Release 9.1 now allows you to simplify the look and feel of commonly used forms.
After completing this topic, you will be able to:

- Demonstrate how to edit forms and assign UI templates to users
- Describe the types of UI changes that are allowable on a form
- Explain how to manage default UI templates and multiple UI templates
- Explain the use of the new *UI Elements* tab in the form settings window
In release 9.1, authorized users can now edit common forms to remove, deactivate, and reposition fields, including user-defined fields.

**Benefits:**
- Users get to work with forms that are tailored for their role and needs, and are not distracted by extraneous information.

**Motivation:** Increase user efficiency in processing forms.

These changes are made directly from the SAP Business One application.
Service is paramount to OEC Computers. To improve the efficiency of service calls, customer support staff need to quickly scan key information in documents and master data. They need a simplified version of the standard forms, with fields that are support-related consolidated on the same tab, unused fields removed, and user-defined fields placed on the main form so they are easily accessible.

In release 9.1, user forms can be easily simplified to meet the needs of a group of users, such as support staff. The edited forms are grouped into UI templates which can be assigned to end users according to role.
In this before and after simplification example of the Item Master Data, all the required fields have been moved to the General tab, and any unused fields have been hidden from the form. All other tabs have been hidden, so the user has access to all the information on the main tab.
A UI template is a collection of UI changes to a set of forms. A new menu function has been added to the *Administration* menu to support the creation of UI templates.

After you add the UI template to the system, you can select forms in the dropdown list and edit them.

Different UI templates can be created for different sets of end users. The template is assigned to users by name. These users will see the modified forms when they open the relevant window.

The ability for an end user to make further changes to a form for personal use is still possible using form settings.
The new functionality is designed for authorized users. A new general authorization has been added called *UI Configuration Template*.

Authorized users are able to create a UI template, edit forms in the template, and assign the UI template to other users based on their job role. Different UI templates can be created for different sets of end users.

Unauthorized users cannot create UI templates.

Authorized users can also edit a form for personal use, using a new menu *Edit Form UI* that has been added to the *Tools* menu.

An unauthorized user can edit a form using the *Tools* menu, only if permitted by an authorized user. Permission must be given for each form.
With this new capability, you can edit the following forms:

- Business Partner Master Data
- Item Master Data
- Sales and Purchasing documents
- Inventory documents
- Incoming and Outgoing Payments
- Journal Entry and Journal Voucher
- Chart of Accounts
In the next few slides we will look at the options you have to edit and simplify a form.
After you select a form in a UI template, an Edit UI button appears. Click this, and you enter edit mode, where you can make design changes. The title of the form changes to include the text “UI Edit Mode”. This is highlighted in the graphic.

In the example the business partner master data form is shown, however, the same editing rules apply to all eligible forms.

In edit mode, you can select a single field or multiple fields, and open the content menu by right-mouse clicking.

If the field is editable (displayed in yellow), the context menu will allow you to hide or deactivate the selected field or fields. In the example we have hidden the fields for mobile phone and fax. You can see the space left by the hidden fields.

If the field is inactive, (displayed in gray), the context menu will only allow you to hide the field.
Saving and Reversing Changes

- After you have made changes you need to save them in the template. You can do this from the context menu.
- *Restore Default* changes all fields back to the original out-of-box format.

After you have made the changes, you need to save them in the template. You can do this by selecting *Save* from the context menu.

The *Restore Default* option on the context menu acts as an “undo” button. So if you have hidden a field, it will be restored on the form in the original position.

Be aware that the action of restoring defaults changes all fields in the form back to the original out-of-box format. Even if you have saved and closed the UI template, when you restore the form it will be set back to the original settings.
Some fields are automatically grouped together, so that they can only be changed as a group. In edit mode, when you select one of the fields with your mouse, all the fields in the group are automatically highlighted. This is shown in the slide example, where all the business partner bank fields on the *Payment Terms* tab are grouped.

When you choose hide or inactivate from the context menu, the action applies to all the fields.

These field groupings are predefined in the system and cannot be changed.
You can move a field or multiple fields using drag and drop. This can be useful for closing the gap left after hiding fields. You can select, then drag and drop remaining fields to close the gaps. In the example, fields on the tab have been moved to close the gap.

You can select and move fields to any part of the form with a gap. Although the form size cannot be made smaller than its original default size, the need for scrolling can be eliminated by moving fields from the bottom to the top of a form.
When you select multiple fields, in addition to hiding and disabling the fields, you have the option to align the fields:

- **Align to Left/Right.** Use this option to line up fields that you have moved with existing fields on the form.
- **Align to Top/Bottom.** Use this option to adjust the vertical spacing between fields that you have moved. The spacing will match the default spacing of fields.

In the example we have selected multiple fields, then used the context menu to align the fields to the top of the tab area.
You have flexible options for moving fields under a tab using drag and drop. You can move a field from a tab to the header area of the form, from the header area of a form to one of the tabs, and from one tab to another.

To move a field from one tab to another, first select the field, then move the field to the header area, then switch tabs and position the field onto the target tab.

In the example, we want to move the Payment Terms field from the Payment Terms tab to the General tab. We first select the field, then drag it to the header area. We switch to the General tab, then position the field on the General tab.
Moving UDFs to the Main Form

- Now possible to move user-defined fields to the main part of a form (header or tab)
  - Select and hold the field until a black border appears (1)
  - Drag the field (2)
  - Move into position (3)

It is now possible to move user-defined fields from the side window to the main header of the form or to a tab on the form. If you have worked with user-defined fields in previous releases, you will appreciate the significance of this change.

To move a UDF:
- Select the field, not the label, and hold with your mouse until a black border appears (see screenshot 1).
- Drag the field to the main form (see screenshot 2).
- Position the UDF on the main form (see screenshot 3).

All user-defined can be moved from the side window, with the exception of UDFs that are created with the Type “General”. These types of UDFs typically hold a link or image.

Only one UDF field can be moved at a time. The new position of the field is only effective for the selected document type. In the example, we have moved the UDF on the Sales Quotation, but the field will not be moved for other document types, such as a sales order, unless you edit the other
document type and move it. This provides a way to move user-defined fields relevant only for a specific document type without the need to use UDF categories in the side window.
A new menu path is available under the *Tools* menu. This function provides a way to make UI changes to a form, for personal use. The menu path is activated when the user has one of the editable forms open. The form then moves into *UI Edit Mode*. The user can make the same changes as available in the UI template window, for example, hide fields and tabs, move fields, and align fields. The user should save the change using the context menu.

The authorization *General > Edit Form UI* is required. Super users have this authorization or, an unauthorized user can be permitted by an authorized user for a one time change.
Some additional editing functions are now available using form settings. We will cover these in the next few slides.
A new tab called *UI Elements* has been added to the form settings window that allows additional form editing.

This new tab is only visible when an authorized user opens the form settings window from one of the editable forms.
In the graphic, the *UI Elements* tab is shown for the item master data. Notice there is an expandable tree structure for each of the form tabs, including the Header area.

From the *UI Elements* tab you can hide and deactivate fields by deselecting the *Visible* and *Active* checkboxes. This produces the same result as using the context menu from within a UI template.

As you can see in the example, we have expanded the *Header* tree in the UI Elements tab, and hidden the *Group* and *Foreign Name* fields on the Header.
A key new feature is the ability to hide an entire tab in a form. Simply deselect the *Visible* checkbox for the tab name row to hide entire tab.

**Exceptions:**
- *Header* and *General* tabs in master data forms
- *Contents* tab in marketing document forms

The rows for these tabs are by default grayed out so cannot be deselected on the *UI Elements* tab.
Managing UI Templates

In this section we examine how to assign and manage UI templates.
Assigning UI Templates to Users

- Assign UI template to users by name
- When user logs in, they will see the forms from the UI template
- Super users do not appear in the name list so cannot be assigned to a UI template

After you have made the changes to the required forms and saved the UI template, you can now assign the template to individual users by name. When the user logs in, they will see the changed forms from the UI template.

Note that super users do not appear in the list of names, so cannot be assigned to a UI template.
The changes made to a form can be copied from one UI template to another. Simply select the rows for the forms you want to copy, choose the Copy To button, and select the target UI template.
Instead of assigning a UI template to a user, you can designate a default UI template on the \textit{Display} tab of the \textit{General Settings}. The default template forms will be automatically applied to all \textit{new} users created after the default template was set. This excludes new super users.

Note there can be only one default UI template.

If a new user is later assigned to a UI template that is not the default template, the assigned template forms will take precedence over the default UI template.
Let us examine how designating a default UI template affects existing users who may or may not have already been assigned to a UI template.

In this example, we have three existing UI templates for Support, Sales-CRM, and Warehouse users.

We have assigned User A to the Sales-CRM template.

Now we select the Support template as the default template. What happens now?

- User A, previously assigned to the Sales-CRM template, is not affected. User A will still see forms from the Sales-CRM template.
- User B, not assigned to a template, is affected and will now see forms from the default Support template.
- User C, a super user, is not affected by the default template.
Multiple Templates

If user is assigned to multiple UI templates with overlapping forms:

- First assigned template considered highest priority
- User has option to choose a different UI template in form settings

The system allows you to assign multiple UI templates to a user. Since the templates could contain overlapping forms, how does the system know which one to use?

The first template assigned to a user is considered the highest priority.

The user has the option to choose a different UI template from a dropdown list in the form settings window, and switch to the forms in that template by choosing the *Apply* button.

If the user has been assigned only one UI template, the dropdown list does not appear in the form settings window.
Removing a Template

To remove a UI template from the system, select the row and delete it using the context menu.

You can remove a UI template by selecting the row and choosing *Delete Row* from the context menu.

The system warns you that the operation is irreversible, and that personal UI changes made by end users to forms in the template will be lost. This could affect a user who was assigned to a UI template, and who was then granted authorization to make additional, personal changes to a form in the UI template.
In summary, authorized users can now simplify forms and assign sets of forms to end users in a UI template.

UI changes can be made by editing the form in the UI template. Some changes can now be made in the form settings window. The table summarizes the types of changes you can make.

Using **UI Edit Mode**, you can:
- Move a field using drag and drop.
- Move a field to another tab.
- Move user-defined fields from the side window to the main form area, thus eliminating the need for the side window.
- Align a group of fields or compact fields to improve the visual appearance.
- Hide a field using the context menu.
- Make a field inactive using the context menu.

Using the **UI Elements** tab in the form settings window, you can:
- Hide a field by deselecting the *Visible* checkbox.
- Make a field inactive by deselecting the *Active* checkbox.
- Hide an entire tab by deselecting the tab name in form settings.

<table>
<thead>
<tr>
<th></th>
<th>UI Edit Mode</th>
<th>Form Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move a field (drag and drop)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Move a field to another tab</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Move a user-defined field to main form</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Align and compact fields</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Hide a field</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Make a field inactive</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Hide a tab</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
Thank you

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