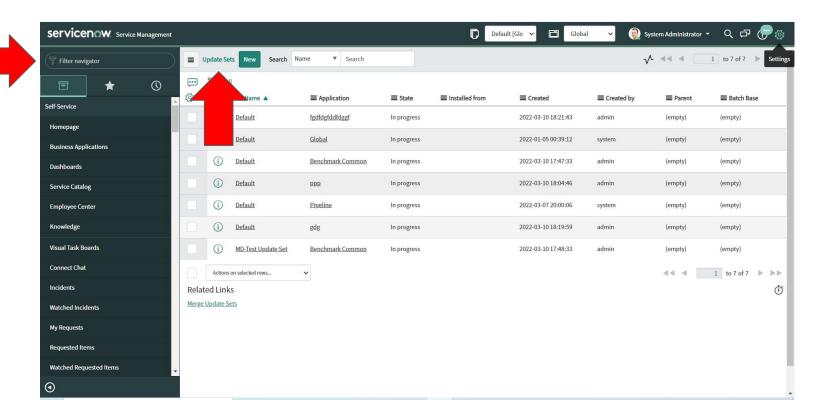
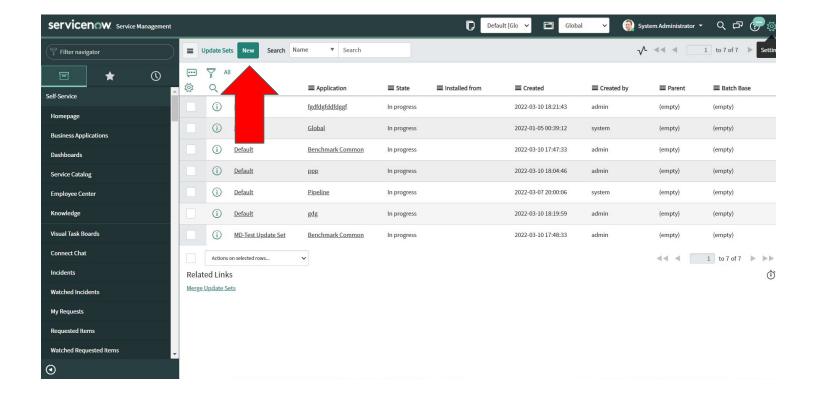


1. Create Update Set:

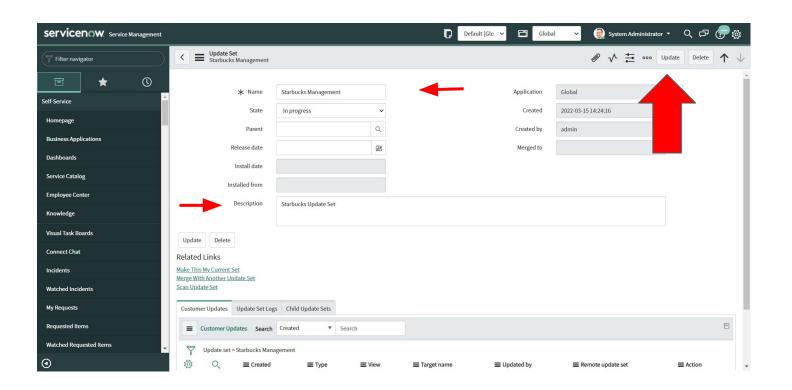
- Search "update sets" in the navigator.



2. Select "new" to create new update set.

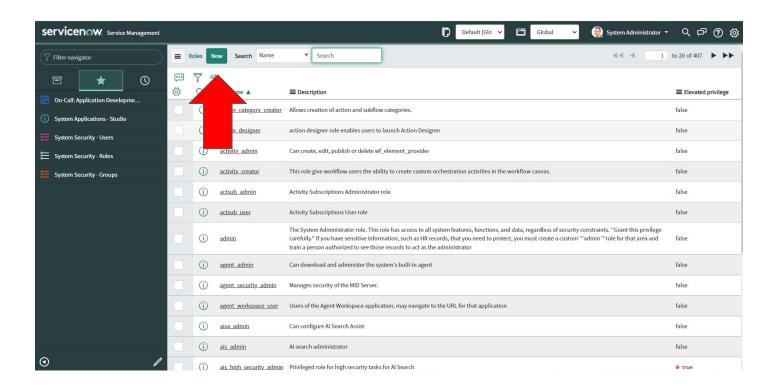


3. Add in company information, and select save/submit/update.

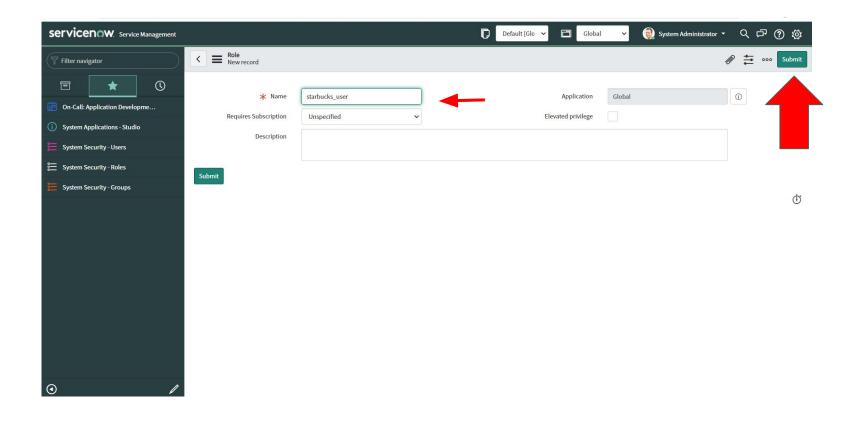


4. Creating Roles

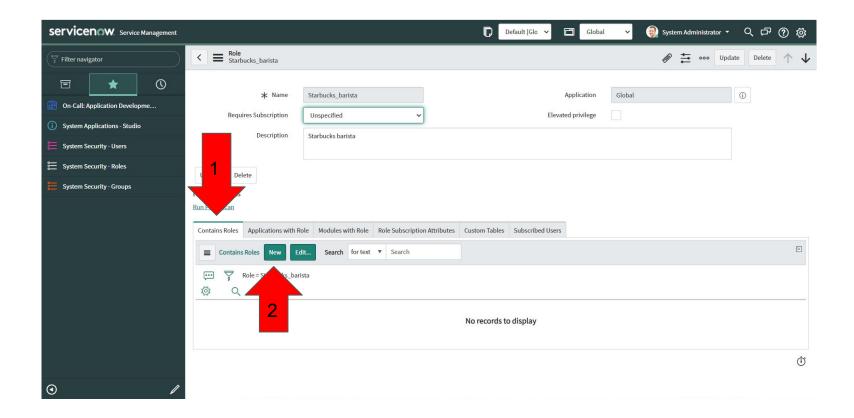
Search for "roles" in the navigator, and click "new."



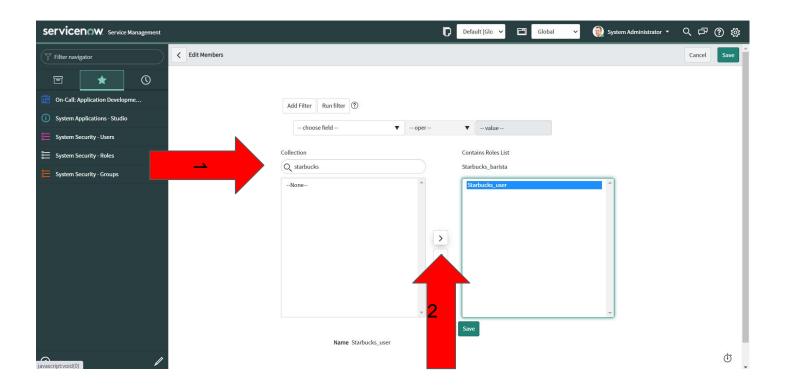
5. Enter company information and save/submit.



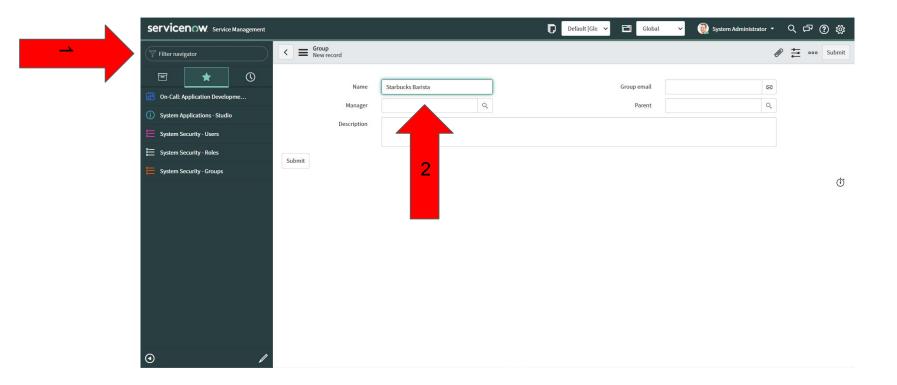
5. To assign a **role** to a user, select the "**contains roles**" tab. Then select **new**.



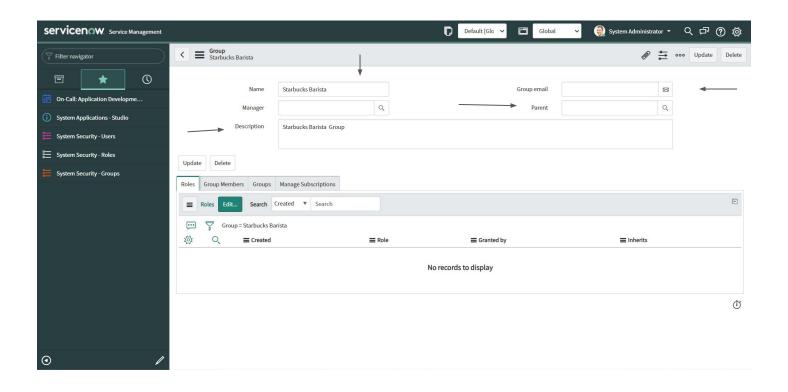
6. Search for the **user**, and select the **>** symbol.



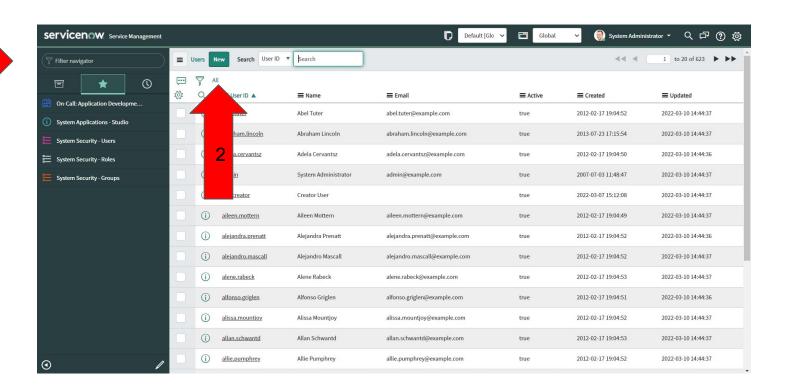
7. To add **groups**, search "**groups**" in the navigator, and select "**new**."



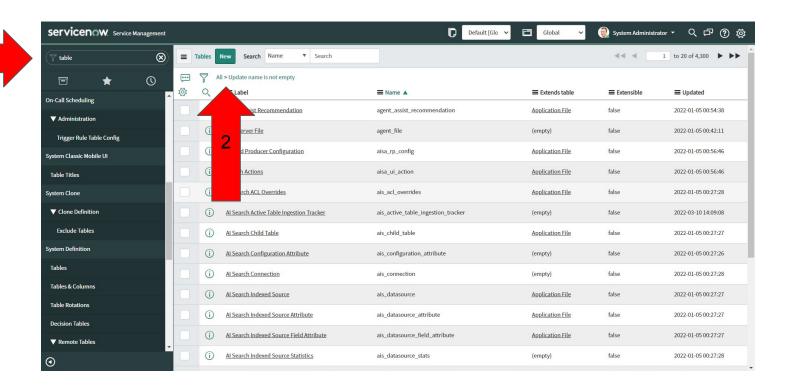
8. Enter company information.



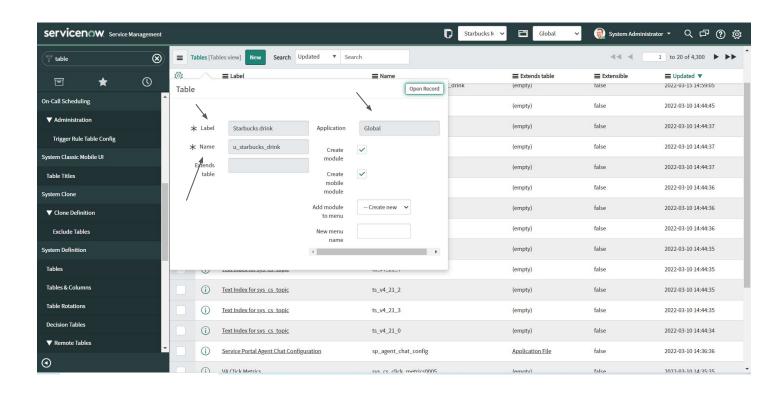
9. To create users, search "users" in the navigator, and select "new."



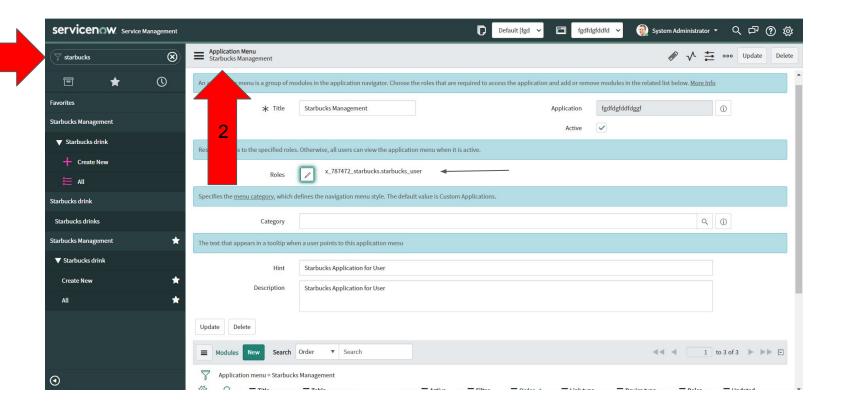
10. To create a **table**, search "**tables**" in the navigator, and select "**new**".



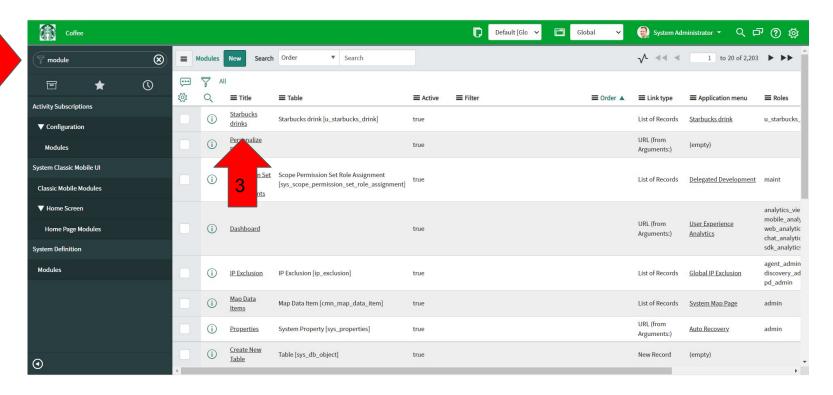
11. Enter company information.

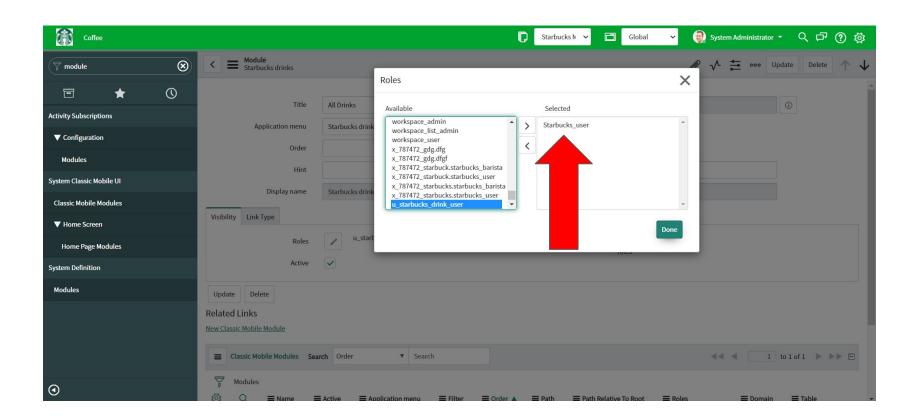


12. To edit the **management application**, search "application menus" in the navigator.

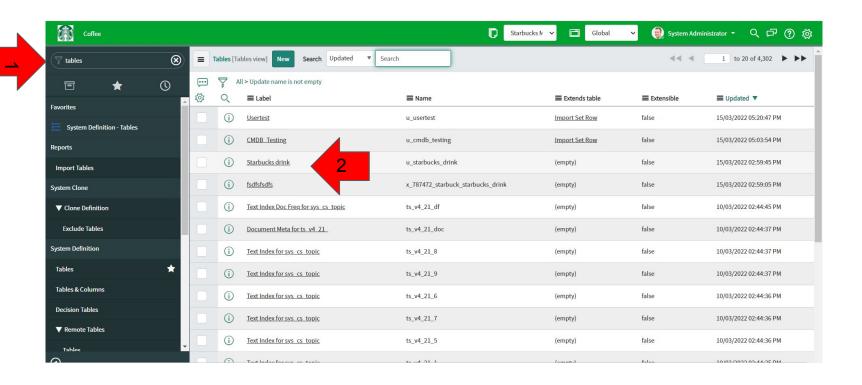


13. To rename a **module**, search "**module**" in the filter navigator, and open the record. Then add the proper **role**.

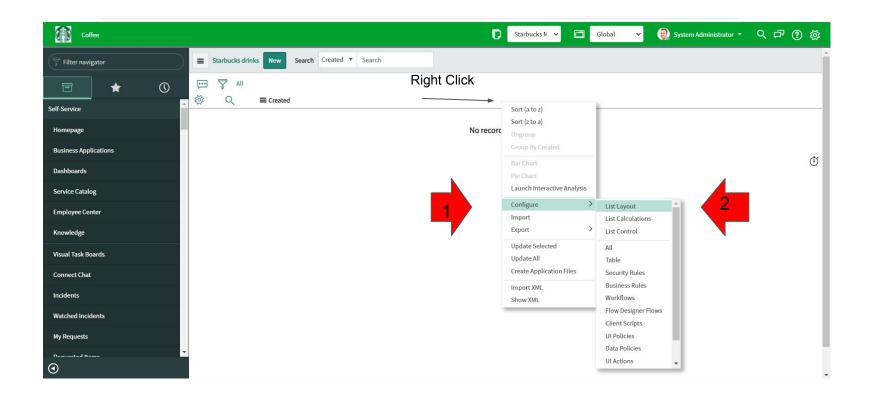




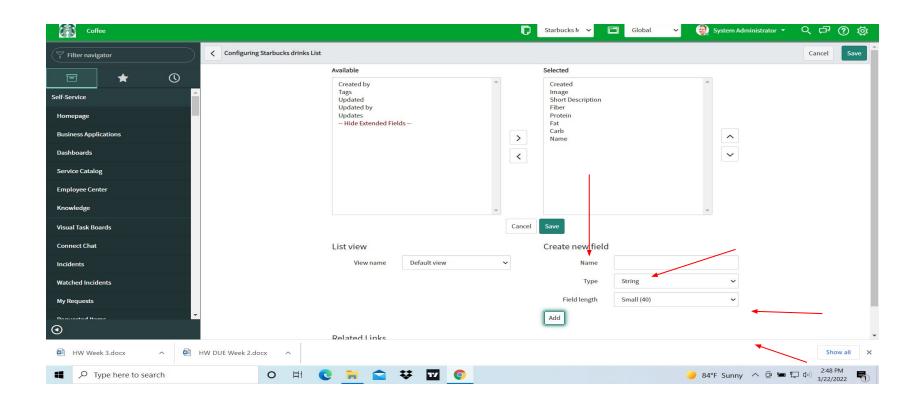
14. To add fields to a **table**, search for "**tables**" in the filter navigator, and open the record you want to update.



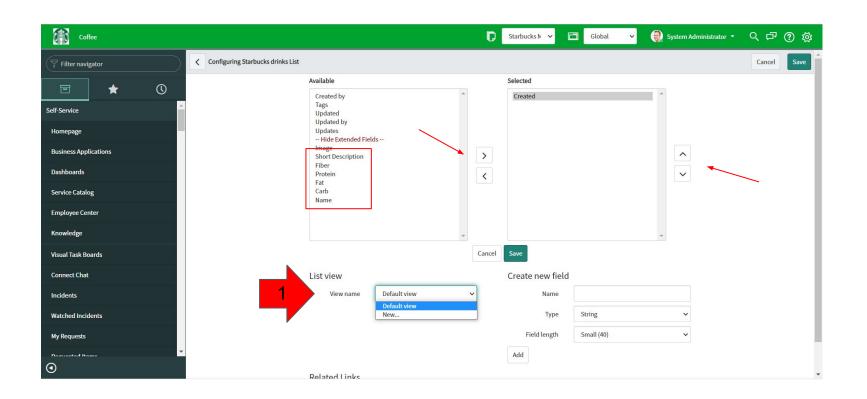
15. After opening the record, right click on the top header, and navigate to "configure" > "list layout"



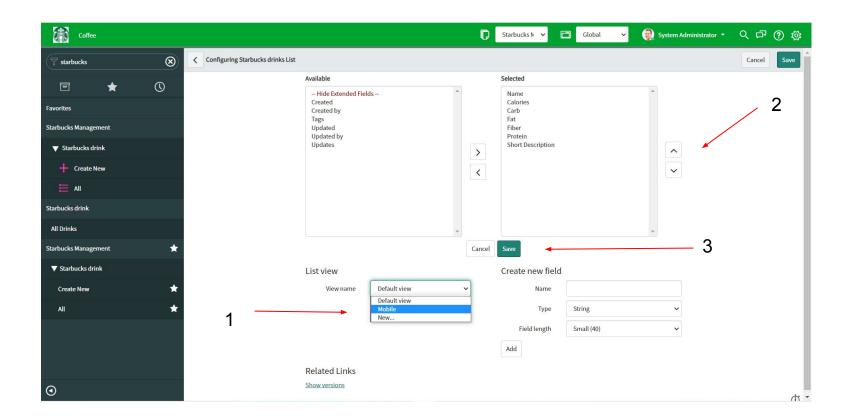
16. Add the fields required by filling out the "create new field" prompts. Move them to the "selected" box by using the ">" button. "Save" when finished.



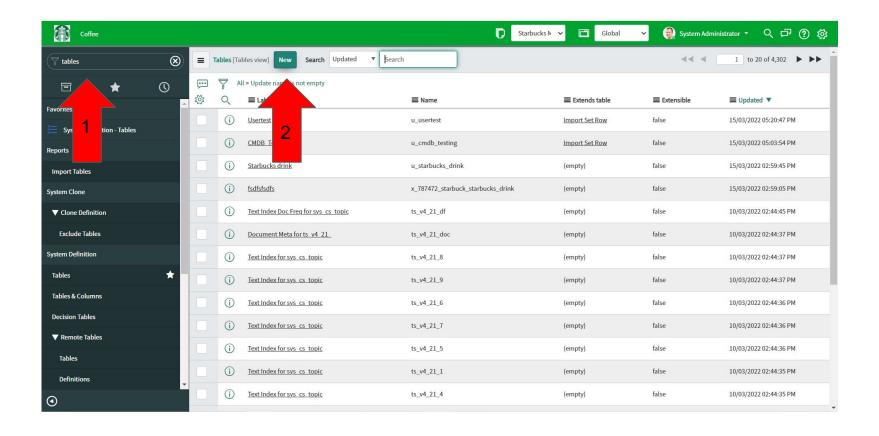
17. To adjust the **default view**, select "**default view**" from the drop down box, and move over the fields in the order you would like using the ">, <, ^" buttons. "**Save**" when finished.



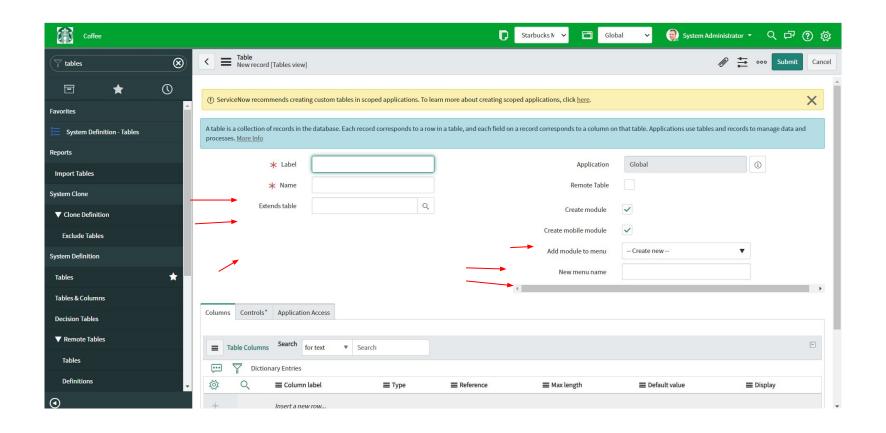
18. To populate a **mobile view**, repeat **step #17** but create a new **view** and title it, **"mobile"**



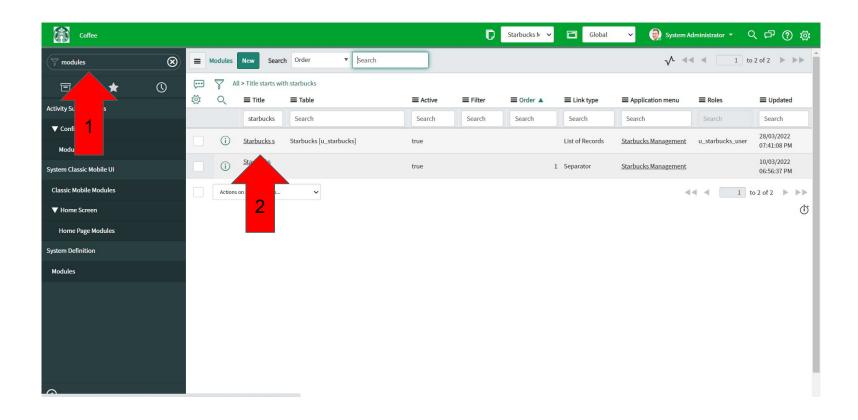
19. To create a **table** that extends a task, search "**tables**" in the filter navigator, then select "**new**".



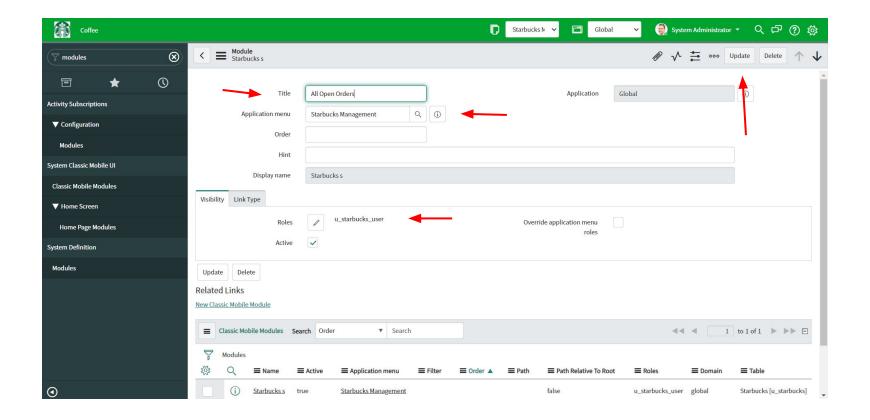
20. Fill out the required information. For this **table** we are going to extend it and also create a **module**.



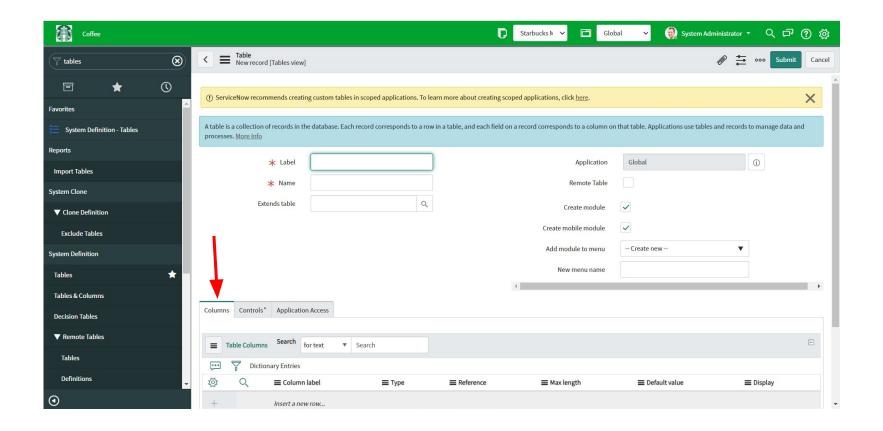
21. To rename a **module**, search "**modules**" in the filter navigator, and open the **module** created in the previous step.



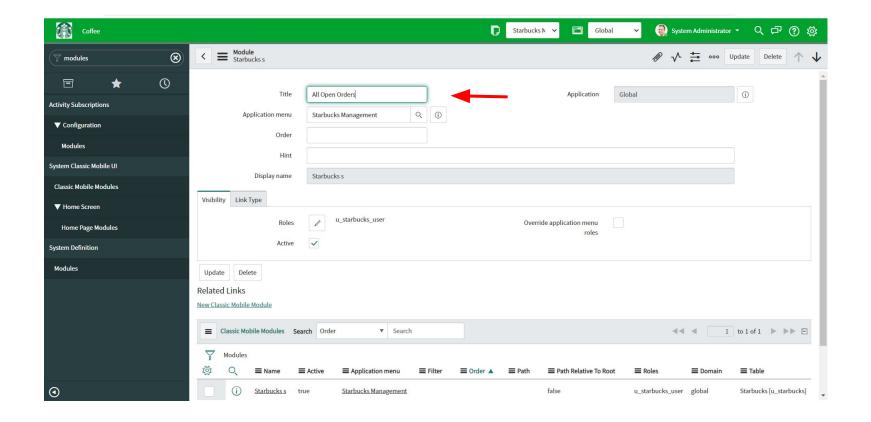
22. Change / update the information as required. Click "update" when finished.



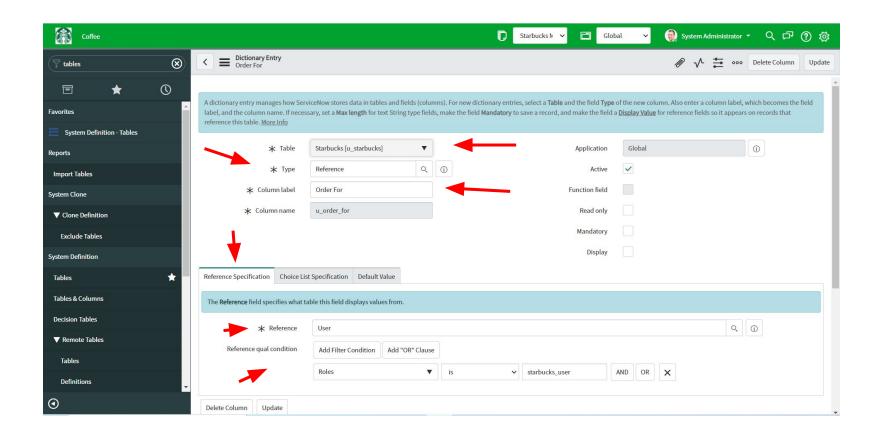
23. To add a **field** to a **table** via a personalized list, navigate to the table, and scroll down to the **column field**.



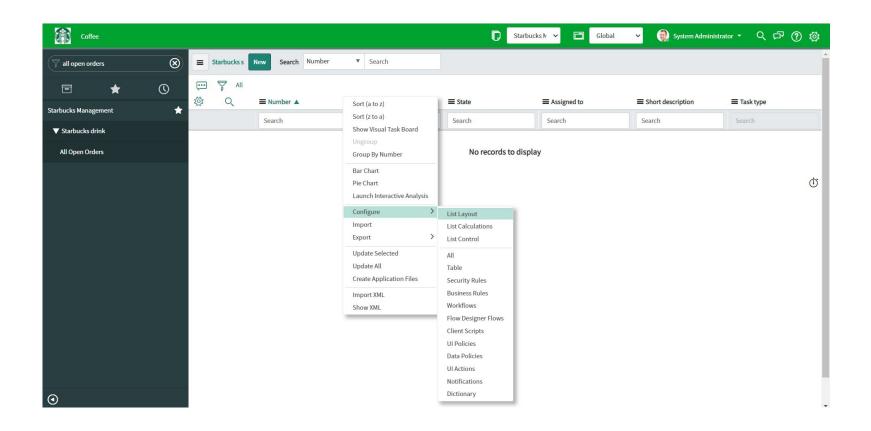
24. Add the **field**.



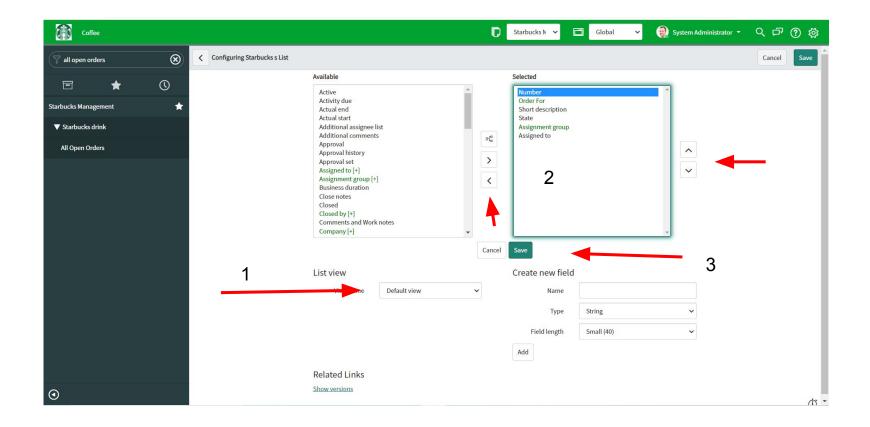
25. Have the **table** in the previous step reference a **user table** by navigating to the table and fill out the required information. "**Update**" when finished.



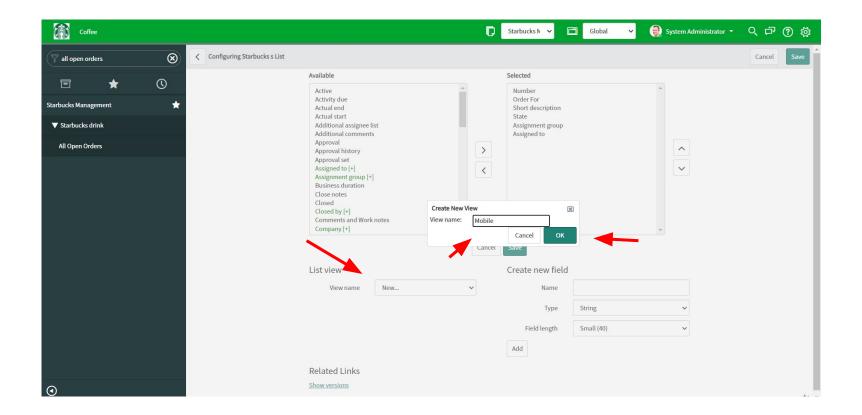
26. To adjust the **default list view** for the **table**, navigate to the table and right click the header. Select **"configure" > "list layout".**



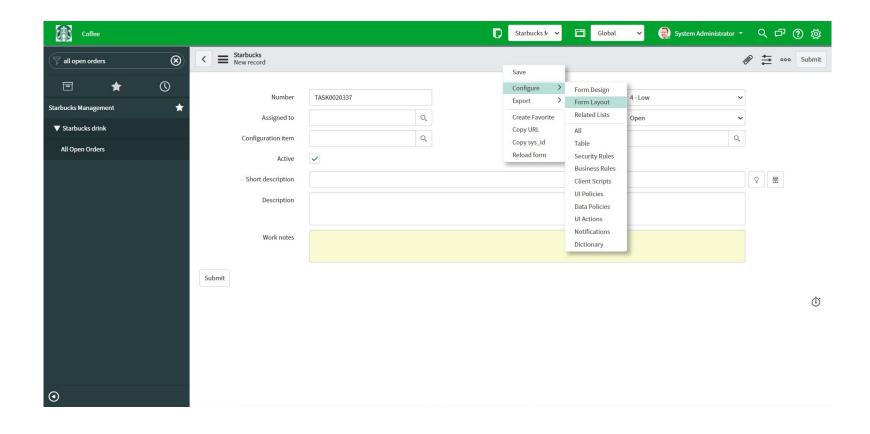
26 (a). Order the "**selected**" **fields** in the desired fashion using the ">, <, ^," buttons. "**Save**" when finished.



27. To adjust the **mobile list view**, repeat the previous step, but make sure that "**mobile**" is selected.



28. To adjust the default **FORM** view, navigate back to the table, right click the header and select: "**configure**" > "**form layout**".



29. Use the ">, <, ^," buttons to adjust the **selected fields**. Click "**save**" when finished.

