



Forms & Lists



Forms & Lists



What is Form

- A form displays information from one record in a data table.
- The specific information depends on the type of record displayed.
- Users can view and edit records in forms.
- Administrators can configure what appears on forms.

What is Record

- A single entity
- Each record has a unique key

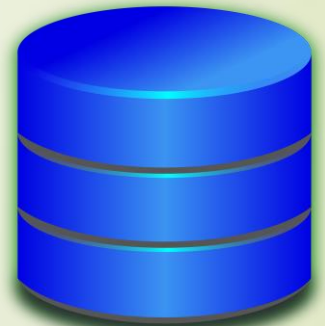
Field(Column)



First Name	Last Name	Qualification	Designation
Srinu	Sunkara	MCA	Instructor
Fred	Luddy	MS	Founder

Record (Row)

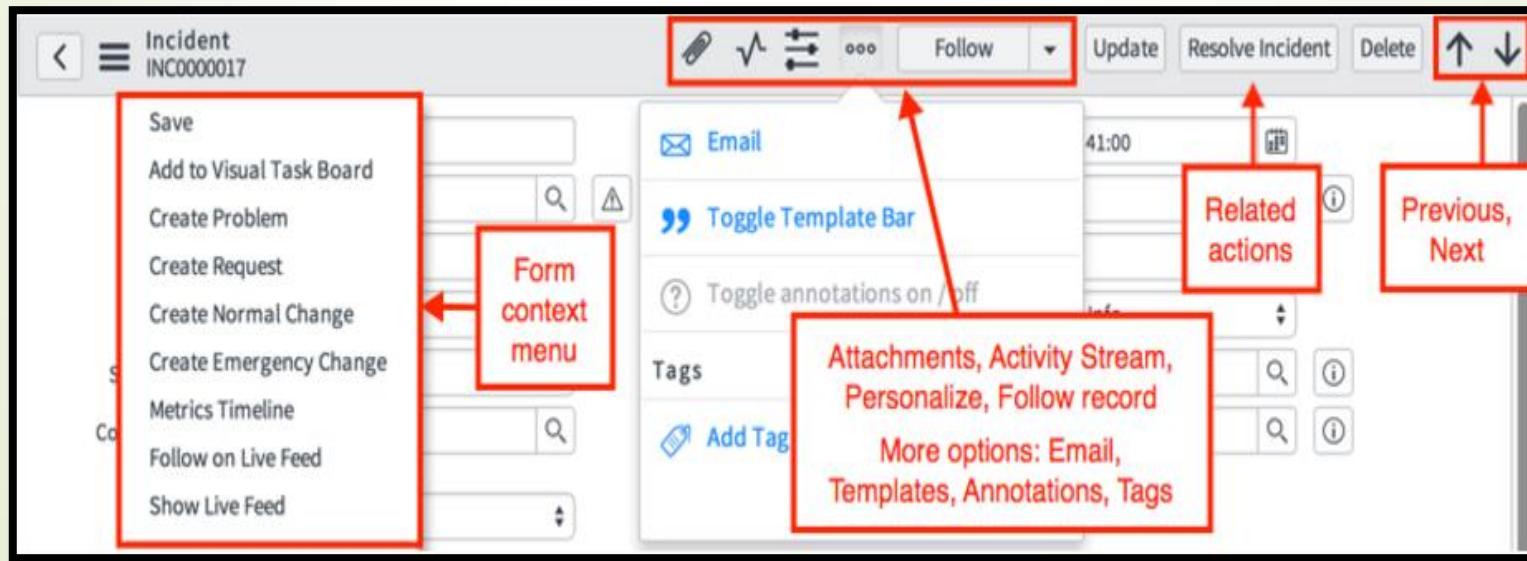
Database
Table



sys_id=e8e875b0c0a80164009dc852b4d677d5

Forms & Form Header

- Single Record
 - Many attributes
 - Customize form
 - Edit data record
- The form header displays the title of the form (table) and provides several controls.
 - The UI16 form header includes the following controls.



Forms Fields

- A field represents an individual item of data on a record
- Users can view and modify field data on a form. For more detailed information
- The individual pieces of data in a record are called fields.
- Users enter data in fields on the form or by using the list editor.
- Administrators can create new or modify existing fields
- Users can enter data in fields by using the list editor or by using a form.
- In form view, fields appear as fields in the form, and in list view they appear as columns of data in the table.

Form Here
* required fields

Name:

Email: Form field hint

Website: Form field hint

Message:

Configuring Forms

- Add/remove fields on form
- Split option
- Related fields

Configuring Incident form

Available

- Active
- Activity due
- Actual end
- Actual start
- Additional assignee list
- Additional comments
- Approval
- Approval history
- Approval set
- Assigned to [+]
- Assignment group [+]
- Business duration
- Business resolve time
- Business service [+]
- Caller [+]
- Caused by Change [+]
- Change Request [+]

Selected

- Num
- Caller
- Category
- | - split - |
- Contact type
- State
- Impact

Form view and section

View name

Default view

Create new field

Name

Problem PRB0040001

Num

PRB0040001

Opened

2018-03-18 00:23:05

Configuration item

*CAROL-IBM

Opened by

System Administrator

State

Open

Priority

3 - Moderate

Change request

Known error

Assignment group

Service Desk

Assigned to

Work notes list

Personalizing Forms

- Second icon on form
- User specific

The screenshot displays a software interface for managing incidents. At the top, a header bar shows a back arrow, a menu icon, the text 'Incident INC0000004', a line graph icon, a settings icon (highlighted with a blue box), a three-dot menu, and buttons for 'Follow', 'Update', and 'Delete'. Below the header, a sidebar on the left contains fields: 'Num' (with a minus icon and value 'INC0000004'), 'Caller' (with an asterisk icon and value 'Fred Luddy'), and 'Category' (with a minus icon and value 'Inquiry / Help'). A 'Personalize Form' dialog box is open in the center, titled 'Personalize Form'. It contains a section 'Form Fields' with a list of fields and their status:

Form Fields	Status
Activity due	<input checked="" type="checkbox"/>
Approval history	<input checked="" type="checkbox"/>
Approval set	<input checked="" type="checkbox"/>
Assignment group	<input checked="" type="checkbox"/>

To the right of the dialog, parts of other form fields are visible, including two dropdown menus and a text input field.

Difference between Lists & Forms

Forms



- 1 record per page
- More fields
- Editing record information
- Better UI
- More powerful

&

Lists



- Multiple records per page
- Limited fields
- Filter and sort records
- Multi-select
- Cell edit

The screenshot shows a JIRA form for a problem record. The header includes a back arrow, a menu icon, the title "Problem PRB0000010", and action buttons for "Follow", "Update", and "Delete". The form fields are arranged in two columns:

- Num:** A text field containing "PRB0000010".
- Opened:** A date/time field showing "2015-07-01 15:55:28".
- Configuration item:** A text field containing "*ASSET-IBM" with search and help icons.
- Opened by:** An empty text field with a search icon.
- Priority:** A dropdown menu showing "4 - Low".
- State:** A dropdown menu showing "Pending Change".

The screenshot shows a JIRA list view for problem records. The header includes a filter icon, the filter text "All > Assigned to = ITIL User", and sort options for "Num" and "Short description". The table contains four rows of problem records:

		Num	Short description
<input type="checkbox"/>	i	PRB0000010	Oracle Down
<input type="checkbox"/>	i	PRB0000009	T-1 Saturated
<input type="checkbox"/>	i	PRB0000007	Router Down
<input type="checkbox"/>	i	PRB0000006	Can't access SFA software

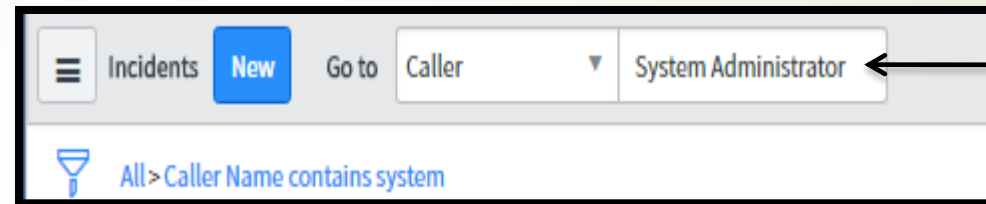
Lists

- A list displays a set of records from a data table.
- You can filter and customize lists to display the information you need.
- Spreadsheets
- Cell edits

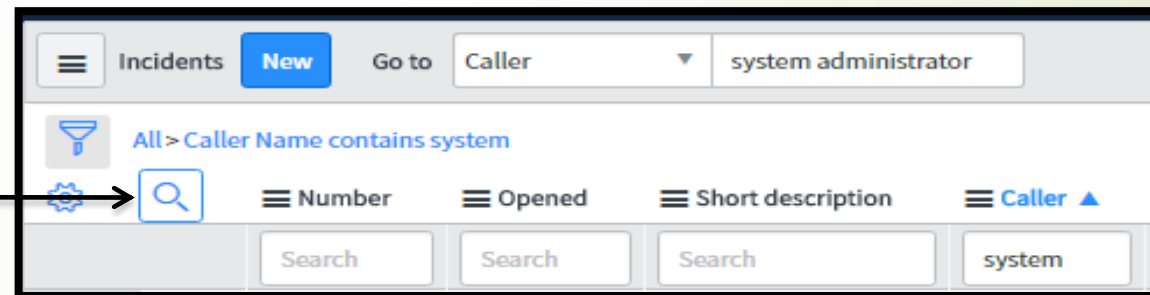
		Num	Opened	Short description	Caller	Priority	
<input type="checkbox"/>	i	INC0000001	2017-05-20 16:09:51	Can't read	Fred Luddy	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000004	2017-05-27 15:49:22	Forgot email password	Fred Luddy	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000005	2017-05-16 16:06:52	CPU load high for over 10 minutes	Alejandro Mascall	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000006	2017-05-20 16:08:05	Hang when trying to print VISIO document	Joe Employee	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000008	2017-05-28 16:08:39	Printer in my office is out of toner	Joe Employee	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000009	2017-05-27 15:50:23	Reset my password	Rick Berzle	1 - Critical	Clo
<input type="checkbox"/>	i	INC0000010	2017-05-21 15:53:02	Need Oracle 10GR2 installed	Fred Luddy	4 - Low	Clo

Filters & Search

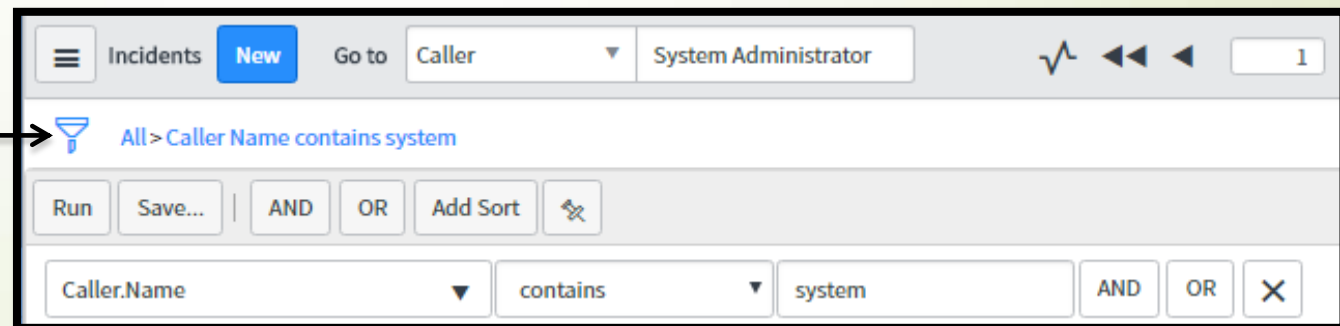
- Many search bars
- Similar search functions
- Search wildcards



This screenshot shows the top navigation bar and the filter bar. The navigation bar includes a menu icon, 'Incidents', a 'New' button, a 'Go to' dropdown set to 'Caller', and a text input field containing 'System Administrator'. Below this, the filter bar shows a funnel icon and the text 'All > Caller Name contains system'. An arrow points from the right side of the slide to the 'System Administrator' text field.



This screenshot shows the search bar and table headers. The search bar has a magnifying glass icon and a 'Search' button. Below it, the table headers are 'Number', 'Opened', 'Short description', and 'Caller'. The 'Caller' header is highlighted in blue. An arrow points from the left side of the slide to the magnifying glass icon.



This screenshot shows the advanced search interface. It includes a 'Run' button, a 'Save...' button, and logical operators 'AND' and 'OR'. Below these, there is a search rule: 'Caller.Name' in a dropdown, followed by 'contains' in another dropdown, then 'system' in a text field, and finally 'AND' and 'OR' buttons. An arrow points from the left side of the slide to the funnel icon.

Search Conditions

Wildcard Syntax	Search Criteria	Example
*[term]	contains	*Mark
!*[term]	does not contain	!*Mark
= [term]	equals	=Miller
!= [term]	does not equal	!=Miller
[term]%	starts with	Hello%
%[term]	ends with	%goodbye

Condition Builder

- Very powerful
- Replaces SQL statements
- Access related fields
- Save condition
- Copy condition
- Field, Operator, Value

The screenshot displays the 'Condition Builder' interface within a web application. At the top, there is a navigation bar with a hamburger menu, the text 'Incidents', a 'New' button, a 'Go to' dropdown set to 'Number', a search input field, and a status indicator showing '1 to 10 of 57' items. Below this is a filter section with a funnel icon and the word 'All'. A toolbar contains buttons for 'Run', 'Save...', 'AND', 'OR', 'Add Sort', and a delete icon. The main area is titled 'All of these conditions must be met' and contains a list of conditions. The first condition is 'Active' is 'true'. The second condition is 'Priority' is one of a list of values: '1 - Critical', '2 - High', '3 - Moderate', and '4 - Low'. A third condition, 'Priority' is not empty, is shown below the others, separated by an 'or' operator. Each condition has a delete 'X' button to its right. A 'Run' button is located at the bottom right of the condition list.

Incidents New Go to Number Search 1 to 10 of 57

All

Run Save... AND OR Add Sort

All of these conditions must be met

Active is true AND OR X

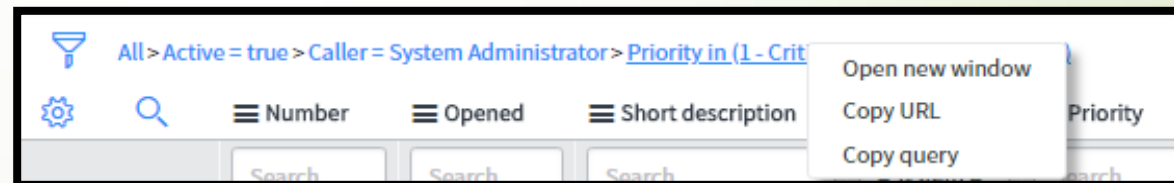
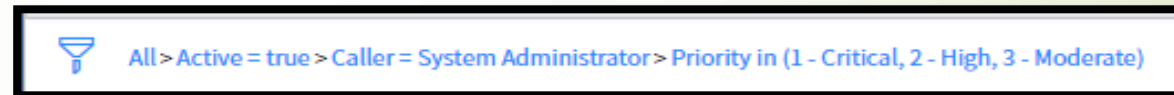
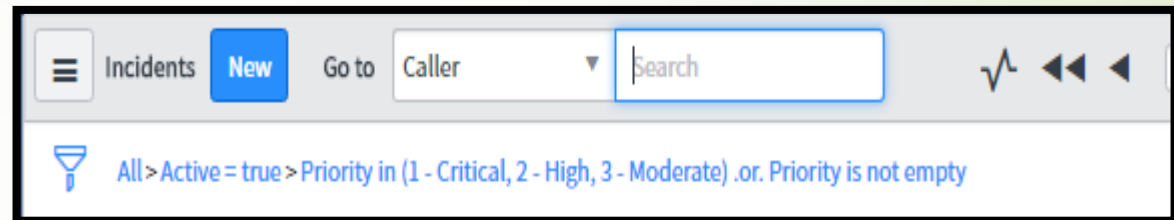
Priority is one of 1 - Critical 2 - High 3 - Moderate 4 - Low AND OR X

or Priority is not empty X

Run

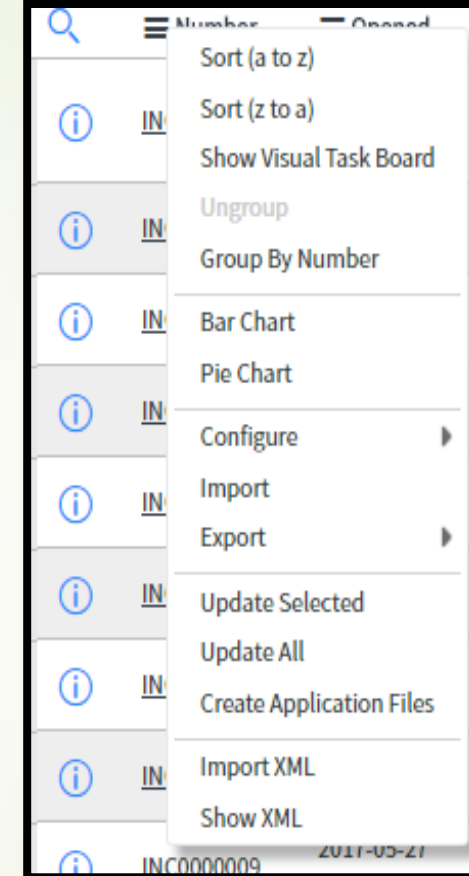
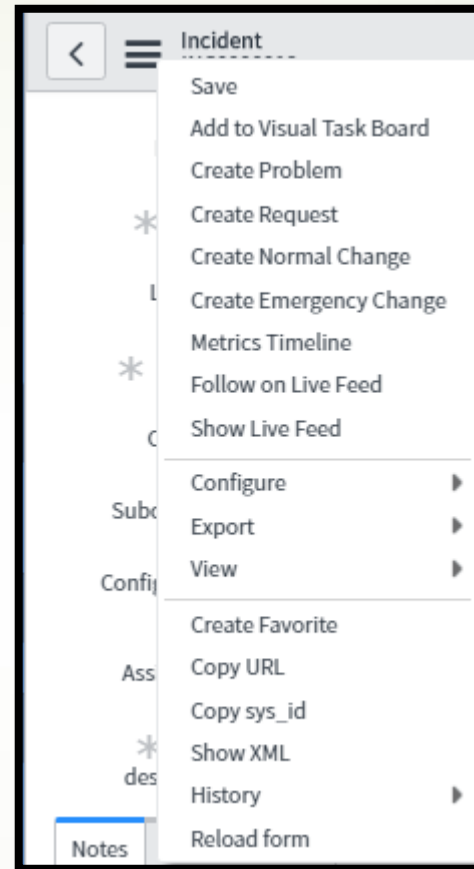
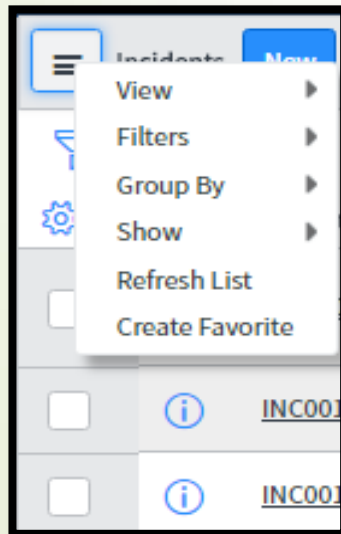
Breadcrumbs

- Dynamic
- Remove a filter by clicking on ">"
- Copy query or URL

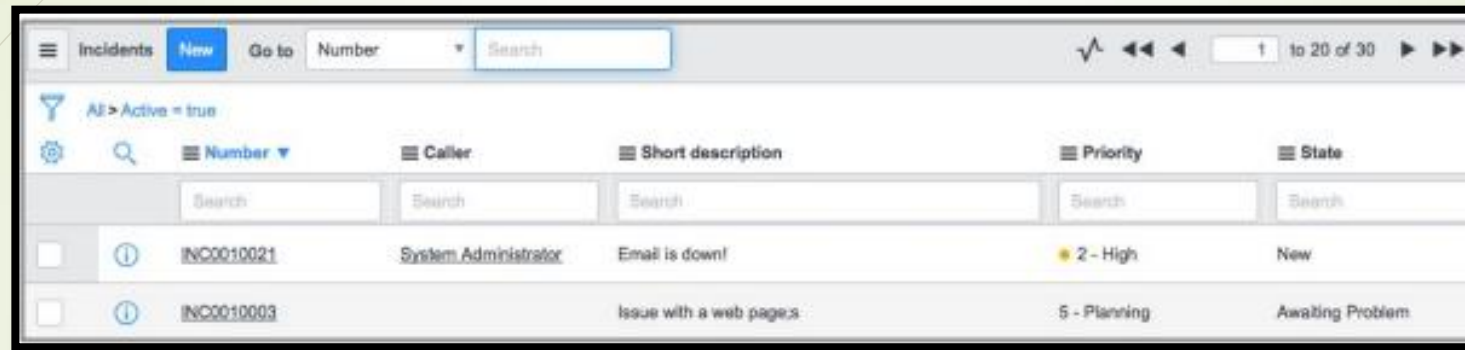


Context Menus

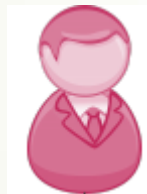
- Appear in list & form views
- Menus with options
- Application look and feel



Personalize Versus Configure



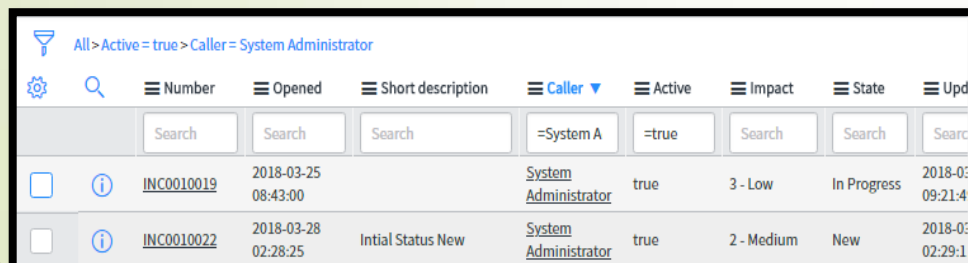
	Number	Caller	Short description	Priority	State
<input type="checkbox"/>	INC0010021	System Administrator	Email is down!	2 - High	New
<input type="checkbox"/>	INC0010003		Issue with a web pages	5 - Planning	Awaiting Problem



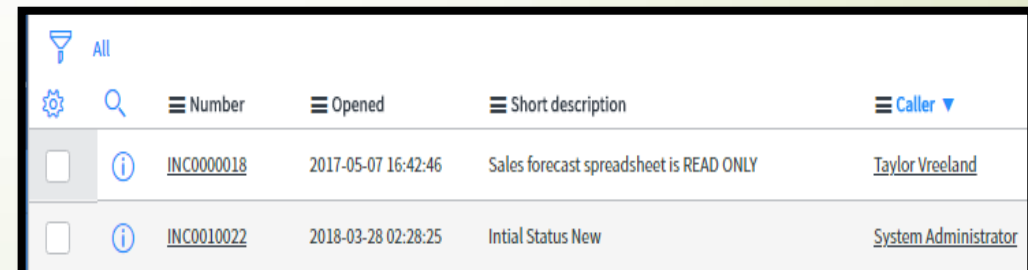
**Businessman
Franklin**



**Administrator
Edward**



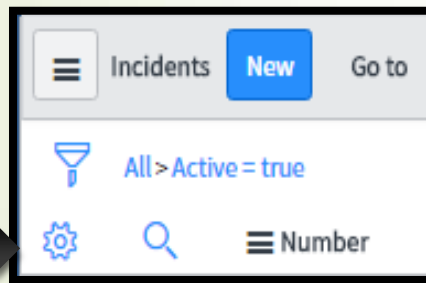
	Number	Opened	Short description	Caller	Active	Impact	State	Updated
<input type="checkbox"/>	INC0010019	2018-03-25 08:43:00		System Administrator	true	3 - Low	In Progress	2018-03-25 09:21:4
<input type="checkbox"/>	INC0010022	2018-03-28 02:28:25	Initial Status New	System Administrator	true	2 - Medium	New	2018-03-28 02:29:1



	Number	Opened	Short description	Caller
<input type="checkbox"/>	INC0000018	2017-05-07 16:42:46	Sales forecast spreadsheet is READ ONLY	Taylor Vreeland
<input type="checkbox"/>	INC0010022	2018-03-28 02:28:25	Initial Status New	System Administrator

Personalizing Lists

- User specific
- Add/remove any field on table
- Reorder fields



Personalize List Columns

Available

- Activity due
- Actual end
- Actual start
- Additional assignee list
- Additional comments
- Approval
- Approval history
- Approval set
- Assigned to
- Assignment group
- Business duration
- Business resolve time
- Business service
- Category
- Caused by Change
- Change Request
- Child Incidents

Selected

- Number
- Opened
- Short description
- Caller
- Active
- Impact
- State
- Updated

☒ Wrap column text ☒ Compact rows ☐ Active row highlighting

☒ Modern cell coloring

☒ Enable list edit ☒ Double click to edit

Cancel OK

Configuring Lists

- Different than gear icon
- System wide
- Permissions

