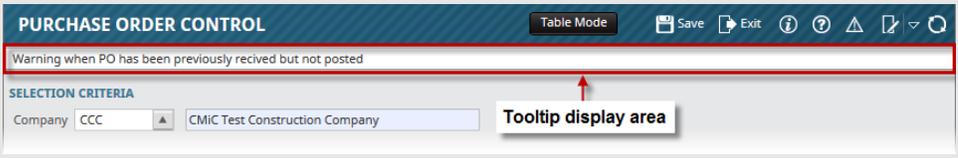
This option is applicable to tables with fields under them that display details for the record selected in the table. If a table's field has its **Single Row** checkbox checked in the Lite Editor, the field will appear as a single row under the table that displays the field's value for the record selected in the table, as shown above.

**New Row -**  
**Checkbox**

Applicable to fields in a field area, not in tables; only the first fields of a row have this checkbox checked; if a row's first field has its **New Row** box unchecked, the row's fields will be appended to the end of the previous row; for a field that is not first in a row, if its **New Row** box is checked, the field and the fields to its right will be moved to a new row.

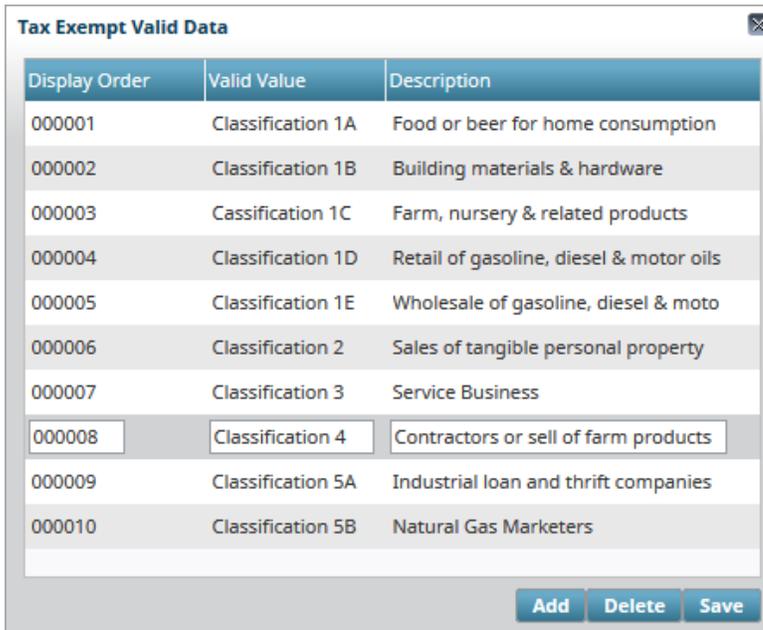
**Free-Form**  
**Row -**  
**Checkbox**

This checkbox is used to set a row to a Free-Form row or Grid row; for details, please refer to the previous subsection, Free Form Rows, Grid Rows & Grid Columns.

<p><b>Link with Previous Field -</b> Checkbox</p>	<p>This option is relevant after adding a new custom field of the <b>Text</b> type via the <b>[Add Field]</b> button's popup, with pre-defined values entered via the <b>[Valid Data]</b> button's popup. For details, please refer to the <i>[Add Field] – Button</i> section.</p> <p>If a new custom field of the Text type has pre-defined values entered for it via the <b>[Valid Data]</b> button, the Text field will be a drop-down list, listing the entered values, and a display-only field will be placed to its right to display the description of its selected value, as follows:</p> <p>Gov. Classification   Classification 1C   Selling farm, nursery and related products</p> <p>These two types of fields should be linked by checking this box for the display-only field on the right. Linked fields are placed closer to each other, as shown below, and if the linked fields are in a Grid row, the linked fields will be placed in the same Grid Column.</p> <p>Gov. Classification   Classification 1C   Selling farm, nursery and related products</p>
<p><b>Column Span</b></p>	<p>Applicable to fields of a Grid row; this field's value sets how many Grid Columns a field spans; for instance, if this value is 2, the field will span over 2 Grid Columns.</p>
<p><b>Tooltip</b></p>	 <p>Use this field to provide a tooltip for the field, which will be displayed in the Tooltip area along the top of the screen, as shown above. Also, any relevant notes about or requirements for the field that are particular to your company can also be entered here.</p>
<p><b>Default Value</b></p>	<p>Default value for field when a <u>new</u> record is created.</p>
<p><b>Required -</b> Checkbox</p>	<p>If checked, the field is required. Required fields are validated only on inserts of a new record, or when the required field is edited for a saved record (note: validation is not triggered if other fields on a saved record are edited).</p>
<p><b>Default</b></p>	<p>Display-only; displays the default number of rows displayed by the table.</p>
<p><b>Custom</b></p>	<p>Use this field to change the default number of rows displayed by the table, which affects the screen's height; to do so, click any Edit icon in any row of the table (if table has no rows, click <b>[Insert]</b> to insert one and have the Edit icon available).</p>
<p><b>Tab Name</b></p>	<p>Use this field to select the tab to which the selected field (editor was launched for selected field) will be moved.</p>
<p><b>Position</b></p>	<p>Radio buttons; select <b>After</b> to move field to right of field selected via the <b>Position Field</b>, or <b>Before</b> to move field to left of field selected via <b>Position Field</b>.</p>
<p><b>Position Field</b></p>	<p>This field works in conjunction with the <b>Position</b> radio buttons, and it is used to select the field that the field being moved will be moved next to, either to its left or its right.</p>

## [Valid Data] – Button

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This button is only visible if the Lite Editor was launched for a field that was added via the [Add Field] button's Add Custom Field functionality, and if the custom field was set up with pre-defined values (Valid Data), which are made available to users for selection. This popup is used to maintain the field's list of values.

### [Add] – Button

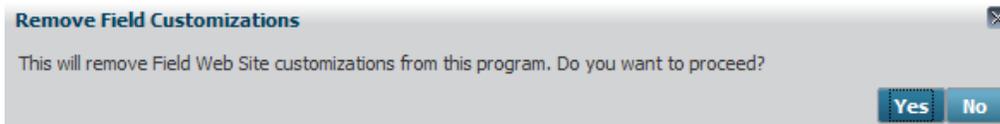
Click to insert new row.

### [Delete] – Button

Click to delete selected row.

## [Remove Field Customizations] – Button

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To remove the customizations applied to a single field, as opposed to the whole screen, click the Lite Editor button to set the screen to Edit mode, then launch the Lite Editor for the field by clicking the field's Edit icon. At the bottom of the Lite Editor's **Fields** tab, click the [Remove Field Customizations] button, which launches a verification message similar to the one above. Select [Yes] to confirm the removal of the field's customizations.

## [Add Field] – Button

This button's popup is used to add a new field, spacer, heading or separator to the block/section of the screen from which the Lite Editor was launched (selected block/section displayed by **Block** display-only field on main Lite Editor screen).

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**NOTE:** The fields available on this popup change according to the **Action Type** selected.

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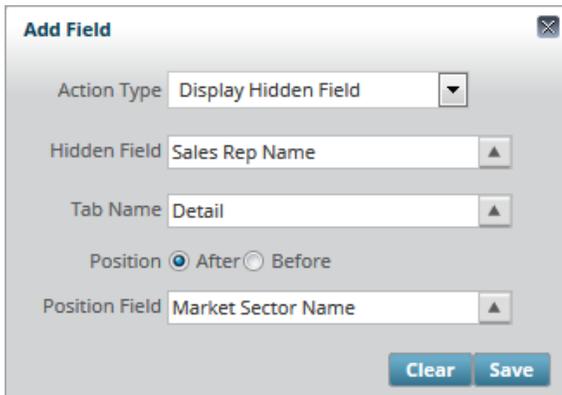
The following table provides details about fields and buttons common to the popup's different **Action Types**. Details about the fields relevant to only particular Action Types are provided in the following subsections about the Action Types.

Field/Button	Description
<b>Action Type</b>	Use this field to select the type of screen object (i.e. new field, heading, separator, or spacer) to add to screen.
<b>Tab Name</b>	Use this field to select the tab to which the screen object will be added.
<b>Position</b>	Radio buttons; select <b>After</b> to add object after the field selected via the <b>Position Field</b> LOV, or <b>Before</b> to add object before the field selected via the <b>Position Field</b> LOV.
<b>Position Field</b>	This field works in conjunction with the <b>Position</b> radio buttons, and it is used to select the field that the new object will be added next to, either before or after it.
<b>New Row</b> – Checkbox	Check this box if the object is to be added to a new line.
<b>Valid Data</b>	Only visible after clicking [Save], if new custom field is one of the following types (Field Type): <b>Text</b> , <b>Number</b> , <b>MultiSelect Text</b> ; this button's popup is used to enter the values to be made available to users for selection.  In the popup, use the [Add] button to insert a new row, and the [Delete] button to delete a selected row.
<b>Clear</b>	Used to clear entered details, and to re-start the popup.
<b>Save</b>	Used to save newly detailed screen object.  <b>NOTE:</b> If you wish to save modifications, but the [Save] button is disabled, tab away from the current field to trigger the enabling of the [Save] button.

The following provides details about the actions available via the **Action Type** field of the Add Field popup:

### Display Hidden Field – Action Type

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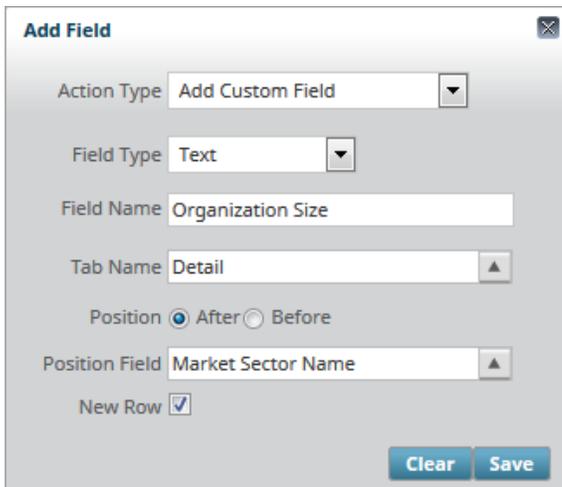
The screenshot shows the 'Add Field' dialog box with the following configuration:

- Action Type:** Display Hidden Field (dropdown)
- Hidden Field:** Sales Rep Name (dropdown)
- Tab Name:** Detail (dropdown)
- Position:** After (radio button selected, Before is unselected)
- Position Field:** Market Sector Name (dropdown)
- Buttons:** Clear and Save

To display a screen's hidden field, select “**Display Hidden Field**” from the **Action Type** field, then select the hidden field via the **Hidden Field** LOV.

### Add Custom Field – Action Type

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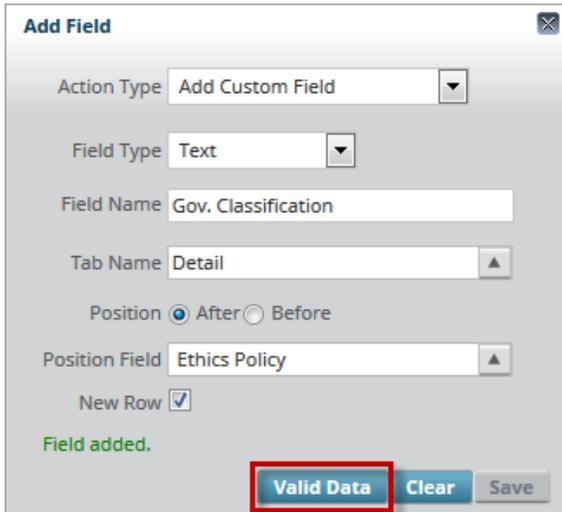
The screenshot shows the 'Add Field' dialog box with the following configuration:

- Action Type:** Add Custom Field (dropdown)
- Field Type:** Text (dropdown)
- Field Name:** Organization Size (text input)
- Tab Name:** Detail (dropdown)
- Position:** After (radio button selected, Before is unselected)
- Position Field:** Market Sector Name (dropdown)
- New Row:**  (checkbox)
- Buttons:** Clear and Save

This option is used to add custom fields to a screen. The type of custom field to add is selected via the **Field Type** field.

As shown above, after the details are entered, the [Save] button becomes enabled to save the new custom field.

After clicking save, if the custom field is of one of the following types: **Text**, **Number**, or **MultiSelect Text**, the **[Valid Data]** becomes available, as shown below:



If applicable, use the **[Valid Data]** button's popup to enter values to be made available to users for selection.

The following provides details about the addable custom fields:

### Text – Field Type

There are two types of custom text fields that can be added to a screen:

#### 1. Simple Textbox (No Pre-defined Values)

Gov. Classification

Shown above is a sample of the Simple Textbox version of the **Text** custom field type. To add a Text field of this type instead of the Drop-Down List type, simply do not provide pre-defined values via the **[Valid Data]** button. If pre-defined values are provided, the Text field will be of the Drop-Down List type.

#### 2. Drop-Down List (Pre-defined Values Available for Selection)

Gov. Classification

Shown above is a sample of the Drop-Down List version of the **Text** custom field type, which comes with an accompanying display-only field to its right that displays the description for the drop-down list's selected value.

To add a Text field of this type instead of the Simple Textbox type, provide pre-defined values via the **[Valid Data]** button. If pre-defined values are provided, the Text field will be of the Drop-Down List type.

Also, to attach the display-only field to its drop-down list, as shown below, after the custom field is added to a screen, and the screen is reloaded, put the screen in Edit mode via the Lite Editor and click the display-only field's Edit icon. Then, check its **Link with Previous Field** checkbox and click **[Save]** to link the two fields together as follows:

Gov. Classification

## Number – Field Type

There are two types of custom number fields that can be added to a screen:

### 1. Simple Number-Box (No Pre-defined Values)

# Pro. Mng. Required

Shown above is a sample of the Simple Number-Box version of the **Number** custom field type. To add a Number field of this type instead of the Drop-Down List type, simply do not provide pre-defined values via the [Valid Data] button. If pre-defined values are provided, the Number field will be of the Drop-Down List type.

### 2. Drop-Down List (Pre-defined Values Available for Selection)

# Pro. Mng. Required

Shown above is a sample of the Drop-Down List version of the **Number** custom field type.

To add a Number field of this type, provide pre-defined values via the [Valid Data] button. If pre-defined values are provided, the field will be of the Drop-Down List type.

## Date – Field Type

Bid Due Date  

Shown above is a sample of the **Date** custom field type, which comes with a Date Picker .

## Checkbox – Field Type

Tax Exempt

Shown above is a sample of the **Checkbox** custom field type.

## MultiSelect Text – Field Type

Bus. Tax Classification(s)  

Shown above is a sample of the **MultiSelect Text** custom field type.

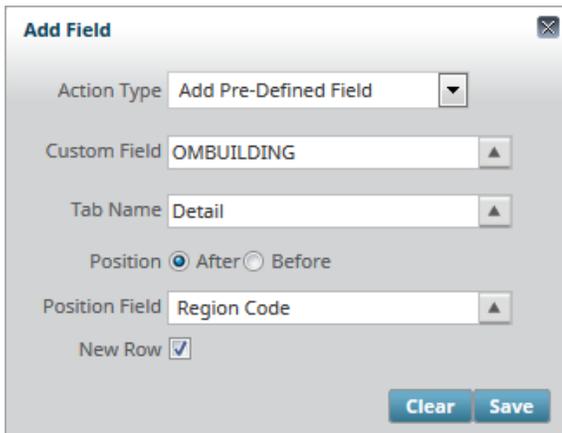
After providing a name for the field via the **Field Name** field, tab away from the field to enable the [Save] button. After saving, the [Valid Data] button becomes enabled to enter the values that are to be made available for selection. Shown below is a sample of a **MultiSelect Text** custom field with its drop-down arrow clicked:

Bus. Tax Classification(s)  

- All
- Food or beer for home consumption
- Building materials & hardware
- Farm, nursery & related products
- Retail of gasoline, diesel & motor oils
- Wholesale of gasoline, diesel & motor oils
- Sales of tangible personal property
- Service Business
- Contractors or sell of farm products
- Industrial loan and thrift companies
- Natural Gas Marketers

## Add Pre-Defined Field (User Defined Field) – Action Type

---



The 'Add Field' dialog box is shown with the following settings:

- Action Type: Add Pre-Defined Field
- Custom Field: OMBUILDING
- Tab Name: Detail
- Position: After (selected)
- Position Field: Region Code
- New Row:

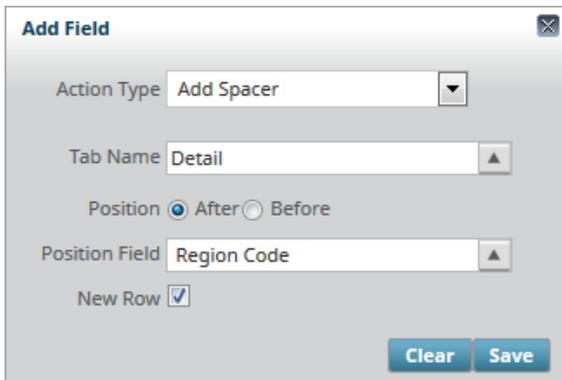
Buttons: Clear, Save

This option is used to add a User Extension Field (User Defined Field) to a screen.

The fields available for the **Custom Field** LOV are maintained via the User Extension Field Maintenance screen (standard Treeview path: *System > User Extensions > Field Maintenance*).

## Add Spacer – Action Type

---



The 'Add Field' dialog box is shown with the following settings:

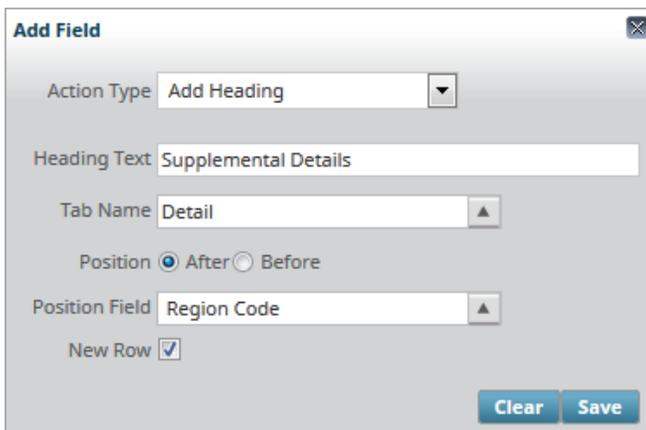
- Action Type: Add Spacer
- Tab Name: Detail
- Position: After (selected)
- Position Field: Region Code
- New Row:

Buttons: Clear, Save

This option is used to add a Spacer to a screen, which is simply an empty row, to separate groups of related fields.

## Add Heading – Action Type

---



The 'Add Field' dialog box is shown with the following settings:

- Action Type: Add Heading
- Heading Text: Supplemental Details
- Tab Name: Detail
- Position: After (selected)
- Position Field: Region Code
- New Row:

Buttons: Clear, Save

This option is used to add a Heading to a screen, as shown below, to group related fields:

A screenshot of a software interface showing a form with the following fields: "# Pro. Mng. Required" (text input with a dropdown arrow), "Tax Exempt" (checkbox), and "Bus. Tax Classification(s)" (text input with a dropdown arrow). A red arrow points from the text "Heading" to the "SUPPLEMENTAL DETAILS" label at the top left of the form.

### Add Separator – Action Type

---

A screenshot of the "Add Field" dialog box. The "Action Type" dropdown is set to "Add Separator". Other fields include "Tab Name" (Detail), "Position" (radio buttons for After and Before, with After selected), "Position Field" (Region Code), and "New Row" (checked). "Clear" and "Save" buttons are at the bottom.

This option is used to add a Separator to a screen, as shown below, to group related fields:

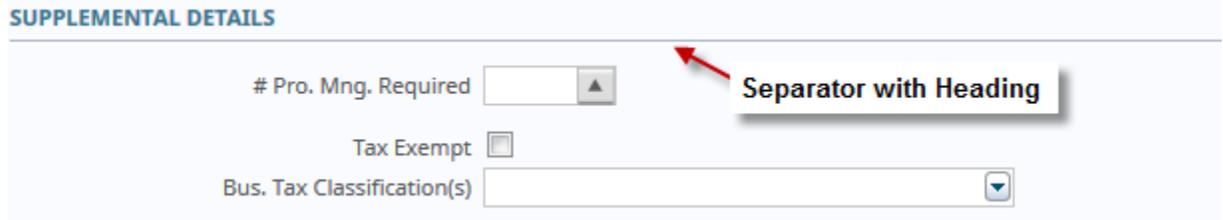
A screenshot of the same software interface as above. A red arrow points from the text "Separator" to a horizontal line that separates the "# Pro. Mng. Required" field from the "Tax Exempt" field.

### Add Separator with Heading – Action Type

---

A screenshot of the "Add Field" dialog box. The "Action Type" dropdown is set to "Add Separator with Heading". The "Heading Text" field contains "Government Classifications". Other fields include "Tab Name" (Detail), "Position" (radio buttons for After and Before, with After selected), "Position Field" (Region Code), and "New Row" (checked). "Clear" and "Save" buttons are at the bottom.

This option is used to add a Separator with Heading to a screen, as shown below, to group related fields:



---

## [Undo] – Button

Undo changes before they are saved.

---

## [Save] – Button

Save changes at the Customization Level (Site, Group, or User) and for the Level Object (Site, UIC Group, or User ID) the Lite Editor was launched.

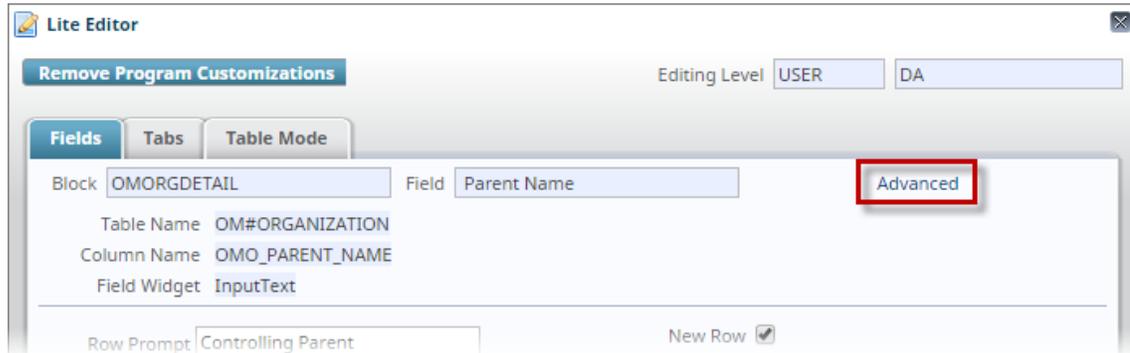
---

**NOTE:** If you wish to save modifications, but the **[Save]** button is disabled, tab away from the current field to trigger the enabling of this button.

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---

## Advanced – Link



The **Advanced** link on the **Fields** tab, framed above, launches a popup to set up various defaults for the field for which editor was launched.

**Advanced Field Properties**

**Query Mode**

Label  Display in Query Mode

Full Display Order  Include in Quick Query

Quick Display Order

**List Of Values**

Auto Suggest

**Friendly Name**

New Name

**Default Value**

Type

Value

*Sample of the Advanced Field Properties popup launched via the **Advanced** link on the **Fields** tab.*

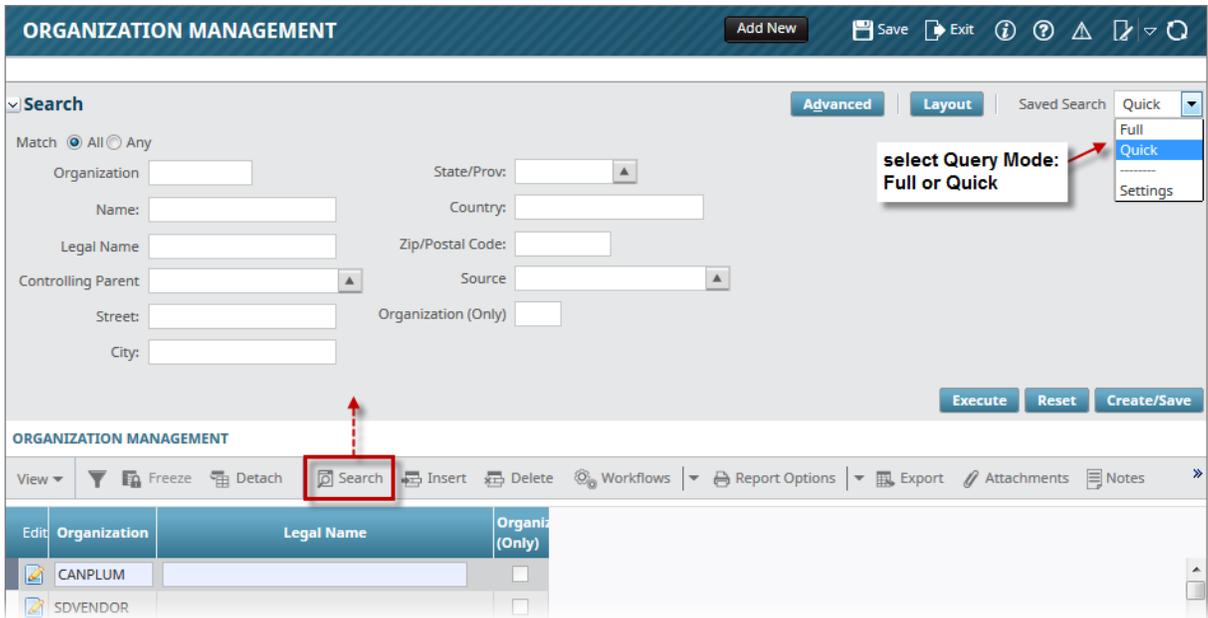
The following provides details about the fields in each section of the Advanced Field Properties popup:

## Query Mode – Section

---

This section's options are used to set up the Search tool (highlighted in red below) for the field that the editor was launched. As shown in the following screenshot, the Search tool has two versions: Full Query and Quick Query.

This sections options can be used to add a screen's field that is not available in the Quick Query to the Quick Query, or to add a new custom field on a screen to either of the queries.



Sample of a screen in Table Mode, with the Quick Query version of the Search tool enabled.

## Label

Label for field's search parameter in the Search tool.

## Full Display Order

Order field's search parameter is to appear in Search tool, relative to the other fields, when the Search tool is in Full Query mode.

## Quick Display Order

Order that field's search parameter is to appear in Search tool, relative to the other fields, when the Search tool is in Quick Query mode.

## Display in Query Mode

Set whether or not field's search parameter is to appear in Search tool when it is in Full Query mode.

## Include in Quick Query

Set whether or not field's search parameter is to appear in Search tool when it is in Quick Query mode.

## List Of Values – Section

---

### Auto Suggest

Select in which Screen Mode(s) (i.e., Table Mode, Form Mode or both) you wish for an LOV to be provided for the field.

## Friendly Name – Section

---

### New Name

Friendly name of field.

## Default Value – Section

---

These options are used to set the default value for the field when new records that contain the field are created.

### Type

If chosen, provide an expression via the **Value** field that will be used to determine the default value for the field when a new record is created.

#### Expression

**WARNING:** The **Expression** option is for developer use, and this functionality is not supported by CMiC Support Agreements. This option requires knowledge of the Groovy language, knowledge of Groovy support in ADF Business Components and some knowledge of Attribute naming conventions in UIRuntime programs. Please note that a Technical Work Order (TWO) is required for any corrections required due to use of this functionality.

#### Literal

If chosen, the **Value** field, you can provide a literal value to default for the field when a new record is created.

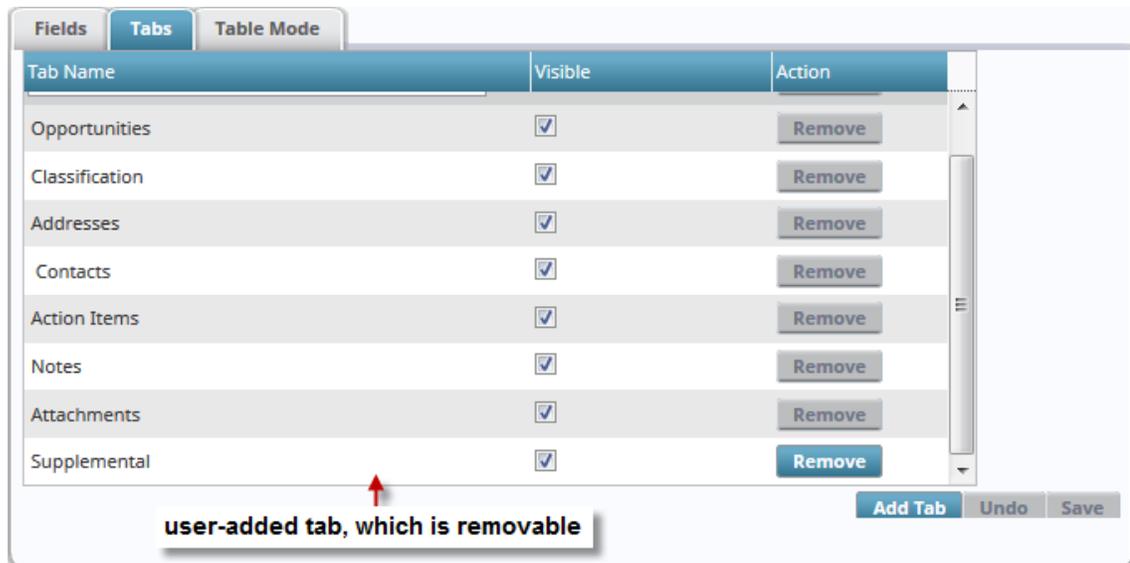
### Value

Depending on the option chosen via the **Type** field, either enter the expression to determine the field's default value, or enter a literal value for the field's default value.

The default value entered here gets displayed by the **Default Value** field on the **Fields** tab of the Lite Editor.

---

## Tabs – Tab



The **Tabs** tab is used to set which tabs are visible, to add a new tab, or to remove a user-added tab.

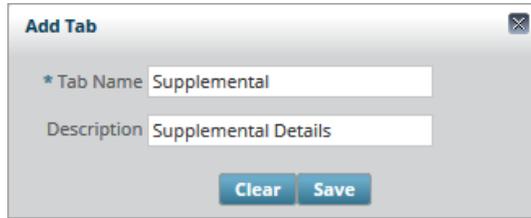
### Visible – Checkbox

If checked, tab is visible, otherwise it is not.

### [Remove] – Button

Enabled if tab was added by a user; standard tabs are not removable.

### [Add Tab] – Button



The 'Add Tab' dialog box contains two text input fields. The first field is labeled '\* Tab Name' and contains the text 'Supplemental'. The second field is labeled 'Description' and contains the text 'Supplemental Details'. At the bottom of the dialog are two buttons: 'Clear' and 'Save'.

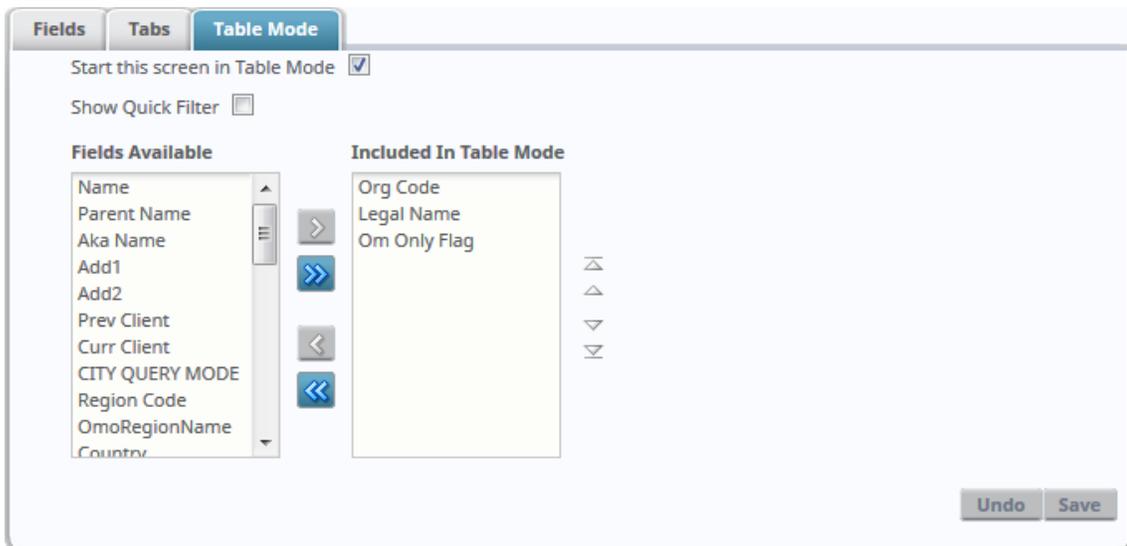
This button is used to add a new user-defined tab to a screen.

### [Undo] – Button

Undo changes before they are saved.

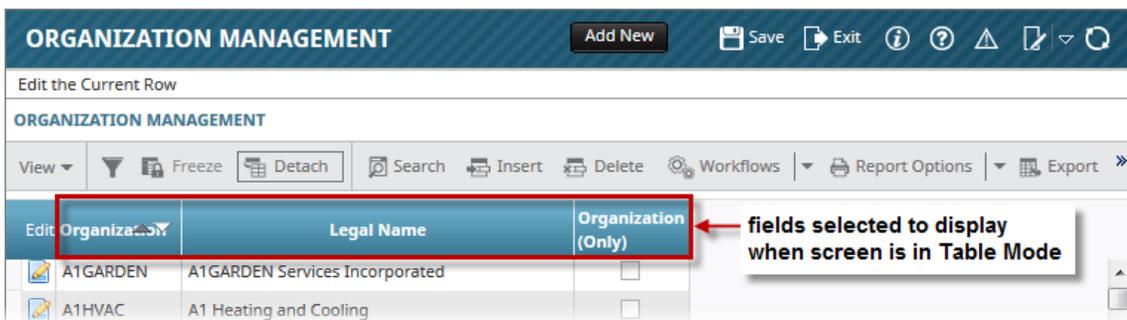
---

## Table Mode – Tab



The 'Table Mode' configuration dialog shows a list of 'Fields Available' on the left and an 'Included In Table Mode' list on the right. The 'Fields Available' list includes: Name, Parent Name, Aka Name, Add1, Add2, Prev Client, Curr Client, CITY QUERY MODE, Region Code, OmoRegionName, and Country. The 'Included In Table Mode' list includes: Org Code, Legal Name, and Om Only Flag. There are arrows between the lists to move fields. At the bottom right are 'Undo' and 'Save' buttons.

The **Table Mode** tab is used to set what fields are included on the screen when it is in Table Mode. The fields listed under the **Included In Table Mode** list are displayed when the screen is in Table Mode, as shown below:



The screenshot shows the 'ORGANIZATION MANAGEMENT' screen in Table Mode. The table has three columns: 'Organization', 'Legal Name', and 'Organization (Only)'. The first two columns are highlighted with a red box, and an arrow points to the third column with the text 'fields selected to display when screen is in Table Mode'. The table contains two rows of data: 'A1GARDEN' and 'A1HVAC'.

Organization	Legal Name	Organization (Only)
A1GARDEN	A1GARDEN Services Incorporated	
A1HVAC	A1 Heating and Cooling	

Use the arrows between the **Fields Available** and **Included In Table Mode** lists to add a selected field to the **Included In Table Mode** list, or to remove a selected field from the **Included In Table Mode** list.

The double-arrows are used to move all the selected fields to the other list.

# Setup

## Security

### User Configuration Privileges for Lite Editor

The screenshot displays the 'USER MAINTENANCE' interface for user 'MIKEFER1'. The 'Configuration Privileges' tab is active, showing a table of privileges. The following table represents the data shown in the screenshot:

* Code	* Name	* Levels Required	Select
UILOUTEDT	UI Layout Builder: Allow User To Edit Layout Definition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIADDEUJDF	UI Lite Editor: Allow User To Add User Defined Fields Via Lite Editor.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIRLTEEDT	UI Lite Editor: Allow User To Edit Program Definition Via Lite Editor.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIMOVECUST	UI Lite Editor: Allow User to Move Customizations To Other Levels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UILOGCRT	UI Logs: Allow User To Create A New Log.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UILOGSRC	UI Logs: Allow User To Register New Log Data Source.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UILOGEDT	UI Logs: Allow User To Save Log Layout	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIPRCBCRT	UI Process Builder: Allow User To Create/Edit Custom Process Defini	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIPRGEDT	UI Program Builder: Allow User To Edit Program Definition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIREPRMMD	UI Report: Allow User To Modify Report Parameters Definition	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHGCUSTLVL	UI Runtime: Allow User To Change Customization Level.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UITRVEDT	UI Treeview Builder: Allow User To Edit Treeview Definition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the privileges table, the 'EDIT PRIVILEGE LEVELS' section is visible, showing a table with the following data:

Level Type	Level Name
Site	mine
Configuration Group	all
User	mine

Pgm: User Maintenance; standard Treeview Path: System > Security > Users > User Maintenance

To use the Lite Editor, a user must be granted the appropriate Configuration Privileges via the User Maintenance screen.

In the User Maintenance screen, search for and select the target user, then click on the **Configuration Privileges** tab. As framed above, the tab contains the 3 Configuration Privileges for the Lite Editor.

For the selected privilege in the **Configuration Privileges** section, the **Edit Privilege Levels** section displays the levels at which the user has the selected privilege for the Lite Editor.

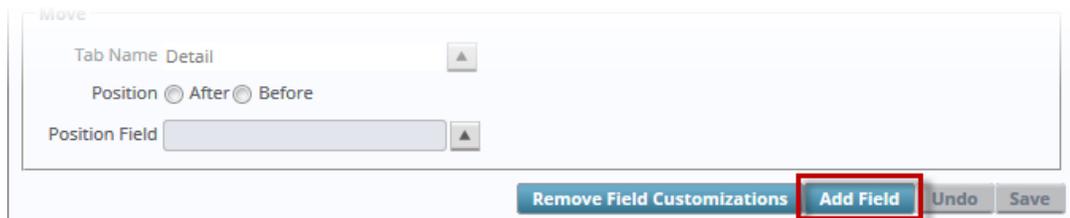
## Configuration Privileges – Section

To grant a user a Configuration Privilege, click the privilege’s corresponding **Select** checkbox.

After granting a user a Configuration Privilege, in the **Edit Privilege Levels** section, click **Insert Record**, then assign the user a **Level Type** privilege and a corresponding **Level Name** privilege.

The follow are details about the Configuration Privileges for the Lite Editor:

### UIADDLEUDF – UI Lite Editor: Allow User To Add User Defined Fields Via Lite Editor



This privilege grants rights to the Lite Editor’s Add Field functionality, which is used to add a user-defined field to a screen.

Once this privilege is granted, the level at which this privilege is granted is set via the **Edit Privilege Levels** section.

### UIRLITEEDT – UI Lite Editor: Allow User To Edit Program Definition Via Lite Editor

This privilege grants rights to the Lite Editor’s customization functionality. If not granted to a user, the Lite Editor’s drop-down arrow will still be available to the user, so that the user can select the version of the screen to launch.

### UIMOVECUST – UI Lite Editor: Allow User to Move Customizations To Other Levels

*\*Currently, the functionality related to this privilege has not yet been implemented.*

## Edit Privileges Levels – Section

EDIT PRIVILEGE LEVELS	
View ▾   Filter   Freeze   Detach   Search   Insert   Insert Multiple   Delete   Workflows   Report Options   Export	
Level Type	Level Name
Site	mine
Configuration Group	ADMIN
User	mine

To understand Edit Privilege Levels, it is necessary to understand how the Lite Editor is used to create customized versions of a screen.

The way in which customized versions of a screen are created via the Lite Editor is similar to the way customized versions of an Enterprise Console are created via the UI Console v10x Tool, and similar to the

way customized versions of an Enterprise Treeview is created via the Treeview Builder v10x Tool. When a customized version of a screen is saved, it is saved at a particular customization level in the system (Site, Group, or User Level), for a particular set of users (all users, users belonging to a particular UIC Group, or a specific user).

The following table provides details about the available **Level Type** edit privileges:

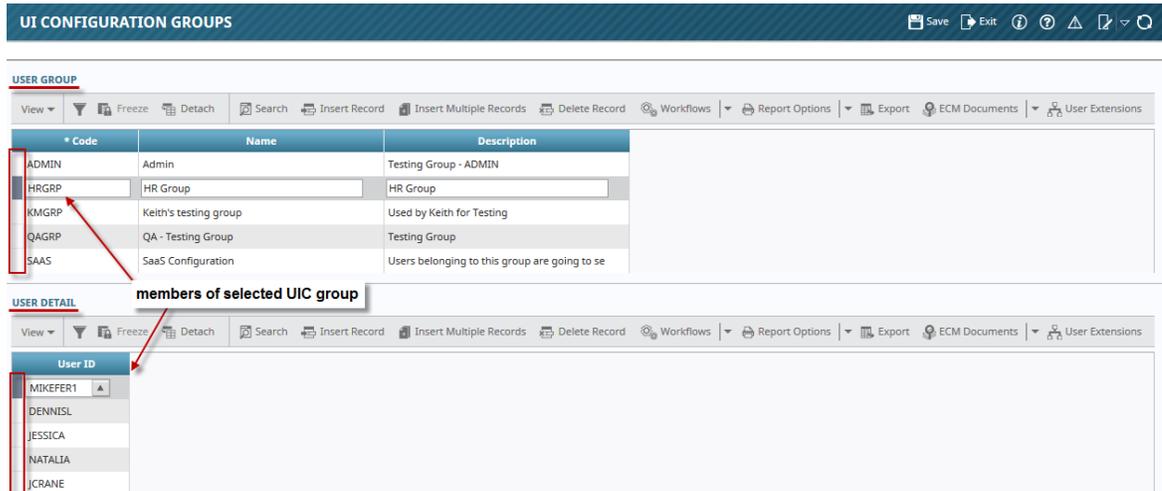
<b>Level Type</b> (Customization Level)	<b>Details</b>
<b>Site</b>	Site Level: privilege to modify screens for all users at the Site Level (aka System/Client Level).
<b>UIC Group</b>	Group Level: privilege to modify screens for UIC Groups. For details about setting up UIC Groups, please refer to the following section, <i>UIC Group Maintenance</i> .
<b>User</b>	User Level: privilege to modify screens for individual user(s).

The values available for the second field, **Level Name**, depend on the value selected for the **Level Type** field. The **Level Name** field specifies the User ID, Site, or UIC Group for which the target user may customize screens. The following table provides details about the available **Level Name** privileges:

<b>Level Name</b> [Set of User(s)]	<b>Details</b>
<b>mine</b>	If <b>User</b> is selected for the first field, the term <i>mine</i> means “my User ID”; if <b>Site</b> is selected for the first field, the term <i>mine</i> means “my site”; if <b>Group</b> is selected for the first field, <i>mine</i> means “my group”.
< <i>User ID</i> >	If <b>User</b> is selected for the first field, User IDs are available, along with the “ <i>mine</i> ” and “ <i>all</i> ” options.
< <i>UIC Group Code</i> >	If <b>Group</b> is selected for the first field, UIC Group codes are available, along with the “ <i>mine</i> ” and “ <i>all</i> ” options.

To review, if **Level Type** is “**User**” and **Level Name** is “**mine**” the user can customize screens for themselves. And if **Level Type** is “**Site**”, and **Level Name** is “**mine**”, the user can customize screens for everyone at the Site Level.

# UIC Group Maintenance



Sample of User Interface Configuration screen; Program Name: SDUICONFIGGROUP; Standard/Default Treeview path: System > Setup > User Interface Configuration

The User Interface Configuration screen is the maintenance screen for User Interface Configuration Groups (UIC Groups). UIC Groups are used to group users for the purpose of assigning them a customized Console, a customized Treeview, or a customized screen at the Group Level.

For instance, Human Resources personnel can be added to a UIC Group titled “HRGRP”, and when a customized Console, Treeview or screen is created for the group, the customized version would be saved at the Group Level, for the HRGRP UIC Group.

## User Group – Section

The **User Group** section lists all of the created UIC Groups. For the UIC Group selected in this section, the **User Detail** section displays its members.

### Add UIC Group

To add a UIC Group, click **[Insert Record]** on the **User Group** section’s Block Toolbar. For the **Code** field, provide an identifying code for the UIC Group; for the **Name** field, provided a name for the UIC Group; and for the **Description** field, provide a description for the group. Click **[Save]** to commit the addition.

### Edit UIC Group Name or Description

Select the group’s row, using the section area (framed by red rectangle in previous screenshot), then edit the group’s name or description using the **Name** or **Description** fields. Click **[Save]** to commit the changes.

### Delete UIC Group

Select the group’s row, using the section area (framed by red rectangle in previous screenshot), then click **[Delete Record]** on the **User Group** section’s Block Toolbar. Click **[Save]** to commit the deletion.

## User Detail – Section

The **User Detail** section displays members of the UIC Group selected under the **User Group** section.

### **Add Member to UIC Group**

To add a member to a selected UIC Group, click **[Insert Record]** on the **User Detail** section's Block Toolbar. Select a User ID from the list of values. Click **[Save]** to commit the addition.

### **Delete Member from UIC Group**

Select the member's row, using the section area (framed by red rectangle in previous screenshot), then click **[Delete Record]** on the **User Detail** section's Block Toolbar. Click **[Save]** to commit the deletion.

# Index

---

## *I*

[Add Field] - Button.....	12
[Remove Field Customizations] - Button .....	11
[Save] - Button .....	18
[Undo] - Button .....	18
[Valid Data] - Button .....	11

---

## *A*

Advanced - Link .....	18
-----------------------	----

---

## *C*

Customizing Screens as Administrator.....	3
---	---

---

## *F*

Fields - Tab .....	8
Free Form Rows, Grid Rows & Grid Columns.....	5

---

## *L*

Launching Lite Editor for Customizations.....	4
Loading Screens at Site, Group or User Level.....	2

---

## *M*

Main Screen Controls.....	7
---------------------------	---

---

## *O*

Overview - Lite Editor .....	1
Overview - Saving and & Launching Customized Screens.....	2

---

## *S*

Saving & Launching Customized Screens.....	2
Saving Customized Screens.....	2
Security.....	24

---

## *T*

Table Mode - Tab .....	22
Tabs - Tab .....	21

---

## *U*

UIC Group Maintenance .....	27
User Configuration Privileges for Lite Editor.....	24

---