

FlukeView Forms

Documenting Software

Tutorial 1: Creating a Customized Form Template

Introduction

This tutorial shows you how to create a custom form template by modifying an existing form template in *FlukeView Forms Designer*. It also shows how you can copy a form template to a different database.

Tutorial

FlukeView Forms Documenting Software ships with a number of form templates. These form templates are generic enough to support customers' basic needs for displaying and printing meter data.

However, many customers want to customize their forms to better display meter data, or to reflect information about their company or project.

FlukeView Forms Designer allows you to take existing form templates and change them to meet your needs.

Form templates contain form items, which are the fields that display meter data or user data. In this tutorial, the term "form item" is generic; text enclosed in angle brackets refers to a specific form item name. For instance, a label form item will appear in the text as <label>.

You can add or remove form items that exist on the template, edit existing form items so that they display different text, or change the way they display meter data.

Open the Form Template

1. From the Windows **Start** menu, open *FlukeView Forms Designer*.
2. The path name of the database that you are currently using is shown in brackets in the blue title bar at the top of *FlukeView Forms Designer*. Remember this path name; you will be changing to a different database for this tutorial, and will want to return to this database when you are finished.
3. From the **File** menu, select **Open Database**. Browse to the directory where *FlukeView Forms Documenting Software* is installed and open the database **tutorial.fdb**, which contains the form template you should use with this tutorial.
4. From the **File** menu, select **Open**. Select the form template **Tutorial 1 – Customize a Form Template** and click **OK** to open.

Change the Title and Font of the Form Title

At the top of the form template is a <label> form item that contains the words "Tutorial 1." The following steps show you how to change the title and font displayed in the <label>.

1. Move your cursor over the <label> that displays the text "Tutorial 1." Right-click on the <label>. A pop-up **Properties** menu appears. Select it.
2. A tabbed dialog box appears. Under the **General** tab, change the **Label text** from "Tutorial 1" to "Line Voltage Test Report." Click **OK**.
3. Not all of the title "Line Voltage Test Report" is visible. To make the form item wider, click on the form item so that shaded border appears around the <label>. Click and drag one of the black anchor dots on the border, and stretch the <label> until it is wide enough to display the text. Release the border to see the redrawn text.
4. Right-click on the <label> and select the pop-up **Properties** menu again. Select the **Fonts** tab.
5. Use the drop-down menu to change the **Font Style** from **Bold** to **Bold Italic**. Select the **Underline** check box. Click **Apply**. The title inside the <label> is now bold, italicized and underlined.
6. You can also change the font type and font size of the text displayed by the <label>. On the **Color** tab of the dialog box, you can change the text or background color of the <label>. Make changes and click **Apply** until you are satisfied with the results. Then, click **OK** to close the properties dialog box.

Delete and Move Form Items

This section demonstrates how to delete form items from the form template or move form items around on the form template.

1. At the bottom of the page is a <label> displaying the text "Display Readings Table." Beneath it is a <display readings table> form item. You have decided to delete both of these.
2. Move your cursor over the <label> that contains the text "Display Readings Table" and click it so that the border appears around the <label>.
3. From the **Edit** menu, select **Delete Form Item**. This will delete the <label>.
4. Delete the <display readings table> the same way.

The <memo> form item that is titled "COMMENTS:" does not have much room for comments to be typed in. The following steps show you how to move the <memo> and make it larger so that longer comments can be displayed.

1. First, click on the <memo> that contains the text "COMMENTS:" so that the border appears around the <memo>.

2. Move your cursor over the border that encloses the <memo>, until your cursor displays a four-way arrow. This indicates that you can drag the <memo> around the form.
3. Hold down your mouse button and drag the <memo> to the place on the form where the table used to exist. Release the mouse button when the <memo> is where you want it to be.
4. Make the <memo> larger by clicking on one of the black anchor dots in a corner of the <memo> border and dragging until the <memo> is large enough to hold several long lines of text.

Add a Second Page to Your Form and Insert a Logged Readings Table

Your form does not currently list your logged data in a tabular form. A <logged readings table> form item would do this, but there is no room left on your form to add one. You can add a second page to the form template, and put a <logged readings table> on the new page.

1. To add a second page to your form template, go to the **Layout** menu and select **Number of Pages**. A dialog box appears, showing that the current number of pages is set to **1**.
2. Change the value in the **Number of pages:** box from **1** to **2**, and click **OK**.

Notice that now there is more room at the bottom of the form. A dotted line shows the division between pages 1 and 2 of the form. In general, do not place form items on the form so that they straddle this line.

Scroll down to the top of page 2 to insert a <logged readings table>.

1. From the **Edit** menu, select **Insert Form Item**. The **Insert Form Item** dialog box appears.
2. Select **FlukeView Logged Readings Table** from the dialog. Click **Insert**. A <logged readings table> appears on the form. Click **Close** to close the dialog box.
3. Move the <logged readings table> until it is at the top of page 2. Leave a little room at the top for the page margin. Make sure the <logged readings table> is not extending past the right or left borders of the page, or overlapping the dotted line between pages 1 and 2.

Save Your Changes to a New Form Template

Now you can save your changes to your customized form template. You can either select **Save** or **Save as** from the **File** menu. **Save** will make the changes to the template you initially opened (in this case, the template file **Tutorial 1 – Customize a Form Template**). **Save as** will save the changes to a new form template and preserve the original template as it was before you made changes. This tutorial uses the **Save as** option.

1. From the **File** menu select **Save As**.
2. In the **Form template name:** box, type in "New Line Voltage Test Report". Click **OK**.
3. From the **File** menu select **Exit**.

4. From the Windows **Start** menu, open *FlukeView Forms*.
5. From the **File** menu of *FlukeView Forms*, select **New Blank Form**.
6. The list of available form templates appears. Select "New Line Voltage Test Report" and click **OK** to create a new form from your customized form template. You can now load meter data into this form.

Copy Your New Template to Your Own Database

Now that you have created your own template, you can copy it to your own database from the tutorial database, so you can use it with the data you are collecting.

1. From the File menu of *FlukeView Forms*, select **Exit**.
2. From the Windows **Start** menu, open *FlukeView Forms Designer*
3. From the **File** menu, select **Open**. Select your new form template "New Line Voltage Test Report." Click **OK**.
4. From the **File** menu, select **Export**. This will allow you to export your form template to a *form template file*, so that it can be imported to a different database.
5. In the Export Form dialog box, type in a file name for the form template file. Use "NewLineVoltage." This creates a file, **NewLineVoltage.ftf**, containing your new form template.

Now we will return to using your own database and copy you new template into it.

1. From the File menu of *FlukeView Forms Designer*, select **Open Database**. Select the database you were using before you started this tutorial.
2. From the **File** menu, select **Import**. Select the form template you just created, **NewLineVoltage.ftf**. This will copy the form template into your database.
3. Double check that your form template is now in your database by selecting **Open** from the **File** menu. "New Line Voltage Test Report" should be one of the form templates listed there. Select the template and click **OK**. Your form template will appear.

You will now be able to use this form template in *FlukeView Forms*.

Notes

- You can start a completely new form by opening *FlukeView Forms Designer*, opening the **File** menu, and selecting **New**. This will give you a blank form that you can add form items to, editing each to display data to your specifications.

See Also

- *FlukeView Forms Users Manual*, "Altering Form Templates"
- Technical Note, *Creating a Professional-Looking FlukeView Forms Template*