

Altova RecordsManager



User & Reference Manual

Altova RecordsManager User & Reference Manual

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Published: 2022

© 2016-2022 Altova GmbH

Table of Contents

1	Altova RecordsManager	5
2	General Information	6
2.1	Getting Started with RecordsManager.....	7
2.2	Roles in RecordsManager.....	9
2.3	How Data Is Stored.....	10
2.4	Color Themes.....	12
2.5	Audits and Change Tracking.....	17
3	System Use	18
3.1	Quick Start: System Use.....	19
3.2	Home Page.....	21
3.3	Container Page.....	23
3.4	Customize Appearance.....	25
3.5	Record Page.....	31
3.5.1	New Records and Templates.....	33
3.5.2	Data-Entry Forms.....	34
3.5.3	Sections.....	35
3.5.4	Editing Data.....	37
3.5.5	Audits and Change Tracking.....	38
3.6	Reminders.....	42
3.7	Searches.....	47
3.8	Jump To.....	52
3.9	Refresh.....	54
3.10	Export Records to XML, CSV.....	56
3.11	Reports.....	59
3.12	Print to PDF.....	61
3.13	Offline Mode.....	62

1 Altova RecordsManager

Altova RecordsManager™ (also written as Altova RecordsManager or, in short as, RecordsManager) makes it possible to build business database solutions in record time using a powerful visual design interface. RecordsManager accelerates the creation of database driven apps by removing the need for backend development and manual coding. Its visual design paradigm lets you focus on the business objects you need to model so you can get your app in users' hands quickly. The flexibility of RecordsManager thus enables you to create a wide range of databases, from simple book collections to more complex contract management systems.



Altova RecordsManager provides the following broad features:

- Centralized data management
- Unlimited, secure data storage
- Links between related data containers
- Granular role and group-based permissions to control access to confidential information
- Automatic reminders for important dates and deadlines
- Search tools to find documents and details instantly
- Printable reports
- Full audit log and change tracking
- Options to customize the app as little or as much as required
- Customize the database, forms, fields, reports, and more
- Select from different themes to configure your display colors and fonts
- Database restore checkpoints

This documentation

This documentation is divided into the following parts:

- [General Information](#)⁶, which provides an overview of how RecordsManager works.
- [System Use](#)¹⁸, which describes how to use RecordsManager databases.

Last updated: 14 June 2022

2 General Information

This section contains general information about Altova RecordsManager, as listed below. We recommend that you read through it before you start your RecordsManager work. It will help you to get a broad understanding of how the RecordsManager system works.

- [Getting Started](#)⁷ provides a broad practical outline of how to get started with system use.
- [Roles in RecordsManager](#)⁹ describes the different kinds of roles that are used in the system.
- [How Data Is Stored](#)¹⁰ explains how a network of data relationships is built up in the system from separate individual records.
- [Color Themes](#)¹² provides an overview of how a default color theme can be set by the system administrator and a new theme selected by a user.
- [Audits and Change Tracking](#)¹⁷ summarizes the change tracking system.

2.1 Getting Started with RecordsManager

On logging in to RecordsManager with your user name and password, you are presented with the Start Page of Altova RecordsManager (*screenshot below*).

- If you have been granted the *Admin* role, then the button **Configure RecordsManager** will be available.
- If you have not been granted the *Admin* role, then the **Configure RecordsManager** button will not be available and you will not be able design databases or configure RecordsManager. The Start Page will display only the databases to which you have been granted viewing or editing access.

Home

ALTOVA

Welcome Neo!

Contract Database

Contracts
20 records available

Company Database

Company Groups
4 records available

Departments
21 records available

Companies
22 records available

Persons
19 records available

Contract reminders

Past Due (4)

- Reminder **Renewal** "C2020/3119 Chestnut Telecom License Agreeemer"
- Reminder **Renewal** "C2020/3122 Office Cleaning Contract"
- Reminder **Renewal** "C2020/3121 Doodle Online Advertising"
- Reminder **Renewal** "C2020/3114 Deciduous Lease"

Getting started with system use

For information about getting started with system use, go to the topic [Quick Start: System Use](#)¹⁹.

System administration can be concurrent with system use

You can reconfigure the database, add new forms, change settings, and carry out other administration tasks even after users have started working with the system. Any admin changes you make will be reflected on the user side as soon as the user interacts with the system.

2.2 Roles in RecordsManager

Each RecordsManager user is given one or more roles. These roles define what a user is allowed and not allowed to do. For example, custom roles such as *Legal* or *Personnel* can be created that correspond to specific functions (such as access by the *Personnel* role to personnel-related contracts but not to client or IT contracts). A user can be associated with one or more roles, and would then be authorized to carry out the functions corresponding to those roles.

The roles that are available in RecordsManager fall into three categories: the *Admin* role, the *All Users* role, and custom roles.

Admin

This role is predefined. It provides a user with all available RecordsManager functionality. Users that have this role can:

- modify the RecordsManager system's users and roles
- configure RecordsManager databases and their components
- modify RecordsManager settings
- configure reminder mails
- enter and edit data in all databases

All Users

This role is predefined.

- Users with this role can enter and edit data in RecordsManager databases. They do not have access to admin functions (*see above*). If you need to perform an admin task, contact your RecordsManager system administrator and request an *Admin* role.
- The *All Users* role is given to all users by default. As a result, any user that can access RecordsManager will be given this role and can enter data (unless otherwise restricted by custom roles).

Custom roles

RecordsManager administrators can define custom roles that can be assigned to users, for example, *Legal* or *Personnel* roles.

- A custom role can provide additional access or can restrict access to different containers of the database
- A custom role can provide access to different functionality within containers (for example, reading rights and writing rights)

2.3 How Data Is Stored

Data is stored in multiple containers, each of which represents one component of information. These containers can be organized in a hierarchy. For example, your RecordsManager app might have a simple hierarchy that contains two databases named *Contract Database* and *Company Database*, as shown below:

```

Contract Database
|
|--Contract
|
Company Database
|
|--Company
|  |
|  |--Department
|  |  |
|  |  |--Person

```

Records and fields

In each container, you will enter records. Each record is defined by a number of fields (which are specific to that container). When you enter a record, what you will be doing is entering values for these fields. You can visualize a container as follows:

Container-A				
	Field-1	Field-2	Field-3	Field-4
Record-1	Field-1-Value	Field-2-Value	Field-3-Value	Field-4-Value
Record-2	Field-1-Value	Field-2-Value	Field-3-Value	Field-4-Value
Record-3	Field-1-Value	Field-2-Value	Field-3-Value	Field-4-Value

So when you enter data in the RecordsManager app, you will be entering records for the different containers of the app. For example, you could add new company records, or department records, or person records, or contract records. In this way you build up the data in the RecordsManager database.

Identity fields

In each container, one or more fields will have been configured (by your system administrator) to be *Identity Fields*. These fields will uniquely identify records. For example, employees would typically have unique ID numbers, so the ID number field can be used to identify records in the *Person* container. In the case of some containers, more than one field might be necessary to come closer to uniqueness (for example, a persons's *Name* and *Date of Birth* fields).

Linking records across containers

During database configuration, your system administrator/s will have built links across the containers. For example, a parent-child link might have been created between company and department, and another parent-child link between department and person. In this case, when you enter a new record for a child container, one

of the field values you would need to add would be for the parent of this (child) record. For example, when adding a new department record (say for a *Legal* department), you will be prompted for this department's company parent (where you could enter, say, a company named *Altova*). By selecting the parent *Altova*, you have established a link between this *Legal* department and the company *Altova*. In this record, then, you are effectively describing the legal department of *Altova*.

In a similar way, your system administrator/s could have built links between containers that are not directly linked in a vertical hierarchy. For example, a link could have been created between a contract and the contracted company. There is no direct hierarchical connection between the *Contract* container and the *Company* container. But if an explicit link is configured between the two, then, while entering, say, the contract data, you will be asked to enter the name of the contracted company. Doing so links the current contract not only with the selected company, but also to that company's (hierarchically descendant) departments and persons.

So, although you are entering data record-by-record for different containers, the RecordsManager app is building a network of connections across records in different containers. This networked nature of the data enables you to generate reports and charts about your contracts, contract dates, and the companies and people involved.

2.4 Color Themes

The RecordsManager user interface can be set to one of the **themes** shown below. Themes can be set at the following levels:

- A default theme for RecordsManager can be set by the system administrator. This theme is applied to the entire RecordsManager app.
- Individual users can override the default theme of the app with [their own selection](#)²⁵ at any time. This can be done via the *Color Theme* setting on the [Home Page](#)²¹ or any [Container Page](#)²³.
- Additionally, for each repository, users can set variations of the selected theme. Variations are set on [Container Pages](#)²³ and apply to the repository in which that container is located.

Default theme

The default theme of RecordsManager is set by your administrator.

Theme samples

The screenshots below show samples of the available themes.

Camouflage

Select overall appearance of the whole app

Color theme

Preview

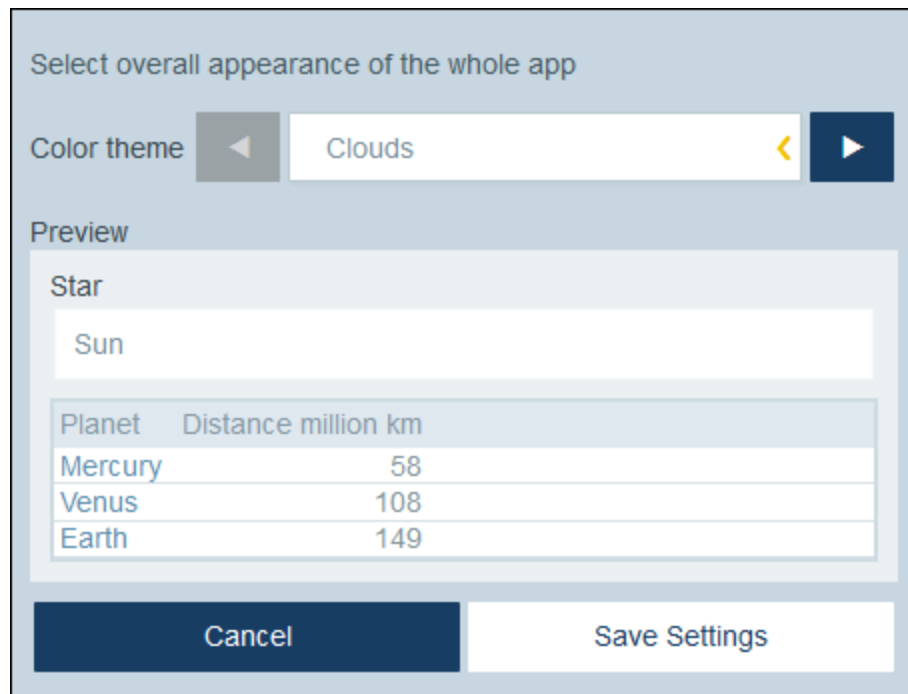
Star

Sun

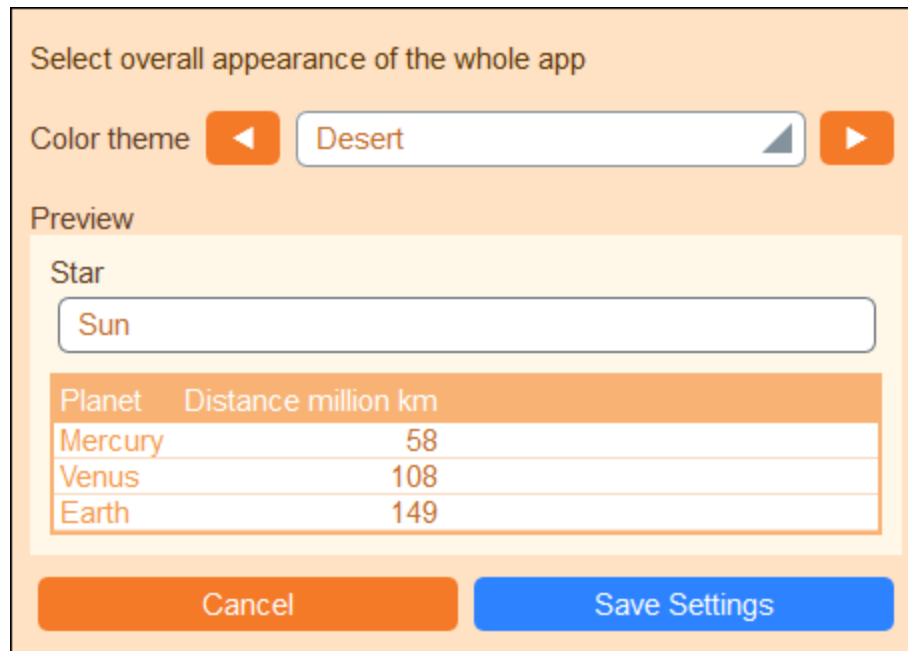
Planet	Distance million km
Mercury	58
Venus	108
Earth	149

Cancel Save Settings

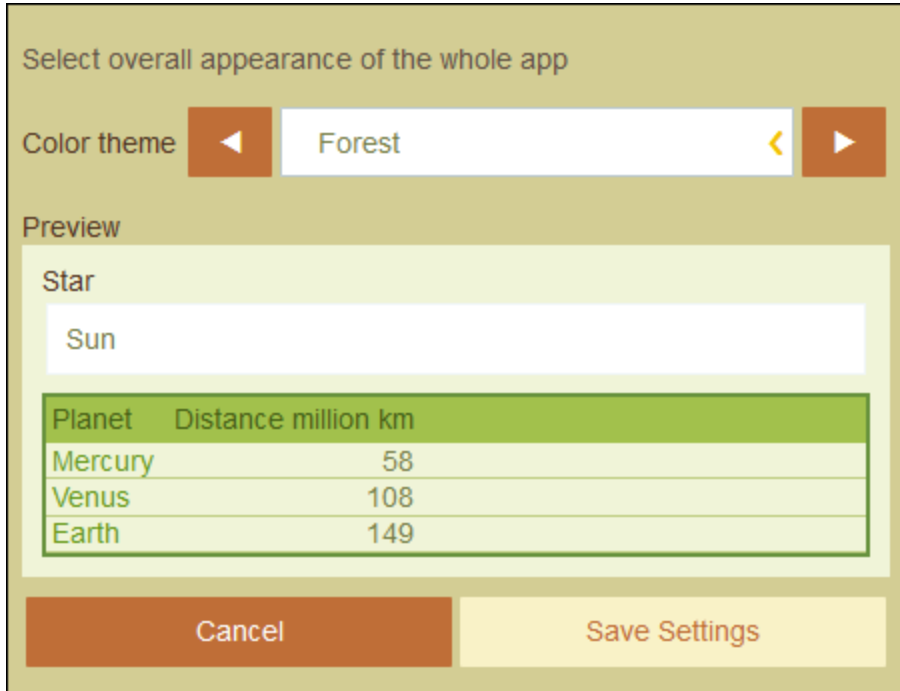
Clouds



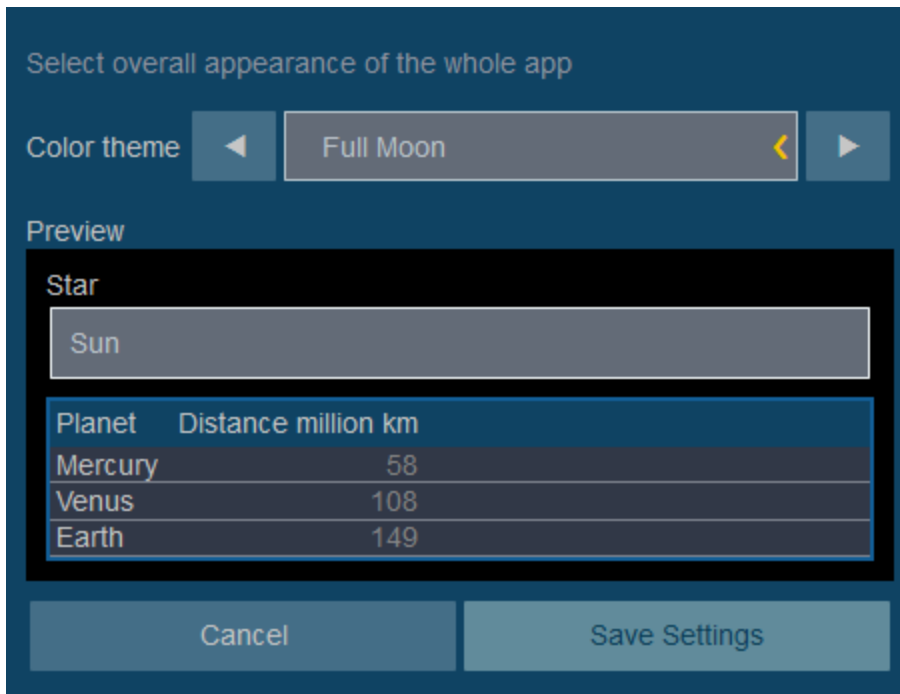
Desert



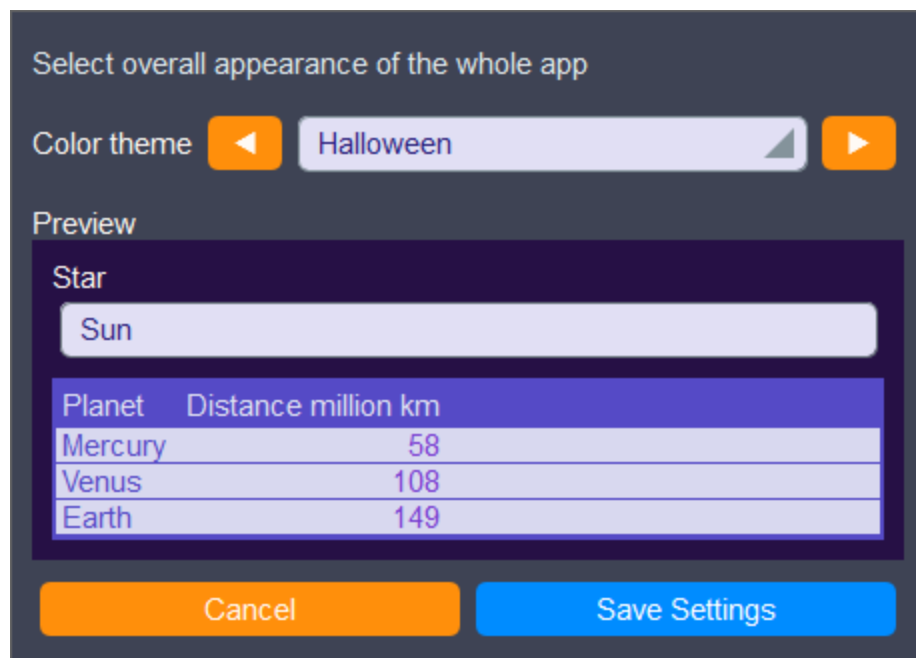
Forest



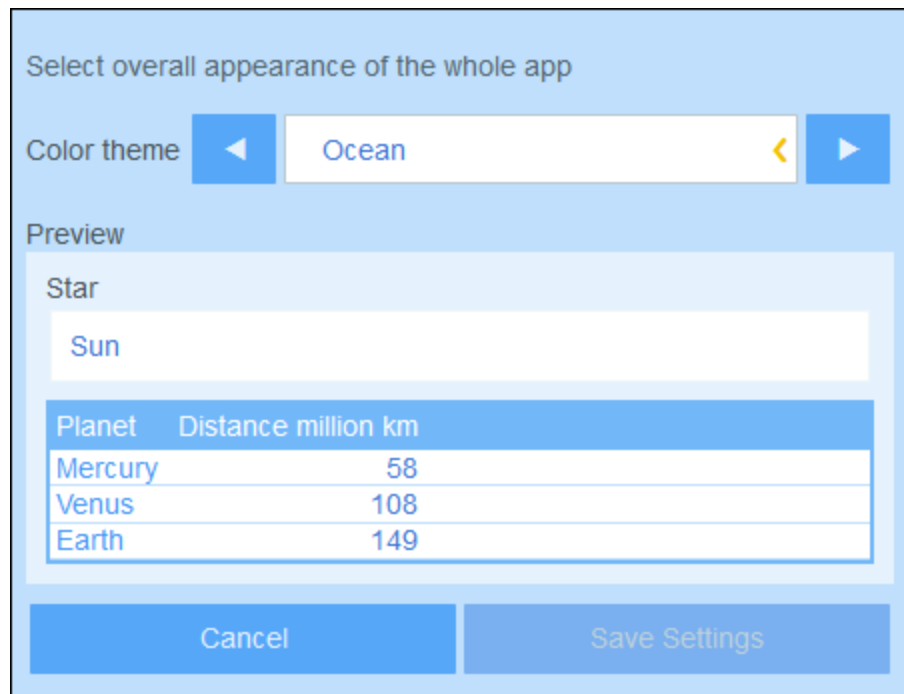
Full Moon



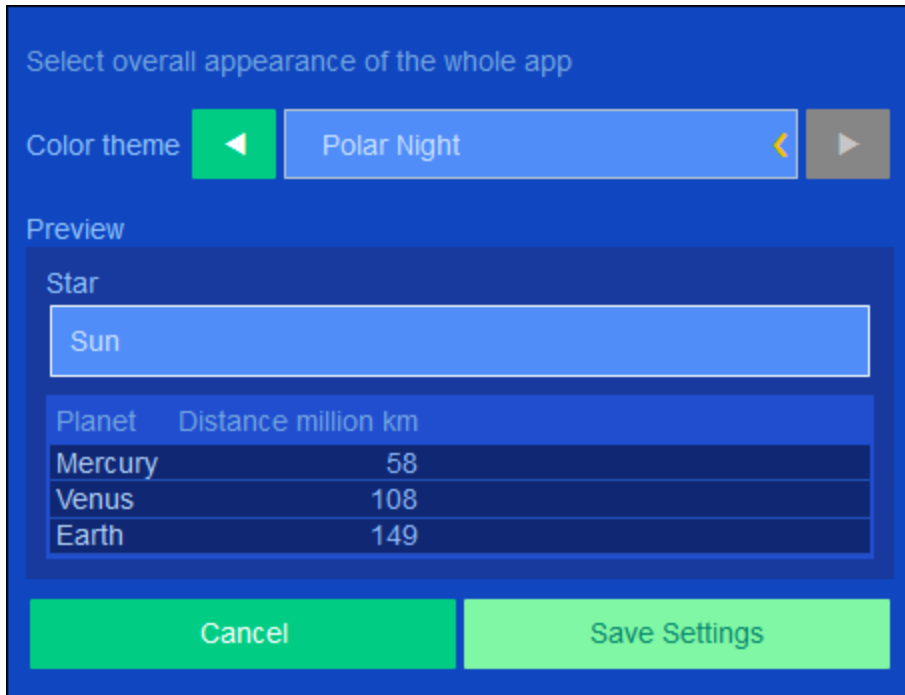
Halloween



Ocean



Polar Night



2.5 Audits and Change Tracking

When users edit the data of a container, they can audit previous changes (see what changes have been made and by whom), track changes, and see a historical view of changes. How to do this is described in the section [System Use | Audits and Change Tracking](#) ³⁸,

3 System Use

When you open Altova RecordsManager, it will have been configured by a system administrator for use in your organization. Typically, the system administrator will be a person in your organization who has set up the app on your network for use among multiple users. If you have questions about how the app has been configured or how it works, contact your system administrator.

The app provides you with the following functionality:

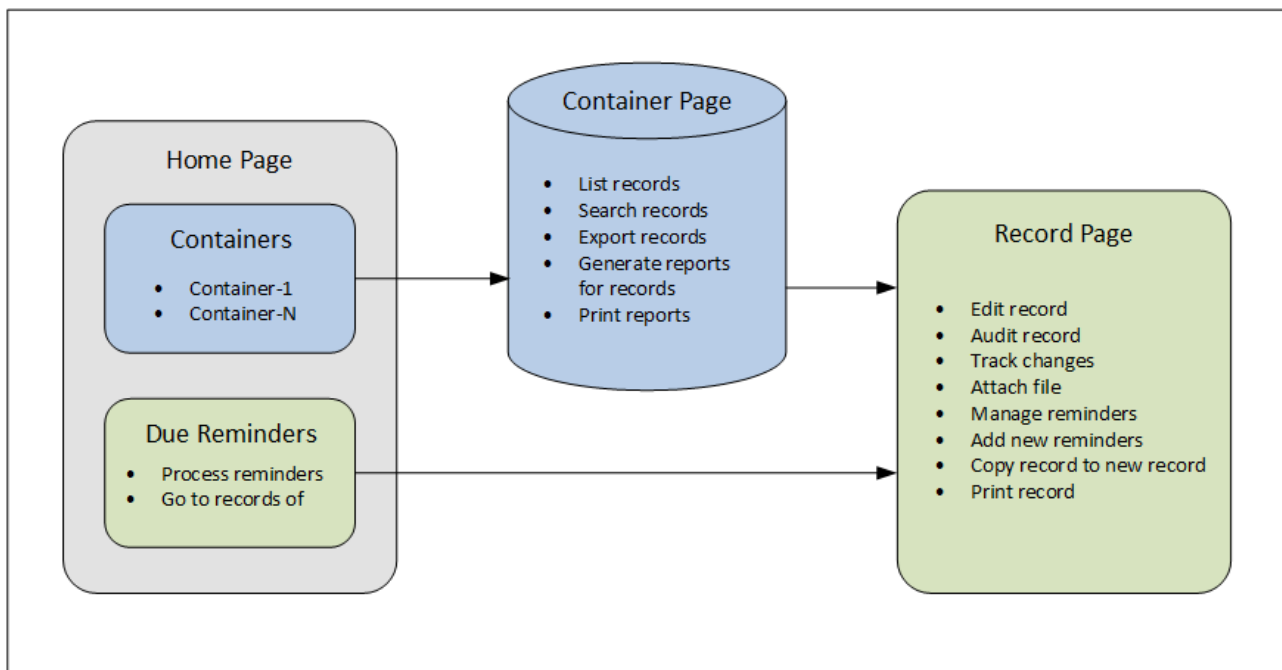
- Enter and edit data about your organization's contracts. You might have the responsibility for maintaining records of all contracts or of only a subset of contracts. Typically, multiple users would be entering and editing data about the contracts. How to enter and edit records is described in the topics [Container Page](#)²³ and [Record Page](#)³¹.
- You can [audit changes and track changes](#)³⁸ made to records.
- Create and edit reminders when significant contract dates come due (for example, a contract renewal). A reminder is used to send notifications to the appropriate persons in your organization. See the topic [Reminders](#)⁴².
- Export a container's contents (that is, its records) to XML and/or CSV files. This is described in the topic [Export Records to XML, CSV](#)⁵⁶.
- Generate charts and reports about a container's records. For example, in a Contracts container, you could generate charts and reports showing the cost of contracts by contract categories, and how these have changed over a period of time.
- Print charts, reports, and record listings.

The subsections of this section describe the RecordsManager functionality that is available to you.

3.1 Quick Start: System Use

Before you read this section and get started, we recommend that you read the [General Information](#)⁶ section, especially the section [How Data Is Stored](#)¹⁰, which explains how the RecordsManager database is structured into the containers in which your data records will be stored. As a user of the RecordsManager app, a large part of your work will involve working with these containers. You will be adding new records and editing existing records.

The Home Page of the app serves as your navigational base. It provides access to the individual containers, within each of which you can edit the records of that container. The due reminders on the Home Page also take you to the record of a particular reminder.



How to use the app

Data entry

- From the **Home Page** select a container (i) to which you want to add records or (ii) in which you want to edit records
- On a **Container Page**, you can view records according to the different listing possibilities available for that container
- On a Container Page, you can search for specific records
- On the data entry form of a record (its **Record Page**), edit the record
- On a Record Page, you can track changes made to the record and audit the record (that is, see who made changes to the record)
- On a Record Page, you can copy the current record to a new record
- On a Record Page, if reminders have been enabled for that container, you can set new reminders and edit existing reminders

Data processing

- From a Container Page, you can export the records of that container to XML and CSV data formats
- From a Container Page, you can generate reports about the records of that container and print those reports
- From a Record Page, you can print the details of a record

Note: You can also [work offline](#)⁶². Your changes will be synchronized automatically when you come back online.

Help

The **Help** button is available on [Container Pages](#)²³ and [Record Pages](#)³¹. Click **Help** on any of these pages to open the online user manual of Altova RecordsManager in a new browser tab.

3.2 Home Page

The Home Page (*screenshot below*) has two parts:

- The upper part contains an overview of the system's databases and their respective containers. Each container displays a count of the container's records. Click a container to see its record listings and to edit records
- The lower part shows due reminders. Each list item is the reminder of a specific record. Click a reminder to go to its record. Click **Snooze** or **Stop** (located at the left of each reminder) to, respectively, snooze or stop the reminder.

The screenshot displays the Altova Home Page interface. At the top left, it says "Home" and "Welcome Neo!". The Altova logo is in the top right. Below the welcome message are three icons: a globe, a gear, and a question mark. The main content is divided into two sections: "Contract Database" and "Company Database".

Contract Database

- Contracts: 20 records available

Company Database

- Company Groups: 4 records available
- Departments: 21 records available
- Companies: 22 records available
- Persons: 19 records available

Contract reminders

Past Due (4)

- Reminder **Renewal** "C2020/3119 Chestnut Telecom License Agreeemer"
- Reminder **Renewal** "C2020/3122 Office Cleaning Contract"
- Reminder **Renewal** "C2020/3121 Doodle Online Advertising"
- Reminder **Renewal** "C2020/3114 Deciduous Lease"

Navigating the app

There are two types of editing page:

- [Container Page](#)²³. You get to this page by clicking a container on the Home Page (*shown in the screenshot above*). From the [Container Page](#)²³, you can edit existing records, add new records, generate reports and charts, and print record listings. See the respective topics for information about these features.
- [Record Page](#)³¹. This page displays the data (the fields) of a record, enabling you to edit that record's data. You get to this page by clicking a record on the [Container Page](#)²³.

The pages are arranged in the following hierarchy, and you can navigate with the help of the navigation links at the top left of the page and your browser's **Back** button.

Home Page > [Container Page](#)²³ > [Record Page](#)³¹

For more information about editing and viewing records, see the respective topics of the *System Use* part of the documentation.

Help

The **Help** button is available on [Container Pages](#)²³ and [Record Pages](#)³¹. Click **Help** on any of these pages to open the online user manual of Altova RecordsManager in a new browser tab.

3.3 Container Page

A Container Page (*screenshot below*) is accessed by clicking that container on the [Home Page](#)²¹. The Container Page displays a listing of the container's records and the functionality available for the container.

ID	TITLE	CATEGORIES
▶ Active (16)		
▼ Canceled/Terminated (1)		
C2020/3118	Pineable Software Purchase	Sales Agreement
▼ Expired (1)		
C2020/3123	Sycamore Cleaning Contract	Operations
▼ Pending (1)		
C2020/3115	PBP	Partner Agreement

Container records








The central feature of the Container Page is its listing of the container's records. If your system administrator has created multiple listing options for this container, then you will be able to select which one to use. The listings will have descriptive names to enable you to choose. For example, in the screenshot above, the selected listing option is *Contracts by Status*. Lists will be different from each other in one or more of the following ways: (i) they have different layouts; (ii) they show different record fields; (ii) they restrict the number of records shown (for example, show only US companies).

Container functionality

The Container Page provides the following functionality: most of which are available via the icons at top right:

- In the *View* combo box, select a list from the available viewing lists. You can switch between lists at any time.
- To add a new record, click **New <Container>**. For information about data entry, see the topic [Record Page](#)³¹.
- To edit an existing record, click that container's **Edit** icon. For a description of how to edit records, see the topic [Record Page](#)³¹.
- To delete a record, click its **Bin** icon.
- If alphabetic sorting on a column is possible, such columns are indicated with a vertical arrow (*circled in red above*). The arrow direction indicates the current sorting order (up = ascending; down = descending). Click the arrow to sort in the opposite order.
- To search for specific records, select the *Search* check box. See [Searches](#)⁴⁷ for details.
- To jump to a specific record. See [Jump To](#)⁵² for details.
- Export the records of the container in CSV and XML formats. See [Export to XML, CSV](#)⁵⁶ for details.
- [Generate reports](#)⁵⁹ about the container's records and print these reports.
- [Print](#)⁶¹ the currently selected listing. See the section [Print to PDF](#)⁶¹ for details.

☰ *Icons of the Container Page*

	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰








Help

The **Help** button is available on [Container Pages](#)²³ and [Record Pages](#)³¹. Click **Help** on any of these pages to open the online user manual of Altova RecordsManager in a new browser tab.

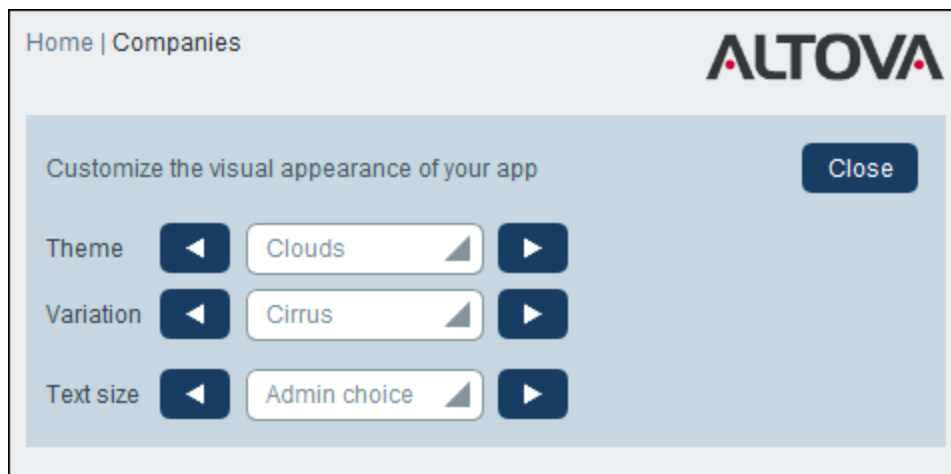
3.4 Customize Appearance

The default appearance of the user interface is determined by the color theme and variation settings that your system administrator has chosen. You, as the user, can change the appearance of the app by clicking the **Customize Appearance** button on the [Home Page](#)²¹ or any [Container Page](#)²³.

Icons of the Container Page

	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

On clicking **Customize Appearance**, the settings shown in the screenshot below appear.



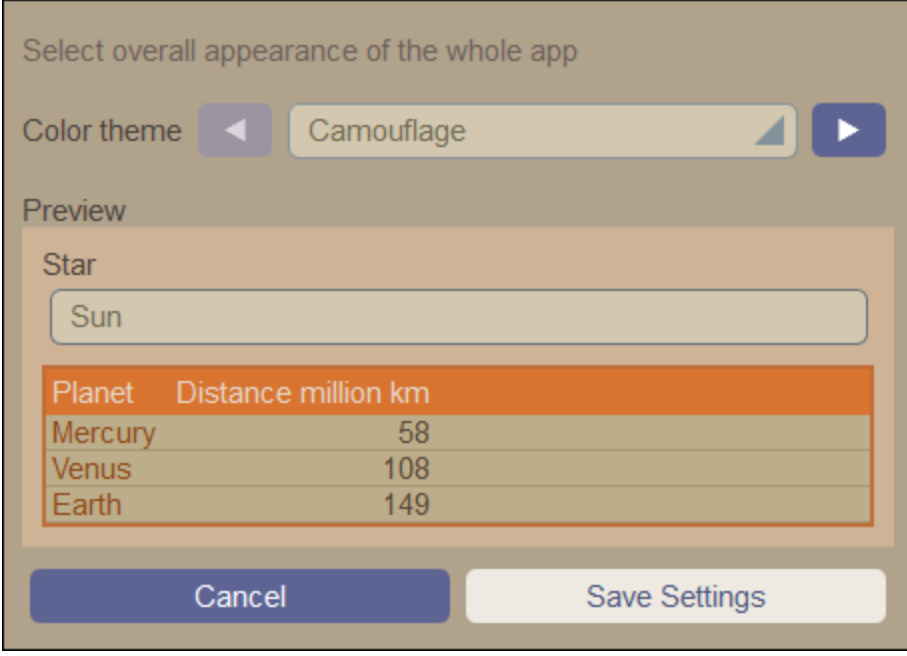
- In the *Theme* combo box, select the theme that you want. This theme will apply to the entire app and all repositories.
- The *Variation* combo box is displayed only on [Container Pages](#)²³ (and not on the [Home Page](#)²¹). It displays the variations of the currently selected app-wide theme and enables you to select a different variation for each repository. When a variation is selected for a container, it will be applied to the repository that holds the container—which means to all the containers in that repository, but not to containers in other repositories. Note that, if you change the **theme** on a [Container Page](#)²³, then the theme change will apply across all repositories.

- The text size of labels and values will, by default, be displayed in the sizes defined by your system administrator. You can change both sizes at once in the *Text Size* combo box (see *screenshot above*), with available choices being sizes relative to the admin-defined sizes.

Changes made here will be applied immediately. They will apply till either (i) you make another change, or (ii) your administrator changes a default selection. Note that the theme applies to the entire app, whereas variations can be set separately for each repository.

Click here for samples of available themes

[Camouflage](#)



Select overall appearance of the whole app

Color theme ◀ Camouflage ▶

Preview

Star

Sun

Planet	Distance million km
Mercury	58
Venus	108
Earth	149

Cancel Save Settings

Clouds

Select overall appearance of the whole app

Color theme ◀ Clouds >

Preview

Star

Sun

Planet	Distance million km
Mercury	58
Venus	108
Earth	149

Cancel Save Settings

Desert

Select overall appearance of the whole app

Color theme ◀ Desert >

Preview

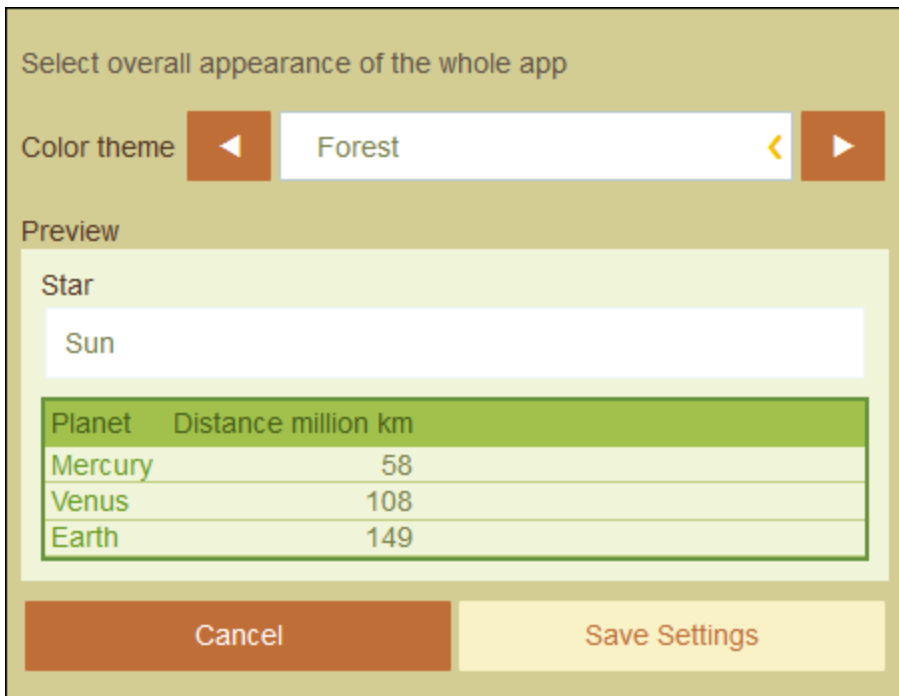
Star

Sun

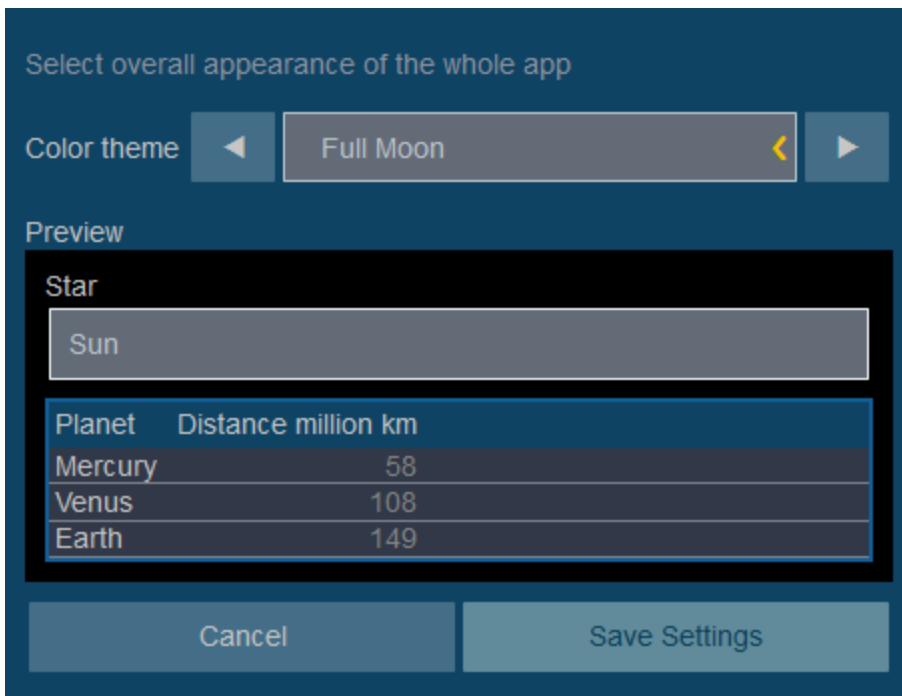
Planet	Distance million km
Mercury	58
Venus	108
Earth	149

Cancel Save Settings

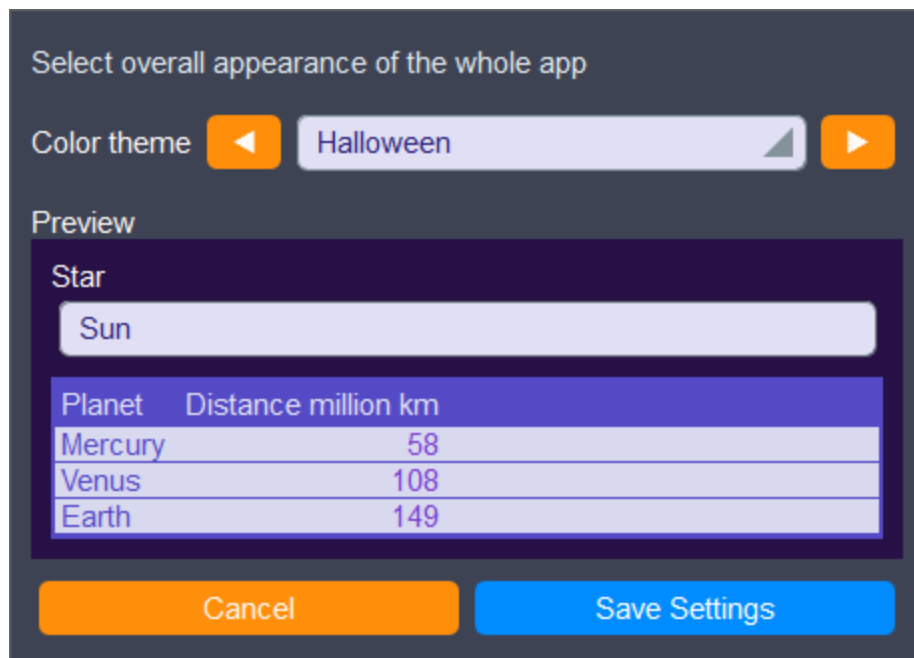
Forest



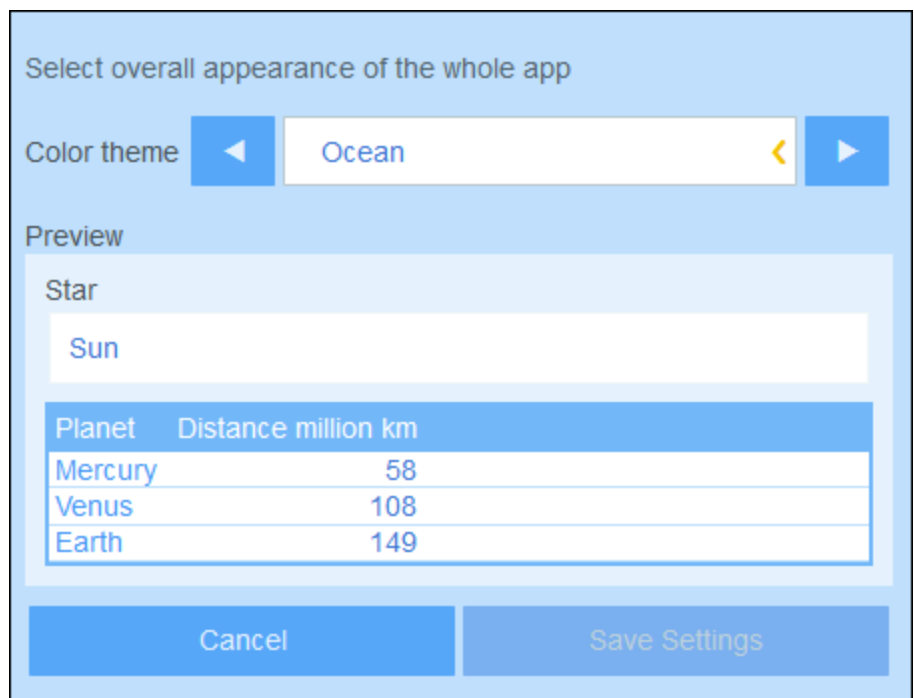
Full Moon



Halloween





Ocean



Polar Night

Select overall appearance of the whole app

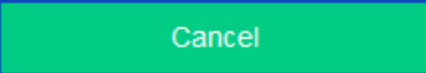
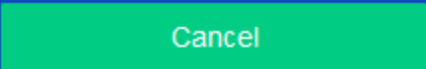
Color theme  Polar Night 

Preview

Star

Sun

Planet	Distance million km
Mercury	58
Venus	108
Earth	149

3.5 Record Page

The Record Page (*screenshot below*) displays the data of a single record of a container. You can select different data entry forms to view and edit the record's data in different layouts. Note that different data entry forms not only have different layouts, but could also show or hide different fields.

Home | Contracts | Edit **ALTOVA**

Contract Database

Contracts

View Legal Entry Form

ID	TITLE
C2020/3122	Office Cleaning Contract

▼ Contracting Party

CONTRACTING PARTY

CONTRACTING DEPARTMENT

▼ Type, Status, Categories, Signee

TYPE

STATUS

PROCESS STATUS

CATEGORIES

SIGNEE

\$ AMOUNT

▶ Description and comments

The following points describe the main features of record pages:

- A [new record](#) ³³ can be created for a container by going to the [Container Page](#) ²³ and clicking **New <ContainerName>**. This brings up the Record Page.

- If templates have been defined for the container, you will be given the option of [selecting a template](#) ³³ instead of starting with a blank record.
- A Record Page essentially displays a [data-entry form](#) ³⁴. If multiple data-entry forms have been defined for the container, then you can switch data-entry forms at any time during editing of the record.
- Your system administrator might have divided long data-entry forms into [sections for ease of navigation](#) ³⁵.
- Every record can be viewed in Changes Mode, where [changes can be tracked and audited](#) ³⁸.

The sub-sections of this section describe these features in detail.

Help

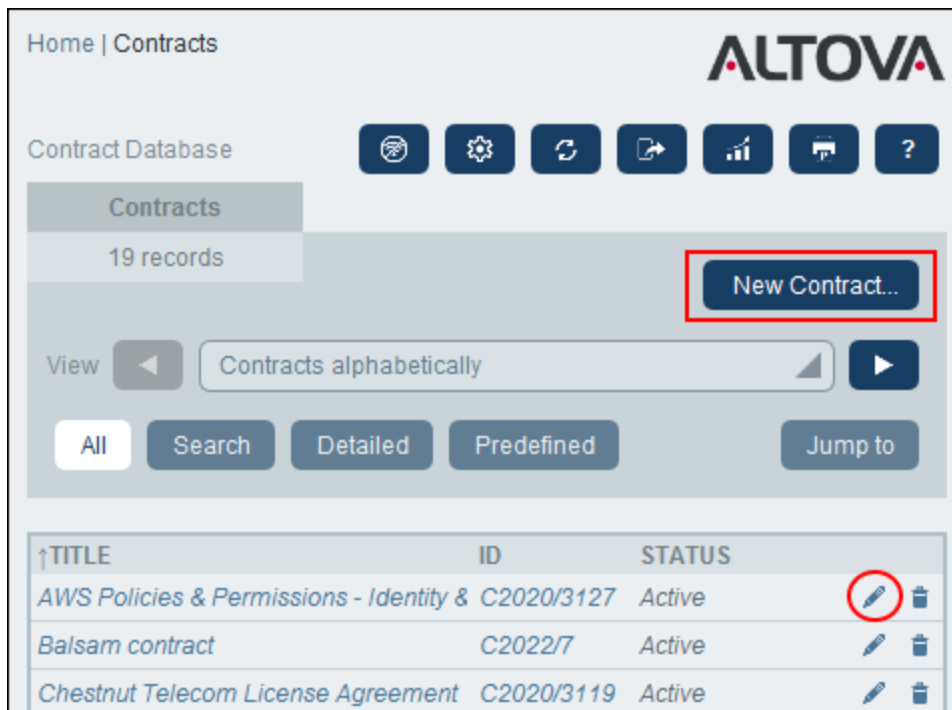
The **Help** button is available on [Container Pages](#) ²³ and [Record Pages](#) ³¹. Click **Help** on any of these pages to open the online user manual of Altova RecordsManager in a new browser tab.

3.5.1 New Records and Templates

Creating new records

To create a new record in a container, do the following:

1. Go to the [Container Page](#) ²³ of the relevant container. The existing records of the container will be displayed (*screenshot below*).



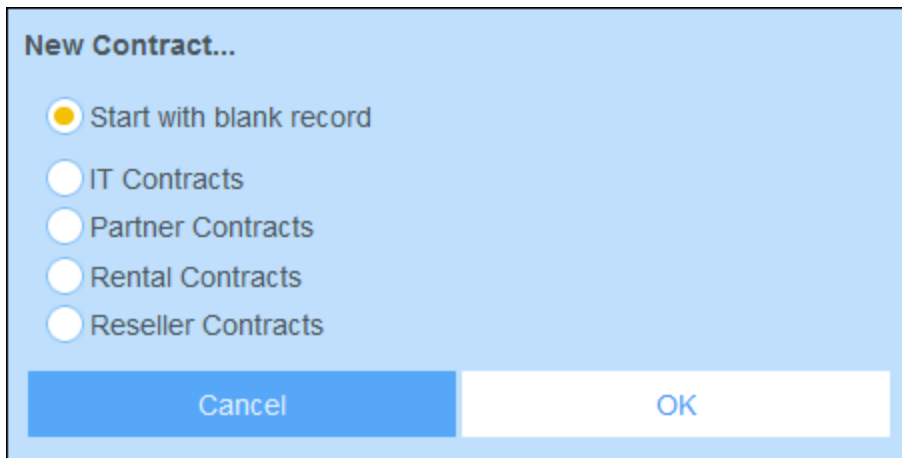
2. To create a new record, click **New <Container>** (*red rectangle above*). The container's data-entry form appears, and you can enter data for the record.

Note: To edit an existing record, click the record's **Edit** icon (*red circle above*). The record's data will be displayed in a data-entry form and can be edited.

Templates

Some containers might have templates defined for them. A template is a new record in which some fields are pre-filled with data to save you work. When you create a new record in a container that has one or more templates defined, you can choose to use one of these templates or to start with a blank record. If you use a template, you can edit any of the pre-filled fields at any time.

On a [Container Page](#)²³, when you click **New <ContainerName>** to create a new record in that container, you are presented, if templates have been defined for this container, with a form to select a template. For example, in the screenshot below, the user is creating a new record in the *Contracts* container, and is presented with five entry form options: four templates and a blank record. If you are given such a choice of templates, select the option you want, and click **OK**. The data-entry form appears.



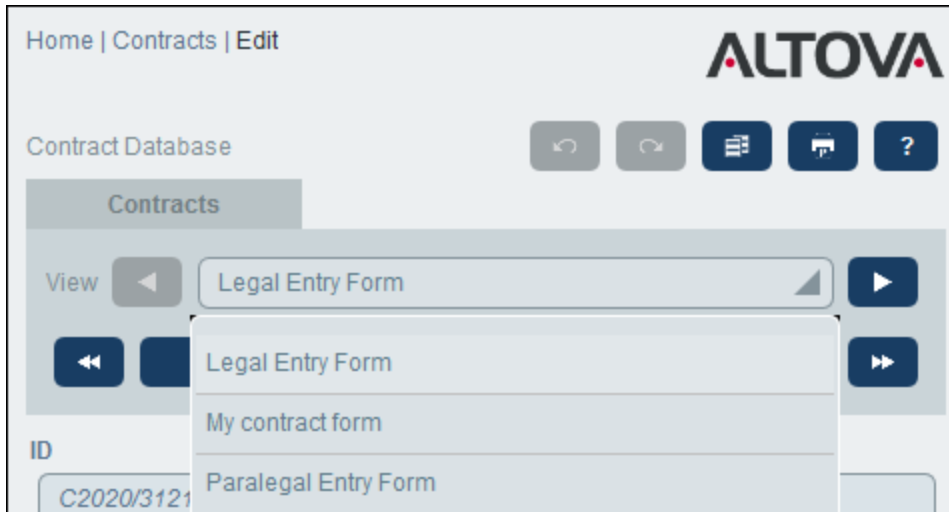
The screenshot shows a dialog box titled "New Contract...". It contains five radio button options: "Start with blank record" (which is selected), "IT Contracts", "Partner Contracts", "Rental Contracts", and "Reseller Contracts". At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

Note: If no template has been defined for a container, then the choice described above is not given to you and the data-entry form appears directly after you click **New <ContainerName>**.

3.5.2 Data-Entry Forms

A container's data-entry form appears when you either create a new record or edit an existing record.

If multiple data-entry forms have been defined for a container, then these will be available in the *View* combo box (*see screenshot below*). Select the form you want to work with. Each form provides a different layout for data entry, so you can change forms at any time. But be sure to save your data before changing forms. In the screenshot below, for example, *Legal Entry Form* might provide a layout that displays basic legal information; whereas *Paralegal Entry Form* might show specific fields related to auxiliary legal matters.



Note: If only one data-entry form has been defined for a container, then that form is displayed directly and the *Select View* combo box does not appear.

For information about editing a record, see the next topic, [Editing Data](#)³⁷.

3.5.3 Sections

Your data-entry form might be designed as a single page or might be divided into sections (see screenshots below). The following possibilities exist:

- Single page
- Single page divided into sections (each of which may initially be open or closed, independent of each other)
- Sections (open or closed) that appear one after another (not on a single page)

The screenshot below shows the first three sections of a data-entry form, where all sections are on the same page. The first three section names are: (i) *Contract Header*, (ii) *Contracting Party*, (iii) *Type, Status, Categories, Signee*. When the form is initially displayed, the first and third sections are open, while the second is closed. To open/close a section, click the arrow to the left of its name.

The screenshot shows a web interface for editing a contract. At the top, there is a breadcrumb trail: "Home | Contracts | Edit". Below this is the "Contract Database" header with a search icon and a help icon. The main content area is titled "Contracts" and features a "View" dropdown menu currently set to "Legal Entry Form". Below the dropdown are navigation buttons: "Cancel", "Changes", and "Save", flanked by left and right arrows. The form is divided into sections, with the second section, "Contract Header", expanded. This section contains two input fields: "ID" with the value "C2020/3122" and "Title" with the value "Office Cleaning Contract". Below this are two collapsed sections: "Contracting Party" and "Type, Status, Categories, Signee". The "Type" dropdown in the second collapsed section is set to "Service Contract".

In the screenshot below, the data-entry form has nine sections, of which the second is shown. Each section appears one after the other; they are not on the same page. The section number and the total number of sections are given next to the section's name. To navigate between sections, click the **Previous/Next** arrows on either side of the section's header. Note that when sections are shown one after another, they are always shown open and cannot be closed.

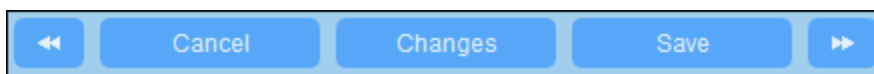
The screenshot shows a web interface for a 'Contract Database'. At the top, there are navigation links: 'Home | Contracts | Edit'. Below this, the 'Contract Database' title is displayed with several utility icons (undo, redo, list, print, help). A 'Contracts' tab is active. A 'View' dropdown menu is set to 'Legal Entry Form'. Below the view menu is a control bar with buttons for navigation (left and right arrows), 'Cancel', 'Changes', 'Save', and another navigation button (right arrow). The main content area is titled 'Contracting Party 2/9'. It contains two input fields: 'Contracting Party' with the value 'American Hornbeam' and 'Contracting Department' which is currently empty. Each input field has a dropdown arrow, an eye icon for visibility, and a pencil icon for editing.

3.5.4 Editing Data

Data for each field of the record is entered via a data-entry device such as a text field, combo box, or date picker, and data entry is straightforward. Click **Save** when you finish editing a record.

Note the following points:

- If your system administrator has set validation rules for a field value, then the field name stays red till a valid value is entered.
- If your system administrator has set validation rules for the record, errors/warnings will be displayed when you click **Save**.
- When you are entering data for a new record, the **Save++** button is available (in addition to the **Save** button). Click **Save++** to save the record and create a new record.
- The arrow buttons (see screenshot below) enable you to navigate to the previous and next records.



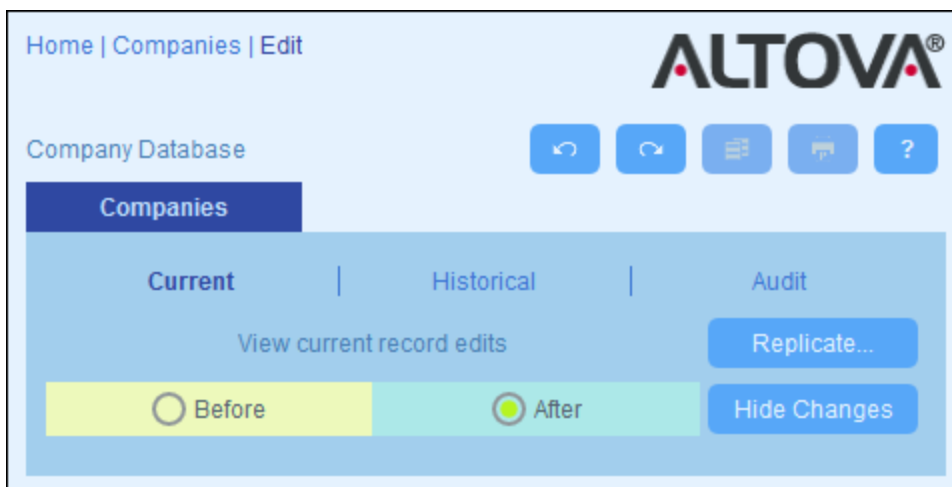
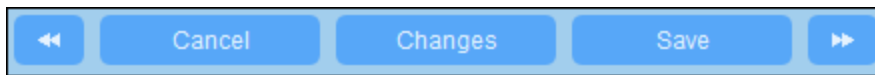
- When you edit data of an existing record, the **Changes** button (see screenshot above) is available. Click it to see past and current changes that have been made to the record being edited. This enables you to review changes before saving. When you are in Changes Mode, you cannot edit the record. To leave Changes Mode, click **Hide Changes**. Changes Mode is described in the next topic, [Audits and Change Tracking](#)³⁸.

- The icons at the top of the form provide additional functionality: *Undo*; *Redo*; *Copy Current Record to New Record*; *Print*. (For Print setup, see the [Print](#)⁶¹ topic); *Help* (links to the RecordsManager user manual).



3.5.5 Audits and Change Tracking

Changes Mode (switched on when you click the **Changes** button; see *screenshot below*) enables you to audit changes (see who has made what changes), to track changes, and to see a historical view of changes.



Changes Mode has three tabs:

- Current:** Shows changes made during the current editing session, before saving. All your changes of the current editing session are shown. Select *Before* or *After* to switch between the pre-change and post-change versions of the record. Click **Replicate** if you want the changes you made to the current record to be applied to other records of the container. In this case, you will be cycled through the records of the listing, and you can decide whether to replicate the change in individual records. The **Save** button will be enabled when the changes can be applied. To move to the next record, click the **Next** navigation arrow button (see *first screenshot above*).
- Historical:** Shows past changes of any field by any user. Cycle through the change events of the past by clicking the **Previous Event** and **Next Event** icons. For each change event, you can see the field values before and after the change by selecting *Before* or *After*, respectively.
- Audit:** Shows the last change made to any field by any user. Next to each changed field, the last user to have made the change is listed as a link. You can click a link to see details of the change, including the date and time of the change.

To leave Changes Mode, click **Hide Changes**.

Collision detection

If another user has modified a record after you have started editing it, then, when you save, you will be warned about the modification and advised to review changes to the record. You can click the **Your Edits** button to see what you have changed and the **Previous** button to see the edits of the other user. If you want to keep the changes of the other user, then click the **Keep Changes** icon near the respective field titles (*circled in red in the screenshot below*).

Company Database

Companies

Current | Historical | Audit

Previous | Your edits | Hide Changes

COMPANY GROUP
Magic Corporations

FULL NAME: Mystery Company | SHORT NAME: MC

STREET1: Mountain View

CITY: Denver | STATE: CO | ZIP: 80212

COUNTRY: USA

CATEGORY

- Customer
- Distributor
- Legal firm
- Operations
- Property Lease
- Reseller
- Vendor

Company Database

Companies

Current | Historical | Audit

Previous | Your edits | Hide Changes

COMPANY GROUP
Magic Corporations

FULL NAME: Mystery Company | SHORT NAME: MC

STREET1

CITY: Denver | STATE: CO | ZIP

COUNTRY: USA

CATEGORY

- Customer
- Distributor
- Legal firm
- Operations
- Property Lease
- Reseller
- Vendor

The situation shown in the screenshots above is that you have changed the *Street1* and *ZIP* fields (screenshot left), while another user has added two values to the *Category* field (screenshot right). You can keep the

Category field changes of the other user by clicking the **Keep Changes** icon near the title of the *Category* field (circled red in screenshot above right). Then click, sequentially, **Hide Changes** and **Save** to save your changes as well as the other user's changes. Note that you can also undo your changes by pressing the relevant **Keep Changes** icon (see screenshot above right). After you click **Hide Changes**, you can review the final edit before saving the record.

Undo/Redo changes

You can undo and redo edits you make to a record by clicking, respectively, the **Undo** and **Redo** buttons (circled green in the screenshots above).

3.6 Reminders

Reminders on the Home Page

Due reminders are displayed at the bottom of the Home Page (see screenshot below). (See [Status of Reminders](#)⁴⁵ below for the meaning of due reminders.)

Contract reminders		
Past Due (4)		
	Reminder Renewal	"C2020/3119 Chestnut Telecom License Agreement"
	Reminder Renewal	"C2020/3122 Office Cleaning Contract"
	Reminder Renewal	"C2020/3121 Doodle Online Advertising"
	Reminder Cancellation	"C2020/3127 AWS Policies & Permissions - Identity & Access Management 7/22/2020"

There are 1 alert group(s) available.
You are currently member of 1 alert group(s)

You can carry out the following reminder-related actions on this page:

- Snooze or stop a reminder. (See [Status of Reminders](#)⁴⁵ for information.)
- Click a reminder to go to the relevant record's data entry form, where you can edit the reminder and/or add new reminders.

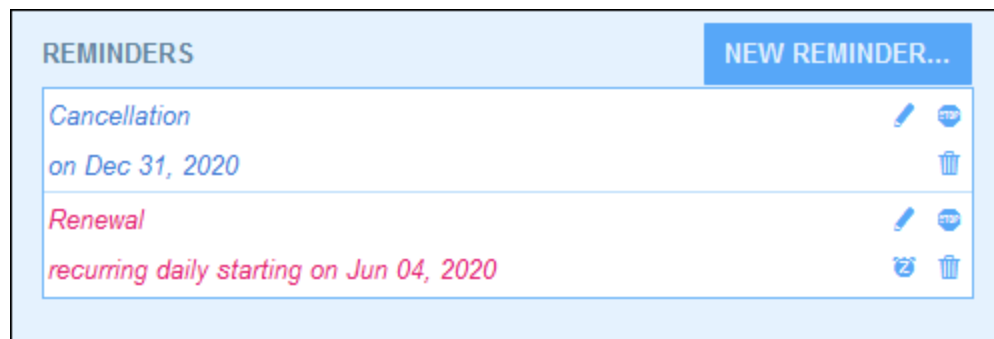
Reminders in data entry forms

Reminders and reminder emails are configured by system administrators. However, users have the final decision about what reminders are sent, when, and to whom.

A user can access a reminder's settings in the following ways:

- By clicking a record to go to that record's data entry form/s. A reminder's settings is best located in one or more of a container's entry forms.
- By clicking a reminder on the [Home Page](#)²¹, which would typically take you to an entry from containing the reminder's settings.





The screenshot below shows the reminder settings of a contract record's data entry form.



A user can do the following:

- Add a new reminder or edit an existing reminder. Clicking either of these commands takes the user to the *Reminder Settings* form, where the reminder can be configured (see below).
- The user can snooze an existing due reminder. See *Status of Reminders* below.
- The user can stop a reminder (which is equivalent to marking the reminder as processed). See *Status of Reminders* below.
- The user can delete a reminder.

Icons for reminder management

	Edit Reminder
	Snooze Reminder
	Stop Reminder
	Delete Reminder

Reminder settings

The *Reminder Settings* form is shown below.

Reminder settings

Category

Description

Recurring

Specific Date | Calculate Date

on

before

after

Once time reached, send notification

every day until reminder is processed or snoozed

only once

to

Define the reminder with the following settings:

- **Category:** Select the category of the reminder. Reminder categories were defined when the reminder field was configured.
- **Description:** Provide a description to help users to understand how this reminder will apply.
- **Recurring:** Select this option to define the reminder as a recurring reminder. A recurrence is defined in terms of a period that follows a selected date. For example, a reminder can recur monthly after the selected date. *Also see Status of Reminders below.*
- **Reminder start time:** There are two alternatives: (i) Select a specific date; or (ii) Calculate a date relative to one of the record's date fields (such as an expiry date). In the screenshot above, for example, the start time has been set to one week before the date in the *Expiry Date* field.
- **Notification frequency:** Send reminder email notifications every day till the reminder is processed or snoozed by the user, or send reminder email notifications once only. *Also see Status of Reminders below.*
- **Notification recipients:** Specify the user groups to which notifications about this reminder will be sent. If no group is specified, then no recipient is selected.

Status of reminders

The status of reminders is defined in the following terms (also see screenshot below, which assumes a current date of 16 September 2020):

- **Start date**: The date from which the reminder becomes *active*. If the start date is in the past, then the reminder stays active if: (i) it is not processed, or (ii) it recurs. If the start date is in the future, then the reminder is an active reminder.
- A **processed reminder** is one for which the reminded event has been carried out and because of which the reminder has been *stopped*.
- **Action date**: (i) For one-time reminders, the same as the start date; (ii) For recurring reminders, the next recurring date after a reminder is processed. An action date can lie in the past or in the future.
- **Active reminder**: (i) A one-time reminder that has a start date in the past and which has not been processed; (ii) A recurring reminder that has a start date in the past (and may have been processed); (iii) (i) A reminder (one-time or recurring) that has a start date in the future. (Note: If the action date of an active reminder is in the past and the reminder has not been processed, then the reminder is a due reminder.)
- **Due reminder**: An active reminder with a start date in the past. Due reminders are a subset of active reminders. Once a reminder becomes due, the possibility to snooze the reminder becomes available.
- A **snoozed reminder** applies to due reminders only. Snoozing a reminder cancels the current action date and selects an action date in the future. The snooze period is specified from the current date.
- **Inactive reminder**: A non-recurring reminder which has a start date in the past and which has been processed.

▼ Reminders	
CONTRACT REMINDERS	NEW REMINDER...
<i>Cancellation</i> on Dec 31, 2020	Active: one-time, start date in future
<i>Cancellation</i> on Sep 01, 2020	Due: one-time, start date in past, not yet processed
<i>Renewal</i> recurring weekly starting on Aug 01, 2020	Due: recurring, start date in past, not yet processed
<i>Renewal</i> recurring weekly starting on Sep 26, 2020 (next on Sep 26, 2020)	Active: recurring, start date in future
<i>Verification</i> on Jun 20, 2020 (snooze until Dec 24, 2020)	Active: one-time, start date in past, was due but now snoozed
<i>Verification</i> recurring yearly starting on Jul 10, 2020 (next on Jul 10, 2021)	Active: recurring, start date in past, processed
<i>Verification</i> on Jul 27, 2020	Inactive: one-time, start date in past, processed

The example uses a current date of 16 September 2020.

Color codes indicate reminder status

During data entry, the text color of reminders indicate their status to the user:

- *Blue*: Active reminders that are not due reminders
- *Red*: Due reminders
- *Gray*: Inactive reminders

Debugging reminder emails

If reminder emails are not being correctly sent, contact your RecordsManager system administrator to verify that the system has been correctly set up.

3.7 Searches

The Search functionality is enabled at the container level. It enables you to search a container's records. You can search for:

- a term within all fields of the container's record (select *Search*), or
- a selected field of the current container, an ancestor container, or a linked-to container (select *Detailed*), or
- records returned by a filter (select *Predefined*).

To run a search, do the following:

1. In the *View* combo box of a container, choose a record listing form for displaying the records of the container. For example, the screenshot below shows the records of a *Departments* container, with the records being listed in a listing form named *Standard list form*.

@ | Home | Departments

Company Database

Departments
16 records

New Department...

View Standard list form

All Search Detailed

↑ COMPANY	NAME		
Arbormull, Inc.	Arbormull Legal		
AWS	Amazon Legal		
Chestnut Group	Chestnut Corporate Sales		
Deciduous Partners	Deciduous Legal		
Dropbox Corporation	Dropbox Enterprise Sales		
HoneyLocust	HoneyLocust Legal		
Microsoft Corporation	Microsoft Enterprise Licensing		
Pineable	Pineable Partners		
Red Maple and Sons	Red Maple Legal		
Salesforce	Salesforce Regional Sales New Englands		
Sycamore	Sycamore Sales		
Tulip, Walnut, and Willow, LLC	TWW Marketing		
Twitter, Inc.	Twitter Florida Regional Sales		
Twitter, Inc.	Twitter Regional Legal		
White Pine Partners	White Pine Operations		
Willow Properties, Inc.	Willow Sales		

- To search for a term across all fields of all the container's records: (i) click **Search** (see screenshot below), (ii) enter the search term (searches are case-insensitive), (iii) click the **Search** icon at right. All records will be listed that contain the search term in any of their fields.

@ | Home | Departments

Company Database

Departments

6 records

New Department...

View Standard list form

All Search Detailed

legal

COMPANY	NAME		
Arbomull, Inc.	Arbomull Legal		
AWS	Amazon Legal		
Deciduous Partners	Deciduous Legal		
HoneyLocust	HoneyLocut Legal		
Red Maple and Sons	Red Maple Legal		
Twitter, Inc.	Twitter Regional Legal		

- To search for a term across a single field of all the container's records: (i) click **Detailed** (see *screenshot below*), (ii) enter the search term (searches are case-insensitive), (iii) select the field you want to search (in the screenshot below this is the *Description* field), (iv) click the **Search** icon at right. All records will be listed that contain the search term in the selected field. Note that the available fields will be the fields of the current container, an ancestor container, or a linked-to container

@ | Home | Departments

Company Database

Departments
3 records

New Department...

View Department Names & Descriptions

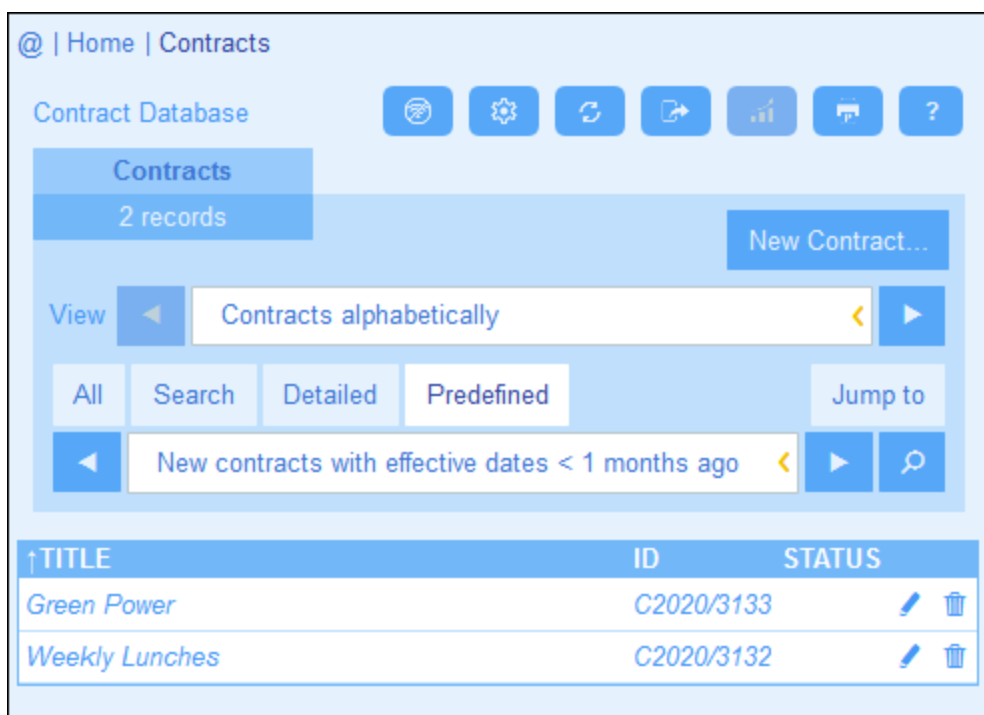
All Search Detailed

Description

legal

NAME	DESCRIPTION
Amazon Legal	Include legal on all sales and agreement discussions
Sycamore Sales	We've worked with both the sales and legal teams at Sycamore
Twitter Regional Legal	Legal discussions

4. If one or more filters have been defined for a container, then the **Predefined** button will be available. To return records selected by a filter: (i) click **Predefined** (see screenshot below), (ii) select one of the filters in the combo box that appears, (iii) click the **Search** icon at right. All records will be listed that match the conditions of the filter.



Icons of the Container Page

	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

3.8 Jump To

The Jump To functionality enables you to jump to a record that begins with or contains the text string you enter. The look-up for the text string is carried out in either one field of the container's records or all fields. What fields are being looked up and whether the text string occurs at the beginning of the field or is contained anywhere in the field would ideally be indicated by the name of the list form (or should be made clear to you in some other way by your administrator).

For example, in the screenshot below, when the list form named *Contracts by Status & Company* is selected, the **Jump To** button becomes available, thereby indicating that the Jump To feature is available for this list form. Since the list form is based on status and company, it is reasonable to assume that a jump-to would look up status and/or company. On typing *Amer*, the first company name that begins with *Amer* moves to the top of the list.

The screenshot shows the 'Contract Database' interface. At the top, there are navigation icons and a 'New Contract...' button. Below this, the 'Contracts' section shows '19 records'. The 'View' dropdown is set to 'Contracts by Status & Company'. Below the view selector, there are tabs for 'All', 'Search', 'Detailed', and 'Predefined'. A 'Jump to' button is circled in red. Below the 'Jump to' button, a search input field contains the text 'Amer'. Below the search field, a list of records is shown, with the first record, 'American Hornbeam (1)', highlighted in red. The record details are: 'C2020/3122 Office Cleaning Contract' with 'Operations' status.

To use the Jump To feature: click **Jump To**, and then enter the text string you want to look up. The record that you want will move to the top of the list.

Note: If the **Jump To** button is not available, it means that your system administrator has not activated the Jump To setting for the current list form.

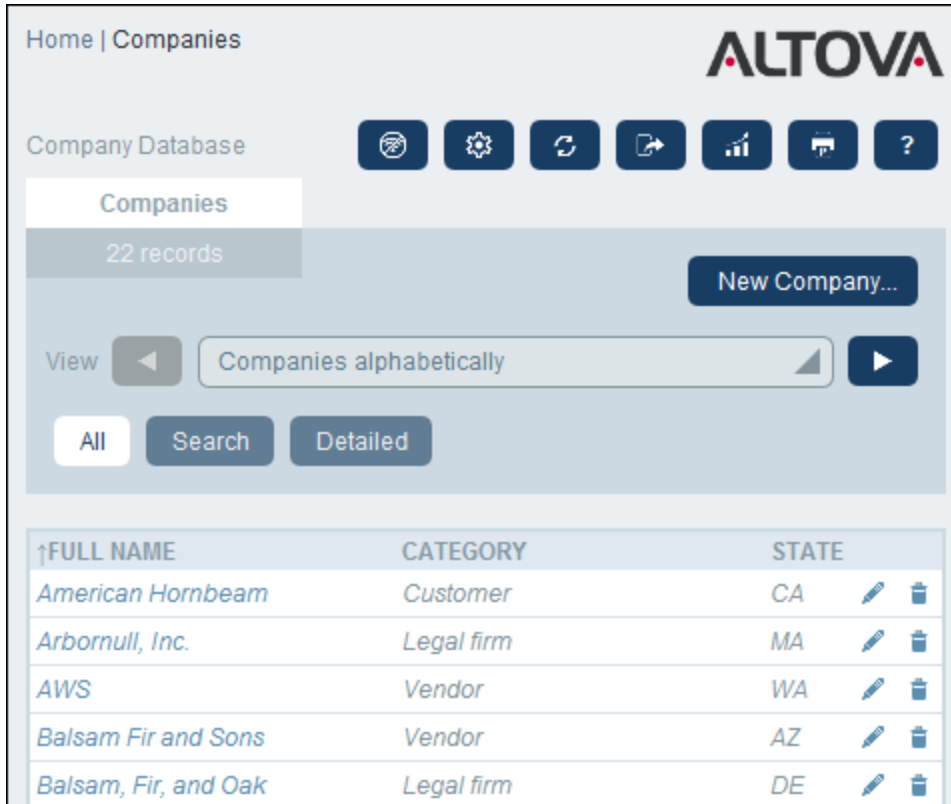
Icons of the Container Page



	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

3.9 Refresh

When a container is opened and its records are listed (as in the screenshot below, which shows a list of *Company* records), you can refresh the data by clicking the **Refresh** button.



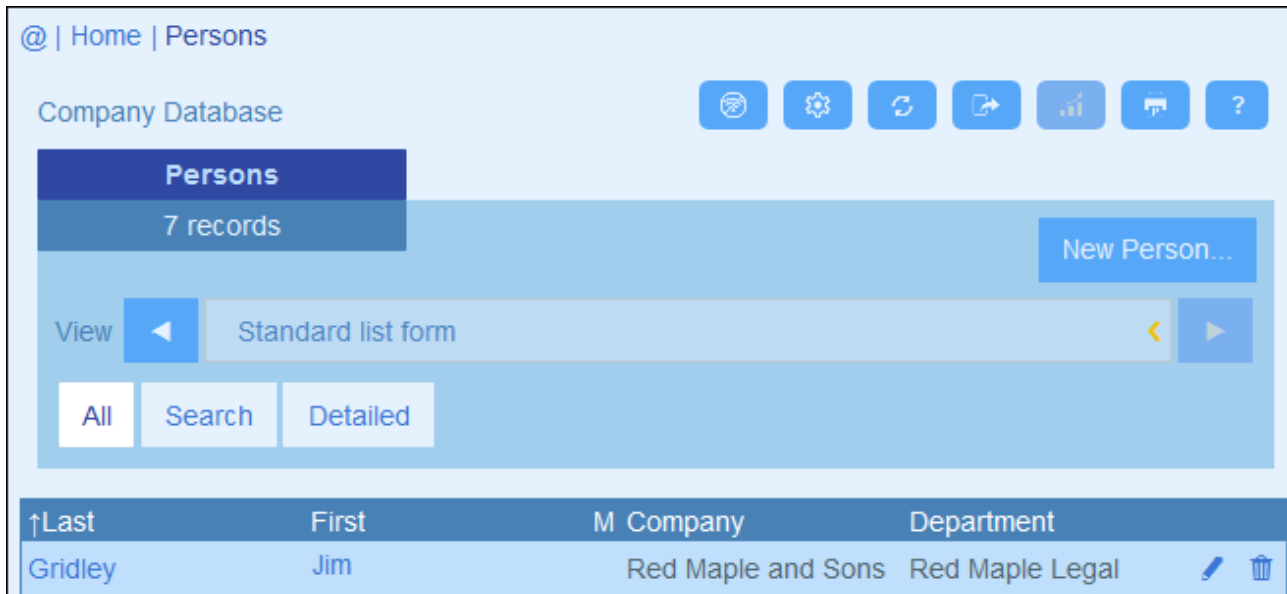
This is useful since the RecordsManager app is a distributed system that can be updated by multiple users. Clicking **Refresh** ensures that you are viewing the latest data in the database.

☐ Icons of the Container Page








	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

3.10 Export Records to XML, CSV

When a container is opened and its records are listed (as in the screenshot below, which shows a list of *Person* records), you can export the data of these records to an XML and/or CSV file. Your system administrator will have defined one or more export forms for each container. Each export form defines a separate set of data fields (of that container) to export. An export form could include not only the fields of the container, but also the name of the parent container and higher-level ancestor containers. In the case of XML exports, child containers and a selection of their fields could also be included. The different export forms will typically have suggestive names, and the multiple options will give you a choice of datasets to export. If you need another dataset for a container, contact your system administrator.



Icons of the Container Page

	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

XML and CSV formats

XML format

The exported XML file will have a root element named `<Root>`, and `<Root>` will have a child element that has the same name as the current container (in our example, this is the container named *Person*). This element will have the child elements that were selected (in the export form) as the fields to export. For example, the export form for a *Person* container (as shown in the screenshot above) might generate an XML file that looks like this:

```
<Root>
  <Person>
    <Department>Sales</Department>
    <First>Jim</First>
    <Last>Gridely</Last>
    <Title>Executive</Title>
    <Phone>123456789</Phone>
    <Email>legal.01@redmaple.com</Email>
  </Person>
  ...
  <Person>
    <Department>Accounts</Department>
    <First>Jane</First>
    <Last>Locke</Last>
    <Title>Manager</Title>
    <Phone>123789777</Phone>
    <Email>accounts.04@altova.com</Email>
  </Person>
</Root>
```

CSV format

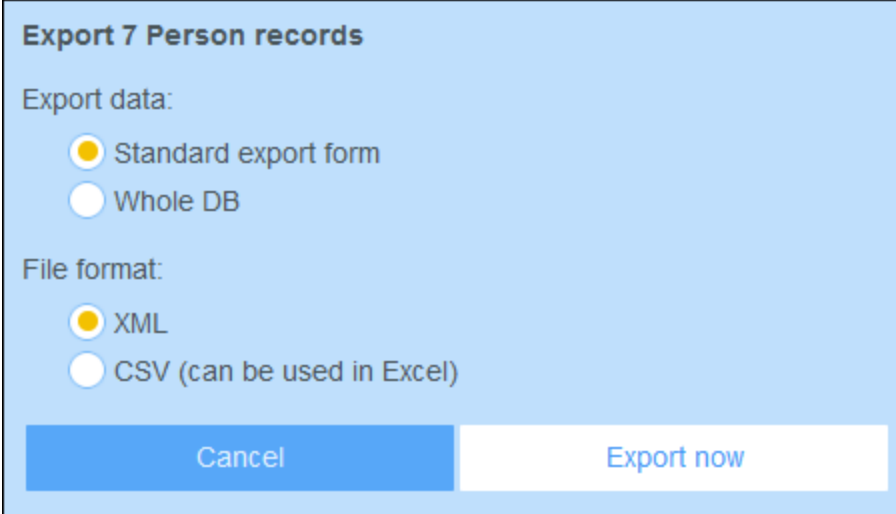
The first line of the CSV file will contain the headers of fields. Each subsequent line contains one record, with the values of fields being in the same sequence as the headers. The separator in records is a comma. Note that each record is a flat listing of the rows of the export form. Child records cannot be displayed because of the flat structure of CSV files. Compare with the XML structure above.

```
"Department","First","Last","Title","Phone","Email"
"Sales","Jim","Gridely","Executive","123456789","legal.01@redmaple.com"
...
"Accounts","Jane","Locke","Manager","123789777","accounts.04@altova.com"
```

Export data

To export to an XML file or a CSV file, do the following:

1. Click **Export to XML/CSV** (see screenshots above).
2. The form that appears (screenshot below) has two parts: (i) the top part lists the export forms that are available for the current container; these will have been defined by your system administrator; select the form you want to use; (ii) in the bottom part, select the export format you want (XML or CSV).



Export 7 Person records

Export data:

Standard export form

Whole DB

File format:

XML

CSV (can be used in Excel)

Cancel Export now

3. Select **Export Now**.
4. In the Save dialog that appears, select the file location where you want to save the exported file, and click **Save**.

Points to note

- An export form exports data related to the current container (for example, a *Person* container).
- XML export: The fields of the container that are selected for export will be exported as XML elements that are children of an element that has the name of the current container (so, for example, an element named *Person*). See *the XML listing above*.
- CSV export: The fields of the container that are selected for export will be exported as the columns of a CSV row, where each CSV row corresponds to a record from the database (for example, one *Person* record). See *the CSV listing above*.
- In export forms, it is not only the container's fields that can be added; parents and higher-level ancestors can also be added. As a result, an exported record can also contain the current container's parents and higher-level ancestors. See *the listings above*.
- While data from child containers can be exported to XML files, they cannot be exported to CSV files. This is because of the flat structure of CSV files.

3.11 Reports

Reports can be generated for the records of a container, separately for each container. The content and layout of reports is defined by your system administrator in a report form. If a report form exists for a container, then the **Reports** button on the container's [Record Listings page](#)²³ is enabled (see screenshot below).

The screenshot shows the Altova interface for the 'Companies' container. At the top, there is a navigation bar with 'Home | Companies' and the Altova logo. Below this, a 'Company Database' section contains several icons: Offline Mode, Customize Appearance, Refresh, Export Records to XML/CSV, Show Report, Print to PDF, and Help. The main content area shows a list of companies with columns for 'FULL NAME', 'CATEGORY', and 'STATE'. The 'Show Report' button is highlighted, indicating that a report form exists for this container.

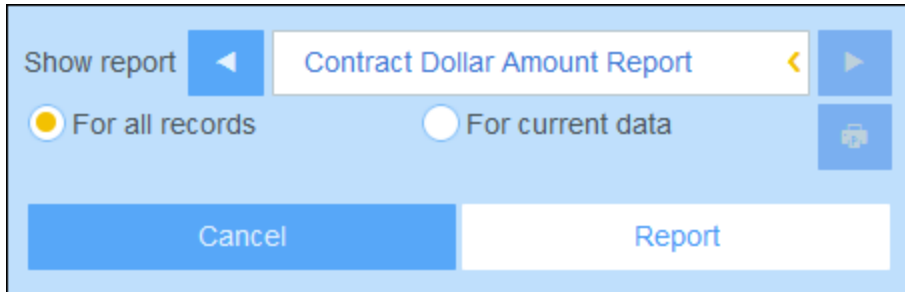
↑FULL NAME	CATEGORY	STATE
American Hornbeam	Customer	CA
Arbornull, Inc.	Legal firm	MA
AWS	Vendor	WA
Balsam Fir and Sons	Vendor	AZ
Balsam, Fir, and Oak	Legal firm	DE

Icons of the Container Page

	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

Report options

On clicking the **Reports** button, the *Report Options* form appears (*screenshot below*).



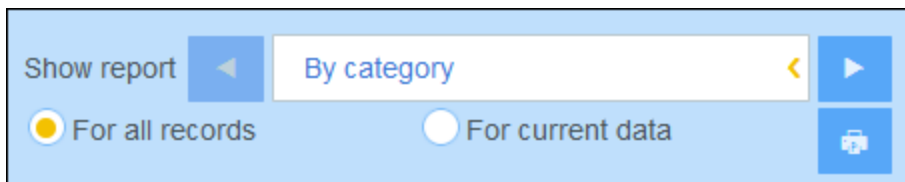
The screenshot shows a light blue dialog box titled "Report Options". At the top left, it says "Show report" followed by a left-pointing arrow, a text input field containing "Contract Dollar Amount Report", a right-pointing arrow, and a blue button with a right-pointing arrow. Below this, there are two radio buttons: "For all records" (which is selected) and "For current data". To the right of these radio buttons is a blue button with a printer icon. At the bottom of the dialog, there are two buttons: "Cancel" and "Report".

You can set the following options:

- If multiple report forms have been defined for the container, then set the *Show report* option to the report form you want to use. If only one report form is available, then this option is not displayed.
- Select whether the report should be generated for all records in the container or only the records in the current record listing (for example, the record listing *Standard list form* that is shown in the first screenshot of this topic, has four records, which may not be the full record count of this container).

The generated report

After the report has been generated, you are once again given the report options (*see above*), but this time within the generated report (*see screenshot below*).



The screenshot shows a light blue dialog box titled "Report Options". At the top left, it says "Show report" followed by a left-pointing arrow, a text input field containing "By category", a right-pointing arrow, and a blue button with a right-pointing arrow. Below this, there are two radio buttons: "For all records" (which is selected) and "For current data". To the right of these radio buttons is a blue button with a printer icon.

Additionally, you can print the report by clicking the **Print** icon (*see screenshot above*). The report will be created as a PDF, which you can save to file.

3.12 Print to PDF

On a [Container Page](#)²³, click the **Print** icon (at top right) to print the current record listing of the current container. The report will be created as a PDF, which you can save to file.

The screenshot shows the Altova Companies database interface. At the top, there is a navigation bar with 'Home | Companies' and the Altova logo. Below this is a 'Company Database' section with several icons: Offline Mode, Customize Appearance, Refresh, Export Records to XML/CSV, Show Report, Print to PDF, and Help. A 'Companies' tab is selected, showing '22 records' and a 'New Company...' button. A 'View' dropdown menu is set to 'Companies alphabetically'. Below the view menu are buttons for 'All', 'Search', and 'Detailed'. The main content area displays a table of company records with columns for 'FULL NAME', 'CATEGORY', and 'STATE'. Each row includes edit and delete icons.

↑FULL NAME	CATEGORY	STATE		
American Hornbeam	Customer	CA		
Arbornull, Inc.	Legal firm	MA		
AWS	Vendor	WA		
Balsam Fir and Sons	Vendor	AZ		
Balsam, Fir, and Oak	Legal firm	DE		

Icons of the Container Page

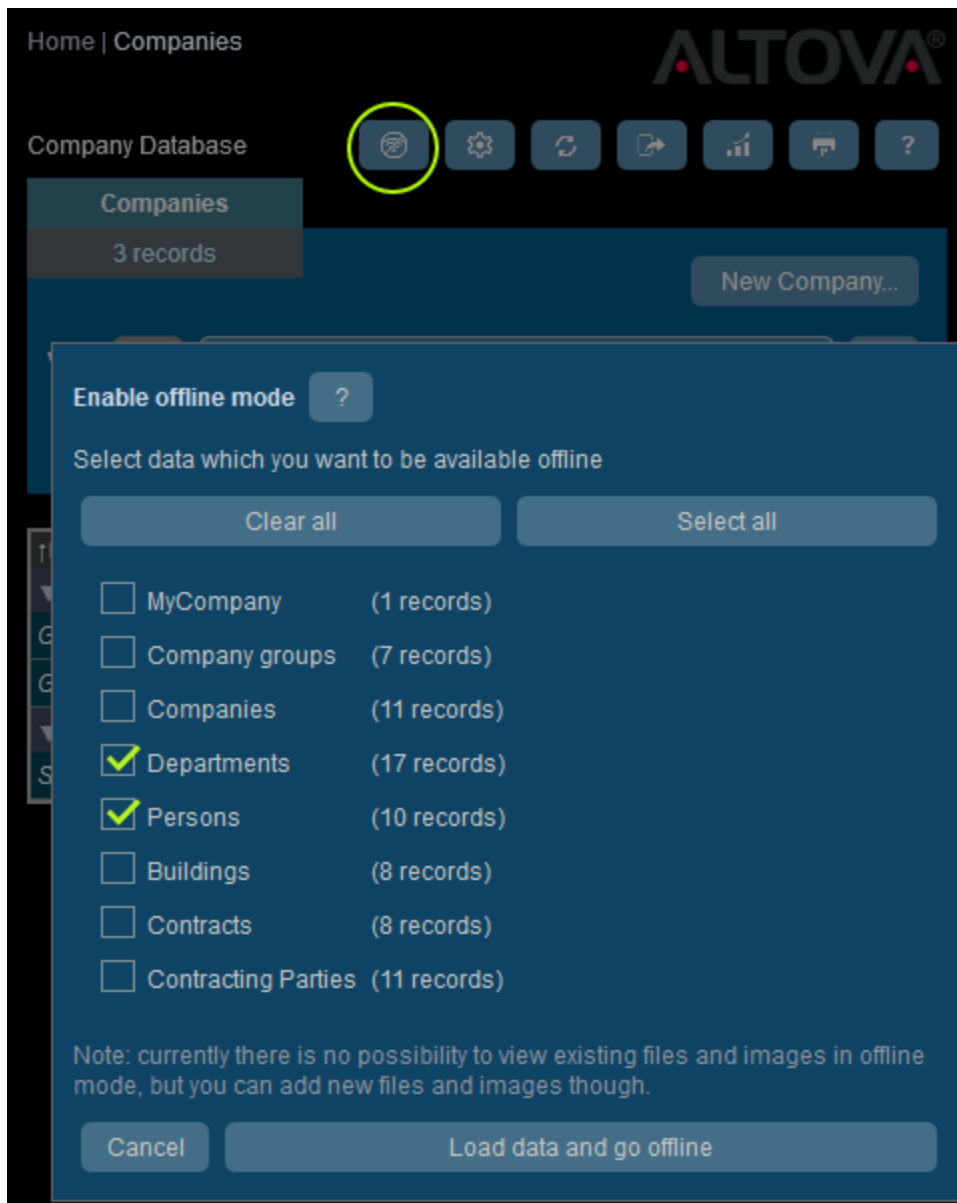
	Offline Mode ⁶²
	Customize Appearance ²⁵
	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

3.13 Offline Mode

Offline Mode enables you to save the records of selected containers to your device, edit these records offline, and save your edits back to the server when you exit Offline Mode. The **Offline Mode** button (*circled green in the screenshot below*) is available on the [Home Page](#)²¹ and any [Container Page](#)²³. For example, the screenshot below shows the **Offline Mode** button of the *Companies* container.

To go offline, edit records offline, and return online, do the following:


1. Click the **Offline Mode** button (circled green in the screenshot below) at any level. It does not matter in which container you are; all containers will be available for selection.
2. In the *Enable Offline Mode* form that appears (*screenshot below*), all containers are displayed and you can select the container/s that you want to edit offline.



3. Click **Load data and go offline**.
4. Records of the container/s that you selected will be available for editing offline. Edit these and save your changes.
5. That you are in Offline Mode will be indicated by a button named **OFFLINE** at top right. To go back online and save your changes to the server database, click **OFFLINE**. When you are back online, your changes will be saved automatically to the RecordsManager database.

Icons of the Container Page

	Offline Mode ⁶²
	Customize Appearance ²⁵

	Refresh ⁵⁴
	Export Records to XML/CSV ⁵⁶
	Show Report ⁵⁹
	Print to PDF ⁶¹
	Help ²⁰

Index

A

Admin zone, 7
Altova RecordsManager™ start page, 5
Audits, 17, 38

C

Change tracking, 17, 38
Color themes, 12, 25
Container Page, 23
Container themes, 25
Containers, 10
 records of, 23
CSV, export data to, 56

D

Data entry forms for records, 34
Data storage, 10
Database structure, 10

E

Exporting data to XML, CSV, 56

G

Getting started, 7

H

Home page (for system use), 21
Home page of app, 7

I

Identity fields, 10

J

Jump To, 52

L

Linking of data records, 10
List form,
 print, 61

O

Offline Mode, 62

P

Print, 61

Q

Quick Start (system use), 19

R

Record Page overview, 31
Record searches, 47
Records,
 adding new, 33
 Changes Mode during edits, 38
 data entry for, 33
 data entry forms for, 34

Records,

- editing data of, 37
- editing existing, 33
- listings of, 23
- sections in, 33, 35
- using template for new record, 33

Records and fields, 10**Refresh records listing, 54****Reminder dates, 42****Reminder settings (set by user), 42****Reminder status (for user), 42****Reminders,**

- editing by app user, 42

Reports,

- generating, 59
- printing, 59

Roles in RecordsManager, 9**X****XML, export data to, 56****S****Searching records, 47****Sections in records, 33, 35****System administration, 7****System use, 7, 18**

- quick start, 19

T**Templates for record entry, 33****Text size in app, 25****Themes, 12**

- variations for containers, 25

U**User zone, 7****V****Variations of themes, 25**