

1.1 COMMON SCREENS / LAYOUTS

Status Final (v1.0)

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1. OVERVIEW

This guideline provides guidance to common screens or layout types that users will encounter in AIS4.

The main types are:

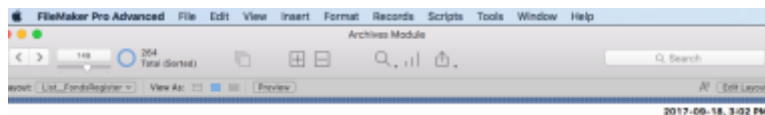
- **Home** screens ([section 3](#)).
- **Record View** screens ([section 4](#)).
- **List View** screens ([section 5](#)).
- **Data Entry** screens ([section 6](#)).
- **Popover** windows ([section 7](#)).
- **Developer** screens ([section 8](#)).

For forms and reports, see the guideline in this manual *AIS4 General Features > Reports, Actions, Statistics*.

2. NAVIGATION

FileMaker software includes generic features to support navigation in and between database records and tables. The ribbon that runs across the top of the FileMaker window (*Status Toolbar*) contains a number of buttons and navigation aids.

- For some types of screen (e.g. **Data Entry** screens), the *Toolbar* is deliberately hidden.
- Users can toggle the *Toolbar* hidden / unhidden (using the FileMaker View menu).
- Users can also customize the buttons that appear in the *Toolbar* on their desktop FileMaker client.



Wherever possible always use AIS navigation buttons instead of the generic FileMaker Status Toolbar button. The AIS buttons trigger scripts that are needed for behind the scenes operations.

- For example, click Done buttons to close windows rather than use the Mac OS "red dot" button in the upper left corner of a FileMaker window.
- AIS buttons typically (but not always) display a tooltip (text that appears when you hover your cursor over an object) that explains the purpose of the button; tooltips have not been fully implemented everywhere in the system.

For purposes of the AIS, the most useful feature of the *Status Toolbar* are those on the left-hand side that support navigation.

- The number above the slider tells you the current record number.
- The number to the right of the slider tells you the total number of records in the current set.
- The slider and the forward / back arrows beside it to the left can be used to navigate to records within the current set.

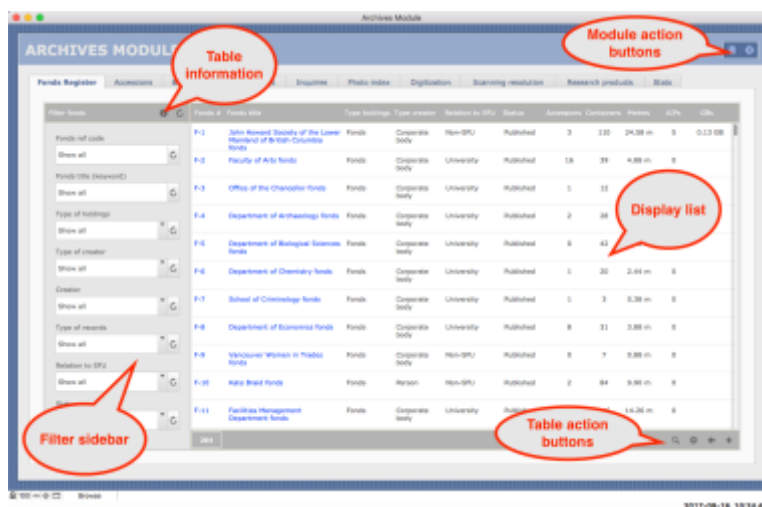
3. HOME SCREENS

There are six modules in AIS4: one for each program area (Archives, Records Management, FIPPA), and three others that share data across or support those program areas (Authority Control, Repository Management, and Office Administration).

Each AIS4 module has a **Home** screen that presents the primary entities tracked by it.

- The **Home** screen is the default landing page when you open a module.
- Each tab on the **Home** screen typically corresponds to one entity tracked by the system.
- To navigate to the **Home** screen, click the Home icon in the *Navigation buttons* in the upper right area of a **Record View** or **List View** screen.

This section provides a description of the main features of a typical **Home** screen.



Display list

The *Display list* takes up the bulk of the **Home** screen and shows records from the database table corresponding to the entity represented by the tab.

- The example above shows all Fonds / Collection records from the Fonds Register table.
- Blue text represent a link; click to navigate to the full record on the Record View screen.
- The number field on the left-hand side of the lower bar beneath the *Display list* gives the total number of records displayed.
- Depending on the tab, there may be other fields returning information about the set of displayed record (e.g. total time spent, total size).

Note that you **cannot** sort entries in the *Display list* on the **Home** screen.

- To sort, click the Get All button (arrow icon) below the list to get all displayed records on the **List View** screen and use the sort features there.
- For the Get All button, see the section below on [Table action buttons](#).

Filter sidebar

The *Filter sidebar* appears along the left side of the screen. It contains filter fields that allow you to narrow the list of records returned in the *Display list*.

- By default, fields are set to "Show all" – meaning all records in the table are displayed.
- Click the Refresh button (circular arrow icon) next to a field to reset it to "Show all."
- Click the Refresh button (circular arrow icon) in the sidebar header to reset all fields to "Show all."

Note that when you navigate between tabs, the values in filter fields may be skewed so that the *Display list* appears empty.

- In FileMaker terms, the same "global" fields are used on the various tabs and the same values will "stick" when you switch from one tab to another.
- Click the Refresh button (circular arrow icon) to restore the *Display list* on the new tab.

Table information

The AIS provides a brief description of the table corresponding to a tab in terms of its purpose and structure; to access, click the Information button (i icon) in the *Filter sidebar*.

- The AIS opens a popover window to show the table information.
- If a related detailed guideline is available in the *AIS4 User Manual*, the popover window will include a download link for the pdf of that section.
- See the section 7 below [for more on popover windows](#).

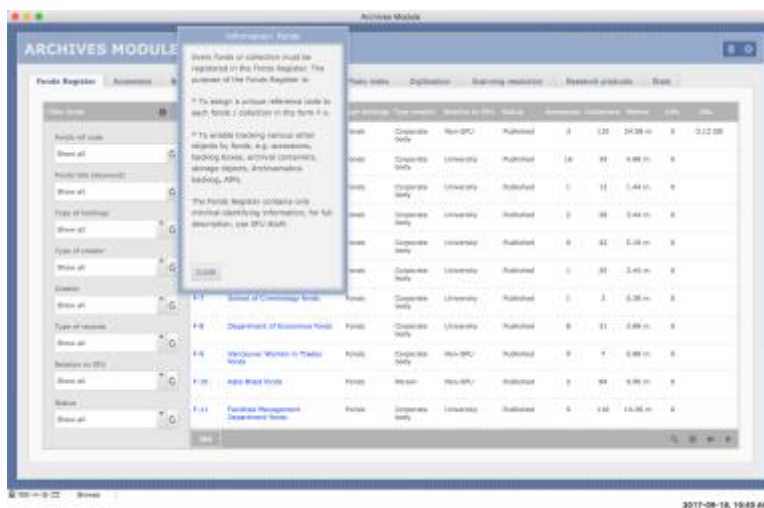


Table action buttons

A set of four *Table action buttons* appears in the bar below the *Display list*, on the right-hand side.

Quick Search button (magnifying glass icon)

- Click to open a popover windows allowing you to search across all records in the table.

- For more information on Quick Search, see the guideline in this manual on *AIS4 General Features > Search*.

Reports / actions button (gear icon)

- Click to open a popover window allowing you to select / run a standard report or action relating to the table (e.g. import records, perform common searches, output standard reports).
- For more information on reporting, see the guideline in this manual on *AIS4 General Features > Reports, Actions, Statistics*.

Get all button (arrow icon)

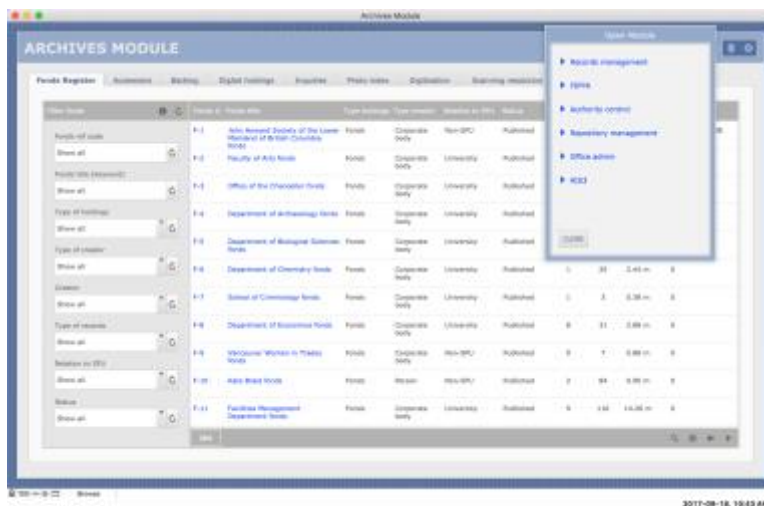
- Click to get all records currently shown in the *Display list* on the table's **List View** screen.

New record button (+ icon)

- Create a new record in the table.
- AIS will typically route you the **Data Entry** screen for that table.

Module action buttons

A set of two *Module action buttons* appears in the upper right section of the **Home** screen window.



Open other module button (database icon).

- Click to open a popover window allowing you to navigate to / open a different AIS4 module or the AIS3 Home screen.

Close file button (x icon)

- Click to close the current file and any open windows associated with it.

4. RECORD VIEW SCREENS

A **Record View** screen presents the full detail of a single record for viewing / editing.

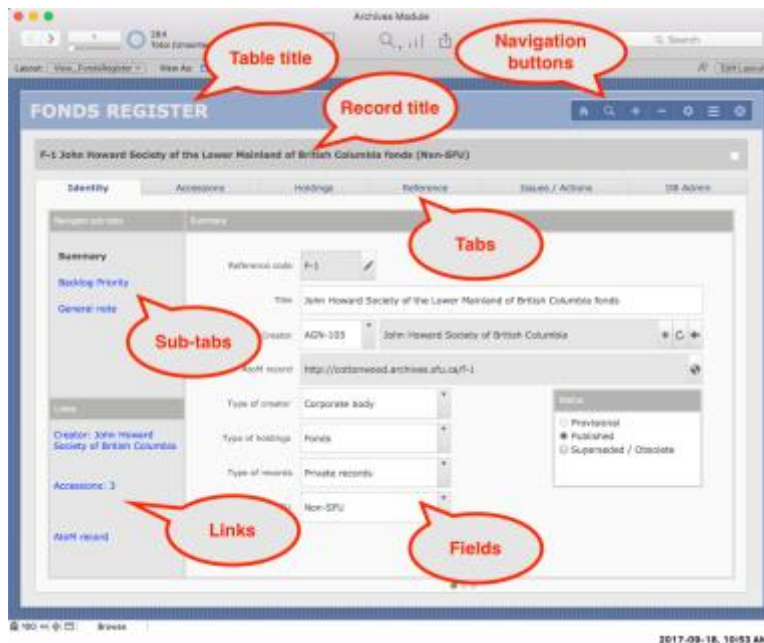


Table name

The name of the database table appears in the upper left side of the screen.

- The table name generally corresponds to an entity that is tracked by the system.

Record title

The title of the current record is shown beneath the *Table title* in a grey box.

- The *Record title* typically combines data from various fields that can be edited in the Fields area under tabs / sub-tabs.

Note that there is a check box on the right-hand side of the *Record title* box.

- Toggle the check box to mark / unmark records.
- For more information on marking records, see the guideline in this Manual *AIS4 General Features > Search*.

Tabs and sub-tabs

Information in the record is stored in fields organized into primary tabs and secondary sub-tabs.

The primary tabs appear along the top of the record, below the *Record title*.

- The current tab is fore-grounded.

Secondary sub-tabs appear in the sidebar on the left side of the record in a box labelled "Navigate sub-tabs".

- Sub-tab links are blue text.
- The current sub-tab text is bolded black.
- The name of the current sub-tab will also appear in the grey header box above the *Fields area*.

Note that not all tabs have sub-tabs.

- If there are no sub-tabs, the sidebar will typically contain some explanatory text describing the purpose of the fields in the current tab.

Two standard tabs are common in most tables:

- The first tab is typically named **Identity** and contains fields that summarize the record.
- The last tab is typically named **DB Admin** and contains calculation and control fields for troubleshooting purposes; see the sub-section below [for more information on the DB Admin tab](#).

Links

The **Identity** tab in most tables typically includes a *Links* box in the sidebar on the left-hand side of the screen.

- These are links to related records in other tables.
- Click a link to navigate to the record(s) on their respective **Record** or **List View** screen.

Fields area

The bulk of the screen is taken up with the *Fields area* which provides access to the data fields under a given tab / sub-tab.

- White fields can be directly edited.
- Shaded fields cannot be directly edited; they typically display data returned from calculations or related records.

The **Identity** tab often contains a distinctive *Status* field where you can view / update the status of a record.

Field action buttons

Icons appear beside some fields indicating actions are available relating to that field. Some but not all are illustrated in the diagram below.

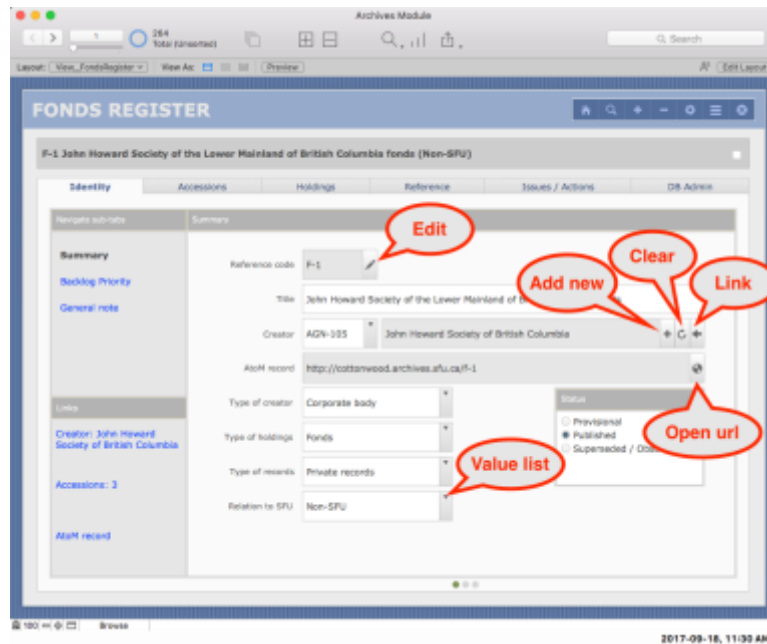
Value list (triangle icon)

- Click to select field value from a list of controlled terms.
- In some cases ("drop-down list"), terms are optional – you can enter a different value or overwrite a selected term.
- In other cases ("pop-up menu"), terms are mandatory – you can only select from the predefined list of terms.

- You cannot tell visually whether the field is governed by a drop-down list (optional terms) or pop-up menu (mandatory terms): if you can place your cursor in the field and begin editing, it is a drop-down list; if not, it is a pop-up menu.

Date field (calendar icon) [not illustrated]

- Enter the date directly or click to use the calendar interface to select a date.



Edit button (pencil icon)

- Appears next to some (but not all) shaded fields.
- Click to navigate to the tab / sub-tab or some other interface (e.g. a popover window) that allows you to directly edit the data.

Clear button (circular arrow icon)

- Clear field contents (sets to blank).
- Typically used when you cannot manually overwrite or clear selections from pop-up menu value list.

Add new (+ icon)

- Create a new related record.
- Typically used when selecting the ID of a record from a value list generated from another table (e.g. a list of Agents).
- AIS will route you to the **Data Entry** screen for that table or to some other interface (e.g. a popover window) that allows you to create the new record.
- Typically when you close the **Data Entry** screen, the selection field will be populated with the ID of the new record you just created.

Link (arrow icon)

- Navigate to a related record in an different table.
- AIS will route you to the record on the Record View.

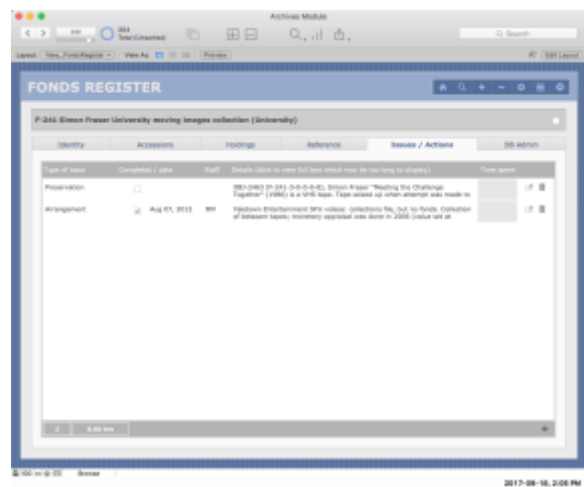
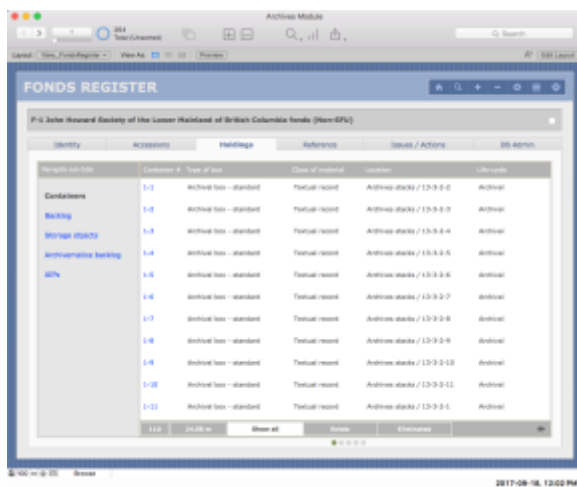
Open url (globe icon)

- Open a url in your default web browser.

Portals (related records)

Some tabs / sub-tabs present a *Portal* in place of a *Fields area*.

- "Portal" is a FileMaker term for a display list showing records from a different table that are related in some way to the current record.
- If the tab includes no sub-tab, the portal will take up the entire record screen.
- If the tab does include sub-tabs (as illustrated here), there will be a "Navigate sub-tabs" sidebar in addition to the portal itself.



Not all of the features described here will be present on every portal and they are not all illustrated in the examples given above.

Portal entry

- Portal entries are given against a white background.
- Most fields in a portal cannot be directly edited.
- Occasionally a field may be editable; it will be shaded grey.

Link (blue text or blue arrowhead)

- Within the portal, links appear as blue text.
- Occasionally a link may be given a blue arrowhead (pointing to the left).
- Click the link to be routed to that record on its full **Record View** screen.

Edit entry button (pencil icon)

- Click the pencil icon to edit the entry.
- AIS will route you to the appropriate **Data Entry** screen in a new window.

Delete entry button (trashcan icon)

- Click the trashcan icon to delete the entry.
- AIS will prompt you to confirm the delete request.
- Note that what is typically deleted here is the link between two entities rather than the related entity itself.
- For example, in the portal on the Accession record **Identity > Archival units** tab, the portal shows links the accession to one or more fonds; by deleting an entry, you sever the link between this accession and that fonds; you do not delete the fonds itself.

Portal summary data

- At the left side in the bar below the portal, one or more fields display summary data about the records displayed in the portal.
- This will typically include the total number of entries.
- Some portals may include additional, context-specific information (e.g. in the illustration above, there are fields returning the total number of boxes and total extent).

Portal filter buttons (text)

- Some portals may allow you to filter the records displayed by the values of one fields.
- Field values are represented by the series of filter buttons.
- There will always be an option to "Show all".
- The filter currently selected is highlighted white.
- Note that if no filter is selected the portal will be empty.
- **If you navigate to an empty portal, always check to see if there are filter buttons and make sure at least one of them is selected.**

Get All button (arrow icon)

- At the right side in the bar below the portal, there may be a Get All button.
- Click to retrieve all the records displayed in the portal presented on their **List View** screen.

New Entry button (+ icon)

- At the right side in the bar below the portal, there may be a New Entry button.
- Click to add a new entry to the portal; the AIS will route you to the appropriate Data Entry screen in a new window.
- Not all portals support creation of new entries by this method.

Download button (individual entry)

- If the related records displayed in the portal include digital objects (e.g. uploaded pdf files), you may be able to download it by clicking a download icon.

Download button (set of entries)

- In some contexts, you may be able to output the portal list as, e.g. a text file.
- In these cases, the download button will appear in the right side of the bar below the portal, next to the Get All and New Entry buttons.

Navigation buttons

A set of *Navigation buttons* appears in the top right area of the window.

- There are typically eight buttons as illustrated and described here.
- The standard set has evolved over time; some screens may not yet have the full standard set.

*Home button (house icon)*

- Click to navigate to the module **Home** screen.
- The landing page will typically be the last tab that you had open on the **Home** screen.

Find Mode search button (magnifying glass icon)

- FileMaker will switch to find mode, allowing you to search fields on the current screen.
- All fields will be blank.
- Enter search text in a field you wish to search on.
- You can click tabs and sub-tabs to access fields.
- Avoid clicking other links and buttons on the screen; typically they will not work in find mode.
- For more information on using find mode, see the guideline in this User Manual *AIS4 General Features > Search*.

New Record button (+ icon)

- Click to create a new record in the current table.
- Typically AIS will route you to the **Data Entry** screen in a new window.
- In some cases, it may simply create a new record and leave you with the new blank record on the **Record View** screen to complete data entry.

Delete Record button (- icon)

- Click to delete the current record.
- AIS will prompt you to confirm the deletion request.

Reports / Actions button (gear icon)

- Click to open a popover window that allows you to select reports and actions relating to the current record or current set of records.
- For more information, see the guideline in this User Manual *AIS4 General Features > Reports, Actions, Statistics*.

Sort button (vertical bars icon)

- Click to sort the current set of records.
- You will be prompted to select the fields on which to sort.
- You can select as many fields as you want and order them as you like.
- You need to know the technical database field names (which are similar to but not the same as the field labels as they appear on-screen).

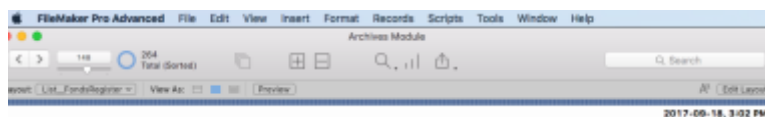
List View button (horizontal bars icon)

- Click to switch to the **List View** screen for the current set of records.

Close file button (x icon)

- Click to close the current file and any open windows associated with it.

In addition AIS button, there is also a *FileMaker Status Toolbar* that runs across the top of FileMaker windows.



See [section 2 above](#) for general comments on the *FileMaker Status Toolbar*.

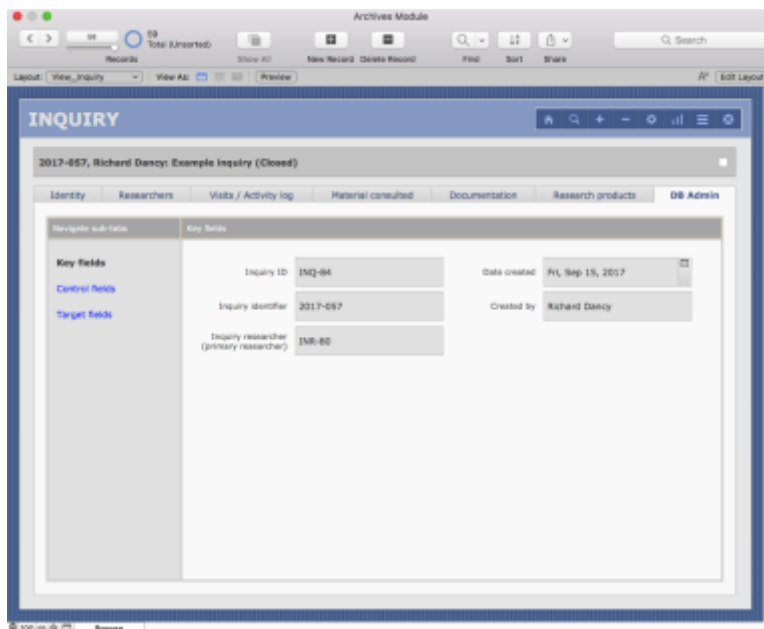
- **As a rule, always use the AIS buttons rather than the generic FileMaker ones.**
- The AIS buttons are attached to specially designed scripts that implement specific operations.

DB Admin tab

The **DB Admin** tab shows calculation and control fields mainly used by the System Administrator for trouble-shooting purposes.

- Most users will not need to access this tab.
- Fields cannot be directly edited on this tab.
- The System administrator should use the **Developer** screen to edit control fields.

The **DB Admin** tab typically has three sub-tabs; if a table has many control fields, it may be necessary to use more than three sub-tabs.



Key fields

- Display the values of a record's "key" fields.
- A FileMaker *primary key* is a unique identifier used to establish relationships between records across various table.
- The value of a *primary key* typically has the form TablePrefix-SerialNumber (e.g. INQ-123); the value is typically auto-entered at record creation.
- A *foreign key* is a field whose value that references a *primary key* from a different table.
- In addition to the key fields, this sub-tab also shows (on the right side) who created the database record and on what date.

Control fields

- *Control fields* are fields whose values are set by calculations or scripts.
- Calculation fields cannot be edited.
- Fields whose values are set script can be edited; they are indicated by an asterisk (*) next to the on-screen field label.
- *Control fields* include fields for sorting (*Sort*), displaying data (*Show*), formatting reports (*Report*), establishing relationships (*Pointer*, *Target*), and other control purposes (*Control*).

Target fields

- *Target fields* (*Target*) are a particular type of *control field* that are referenced by external tables to establish relationships to support display of records in filterable portals.
- They typically have the form "Show all [line break] + value".

- In order to function as targets, they must be indexable (i.e. they cannot be calculation fields drawing data from related records in an external table).
- Most are calculation fields drawing from fields in the current table, but some are set by script (if they need data stored in external tables – e.g. a list of related record IDs).

5. LIST VIEW SCREENS

A **List View** screen presents an abbreviated view of all records in the current set in the form of a list.

FONDS #	TITLE	TYPE	RELATION TO SPS	STATUS	ACCESSIONS NOT PROCESSED	BACKLOG RECORDS	ARCHIVAL CONTAINERS	STORAGE OBJECTS	AIPS	MARK
F-238	7th Floor Media Fonds	Fonds	University	Provisional	3	22	0	0	0	<input type="checkbox"/>
F-49	Academic Planning Office fonds	Fonds	University	Published	0	0	2	0	0	<input type="checkbox"/>
F-202	Academic Planning Services fonds	Fonds	University	Published	0	0	21	0	0	<input type="checkbox"/>
F-203	Academic Relations Office fonds	Fonds	University	Published	9	24	13	0	0	<input type="checkbox"/>
F-266	Academic Women fonds	Fonds	Carious community	Provisional	1	1	0	0	0	<input type="checkbox"/>
F-70	Alan B. Cunningham Fonds	Fonds	Non-GFU	Published	0	0	2	0	0	<input type="checkbox"/>
F-210	Alumni Relations Office Fonds	Fonds	University	Provisional	3	4	0	0	0	<input type="checkbox"/>
F-271	Angela Hrynuk Fonds	Fonds	Non-GFU	Provisional	1	22	0	0	0	<input type="checkbox"/>

Table name

The name of the database table appears in the upper left side of the screen.

- It appears in the same location as on the **Record View** screen.

List entries

The list of entries takes up the bulk of the screen.

- The total number of records in the list can be seen in the *FileMaker Status Toolbar* next to the slider.
- The current record is highlighted white.
- Fields cannot typically be edited on the **List View** screen.
- Links are given as blue text.
- Typically the link in the first column on the left will take you back to the full **Record View** screen for that record.
- The *Mark Record* field on the right of the entry can be toggled on or off.

Column headers (sort)

The *Column headers* in the grey box across the top of the list show the names of the fields displayed.

You can sort the list by clicking the *Column headers*.

- Clicking the headers will toggle the direction of the sort.
- E.g. click once to sort ascending (a–z); click a second time to sort descending (z–a).

List buttons

The List buttons along the bottom of the list provide a number of navigation operations.

- There are typically eleven buttons as illustrated and described here.
- The standard set has evolved over time; some screens may not yet have implemented the full standard set.



First, Prev, Next, Last

- Takes you respectively to the first, previous, next or last record in the list.

Isolate

- Reduces the current set to the current record; all other records omitted.

Omit

- Omit the current record from the current set.
- **Note that this does not delete the record, it simply excludes it from the current set.**

Omit multi

- Prompts you to specify how many records to omit from the current set.

Show all

- Restores the current set to all records in the current table.

Mark

- Mark all records in the current set (*Mark record* = checked).

Unmark

- Unmark all records in the current set (*Mark record* = blank).

Get Mark

- Get all marked records in the current table.

Navigation buttons

A set of *Navigation buttons* appears in the top right area of the window.

- With one exception, it is the same set of buttons that appear on the **Record View** screen, illustrated and described in [section 3 above](#).
- The exception is: instead of a List View button, it has a Record View button to take you to the current record on its full **Record View** screen.
- You can use these List View / Record View buttons to toggle between the two views of the current set.
- The Find Mode button here will route you to the **Record View** screen in FileMaker find mode.

6. DATA ENTRY SCREENS

A **Data Entry** or **Import Data Review** screen presents all fields available for editing in a single, continuous, scrolling page.

- Whereas the **Record View** screen groups fields by tab, the **Data Entry** screen groups them in sections on a single page.
- **Data Entry** screens are the typical interface for creating new records, accessed when you click the New Record button in a given table.
- **Import Data Review** screens are typically used when you run a scripted action to import csv data from outside the AIS (e.g. from a spreadsheet or web form).
- **Data Entry** and **Import Data Review** screens are structured in the same way.

Navigation bar buttons

There is a set of *Navigation bars buttons* running along the top and (sometimes) the bottom of the screen.

- These remain stationary as you scroll through the body of the record.
- The buttons are slightly different for **Data Entry** or **Import Data Review** screens.
- Screens that contain few fields may not have the bottom bar set of buttons.

Top navigation bar

Done button

- Closes the **Data Entry** window, saving any data entered during the data entry process, and typically routes you to the new record on its full **Record View** screen.

Submit button

- Appears only on **Import Data Review** screens in place of the Done button.
- Registers the data imported to create new record(s) and complete the import process.
- The review window closes and you are typically routed to the new record(s) on the **Record View** or **List View** screen.

Cancel button

- Click to cancel the data entry or import process.
- The AIS will prompts you confirm the delete request, then deletes the current record(s) and closes the **Data Entry / Import Data Review** window.
- Not available on all **Data Entry** screens.

New Record button

- Click to create an additional new record in the same table.
- Make sure you have completed data entry on the current record before creating a new one.
- Not available on all **Data Entry** screens.

Bottom navigation bar

Zoom in / Zoom out button

- Click to increase or decrease the size of text, fields and objects on the screen.
- Note that the top and bottom navigation bars themselves are not affected.

Page up / Page down button

- Click to scroll the window up or down.

Top / Bottom button

- Click to jump to the top or bottom of the screen.

Spell check button

- Click to check the spelling in all fields in the current record.

Note that the bottom *Navigation Bar* does not appear on all **Data Entry** screens (omitted if they contain few fields).

If you have imported data that will result in multiple AIS records, an additional set of buttons appears in the bottom *Navigation Bar* (not depicted in the example shown):

Record # of #

- Shows how many records were imported and the number of the current record.

First, Previous, Next, Last buttons

- Click to navigate between records in the set.

Data entry area

The *Data entry area* contains fields for data entry.

- Fields are grouped into sections boxes.
- White fields can be directly edited.

Red arrows appear next to mandatory fields.

- The arrows disappear once you have entered data in the field.

Section information buttons may appear in the section header bars.

- Click the button to open a popover window explaining the purpose of the section and giving guidance for data entry in particular fields.
- Section information buttons have not yet been implemented in all Data Entry screen.

Sidebar portal

Some **Data Entry** screens include a sidebar on the right side of the window with a portal showing other entries related to the same parent record.

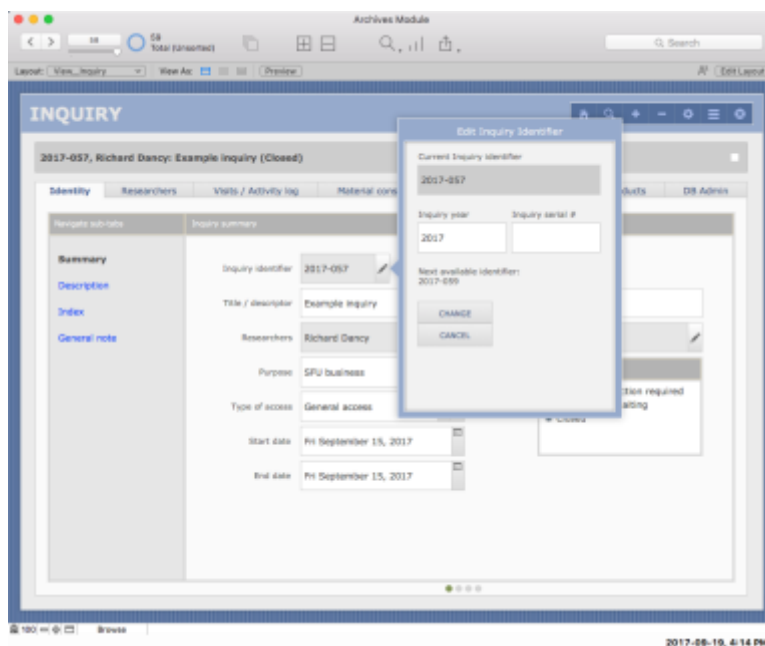
- For example, all sources registered to the same accession.
- The current record you are working with on the **Data Entry** screen is highlighted grey in the portal.
- To navigate to a different record (while staying on the **Data Entry** screen), click its entry in the portal.
- Not all **Data Entry** screens include the sidebar portal.

7. POPOVER WINDOWS

A FileMaker popover is a small window that floats over the current layout and can be triggered by clicking buttons or text objects.

The AIS uses popover windows for various purposes. Popovers may:

- Present context-specific explanatory text.
- Provide an interface for creating related records in other tables.
- Enable users to access portal data when there is not enough screen space to display the full field in the portal.
- Provide pick-lists and menus (e.g. for reports).



To close a popover window, click the Close or Cancel button or click anywhere outside the popover.

8. DEVELOPER SCREENS

Developer screens show all the fields in a table in a simple alphabetical listing. The screens are not readily accessed by users, and are intended for system administrators for trouble-shooting purposes and for access by AIS scripts.

To access a **Developer** screen:

- Switch to FileMaker Edit Layout mode.
- Use the FileMaker Layout Menu to navigate to the appropriate screen in the Developer folder.

The screenshot shows a web browser window titled 'Archives Module' displaying the 'ACCESSION ARCHIVAL UNIT (AAU)' form. The form contains the following fields and values:

_idft_fondRefCode	F-19
_idft_accessionID	ACN-1
_idft_accessionArchivalUnitID	AAU-1
--- GENERAL FIELDS ---	
admin_created_dt	2016-12-22
admin_createdBy_nm	Richard Dancy
archivalUnit_levelDescription_txt	Fonds
archivalUnit_rate_nm	
archivalUnit_primaryFlag_txt	
archivalUnit_refCode_txt	F-19
archivalUnit_site_nm	Department of Physics fonds
ref_file_nm	
ref_fonds_nm	29
ref_item_nm	
ref_series_nm	
ref_subSeries_nm	
ref_subSubSeries_nm	
url_atomLink_txt	http://bottomwood.archives.slu.ca/F-19
--- UTILITY FIELDS ---	
zzControl_allTableFields_txt	_idft_fondRefCode
zzControl_levelDescription_kn	1
zzFilter_portal_get	
zzPrinter_number\$2_sch	2
zzReport_levelCodeTitle\$code_txt	F-19, Department of Physics fonds
zzShow_levelCodeTitle_txt	Fonds: F-19, Department of Physics fonds

The browser window shows the URL 'http://bottomwood.archives.slu.ca/F-19' and the date '2017-09-19, 4:58 PM'.

Most tables in the AIS include a field ($\langle\langle\langle$ *Control_allTableFields__uct* $\rangle\rangle\rangle$) that returns the name of all fields in the table.

- Access this field on the **Developer** screen to copy / paste or export a list of the table's fields.
- Note that the list will only be complete if in fact all fields are included on the **Developer** screen.

Document Control

Version history			
<u>Version</u>	<u>Date</u>	<u>Finalized by</u>	<u>Version notes</u>
v1.0	Sep 19, 2017	Richard Dancy	First iteration