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2025 SUN CONFERENCE: HANDS ON LAB

## Building widget solutions for Workspaces with the Runtime Builder.

**Marcello Martins**

Senior Technical Solution Consultant

Feb 24: 4:00 PM – 5:00 PM Grand Ballroom E  
Feb 26: 11:30 AM – 12:30 PM Grand Ballroom E



INDUSTRY SPECIFIC

CLOUDSUITE SOLUTIONS



# Agenda

**01** Introduction & Access

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**02** Customer Credit Limits

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**03** Shipments By Month

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**04** Customer Interactions

# Login Information

**Monday**  
**Feb. 24<sup>th</sup> @ 4:00pm**

Username:

D1S9RE\_XX

Password:

SUNConf\$tuD1S9XX

Replace **XX** with your student number

**Wednesday**  
**Feb. 26<sup>th</sup> @ 11:30am**

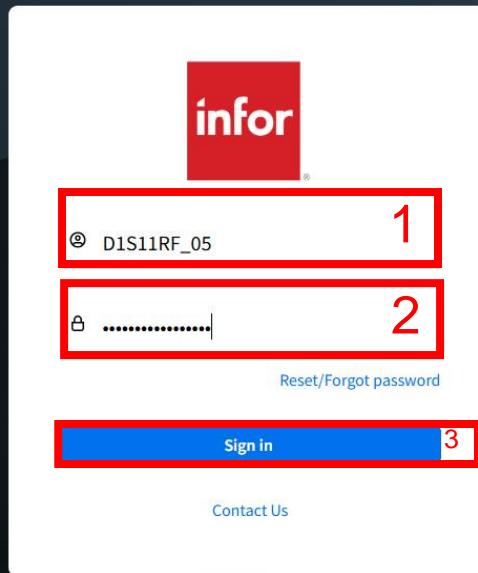
Username:

D3S9RE\_XX

Password:

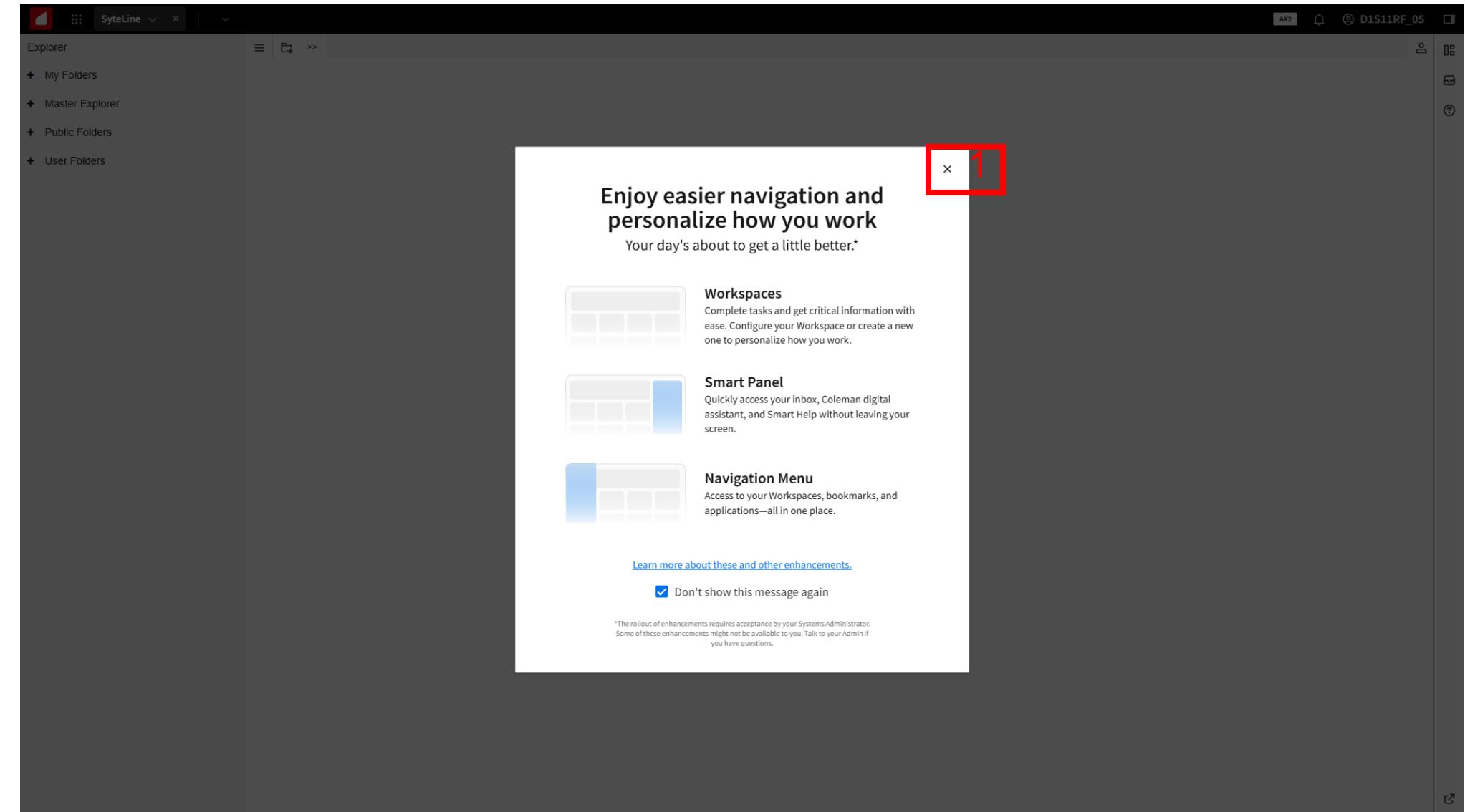
SUNConf\$tuD3S9XX

Replace **XX** with your student number



1. ENTER your username
2. ENTER your password
3. SELECT Sign in





1. **CLICK** the X at the top right to close the message



The screenshot shows a web browser window with a dark theme. At the top, there is a navigation bar with a red square icon (1), the text "SiteLine" (2), and a search bar containing the text "OS" (2). Below the search bar, it says "6 results". Under the heading "Applications", there is a list of items (3) starting with "OS" (Document Management, API Gateway, ION, Mongoose, Health Service).



Recently closed

1. CLICK on the Navigation Menu in the top left
2. ENTER 'OS' in the search bar
3. SELECT OS under Applications

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SyteLine OS D.1 Session 9 Room E Student... 7

Home Document Management API Gateway ION Mongoose Health Service

## OS

Configure and maintain important parts of your CloudSuite here

Document Management

API Gateway

ION

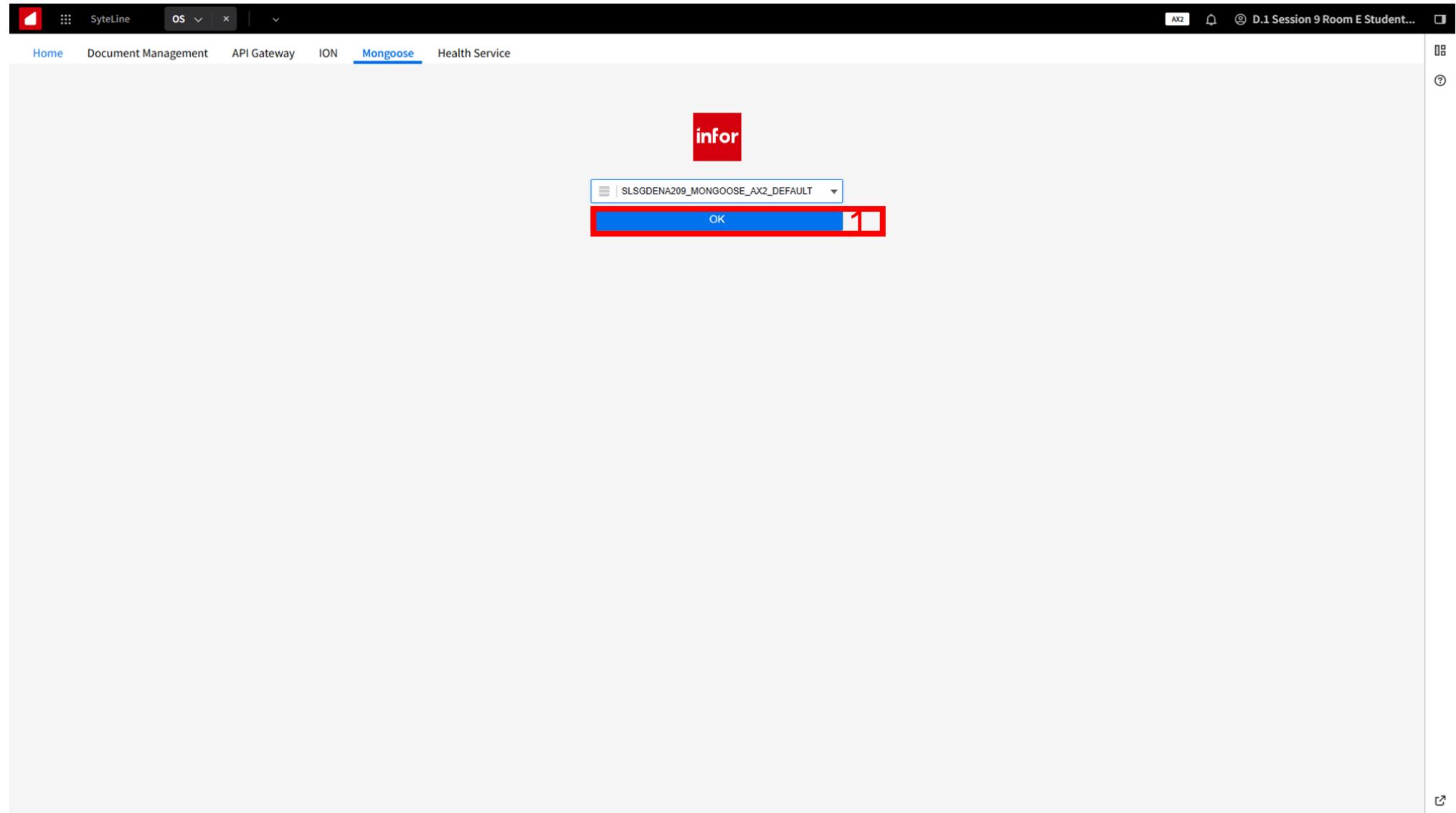
Mongoose

Health Service

The 'Mongoose' service card is highlighted with a red border and the number '1' is displayed below it.

1. CLICK Mongoose

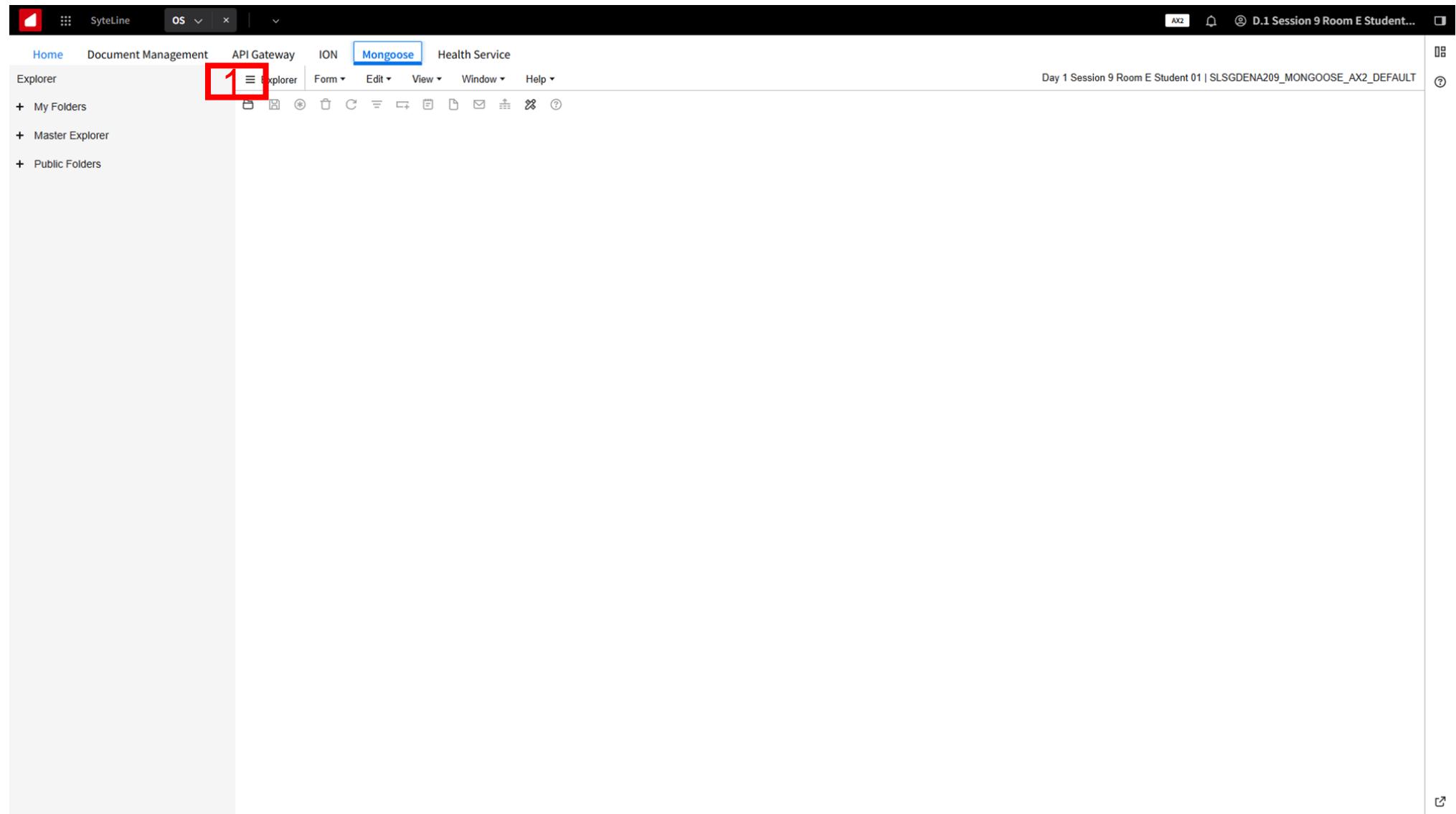




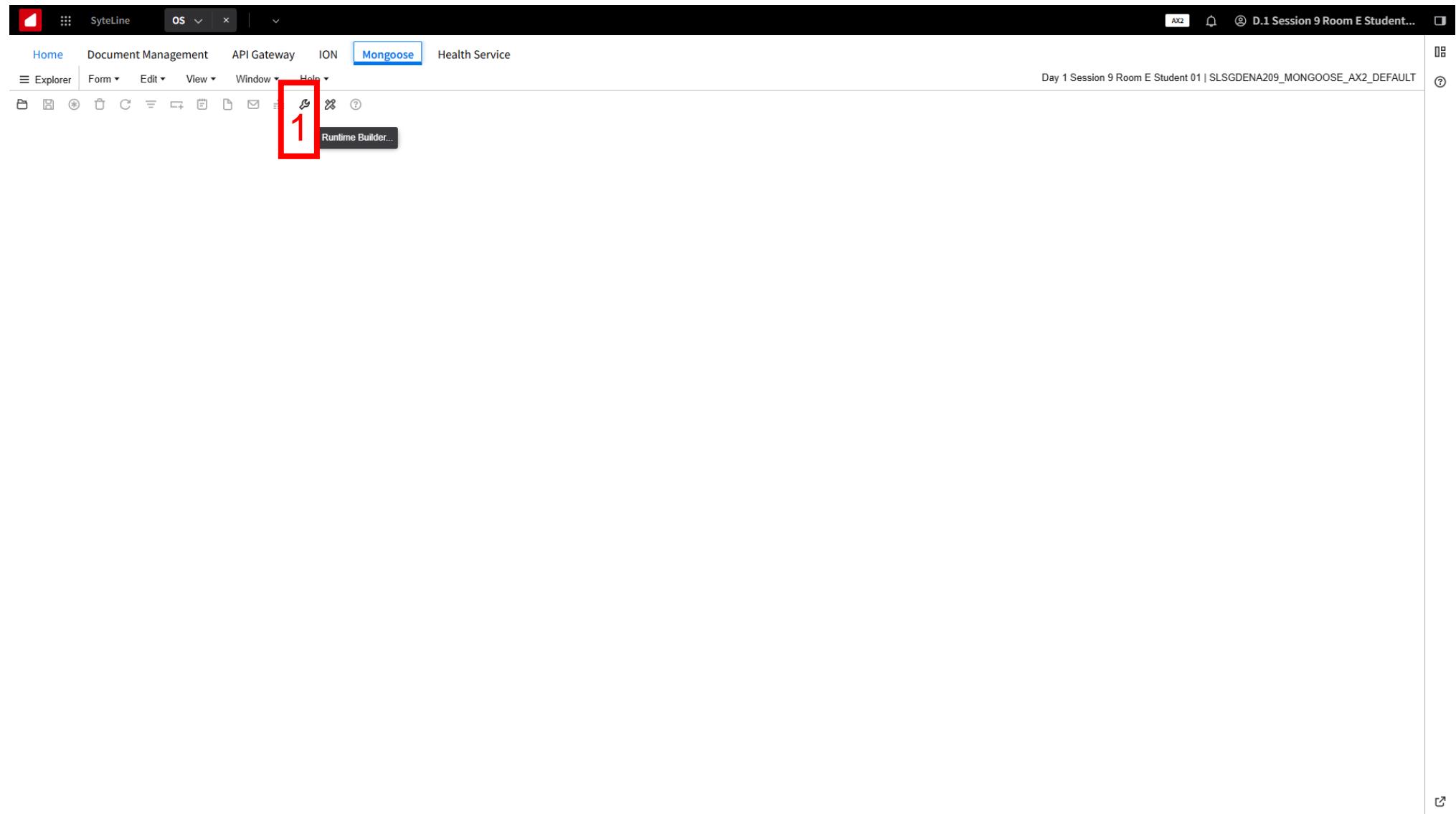
1. CLICK OK



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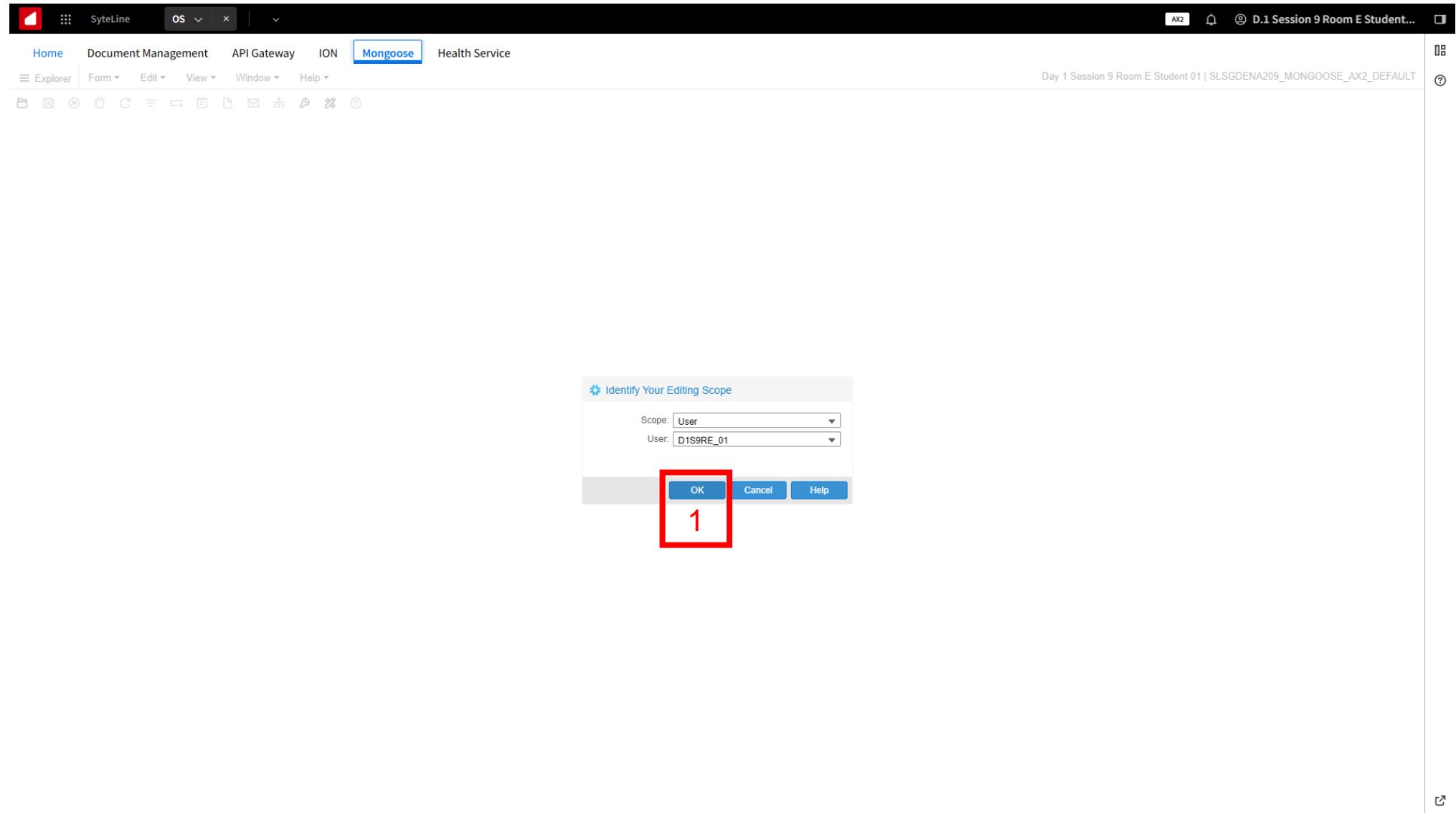


1. CLICK the Explorer icon to hide the Explorer menu



1. CLICK the Runtime Builder button

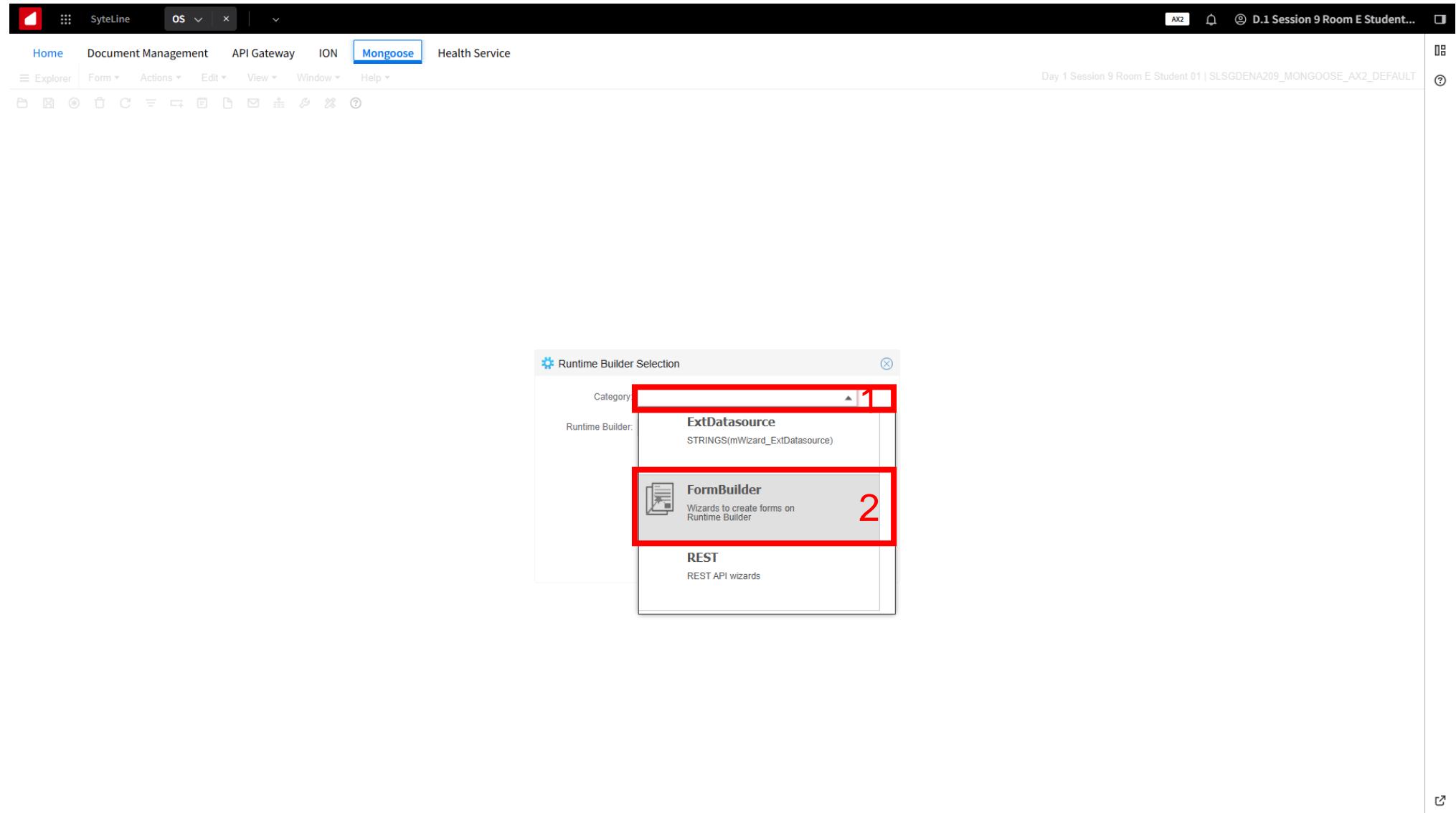




1. CLICK OK



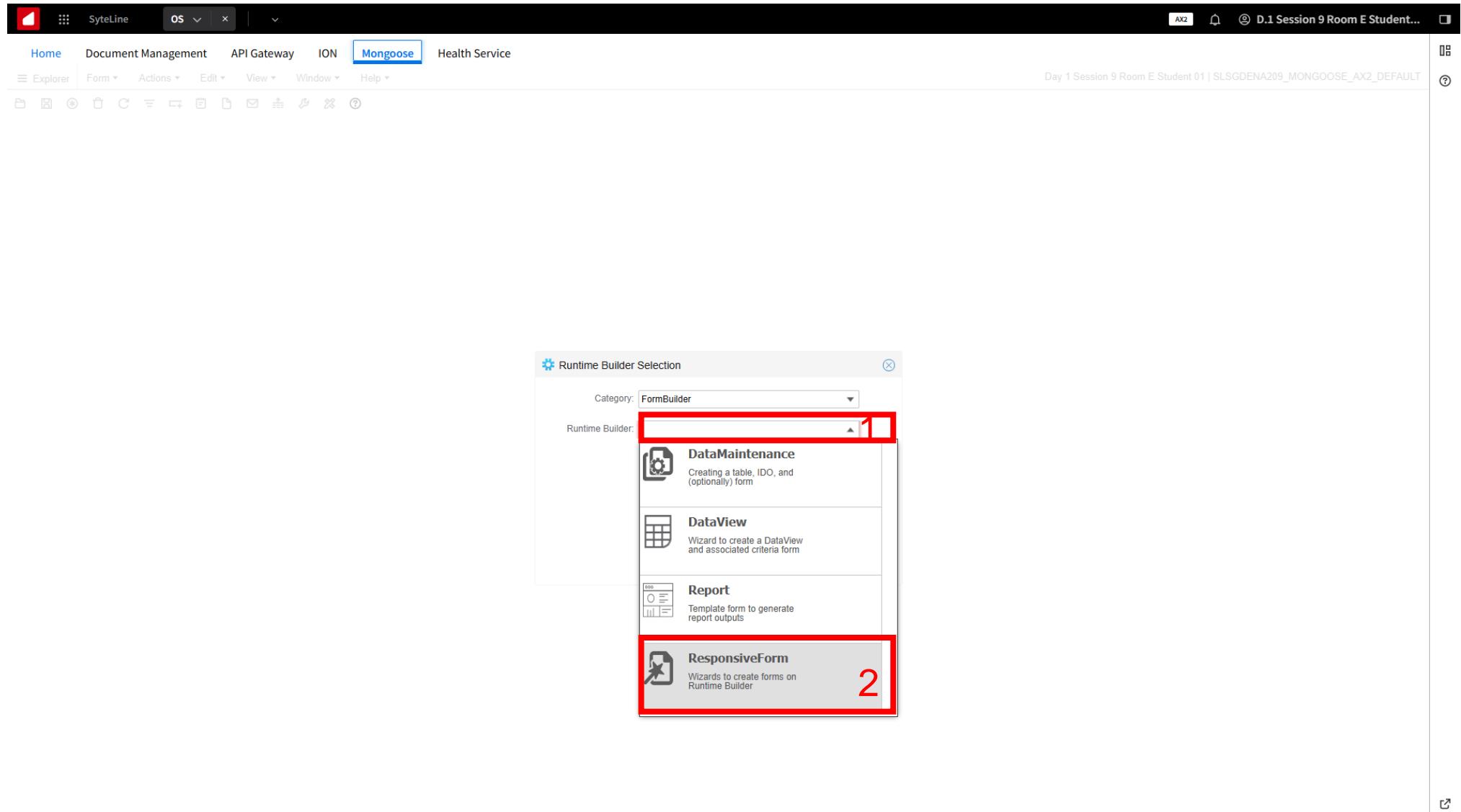
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1. CLICK the Category drop-down button
2. SELECT FormBuilder

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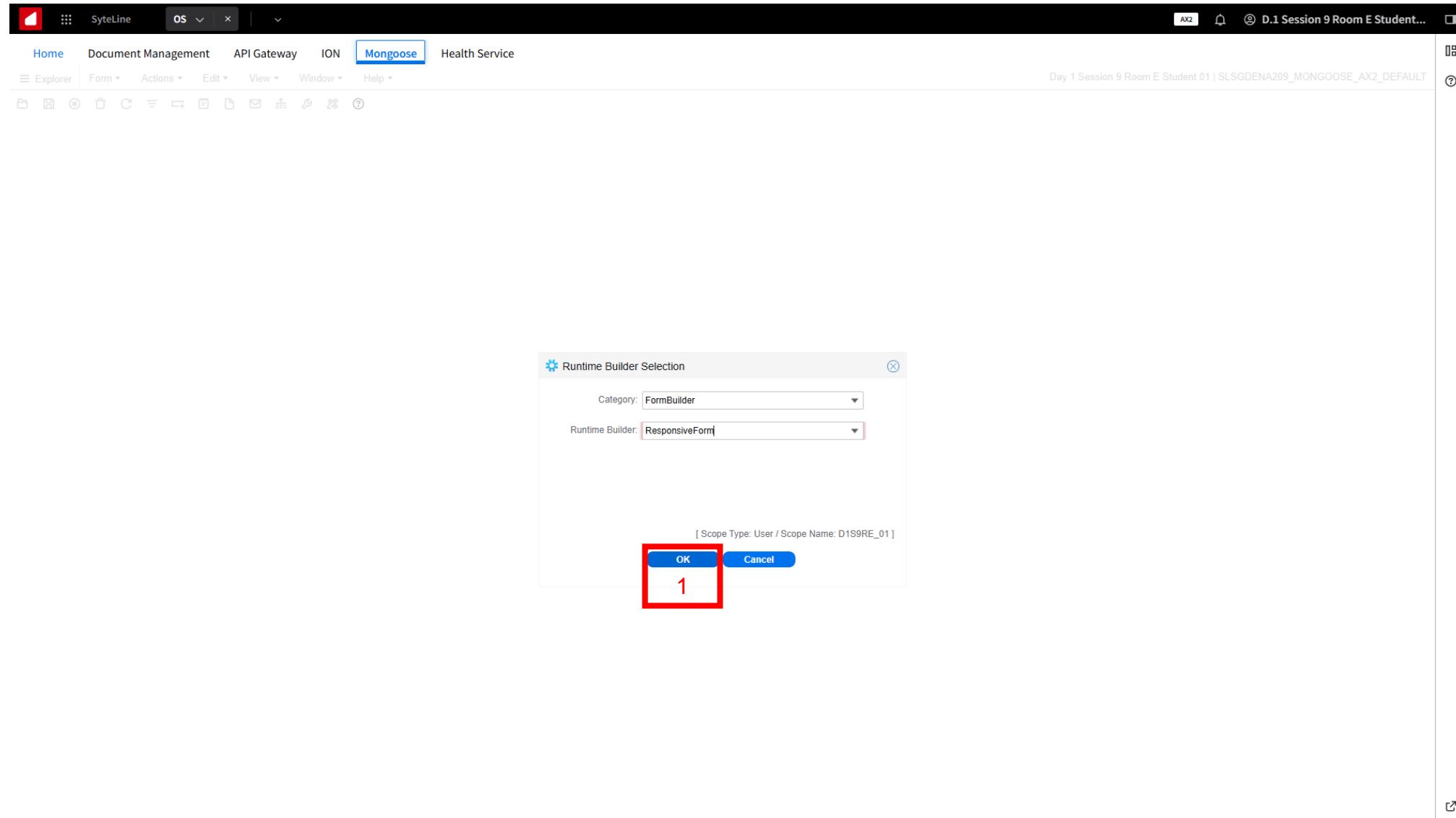




1. CLICK the RunTime Builder drop-down button
2. SELECT ResponsiveForm

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1. CLICK OK



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Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions Edit View Window Help

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

The Form Builder window has a blue header bar with the title 'Form Properties'. Below it, there's a text input field labeled 'Enter a name for this form' containing 'D1S9RE\_01\_CreditLimits' (step 1). To the right is a dropdown menu with 'csi\*' selected (step 2). A third step, 'csi\_custaddr\_mst\_Localized', is highlighted in a red box (step 3). On the left, there are three form type options: 'Widget', 'Non-Data', and 'FullForm'. On the right, there's a preview area with a grid layout and buttons for 'ADD' and 'SAVE'.

Form Properties

Enter a name for this form  
D1S9RE\_01\_CreditLimits 1

Select A Form Type

Widget  
Widget sized form that allows for up to 2 columns

Non-Data  
Templates that are strictly layout based

FullForm  
Full form, build from scratch layout

csi\* 2

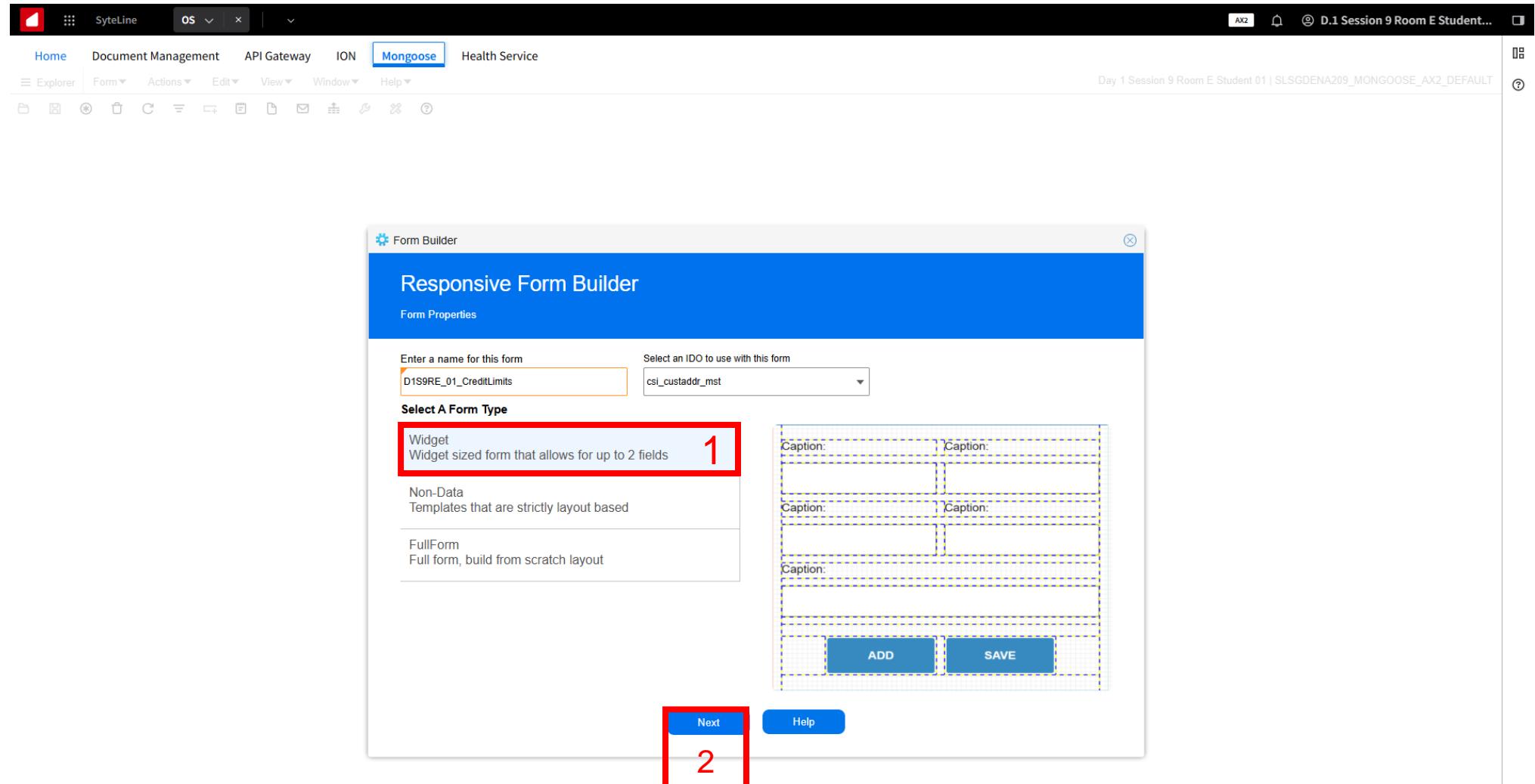
csi\_co\_mst  
csi\_coitem\_mst  
csi\_custaddr\_mst  
csi\_custaddr\_mst\_Localized 3

Caption:  
Caption:  
Caption:  
Caption:  
Caption:

ADD SAVE

Next Help

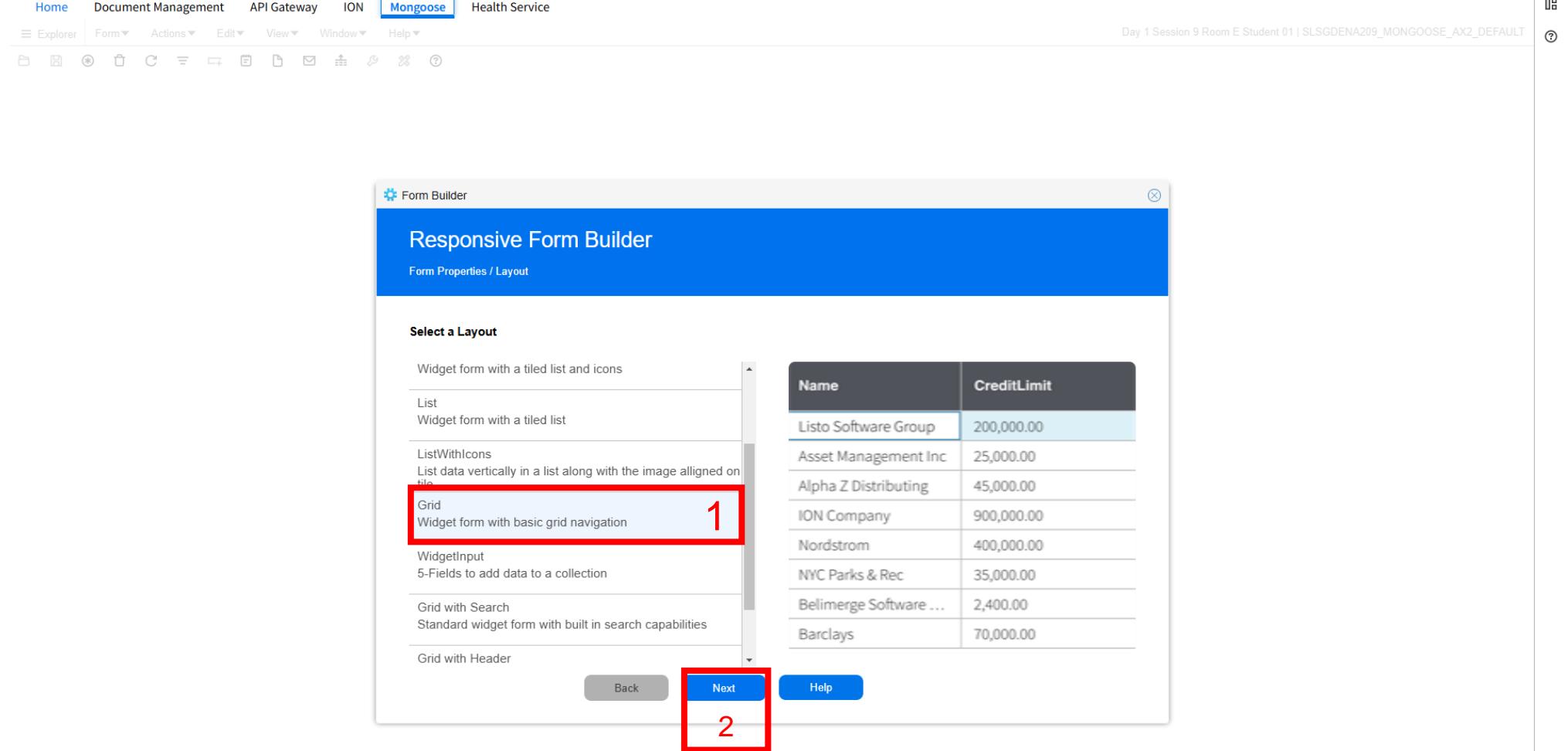
1. ENTER {Username}\_CreditLimits (ex. D1S9RE\_01\_CreditLimits)
2. ENTER 'csi\*' then CLICK the drop-down button
3. SELECT csi\_custaddr\_mst\_Localized



1. **SELECT** Widget
2. **CLICK** Next

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Form Properties / Layout

Select a Layout

- Widget form with a tiled list and icons
- List
- Widget form with a tiled list
- ListWithIcons
- List data vertically in a list along with the image aligned on tile.
- Grid** 1  
Widget form with basic grid navigation
- WidgetInput
- 5-Fields to add data to a collection
- Grid with Search
- Standard widget form with built in search capabilities
- Grid with Header

Back Next Help

Name	CreditLimit
Listo Software Group	200,000.00
Asset Management Inc	25,000.00
Alpha Z Distributing	45,000.00
ION Company	900,000.00
Nordstrom	400,000.00
NYC Parks & Rec	35,000.00
Belimerge Software ...	2,400.00
Barclays	70,000.00

1. SELECT Grid
2. CLICK Next





### Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 2 Properties to include in your form

Available

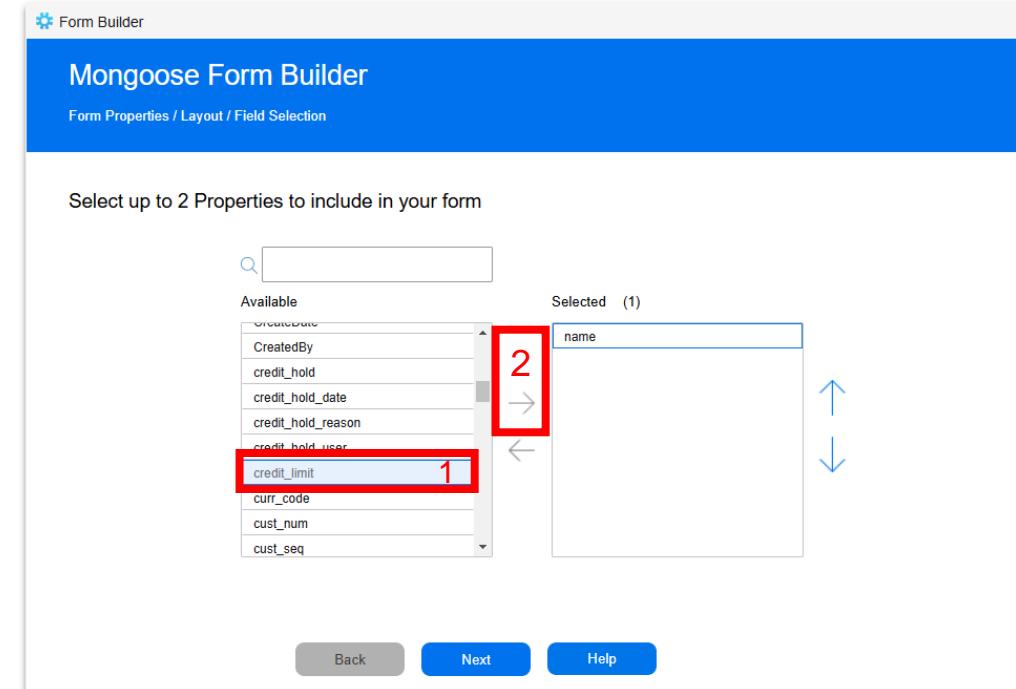
- internet\_url
- InWorkflow
- Item\_name
- name** 1
- NoteExistsFlag
- order\_credit\_limit
- RecordDate
- RowPointer
- ship\_to\_email
- site\_ref

Selected (0)

2 → ← ↑ ↓

Back Next Help

1. SCROLL and SELECT “name”
2. CLICK the ‘->’ to add name to the Selected box



1. SCROLL and SELECT “credit\_limit”
2. CLICK the ‘->’ to add name to the Selected box

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Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions Edit View Window Help

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Form Builder

## Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 2 Properties to include in your form

Available

- CreatedBy
- credit\_hold
- credit\_hold\_date
- credit\_hold\_reason
- credit\_hold\_user
- curr\_code
- cust\_num
- cust\_seq
- datalake\_timestamp

Selected (2)

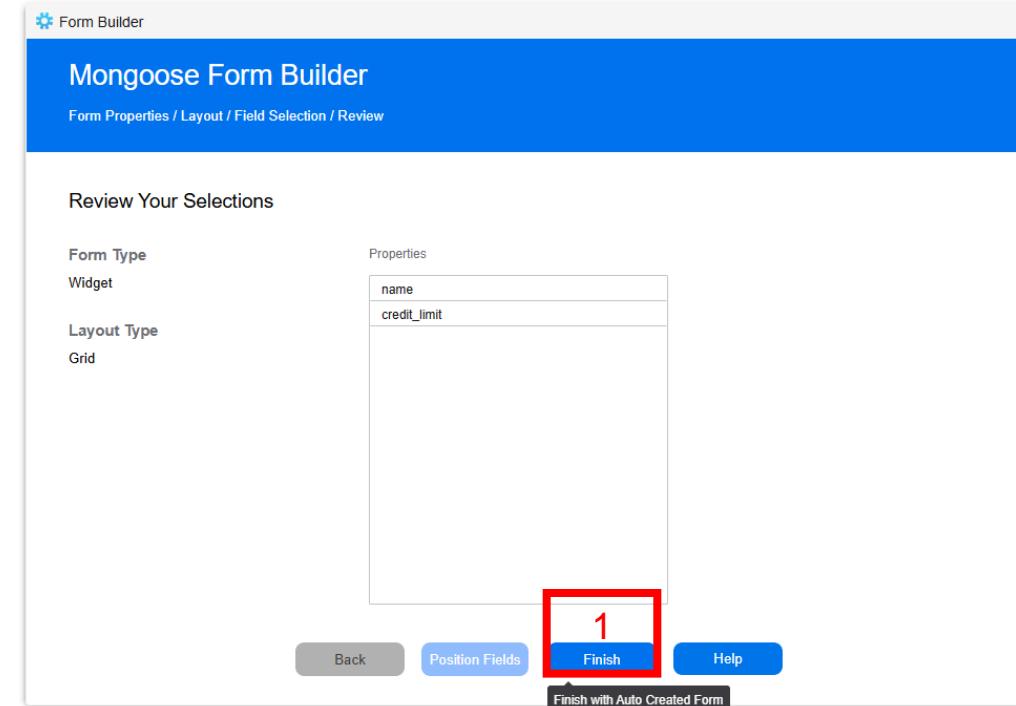
- name
- credit\_limit

Back Next Help

1

1. CLICK Next





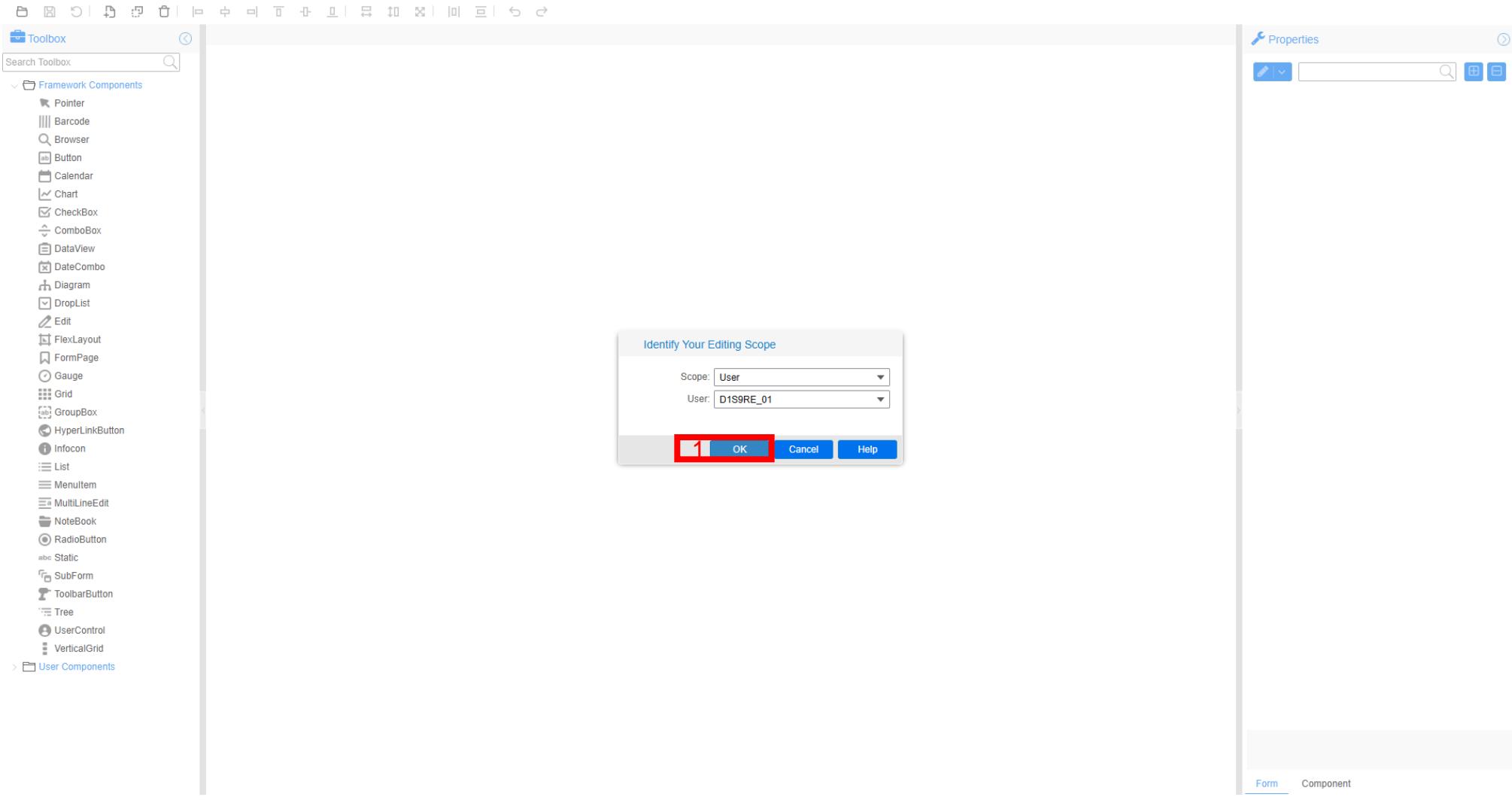
1. CLICK Finish

The screenshot shows the SyteLine application interface. At the top, there is a navigation bar with links for Home, Document Management, API Gateway, ION, Mongoose (which is highlighted in blue), and Health Service. Below the navigation bar is a toolbar with various icons for file operations like Open, Save, Print, and Copy. A dropdown menu labeled 'Help' is open, showing options like 'Open designer in a new window'. A red box highlights this specific option. The main area displays a grid titled 'Form Builder Template - Widget - Grid'. The grid has two columns: 'Name' and 'Credit Limit'. The 'Name' column contains numerous entries starting with 'D1S11RF\_'. The 'Credit Limit' column shows values such as 2,000,000.00, 0.00, and 500.00. The bottom right corner of the grid has a small edit icon.

Name	Credit Limit
D1S11RF_05	2,000,000.00
D1S11RF_05	2,000,000.00
D1S11RF_05	2,000,000.00
D3S11RE_22	0.00
D3S11RE_22	0.00
D3S11RE_22	0.00
Carolina Frames, Inc.	250,000.00
Carolina Frames, Inc.	250,000.00
Carolina Frames, Inc.	250,000.00
D1S11RF_55	0.00
D1S11RF_55	0.00
D1S11RF_55	0.00
D1S11RF_06	500.00
D1S11RF_06	500.00
D1S11RF_06	500.00
D3S11RE_00	0.00
D3S11RE_00	0.00
D3S11RE_00	0.00
D1S11RF_00	0.00
D1S11RF_00	0.00
D1S11RF_00	0.00
D1S11RF_02	0.00
D1S11RF_02	0.00
D1S11RF_02	0.00
D1S11RF_03	0.00
D1S11RF_03	0.00
D1S11RF_03	0.00
D1S11RF_04	0.00
D1S11RF_04	0.00
D1S11RF_04	0.00
D1S11RF_07	0.00
D1S11RF_07	0.00
D1S11RF_07	0.00

1. CLICK the Designer button





1. CLICK OK



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Replace ▾ Undo ▾ Redo ▾

**D1S9RE\_01\_CreditLimits**

Properties

Name	D1S9RE_01_CreditLimits
Description	1 D1S9RE_01_CreditLimits
Caption	2 D1S9RE_01_CreditLimits
Version	User version for user D1S9...
Device Type	Default
Form Type	Normal
Is Master	True
> Appearance	
> Behavior	
> Help	
> Layout	

Design

Form Details

Caption

Form Component

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. ENTER '{UserName}\_CreditLimits' in the Description Design property
2. ENTER '{UserName}\_CreditLimits' in the Caption Design property



The screenshot shows the Infor Form Designer application. On the left is the Toolbox containing various components like Pointer, Barcode, and Button. The main area displays a form titled "D1S9RE\_01\_CreditLimits" with a single table row containing columns for "Name" and "Credit Limit". On the right is the Properties panel. A red arrow points upwards from the bottom of the Properties panel towards section 1. Section 1 is the "Layout" section, which is expanded. Section 2 is the "Size" section, which is also expanded and contains a field for "Height" set to "15". Section 3 is the "Form Details" handle, which is highlighted with a red box and has a red arrow pointing up towards section 1.

**D1S9RE\_01\_CreditLimits**

Name	Credit Limit
------	--------------

**Properties**

**Design**

- Name: D1S9RE\_01\_CreditLimits
- Description: D1S9RE\_01\_CreditLimits
- Caption: D1S9RE\_01\_CreditLimits
- Version:
- Device Type: Default
- Form Type: Normal
- Is Master: True

**Appearance**

**Behavior**

**Layout**

- Splitter: None
- Pane 0 Scroll Bars: As Needed
- Pane 1 Scroll Bars: As Needed
- Form Pages:
- Unit: Char
- Size: 35; 15

**Height**

Height: 15

Synchronize FlexLayout att.: True

**Form Details**

Height  
Height

**Form Component**

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. EXPAND the Layout section in the Properties panel
2. EXPAND the Size and UPDATE Height to '15'
3. CLICK the Form Details handle (^) to expand the panel



D1S9RE\_01\_CreditLimits

Properties

Design

Name: MKZ\_Credit.limits  
Description: D1S9RE\_01\_Credit...  
Caption: D1S9RE\_01\_Credi  
Version: User version for us...  
Device Type: Default  
Form Type: Normal  
Is Master: True  
Appearance  
Behavior  
Help  
Layout

Splitter: None  
Pane 0 Scroll Bars: As Needed  
Pane 1 Scroll Bars: As Needed  
Form Pages

Unit: Char  
Size: 35; 15  
Width: 35  
Height: 15  
Synchronize FlexL...: True

Form Details

Collections Components Event Handlers Variables Design View Size

Primary Collection: csi\_custaddr\_mst\_Localized 1

Custom Load Method

Method Parameters

Read Mode

2 Options

3 Standard Operations

4 New/Copy: False  
Save: False  
Delete: False  
Notes: False  
Graph: False

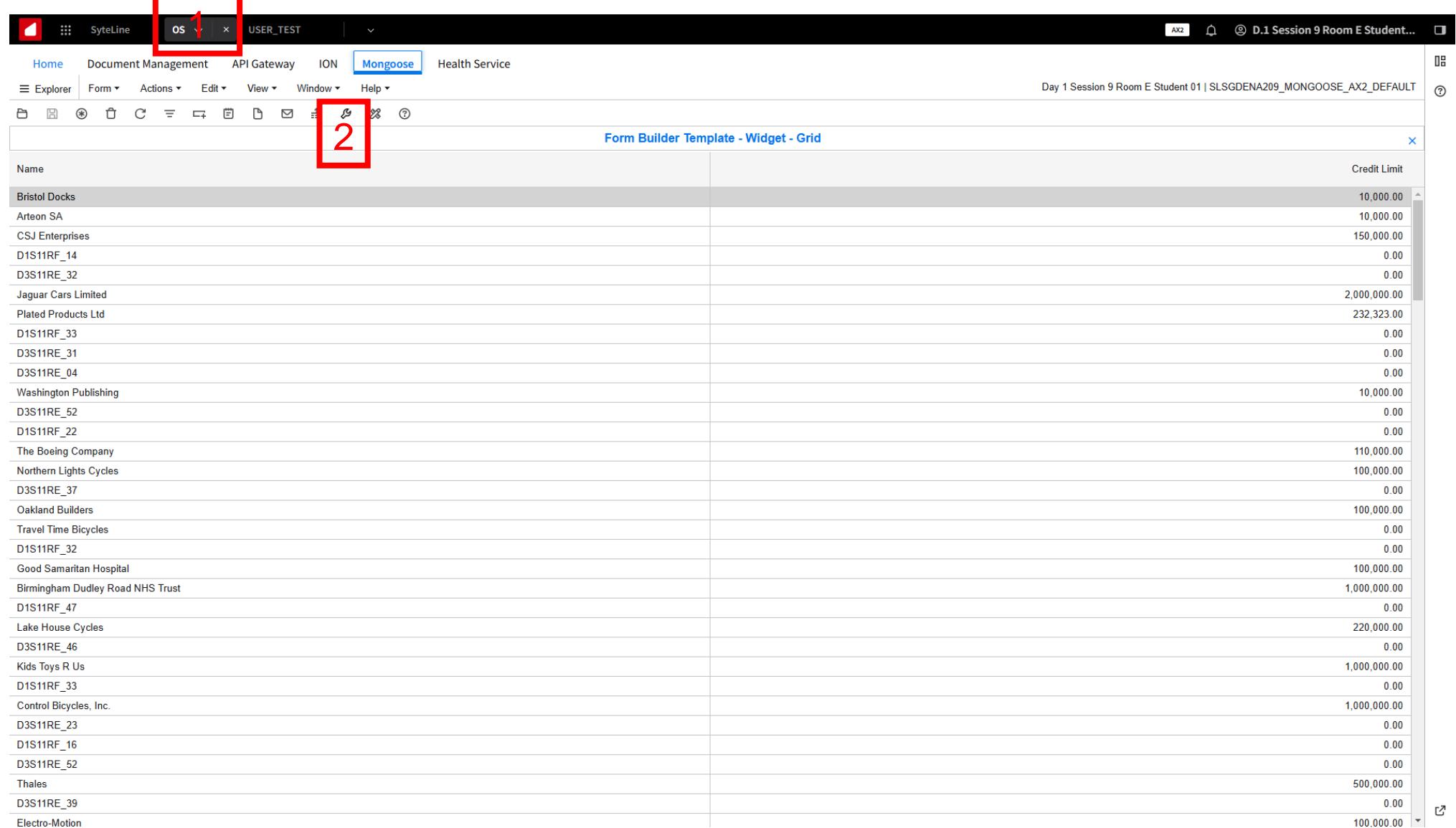
Spreadsheet Disabled: False

Graph

Graph

[ ScopeType: User / ScopeName: D1S9RE\_02 ]

1. CLICK Primary Collection: csi\_custaddr\_mst\_Localized
2. SCROLL down on the right panel to Options and EXPAND it
3. EXPAND Standard Operations
4. UPDATE New Copy, Save, Delete, Notes & Graph = "FALSE"
5. CLICK Save



1

2

SyteLine OS USER\_TEST

Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions Edit View Window Help

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

1. Go to OS
2. CLICK the Runtime Builder button

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SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Runtime Builder Selection

Category: **1**

Runtime Builder:

- ExtDatasource** STRINGS(mWizard\_ExtDatasource)
- FormBuilder** Wizards to create forms on Runtime Builder **2**
- REST** REST API wizards

1. CLICK the Category drop-down button
2. SELECT FormBuilder

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SyteLine OS USER\_TEST

Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions Edit View Window Help

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Runtime Builder Selection

Category: FormBuilder

Runtime Builder:

- DataMaintenance** Creating a table, IDO, and (optionally) form 1
- DataView** Wizard to create a DataView and associated criteria form
- Report** Template form to generate report outputs
- ResponsiveForm** Wizards to create forms on Runtime Builder 2

1. CLICK the RunTime Builder drop-down button
2. SELECT ResponsiveForm

SyteLine OS D1S9RE\_01 D.1 Session 9 Room E Student... 30

**Mongoose** Health Service

Explorer Form Actions Edit View Window Help

Form Builder Template - Widget - Grid

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

**Runtime Builder Selection**

Category: FormBuilder Runtime Builder: ResponsiveForm

[ Scope Type: User / Scope Name: D1S9RE\_01 ]

**OK** **Cancel**

1

1. CLICK OK



SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	110,000.00
The Boeing Company	100,000.00
Northern Lights Cycles	0.00
D3S11RE_37	100,000.00
Oakland Builders	0.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Properties

Enter a name for this form: 1

ShipmentsByMonth 2

ShipmentsByMonth 3

Select A Form Type

Widget  
Non-Data  
FullForm

Caption:

ADD SAVE

Next Help

1. ENTER {Username}\_Shipments (ex. D1S9RE\_01\_Shipments)
2. CLICK the drop-down button
3. SELECT ShipmentsByMonth

SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder

## Responsive Form Builder

Form Properties

Enter a name for this form: D1S9RE\_01\_Shipments

Select an IDO to use with this form: ShipmentsByMonth

Select A Form Type

1. Widget: Widget sized form that allows for up to 2 fields

2. Non-Data: Templates that are strictly layout based

3. FullForm: Full form, build from scratch layout

Widget layout diagram:

```

    graph TD
        subgraph WidgetLayout [Widget Layout]
            direction LR
            C1[Caption] --- F1[Field]
            C2[Caption] --- F2[Field]
            C3[Caption] --- F3[Field]
            C4[Caption] --- F4[Field]
            C5[Caption] --- F5[Field]
            ADD[ADD] --- SAVE[SAVE]
        end
    
```

Next Help

1. SELECT Widget
2. CLICK Next

infor



SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder

## Responsive Form Builder

### Form Properties / Layout

Select a Layout

- Graph  
Graph data using FusionCharts **1**
- List v2  
Widget form with a tiled list
- List with Icons  
Widget form with a tiled list and icons
- List  
Widget form with a tiled list
- ListWithIcons  
List data vertically in a list along with the image aligned on tile
- Grid  
Widget form with basic grid navigation

Back Next Help **2**

1. SELECT Graph
2. CLICK Next

SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder Mongoose Form Builder Form Properties / Layout / Field Selection Select up to 2 Properties to include in your form Available Selected (0)

Month → ↑ ↓

1 2

Back Next Help

1. SCROLL and SELECT “Month”
2. CLICK the ‘->’ to add name to the Selected box

SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder Mongoose Form Builder Form Properties / Layout / Field Selection

Select up to 2 Properties to include in your form

Available Selected (1)

Shipment 1 → 2

Back Next Help

1. SCROLL and SELECT "Shipments"
2. CLICK the '→' to add Shipments to the Selected box

SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder Mongoose Form Builder Form Properties / Layout / Field Selection

Select up to 2 Properties to include in your form

Available: CreateDate, CreatedBy, InWorkflow, NoteExistsFlag, RecordDate, RowPointer, UpdatedBy, \_ItemId, \_ItemWarnings

Selected (2): Month, Shipments

Back Next Help

1

1. CLICK Next



SyteLine OS USER\_TEST

Mongoose Health Service

Form Builder Template - Widget - Grid

Name Credit Limit

Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00
D3S11RE_04	0.00
Washington Publishing	10,000.00
D3S11RE_52	0.00
D1S11RF_22	0.00
The Boeing Company	110,000.00
Northern Lights Cycles	100,000.00
D3S11RE_37	0.00
Oakland Builders	100,000.00
Travel Time Bicycles	0.00
D1S11RF_32	0.00
Good Samaritan Hospital	100,000.00
Birmingham Dudley Road NHS Trust	1,000,000.00
D1S11RF_47	0.00
Lake House Cycles	220,000.00
D3S11RE_46	0.00
Kids Toys R Us	1,000,000.00
D1S11RF_33	0.00
Control Bicycles, Inc.	1,000,000.00
D3S11RE_23	0.00
D1S11RF_16	0.00
D3S11RE_52	0.00
Thales	500,000.00
D3S11RE_39	0.00
Electro-Motion	100,000.00

Form Builder

## Mongoose Form Builder

Form Properties / Layout / Field Selection / Review

Review Your Selections

Form Type: Widget

Properties:

- Month
- Shipments

Layout Type: Graph

1

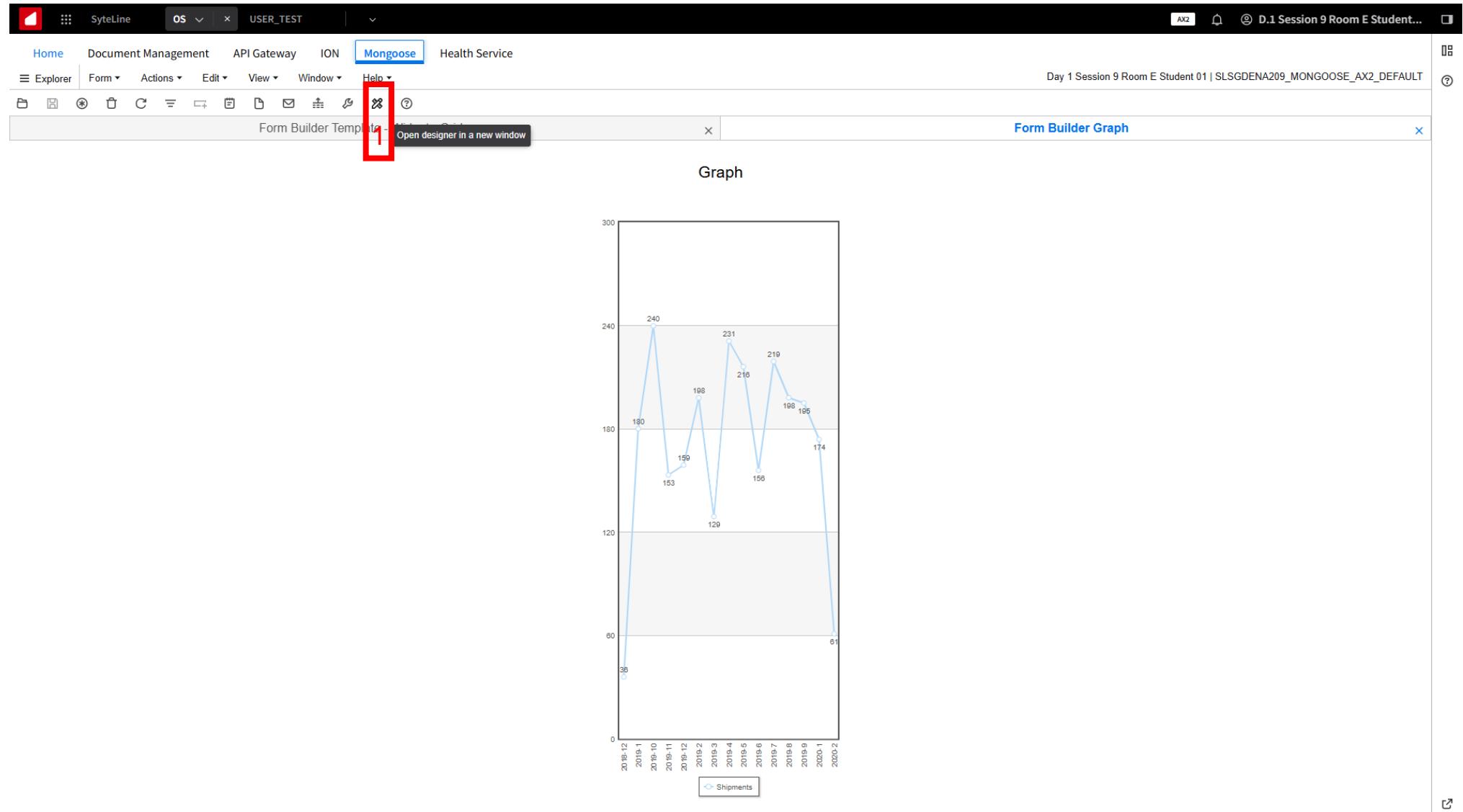
Finish

Back Position Fields Help

Finish with Auto Created Form

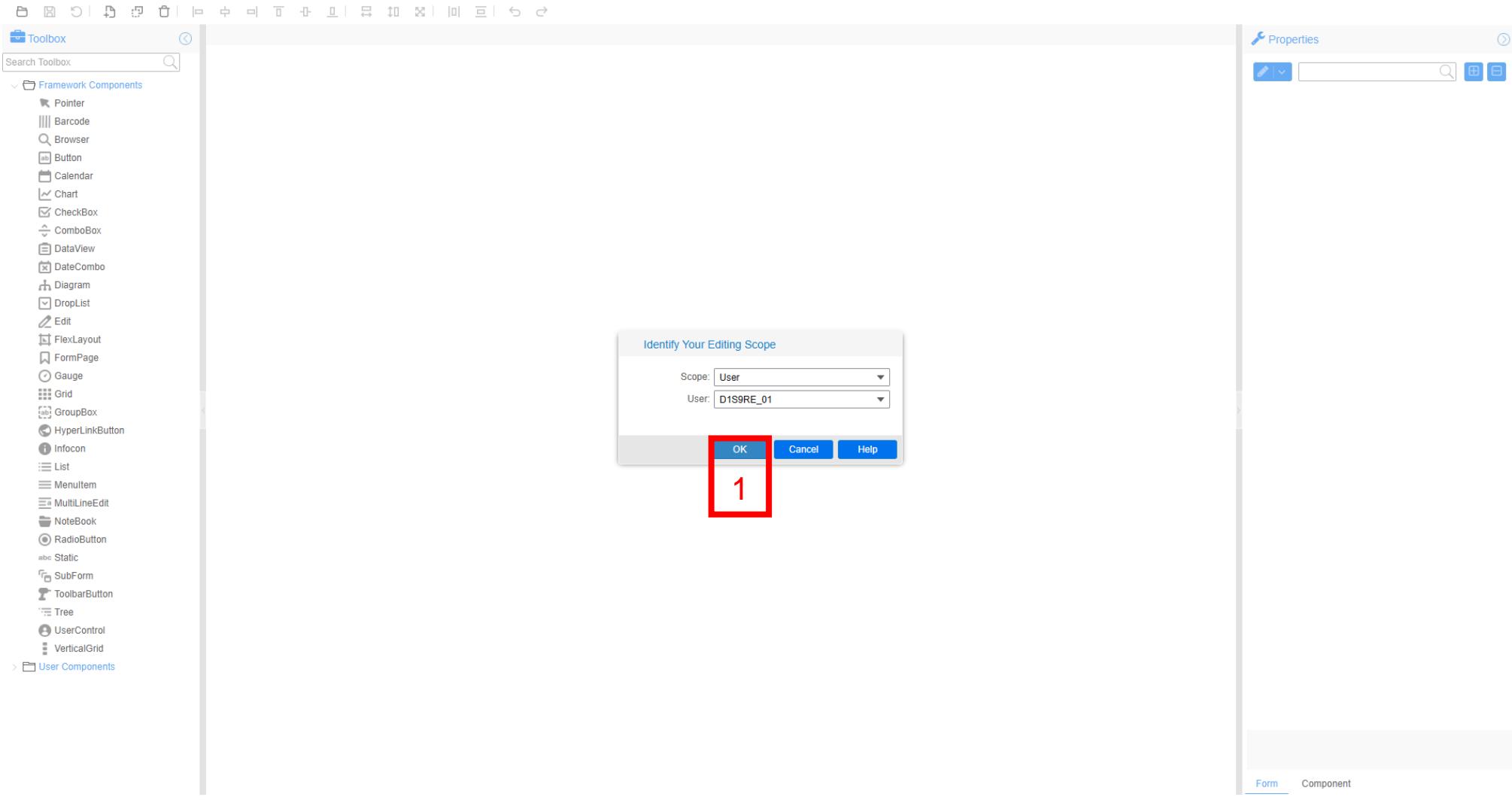
1. CLICK Finish





1. CLICK the Designer button





1. CLICK OK



D1S9RE\_01\_Shipments

Properties

Design	
Name	D1S9RE_01_Shipments
Description	1 D1S9RE_01_Shipments
Caption	2 D1S9RE_01_Shipments
Version	User version for user D1S...
Base Form Name	WSFormBuilderGraphTem...
Replace Base Form	False
Device Type	Default
Form Type	Normal
Is Master	True
Appearance	
Behavior	
Help	
Layout	

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. ENTER '{UserName}\_Shipments' in the Description Design property
2. ENTER '{UserName}\_Shipments' in the Caption Design property



The screenshot shows the WSFormBuilder interface. The main window title is "D1S9RE\_01\_Shipments". On the left, the "Toolbox" contains sections for "Framework Components" and "User Components", with many items like Pointer, Barcode, and Chart listed. The central workspace has a "Graph" component placed on a grid. On the right, the "Properties" panel is open, showing general form settings like Name, Description, and Version, followed by sections for Appearance, Behavior, Help, and Layout. The "Layout" section is expanded, and the "Size" section is also expanded, showing the "Height" field highlighted with a red box and the value "17" being edited. The status bar at the bottom indicates the language is "en-US" and it is "powered by infor".

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

1. EXPAND the Layout section in the Properties panel
2. EXPAND the Size and UPDATE Height to '17'



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Replace ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDown
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Shipments

Graph 1

Properties

staticImage

Name	staticImage
Description	
Caption	Graph
Type	Static
From Base Form	2 True
From Device Master	True
Behavior	3 False
Data Source	
Events	
Help	
Inheritance	
Layout	
Miscellaneous	

From Base Form

From Base Form

Form Component

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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- 1. CLICK Graph static field**
- 2. SELECT “From Base Form” drop-down**
- 3. CLICK False**





Search Toolbox

- Framework Components
  - Pointer
  - Barcode
  - Browser
  - Button
  - Calendar
  - Chart
  - CheckBox
  - ComboBox
  - DataView
  - DateCombo
  - Diagram
  - DropDown
  - Edit
  - FlexLayout
  - FormPage
  - Gauge
  - Grid
  - GroupBox
  - HyperLinkButton
  - Infocon
  - List
  - MenuItem
  - MultiLineEdit
  - NoteBook
  - RadioButton
  - Static
  - SubForm
  - ToolbarButton
  - Tree
  - UserControl
  - VerticalGrid
- User Components

## D1S9RE\_01\_Shipments

Shipments By Month

Properties	
staticImage	<input type="text"/>
Name	staticImage
Description	
Caption	1 Shipments By Month
Type	Static
From Base Form	False
From Device Master	True
Appearance	
Behavior	
Data Source	
Events	
Help	
Inheritance	
Layout	
Miscellaneous	

Caption  
Caption

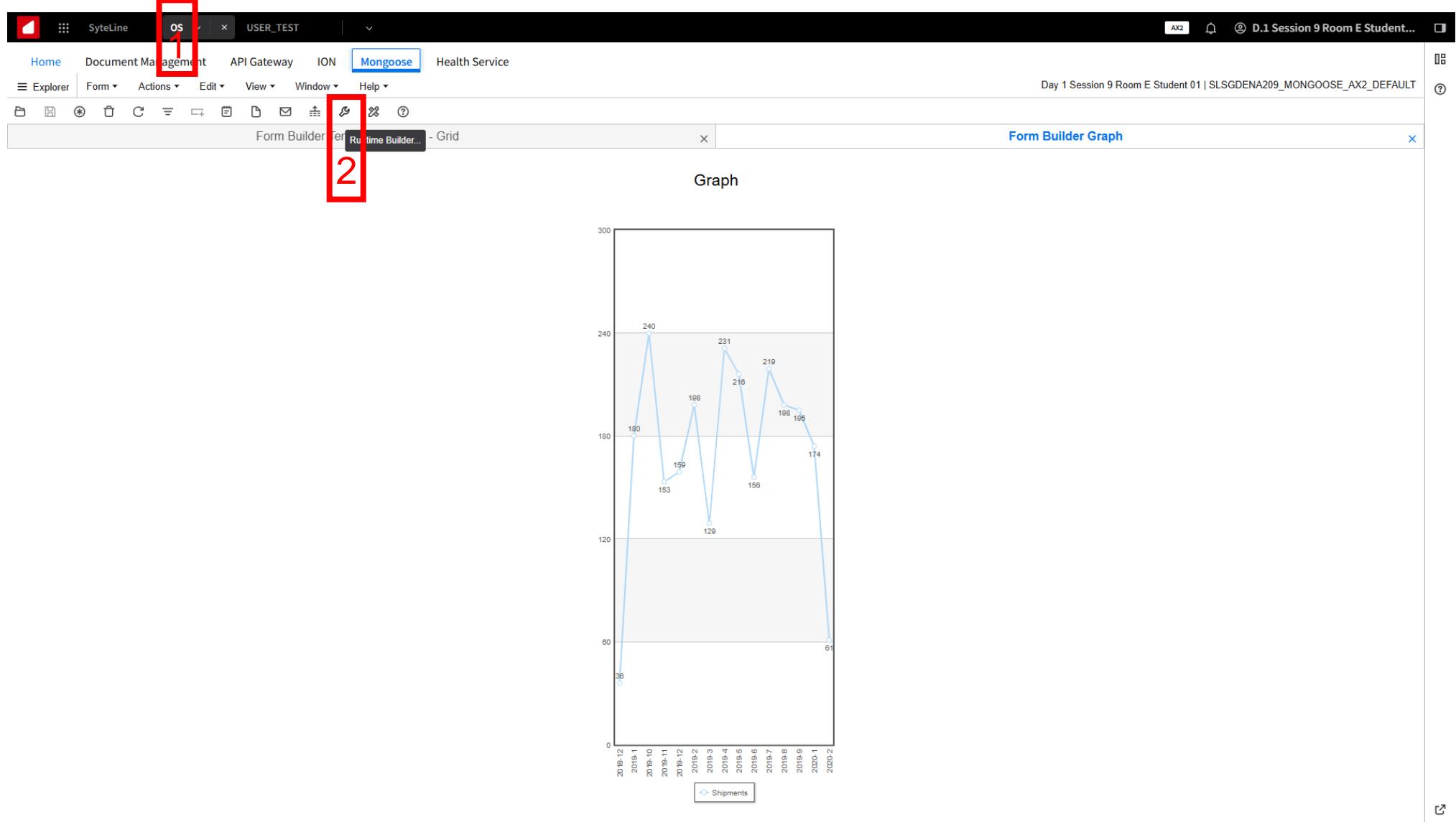
Form Component

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[ ScopeType: User / ScopeName: D1S9RE\_01 ]

1. ENTER 'Shipments By Month' press Tab
2. CLICK Save button





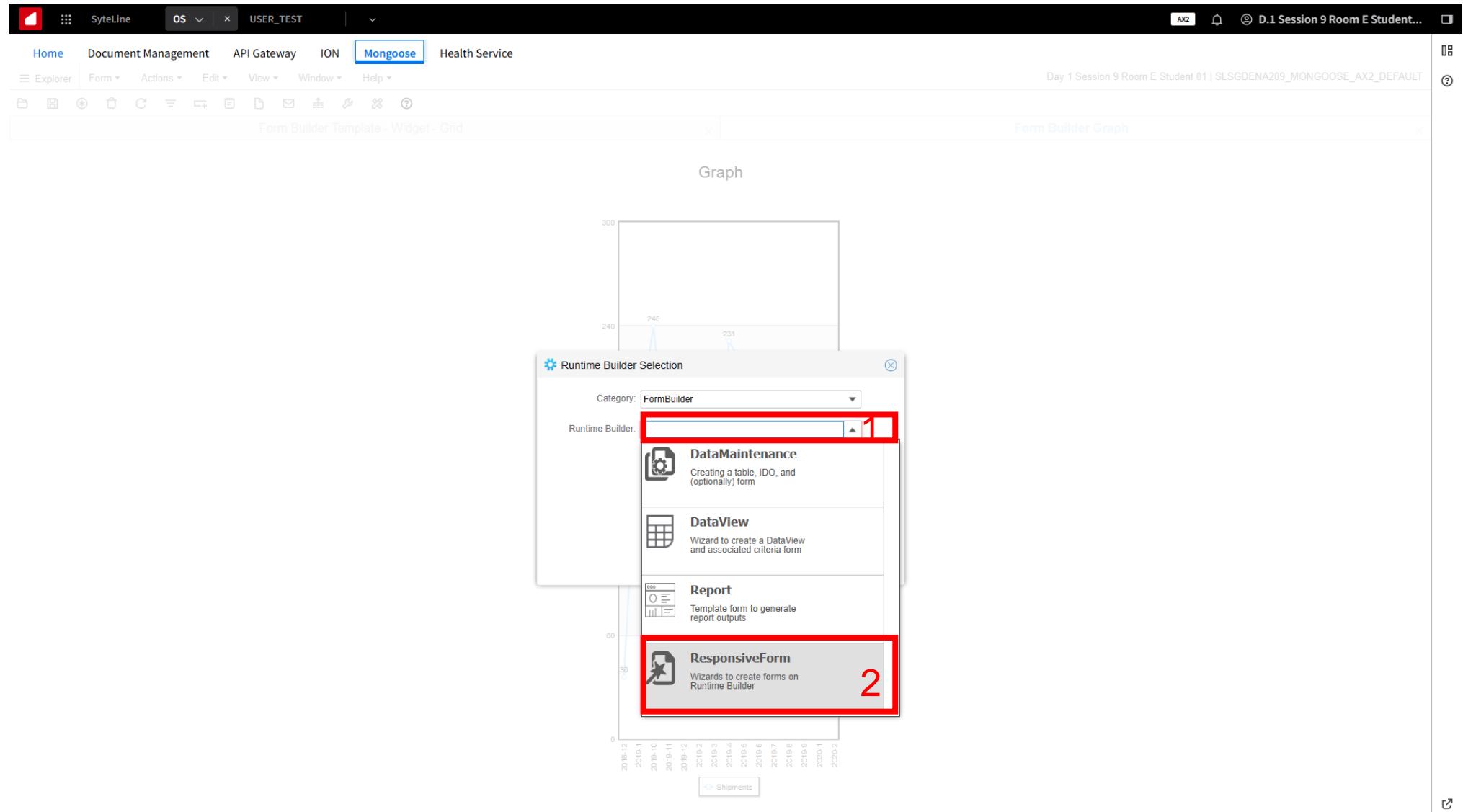
1. Go to OS
2. CLICK the Runtime Builder button



The screenshot shows the SyteLine Mongoose interface. At the top, there's a navigation bar with tabs: Home, Document Management, API Gateway, ION, **Mongoose**, and Health Service. Below the navigation bar is a toolbar with icons for Explorer, Form, Actions, Edit, View, Window, and Help. The main area has two tabs: "Form Builder Template - Widget - Grid" and "Form Builder Graph". A "Graph" chart is visible in the background. In the center, a modal dialog titled "Runtime Builder Selection" is open. It has a "Category" dropdown menu with the number "1" next to it. Below the dropdown is a "Runtime Builder:" section. Inside the "Runtime Builder:" section, there are three items: "ExtDatasource" (highlighted with a red border), "FormBuilder" (highlighted with a red border and labeled with the number "2"), and "REST". The "FormBuilder" item is described as "Wizards to create forms on Runtime Builder". At the bottom of the dialog, there's a "Shipments" button. The entire "Runtime Builder Selection" dialog is highlighted with a red border.

1. **CLICK** the Category drop-down button
2. **SELECT** FormBuilder





1. CLICK the RunTime Builder drop-down button
2. SELECT ResponsiveForm

infor

35<sup>TM</sup>  
SUN

SyteLine OS USER\_TEST

Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions View Window Help

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Runtime Builder Selection

Category: FormBuilder

Runtime Builder: ResponsiveForm

[ Scope Type: User / Scope Name: D1S9RE\_01 ]

OK Cancel

1

Shipments

47

1. CLICK OK



SyteLine OS USER\_TEST D.1 Session 9 Room E Student... 48

Home Document Management API Gateway ION Mongoose Health Service

Explorer Form Actions Edit View Window Help

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid Form Builder Graph

Graph

**Form Builder**

### Responsive Form Builder

Form Properties

Enter a name for this form: **D1S9RE\_01\_Interactions** 1

Select A Form Type

- Widget: Widget sized form that allows for up to 2 columns
- Non-Data: Templates that are strictly layout based
- FullForm: Full form, build from scratch layout

cs1\* 2

csi\_co\_mst  
csi\_citem\_mst  
csi\_custaddr\_mst  
csi\_custaddr\_mst\_localized  
**csi\_interaction\_mst** 3

Caption: ADD SAVE

Next Help

Shipments

1. ENTER {Username}\_Interactions (ex. D1S9RE\_01\_Interactions)
2. ENTER 'csi\*' then CLICK the drop-down button
3. SELECT csi\_interaction\_mst

SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Form Builder

### Responsive Form Builder

Form Properties

Enter a name for this form: D1S9RE\_01\_Interactions

Select an IDO to use with this form: csi\_interaction\_mst

Select A Form Type

1. Widget  
Widget sized form that allows for up to 2 fields

2. Non-Data  
Templates that are strictly layout based

3. FullForm  
Full form, build from scratch layout

ADD SAVE

Next Help

Shipments

2018-12 2019-1 2019-2 2019-3 2019-4 2019-5 2019-6 2019-7 2019-8 2019-9 2020-1 2020-2

49

1. SELECT Widget
2. CLICK Next

**infor**

The screenshot shows the SyteLine Form Builder interface. At the top, there's a navigation bar with tabs like Home, Document Management, API Gateway, ION, Mongoose (which is selected), and Health Service. Below the navigation bar is a toolbar with various icons for file operations. The main area is titled "D1S9RE\_01\_Shipments" and "Shipments By Month". A modal window titled "Form Builder" is open, specifically the "Form Properties / Layout" section. Inside, it says "Select a Layout" and lists several options: ListWithIcons, Grid, WidgetInput (which is highlighted with a red box and has the number 1 next to it), Grid with Search, Grid with Header, and Grid with Header and Actions. At the bottom of the modal are "Back", "Next" (which is highlighted with a red box and has the number 2 next to it), and "Help" buttons. The background shows a timeline from 2018-12 to 2020-2 with a "Shipments" button.

1. **SELECT** WidgetInput
2. **CLICK** Next

infor



SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 5 Properties to include in your form

Available

Selected (0)

Date 1

2

Back Next Help

Shipments

1. SELECT “Date”  
2. CLICK the ‘->’ to add Date to the Selected box

infor



SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 5 Properties to include in your form

Available

Selected (1)

Customer 1 → Date

Back Next Help

0 2018-12 2019-3 2019-4 2019-5 2019-6 2019-7 2019-8 2019-9 2020-1 2020-2

Shipments

1. SELECT “Customer”
2. CLICK the ‘->’ to add Customer to the Selected box

infor



SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 5 Properties to include in your form

Available

Selected (2)

1

2

Date  
Customer

Back Next Help

Shipments

53

1. SELECT “Type”
2. CLICK the ‘->’ to add Type to the Selected box

infor



SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 5 Properties to include in your form

Available

Selected (3)

Status 1 → 2

Date Customer Type

Back Next Help

0 2018-12 2019-3 2019-4 2019-5 2019-6 2019-7 2019-8 2019-9 2020-1 2020-2

Shipments

The screenshot shows the 'Mongoose Form Builder' window. In the 'Available' list, the 'Status' field is highlighted with a red box and the number '1'. A red box labeled '2' is placed over the right-pointing arrow between the 'Available' and 'Selected' lists. The 'Selected' list contains three items: 'Date', 'Customer', and 'Type'. Below the lists are 'Back', 'Next', and 'Help' buttons. At the bottom, there's a date range selector from '0' to '2020-2' and a 'Shipments' button.

1. SELECT "Status"
2. CLICK the '→' to add Status to the Selected box

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SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

Form Builder

Mongoose Form Builder

Form Properties / Layout / Field Selection

Select up to 5 Properties to include in your form

Available

Selected (4)

Details 1 → 2

Date  
Customer  
Type  
Status

Back Next Help

3

Shippments

55

1. SELECT “Details”
2. CLICK the ‘->’ to add Details to the Selected box
3. CLICK Next

SyteLine OS USER\_TEST

Mongoose Health Service

Day 1 Session 9 Room E Student 01 | SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT

Form Builder Template - Widget - Grid

Form Builder Graph

Graph

**Mongoose Form Builder**

Form Properties / Layout / Field Selection / Review

Review Your Selections

Form Type: Widget

Properties:

- Date
- Customer
- Type
- Status
- Details

Layout Type: WidgetInput

1

Finish

Back Position Fields Help

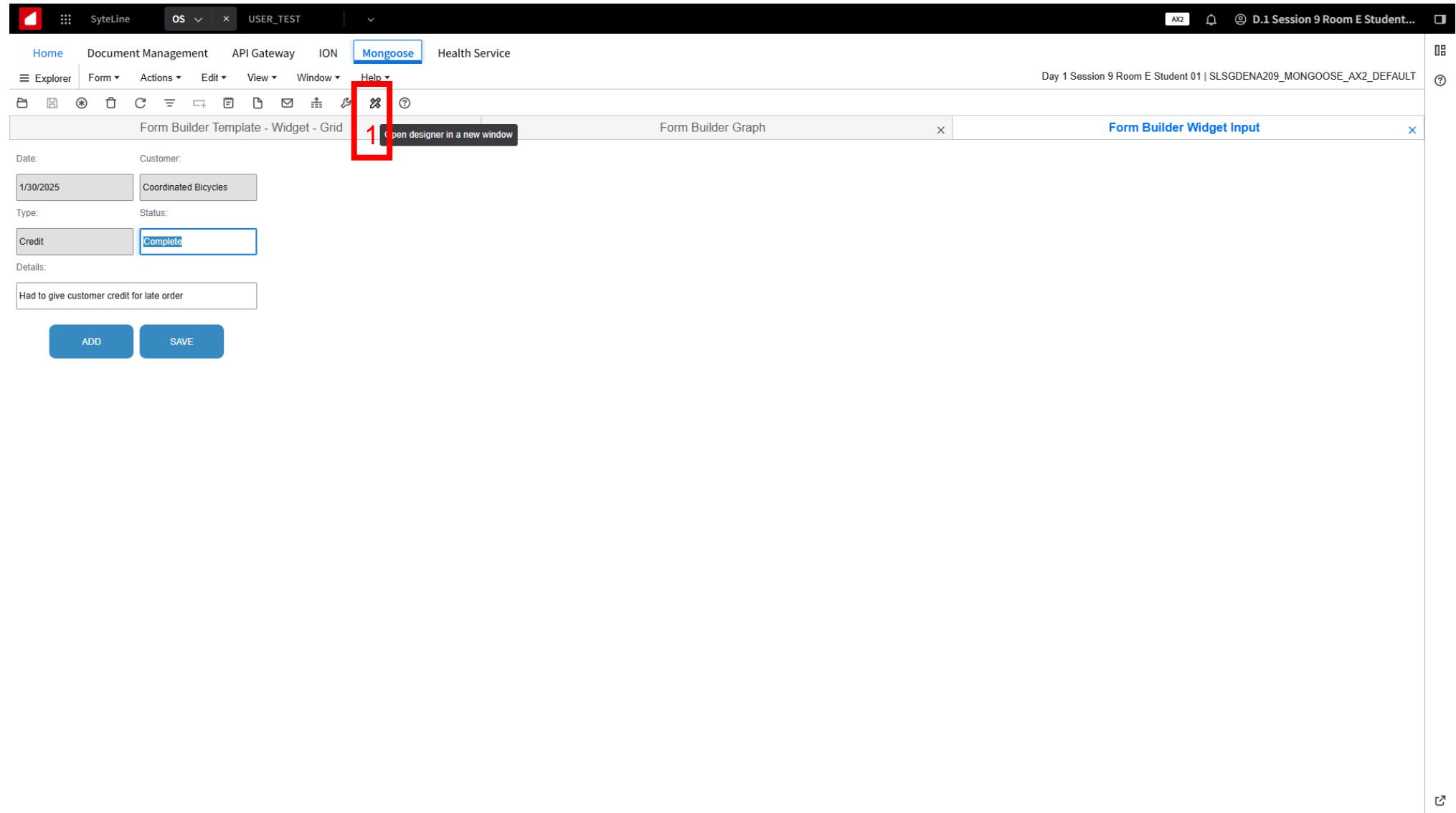
Finish with Auto Created Form

Shipments

A screenshot of the Mongoose Form Builder interface. The main window title is 'Mongoose Form Builder' and the sub-section is 'Review Your Selections'. On the left, there are sections for 'Form Type' (Widget) and 'Layout Type' (WidgetInput). On the right, there is a table titled 'Properties' containing five rows: Date, Customer, Type, Status, and Details. At the bottom of the window, there are several buttons: 'Back', 'Position Fields', 'Help', and a large blue 'Finish' button. A red box with the number '1' is drawn around the 'Finish' button. Below the window, there is a timeline from 2018-12 to 2020-2, and a small 'Shipments' icon.

1. CLICK Finish





The screenshot shows the SyteLine application interface with the following details:

- Header:** SyteLine OS USER\_TEST D.1 Session 9 Room E Student... 57
- Navigation Bar:** Home, Document Management, API Gateway, ION, Mongoose (highlighted in blue), Health Service.
- Sub-Header:** Explorer, Form, Actions, Edit, View, Window, Help.
- Toolbar:** Includes icons for file operations like Open, Save, Print, and a search bar.
- Content Area:**
  - Form Builder Template - Widget - Grid:** This section contains fields for Date (1/30/2025), Customer (Coordinated Bicycles), Type (Credit), and Status (Complete). It also includes a Details text area with the placeholder "Had to give customer credit for late order".
  - Form Builder Graph:** A graph-based interface for form design.
  - Form Builder Widget Input:** A separate window titled "Form Builder Widget Input".
- Bottom Buttons:** ADD and SAVE buttons.

1. CLICK the Designer button



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Print ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDown
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

Name	D1S9RE_01_Interactions
Description	1 D1S9RE_01_Interactions
Caption	2 D1S9RE_01_Interactions
Version	User version for user D1S...
Base Form Name	WSFormBuilderWidgetInp...
Replace Base Form	False
Device Type	Default
Form Type	Normal
Is Master	True
Appearance	
Behavior	
Help	
Layout	
Splitter	None
Pane 0 Scroll Bars	As Needed
Pane 1 Scroll Bars	As Needed
Form Pages	
Unit	Char
Size	
Width	42.25
Height	17
Synchronize FlexLayout a...	

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. ENTER '{UserName}\_Interactions' in the Description Design property
2. ENTER '{UserName}\_Interactions' in the Caption Design property



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Print ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

editDate Customer

1

Type Status

Details

ADD SAVE

Properties

editDate

Name editDate

Description

Caption

Type DateCombo

From Base Form Barcode

From Device Master BrowserControl

Appearance Calendar

Behavior CancelPushButton

Data Source Chart

Events CheckBox

Help ComboBox

Inheritance DataView

Layout DateCombo

Miscellaneous DefPushButton

Diagram

DropList

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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- 1. CLICK on edit field for Type**
- 2. SELECT Type drop-down in the Properties Panel**
- 3. SELECT DateCombo**



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Print ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

editCustomer

Design

Name	editCustomer
Description	
Caption	
Type	2 DropDownList
From Base Form	DateCombo
From Device Master	DefPushButton
Appearance	Diagram
Behavior	3 DropDownList
Data Source	Edit
Events	FlexLayout
Help	FormPage
Inheritance	Gauge
Layout	Graph
Miscellaneous	Grid
	GridColumn
	GroupBox

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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- 1.** CLICK on the edit field for Customer
- 2.** SELECT Type drop-down in the Properties panel
- 3.** SELECT DropDownList



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Replace ▾ Undo ▾ Redo ▾ Print ▾

**Toolbox**

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

editCustomer

Design

Name	editCustomer
Description	
Caption	
Type	DropDownList
From Base Form	False
From Device Master	True

Appearance

Events

Help

Inheritance

Layout

Miscellaneous

Data Source

Binding Type

Binding

Required

To Be Determined

Upper or Lower Case

Value Is List Index

Default Value

Data Type

List Source

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Open Edit Property Dialog

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. EXPAND Data Source
2. CLICK '...' for List Source



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Undo ▾ Redo ▾ Cut ▾ Copy ▾ Paste ▾ Find ▾ Replace ▾ Align ▾ Scale ▾ Rotate ▾

To exit full screen, press and hold Esc

D1S9RE\_01\_Interactions

Customer

Date: Type: Status: Details: ADD SAVE

Properties

editCustomer

Design

- Name: editCustomer
- Description:
- Caption:
- Type: DropDownList
- From Base Form: False
- From Device Master: True

Appearance

Behavior

Data Source

Binding Type	Property
Binding	object Customer
Required	False
To Be Determined	False
Upper or Lower Case	Mixed
Value Is List Index	False
Default Value	
Data Type	
List Source	
Validation	
Formatting	
Events	
Help	
Inheritance	
Layout	
Miscellaneous	

Edit List Source Specifications

Type: DO Collection 1

IDO: csi\_custaddr\_mst\_Localize 2

Properties: csi\_custaddr\_mst

Columns to Display: csi\_custaddr\_mst\_Localized 2

Filter etc.: [ ]

Columns to Display dropdown list:

- csi\_custaddr\_mst\_Localized 2
- csi\_interaction\_mst
- CSPMongooseColorPalette
- CSPMongooseThemeAttributes
- CSPNamespaces
- CSPTags
- CustomCols
- DatabaseSchemaReport
- DataLakeEventStates
- DataLakeLogs
- DefaultTypes

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. SELECT “IDO Collection” from the Type drop-down
2. SELECT “csi\_custaddr\_mst\_Localized” from IDO drop-down



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

**Toolbox**

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Edit List Source Specifications

Type: IDO Collection

IDO: csi\_custaddr\_mst\_Localize

Properties: name

Filter etc.: cust\_seq='0' AND site\_ref ='DA'

Rec Cap Override: 0

Columns to Display: 1 2

OK Cancel Help

Properties

editCustomer

Design

Name: editCustomer

Description

Caption

Type: DropDownList

From Base Form: False

From Device Master: True

Appearance

Behavior

Data Source

Binding Type: Property

Binding: object Customer

Required: False

To Be Determined: False

Upper or Lower Case: Mixed

Value Is List Index: False

Default Value

Data Type

List Source: STDOLE csi\_custaddr\_ms...

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. ENTER 'name' in Properties field
2. ENTER '1' in Columns to Display
3. ENTER `cust_seq='0' AND site_ref ='DA'` in Filter field
4. CLICK OK

Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Print ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDown**
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

editType

Name: editType

Description:

Caption:

Type: **2 DropDownList**

From Base Form: Chart

From Device Master: CheckBox

Appearance

Behavior

Data Source

Binding Type

Binding:

Required: **3 DropDownList**

To Be Determined

Upper or Lower Case

Value Is List Index

Default Value

Data Type

List Source

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. CLICK on the edit field for Type
2. SELECT Type drop-down in the Properties panel
3. SELECT DropDownList

Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Replace ▾ Undo ▾ Redo ▾

**Toolbox**

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

[No Title]

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

**Properties**

editType

Name	editType
Description	
Caption	
Type	DropList
From Base Form	False
From Device Master	True
Appearance	
Behavior	
Data Source	
Binding Type	Property
Binding	object.Type
Required	False
To Be Determined	False
Upper or Lower Case	Mixed
Value Is List Index	False
Default Value	
Data Type	
List Source	
Validation	
Formatting	
Events	
Help	
Inheritance	
Layout	
Miscellaneous	

1

Open  
Edit  
Property  
Dialog



1. EXPAND Data Source
2. CLICK '...' for List Source

Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

**Toolbox**

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataGridView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

editType

Name: editType

Description

Caption

Type: DropDownList

From Base Form: False

From Device Master: True

Appearance

Behavior

Data Source

Binding Type: Property

Binding: object.Type

Required: False

To Be Determined: False

Upper or Lower Case: Mixed

Value Is List Index: False

Default Value

Data Type

List Source

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Edit List Source Specifications

Type: IDO Collection

IDO: Interaction\_types

Properties:

Columns to Display:

Filter etc.:

InboundBODPriorities

Interaction\_types

IntranetSharedTables

IntranetSharedUserTables

IONAPIMethods

IONAPIServers

IONAPISuites

IONMessagingErrors

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. SELECT “IDO Collection” from the Type drop-down
2. SELECT “interaction\_types” from IDO drop-down



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

Toolbox

Search Toolbox

D1S9RE\_01\_Interactions

Properties

editType

Name: editType

Description:

Caption:

Type: DropDownList

From Base Form: False

From Device Master: True

Appearance:

Behavior:

Data Source

Binding Type: Property

Binding: object.Type

Required: False

To Be Determined: False

Upper or Lower Case: Mixed

Value Is List Index: False

Default Value:

Data Type:

List Source:

Validation:

Formatting:

Events:

Help:

Inheritance:

Layout:

Miscellaneous:

**Form Details**

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

en-US | powered by Infor

**Edit List Source Specifications**

Type: IDO Collection

IDO: Interaction\_types

Properties: Type

Filter etc.:

Rec Cap Override:

Columns to Display: 1 2

OK Cancel Help

1 2 3

1. ENTER 'Type' in Properties field
2. ENTER '1' in Columns to Display
3. CLICK OK



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Find ▾ Print ▾ Zoom ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

editStatus

Design

Name: editStatus

Description:

Caption:

Type: **2 DropDownList**

From Base Form: DateCombo

From Device Master: DefPushButton

Appearance

Behavior

3 DropDownList

Data Source

Binding Type: Edit

Binding: FlexLayout

Required: FormPage

To Be Determined: Gauge

Upper or Lower Case: Graph

Value Is List Index: Grid

Default Value: GridColumn

Data Type

List Source: GroupBox

Validation:

Formatting:

Events:

Help:

Inheritance:

Layout:

Miscellaneous:

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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- 1.** CLICK on the edit field for Status
- 2.** SELECT Type drop-down in the Properties panel
- 3.** SELECT DropDownList

The screenshot shows the Infor Form Designer interface. The main area displays a form titled "D1S9RE\_01\_Interactions". The form layout includes fields for "date", "Customer", "type", "status", and "Details", followed by "ADD" and "SAVE" buttons at the bottom. On the left, the "Toolbox" is open, showing various components like Pointer, Barcode, Browser, Button, Calendar, Chart, CheckBox, ComboBox, DataView, DateCombo, Diagram, DropDownList, Edit, FlexLayout, FormPage, Gauge, Grid, GroupBox, HyperLinkButton, Infocion, List, MenuItem, MultiLineEdit, NoteBook, RadioButton, Static, SubForm, ToolbarButton, Tree, UserControl, and VerticalGrid. The "Properties" panel on the right is focused on a component named "editStatus". A red box highlights the "List Source" section under the "Data Source" category. A context menu is open over this section, with the "1" option highlighted. The menu options are Open, Edit, Property Dialog.

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. EXPAND Data Source
2. CLICK '...' for List Source



Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

**Toolbox**

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- Infocon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

editStatus

Properties

Name	editStatus
Description	
Caption	
Type	DropDown
From Base Form	False
From Device Master	True
> Appearance	
> Behavior	
> Data Source	
Binding Type	Property
Binding	object.Status
Required	False
To Be Determined	False
Upper or Lower Case	Mixed
Value Is List Index	False
Default Value	
> Data Type	
List Source	
> Validation	
> Formatting	
> Events	
> Help	
> Inheritance	
> Layout	
> Miscellaneous	

Edit List Source Specifications

Type: **Inline** 1

Entries: **...** 2

Column For Value:

Columns to Display:

OK Cancel Help

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. SELECT 'Inline' from the drop-down for the Type field
2. SELECT '...' for Entries field

Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

editStatus

Name: editStatus

Description:

Caption:

Type: DropDownList

From Base Form: False

From Device Master: True

Appearance

Behavior

Data Source

Binding Type: Property

Binding: object.Status

Required: False

To Be Determined: False

Upper or Lower Case: Mixed

Value Is List Index: False

Default Value:

Data Type

List Source:

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Edit Inline List Entries

Column 1

1	Active	1	New Row	2
2	Complete	3	Delete Row	

New Column

sDeleteColumn

OK

Cancel

Help

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

en-US | powered by Infor

1. ENTER 'Active' in line 1
2. CLICK New Row button
3. ENTER 'Complete' in line 2
4. CLICK OK

Form ▾ Edit ▾ View ▾ Help ▾

File ▾ Copy ▾ Paste ▾ Delete ▾ Find ▾ Zoom ▾ Print ▾

Toolbox

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataGridView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

editStatus

Name: editStatus

Description:

Caption:

Type: DropDownList

From Base Form: False

From Device Master: True

Appearance

Behavior

Data Source

Binding Type: Property

Binding: object.Status

Required: False

To Be Determined: False

Upper or Lower Case: Mixed

Value Is List Index: False

Default Value:

Data Type

List Source:

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

Edit List Source Specifications

Type: Inline

Entries: Active,Complete

Column For Value: 1

Columns to Display: 1

OK

Cancel

Help

3

Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. ENTER '1' in Column For Value
2. ENTER '1' in Columns to Display
3. CLICK OK

Form ▾ Edit ▾ View ▾ Help ▾

1

Search Toolbox

Framework Components

- Pointer
- Barcode
- Browser
- Button
- Calendar
- Chart
- CheckBox
- ComboBox
- DataView
- DateCombo
- Diagram
- DropDownList
- Edit
- FlexLayout
- FormPage
- Gauge
- Grid
- GroupBox
- HyperLinkButton
- InfoIcon
- List
- MenuItem
- MultiLineEdit
- NoteBook
- RadioButton
- Static
- SubForm
- ToolbarButton
- Tree
- UserControl
- VerticalGrid

User Components

D1S9RE\_01\_Interactions

Properties

editStatus

Design

Name	editStatus
Description	
Caption	
Type	DropDownList
From Base Form	False
From Device Master	True

Appearance

Behavior

Data Source

Binding Type	Property
Binding	object.Status
Required	False
To Be Determined	False
Upper or Lower Case	Mixed
Value Is List Index	False
Default Value	

Data Type

List Source

Validation

Formatting

Events

Help

Inheritance

Layout

Miscellaneous

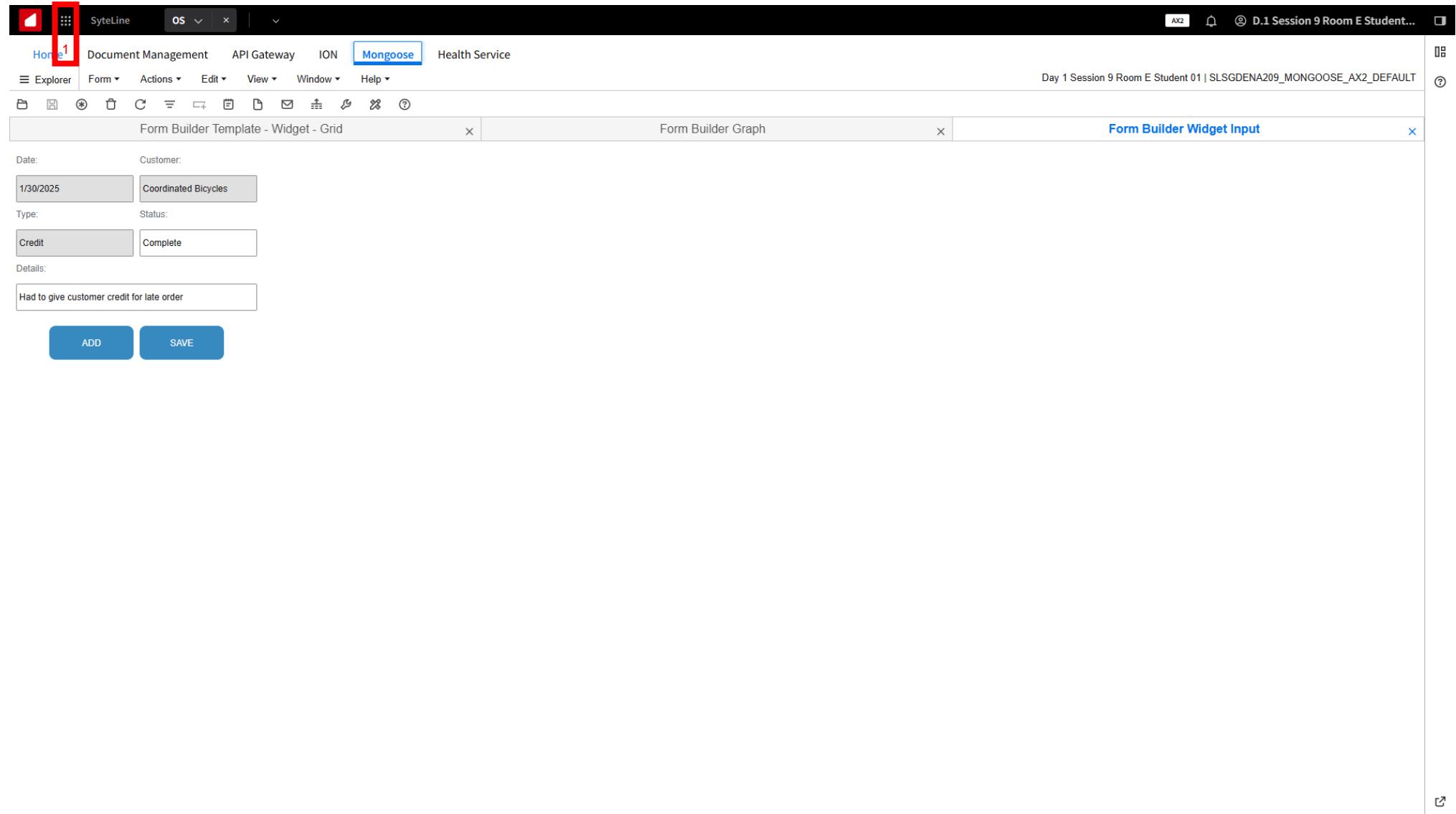
Form Details

[ ScopeType: User / ScopeName: D1S9RE\_01 ]

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1. CLICK Save
2. Go back to the portal





The screenshot shows the SyteLine application interface. At the top left, there is a navigation menu with several items: Home (highlighted with a red box), Document Management, API Gateway, ION, Mongoose (selected tab), and Health Service. Below the menu, there are tabs for Explorer, Form, Actions, Edit, View, Window, and Help. The main content area displays three windows: 'Form Builder Template - Widget - Grid', 'Form Builder Graph', and 'Form Builder Widget Input'. The 'Form Builder Widget Input' window is active and contains fields for Date (1/30/2025), Customer (Coordinated Bicycles), Type (Credit), Status (Complete), and Details (Had to give customer credit for late order). At the bottom of this window are two buttons: 'ADD' and 'SAVE'. The status bar at the bottom right indicates 'Day 1 Session 9 Room E Student 01 | SLGDENA209\_MONGOOSE\_AX2\_DEFAULT'. A red circle in the top right corner contains the number '74'.

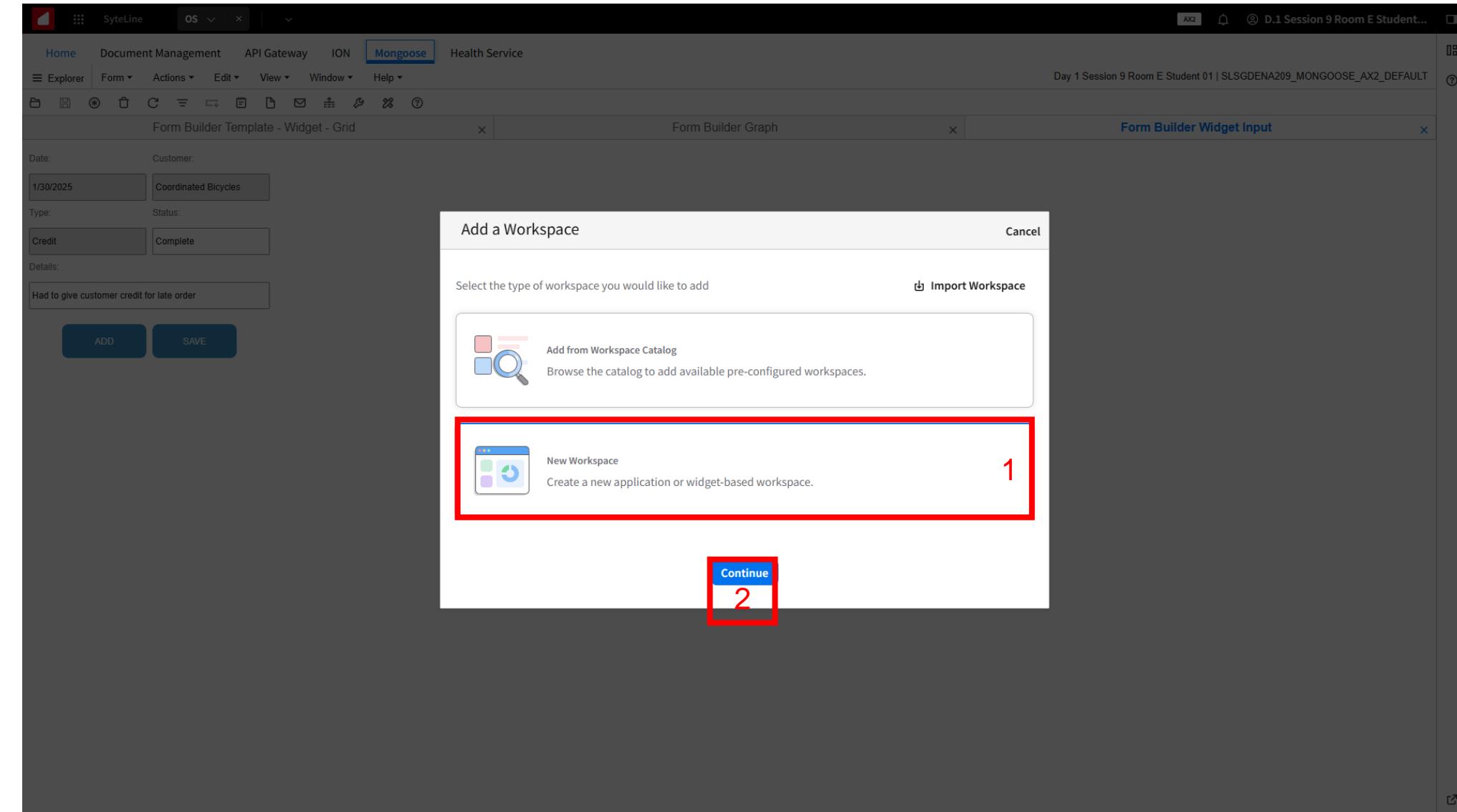
1. CLICK on the Navigation Menu in the top left



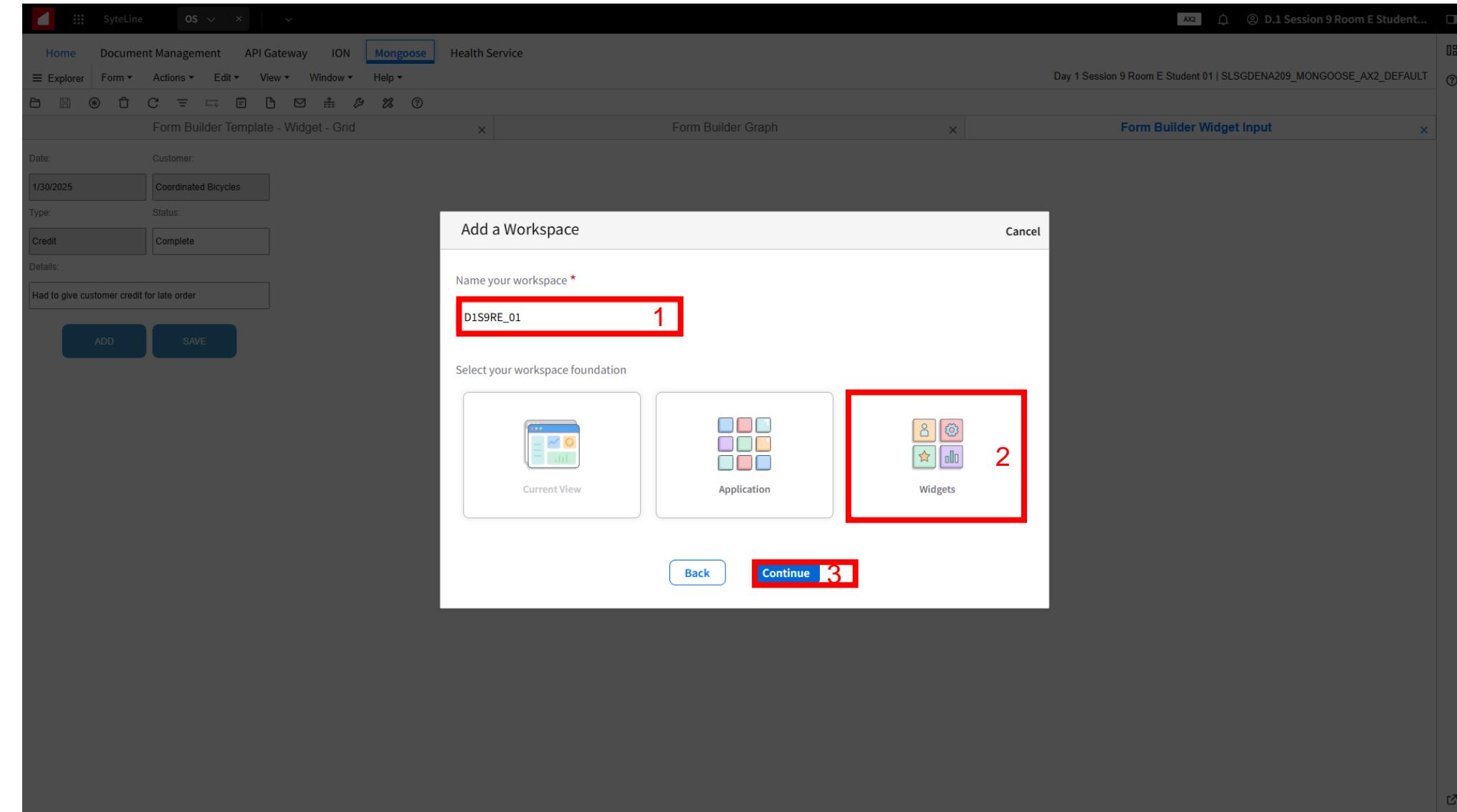
The screenshot shows the SyteLine application interface. The top navigation bar includes icons for SyteLine, OS, and Help, along with session information (D.1 Session 9 Room E Student...) and a red circular badge with the number 75. The main menu has tabs for Mongoose and Health Service, with Mongoose selected. A search bar at the top left says "Search this menu". The left sidebar contains sections for Workspaces, Bookmarks, and Applications. The Workspaces section is expanded, showing three items: "Project Manager Home", "Quality Control Homepage", and another "Project Manager Homepage". Below this is a "See more" link and a button labeled "+ Add a Workspace" with a red box and the number 1. The Bookmarks section shows a placeholder icon and the message "No Bookmarks yet". The Applications section lists "os", "Document Management", and "SyteLine", with a "See more" link. At the bottom of the sidebar are "Recently closed" and "Open" sections. The main workspace area displays three tabs: "Widget - Grid", "Form Builder Graph", and "Form Builder Widget Input", with the last one being the active tab.

1. CLICK “Add a Workspace” under Workspaces section

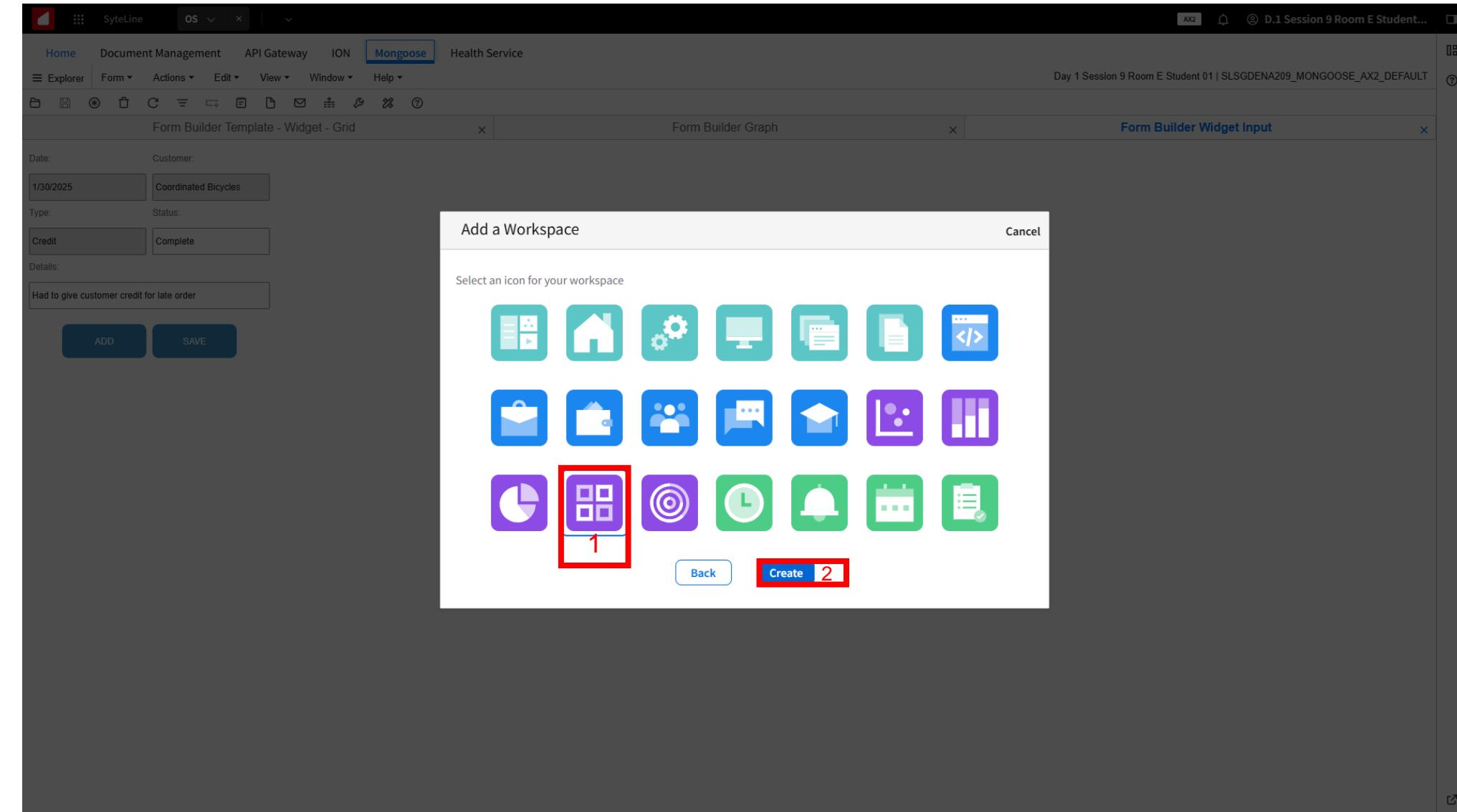




1. **SELECT** New Workspace
2. **CLICK** Continue



1. ENTER your username as the workspace name
2. CLICK on Widgets
3. CLICK Continue

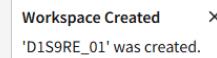


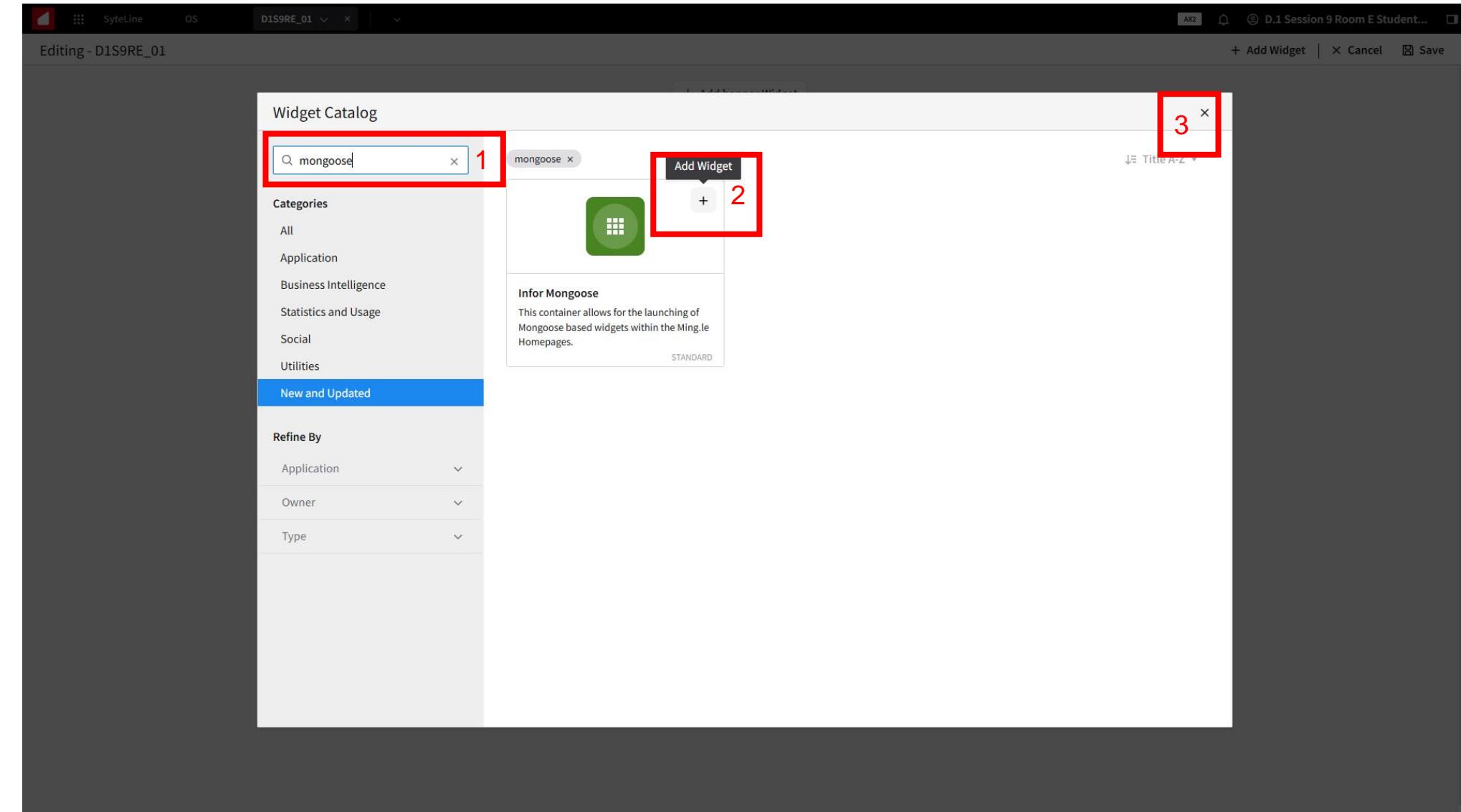
1. SELECT an Icon

Editing - D1S9RE\_01

+ Add Widget | X Cancel |  Save + Add banner Widget

Add a widget from the catalog to start building your Workspace.

 + Add Widget 1 Workspace Created X  
'D1S9RE\_01' was created.**1. CLICK + Add Widget**



1. ENTER 'mongoose' in search field
2. CLICK "+" 3 times to add the Infor Mongoose widget to your workspace
3. CLICK X to close the widget catalog

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35<sup>TM</sup>  
SUN  
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SyteLine OS D1S9RE\_01 D.1 Session 9 Room E Student... 81

Editing - D1S9RE\_01 + Add Widget | X Cancel Save 1

+ Add banner Widget

Infor Mongoose Infor Mongoose Infor Mongoose

Widget Settings Widget Settings Widget Settings

① ① ①

+

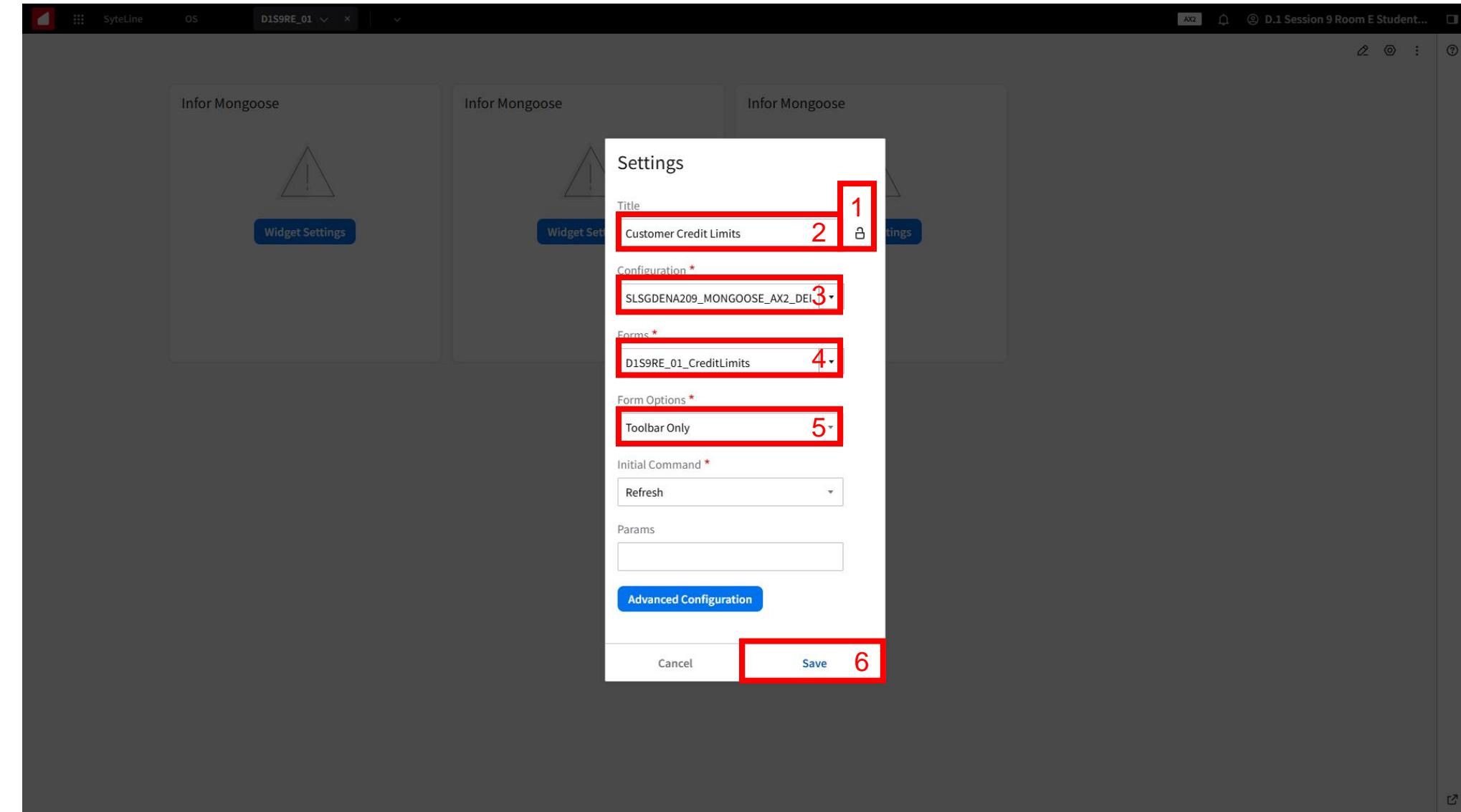
1. CLICK Save



The screenshot displays a user interface with three identical 'Infor Mongoose' components. Each component features a warning icon (an exclamation mark inside a triangle) and a 'Widget Settings' button. The first component's 'Widget Settings' button is highlighted with a red border and a white background, with a red '1' indicating a notification. The other two components have standard blue 'Widget Settings' buttons. The top right corner of the screen shows a red circular badge with the number '82'.

1. CLICK Widget Settings button for the first widget





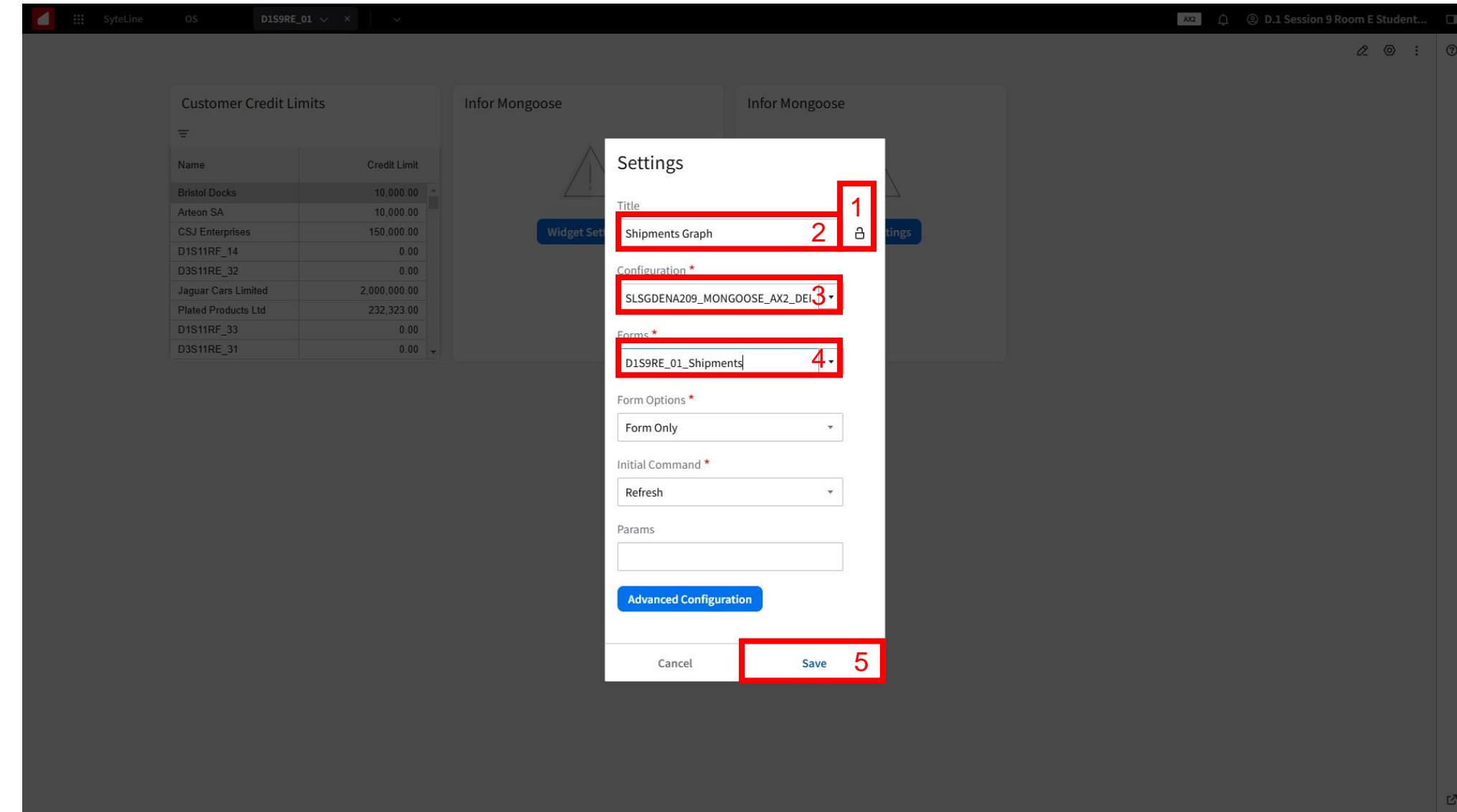
1. CLICK Unlock button for the Title field
2. ENTER Customer Credit Limits for the Title
3. ENTER/COPY SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT for Configuration field
4. ENTER {Username}\_CreditLimits for Forms field
5. SELECT Toolbar Only for Form Options
6. CLICK Save

The screenshot shows a SyteLine interface with the following components:

- Customer Credit Limits**: A table view showing credit limits for various customers. The first row, "Bristol Docks", is selected.
- Infor Mongoose**: Two identical widgets displaying a triangle icon and a "Widget Settings" button with a red badge containing the number "1".

1. CLICK Widget Settings button for the first widget





1. CLICK Unlock button for the Title field
2. ENTER Shipments Graph for the Title
3. ENTER/COPY SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT for Configuration field
4. ENTER {Username}\_Shipments for Forms field
5. CLICK Save

SyteLine OS D1S9RE\_01 X AX21 D.1 Session 9 Room E Student... ☐ ⌂ ⌂ ⌂ ⌂

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**Customer Credit Limits**

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00

**Shipments Graph**

**Shipments By Month**

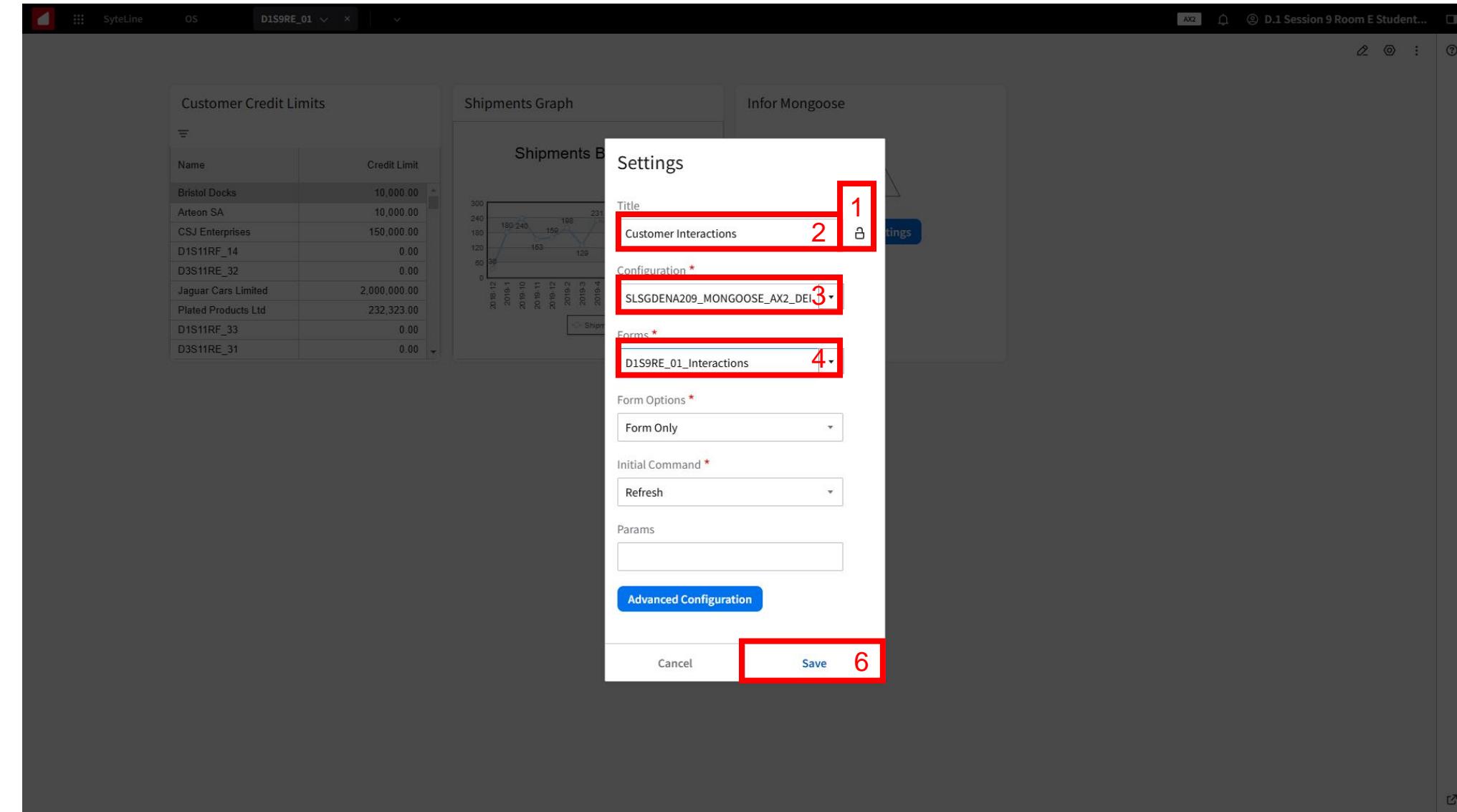
Shipments

**Infor Mongoose**

Widget Settings 1

1. CLICK Widget Settings button for the first widget





1. CLICK Unlock button for the Title field
2. ENTER Customer Interactions for the Title
3. ENTER/COPY SLSGDENA209\_MONGOOSE\_AX2\_DEFAULT for Configuration field
4. ENTER {Username}\_Interactions for Forms field
5. CLICK Save

SyteLine OS D1S9RE\_01 X | v AX21 Bell D.1 Session 9 Room E Student... □

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**Customer Credit Limits**

Name	Credit Limit
Bristol Docks	10,000.00
Arteon SA	10,000.00
CSJ Enterprises	150,000.00
D1S11RF_14	0.00
D3S11RE_32	0.00
Jaguar Cars Limited	2,000,000.00
Plated Products Ltd	232,323.00
D1S11RF_33	0.00
D3S11RE_31	0.00

**Shipments Graph**

### Shipments By Month

Month	Shipments
2018-12	88
2019-1	180
2019-2	240
2019-3	159
2019-4	198
2019-5	231
2019-6	216
2019-7	156
2019-8	219
2019-9	198
2019-10	105
2019-11	174
2019-12	61
2020-01	129
2020-02	129

**Customer Interactions**

Date: 1/30/2025 Customer: Coordinated Bicycles

Type: Status: Credit Complete

Details: Had to give customer credit for late order

**ADD** **SAVE**

1. ENTER your username
2. ENTER your password
3. SELECT Sign in

infor





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