

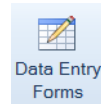
Deploying Data Entry Forms

Overview

Data Entry Forms are deployed on local system or on a remote system using a **Team Client**.

Local

On the system where **XLReporter** is installed, Data Entry Forms is opened from the **Home** tab of the **Project Explorer** by selecting the following:



The application can also be run from the command line by running:

`C:\XLReporter\bin\XLRxFrm.exe`

This assumes **XLReporter** is installed on the *C* drive.

It can also be opened from external applications and HMI displays by running the same executable.

Windows Team Client

From a **Team Client**, the application is opened by the **Team Explorer** from remote workstations and mobile devices.

Security

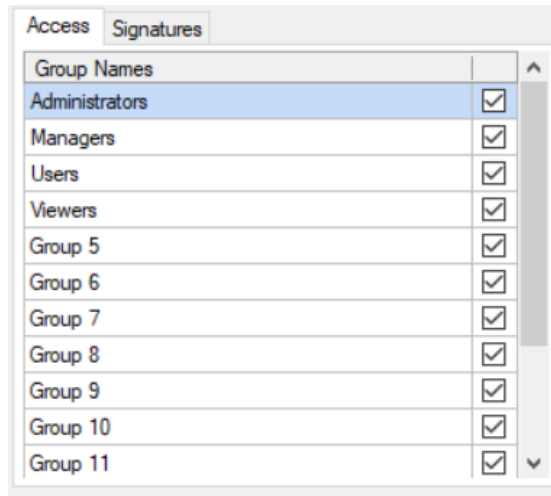
If **User Accounts** is not enabled, then any user can use all the features.

If **User Accounts** is enabled, there are two privileges the user can have with Data Entry Forms.

| | |
|--|-------------------------------------|
| Form : Edit and save data entry forms | <input checked="" type="checkbox"/> |
| Form : Lock completed data entry forms | <input checked="" type="checkbox"/> |

If the user does not have the *Edit and save data entry forms* privilege, they cannot even access the Data Entry Forms application.

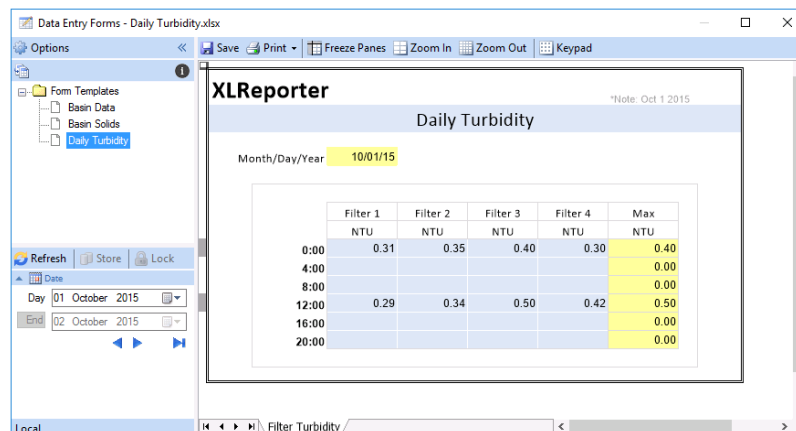
In addition, specific form templates can be configured for specific groups so if the user is not part of the group, the template will not be listed in the Data Entry Forms application.



To configure, open any form template and select **Template, Settings, General** (Design Studio) or **XLReporter, Settings, General** (Excel).

User Interface

The interface consists of a Left view and a Right view. The Left view is where the form and parameters are specified, and the Right view shows the content of a form.



Left View

The left view contains the forms assigned to the user logged on (if **User Accounts** is enabled) and a user entry panel to determine the content of the display.

Right View

The right view displays the content of the form selected. The **A** column indicates the status of a row as a color indicator. The following colors are used:

- **No color** – the row is empty; no data has been entered.
- **Grey** – the row is read from the database table and displayed on the form.
- **Green** – the row is edited and waiting to be stored to the database. After the store if the store is successful the cell changes to **Grey**.
- **Red** – the row is edited but has not been successfully stored to the database. Typically, in this scenario an error message appears to describe why the store was not successful.
- **Dark Yellow** – the individual record is locked and cannot be edited.
- **Yellow** – every record in the form is locked and cannot be edited.

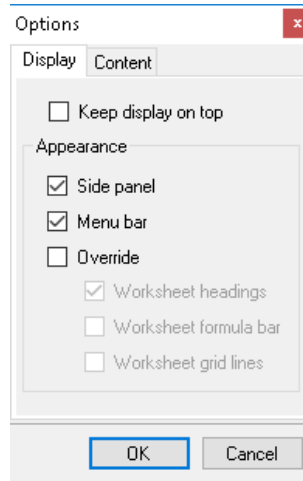
Collapse/Expand << >>

These buttons expand and collapse the left panels.

Store

When manual data entry is complete, click **Store** to save the data back to the database.

Options



Keep display on top

This option makes the application the topmost window. Use this setting if this is launched from an HMI display.

Appearance

Override

These settings override the settings saved in the workbook template.

Worksheet headings

This option displays headings (e.g., row numbers and column letters) on the right side of the application.

Worksheet formula bar

This option displays the formula bar above the worksheet.

Lock

When one or more records are locked, edits may still be made to the form worksheet, however those edits cannot be stored back to the database. There are two lock options provided for a data entry form:

Lock Button

The **Lock** button locks every record currently displayed on the form. This is best used with forms set up *By Table* where multiple records are shown.

Conversely, the **Unlock** button unlocks every record displayed in the form so that edits can be stored to the database.

Lock Record (right-click)

The **Lock Record** option is available when right clicking the **A** column. This locks the record in the currently selected row of the form.

Conversely, the **Unlock Record** option unlocks the record in the selected row.

Cancel Edit (right-click)


If a value is entered or edited by mistake, the edit can be removed by selecting the cell in the **A** column corresponding to the edited record (colored green) and either clicking **Esc** on the keyboard, **Cancel** in the **Keypad** or right-click **Cancel Edit**.

Delete (right-click)

If a record has been entered and stored by mistake, the record can be removed from the table by selecting the cell in the **A** column corresponding to the stored record (colored gray) clicking **Delete** on the keyboard, **Delete** in the **Keypad** or right click **Delete Record**.

Keypad

The soft keypad is useful when using **Data Entry Forms** on a tablet or touch screen PC.

There are three available keypad types *Alphabetic*, *Date Time* and *Numeric*. When the keypad is opened, keypad type shown is based on either the cell value (if it is populated) or the cell format (if it is empty). The  button toggles between the different types.

Note that if a cell is selected which has validation (like a drop-down list) the keypad is disabled.

For the *Alphabetic* keypad type, clicking **.?123** will display punctuation characters.

The **Delete** pushbutton deletes the value in the selected cell except if the cell selected is in the **A** column of a record in which case this deletes the record from the database.

The **Cancel** pushbutton is only used when a cell in the **A** column is selected for a currently edited record. This cancels the edit, so the record is not stored to the database.

The arrow keys move the selector from the currently selected cell. The **A?** moves the selector to the **A** column of the row of the currently selected cell.

Enter

The **Enter** pushbutton sets the keypad value to the currently selected cell.

Windows Team Clients

When using Data Entry Forms through the Windows Team Client, there are a few things that need to be considered.

Database Access

Depending on the database used to store the form data, considerations need to be made to ensure that the database is accessible from the Windows Team Clients.

Microsoft SQL Server

Connectors defined to SQL Server can be done so by either using **Windows** or **SQL Server** authentication.

If Windows authentication is selected, the current Windows user is used for the connection. From a Windows Team Client, this user is defined for the *XLRwebpool* **Application Pool** as defined in the **Internet Information Services (IIS) Manager** where **XLReporter** is installed. By default, this is a very low-level built-in user, but can be changed if needed. For more information, see **Setup the Web Portal** in the Document Library.

SQL Server authentication has no dependencies on the Windows user at all.

Microsoft Access

Connectors defined to Access define a file located somewhere on the local machine or network to store data.

In order for Data Entry Forms to store data to this database, the Windows user must have write access to the file. From a Windows Team Client, this user is defined for the *XLRwebpool* **Application Pool** as defined in the **Internet Information Services (IIS) Manager** where **XLReporter** is installed. By default, this is a very low-level built-in user, but can be changed if needed. For more information, see **Setup the Web Portal** in the Document Library.

The options are either to set up the Windows Team Clients to run under a specific user and give that user write permissions to the database file or to give **Everyone** write access to the file and not change the user.

Offline/Out of Network Range

In order to access Data Entry Forms from a Windows Team Client, the machine must be connected via network (either wired or wireless) to the machine where **XLReporter** is installed.

Once logged in and the Data Entry Forms application is opened, if the network connection is lost, the ability to change forms or store data is disabled. However, the currently selected form will remain opened, and data can be entered on it.

As long as the application remains opened, no data entered will be lost. Once network connectivity is re-established and you are logged back in, you can then store the data from the form back to the database.

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