



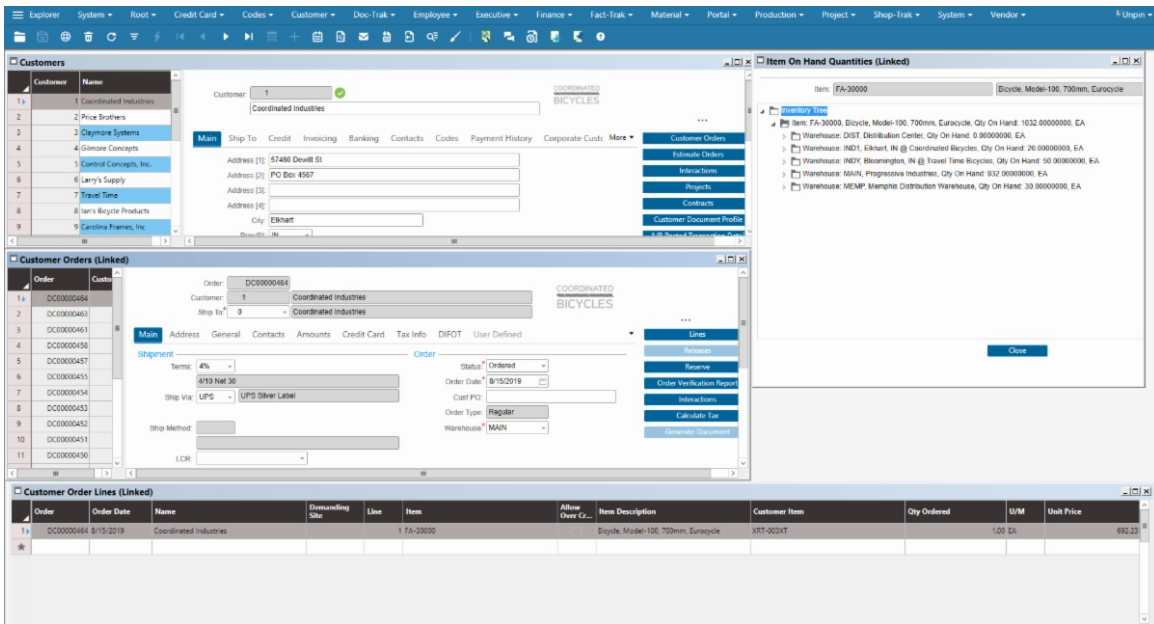
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CSI (SyteLine) Tips and Techniques Newsletter

Creating Your Own Workspace

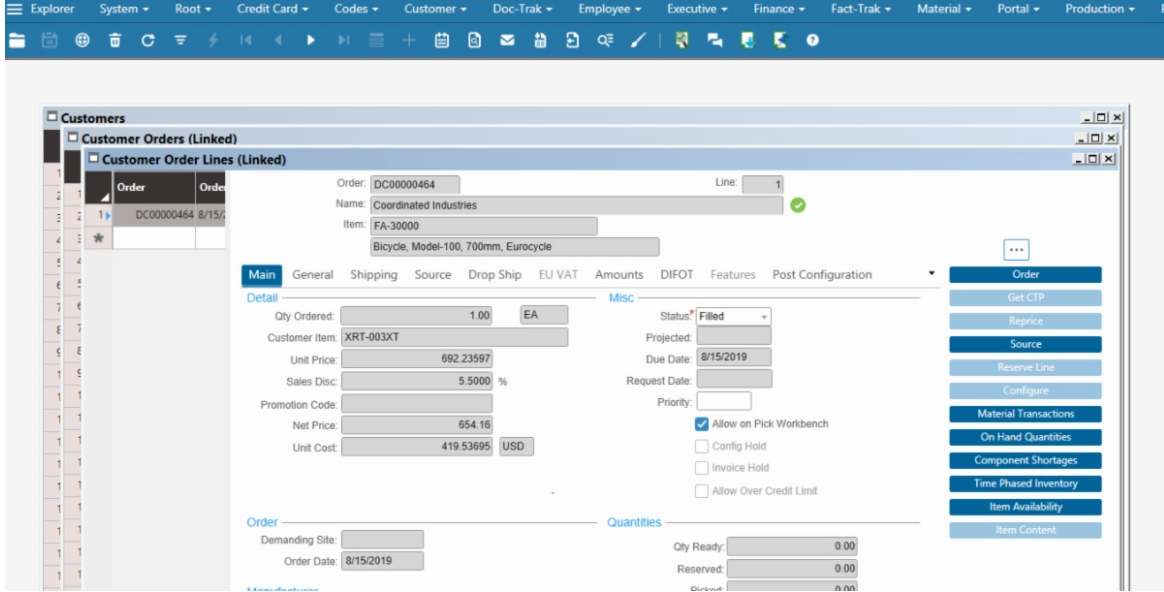
Did you know you can create your own workbench of pre-arranged, linked forms in SyteLine/Cloudsuite Industrial? This feature will help you if often work in multiple forms simultaneously and can be highly productive.

Here's an example of a linked form workspace for Customer Order Entry:

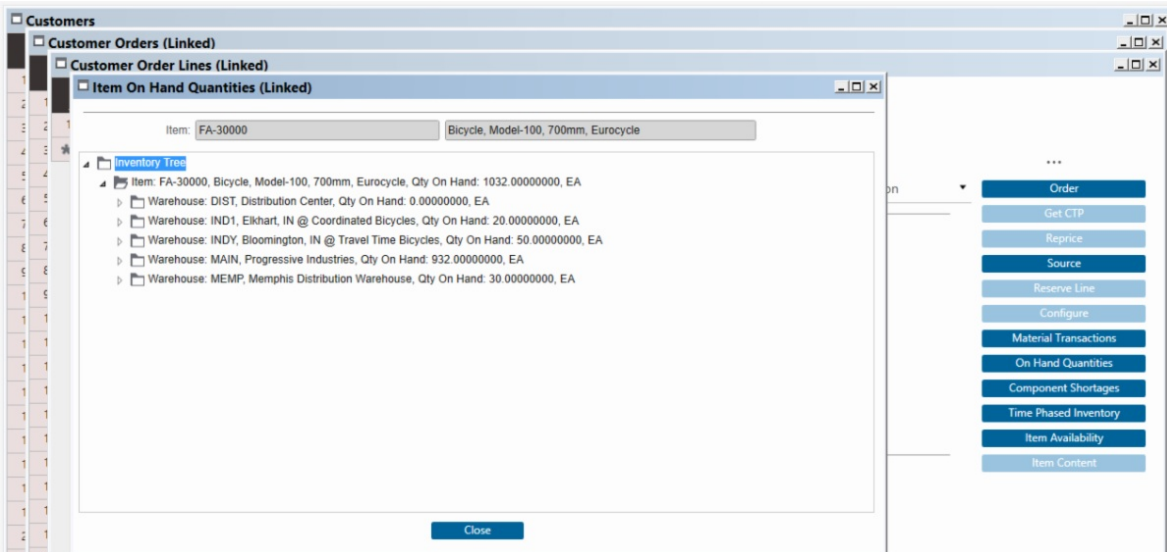


The first requirement to set up a workspace is to turn off the tabbed user interface. If you don't know how to do this see our prior tip on turning off the Tabbed User Interface. [Click here](#) to see the earlier Tip.

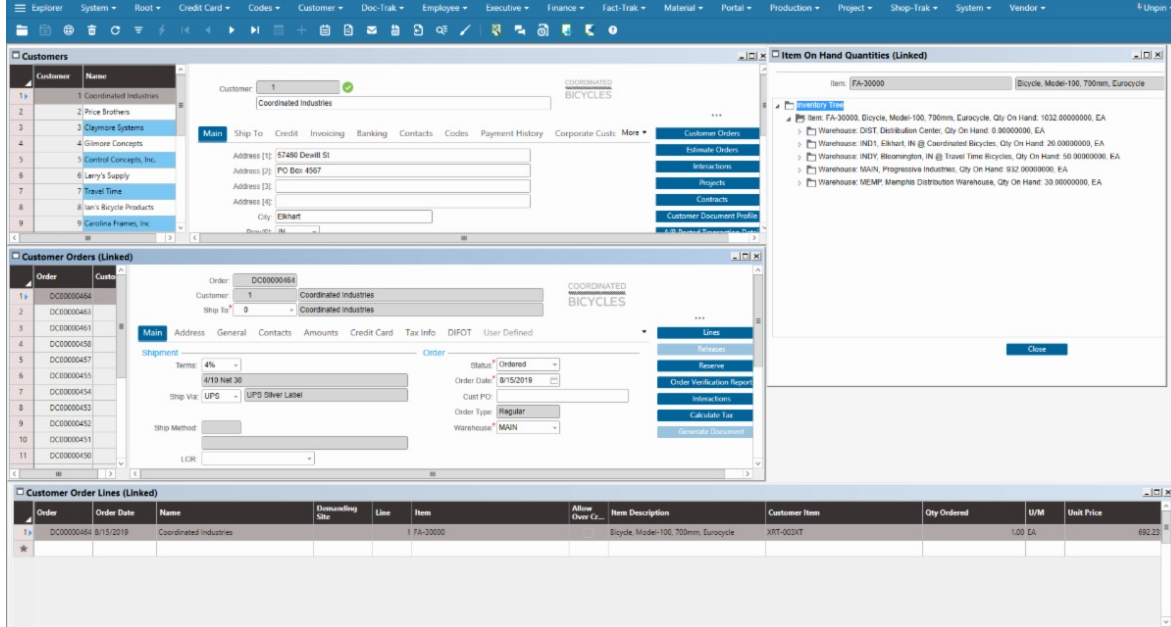
Now with tabs turned off, open the forms that you want to arrange. In the screen shot below I've opened the Customers form first, then used the button on that form to open up the Customer Orders form linked, then used the button on that form to open up the Customer Order Lines form linked.



Perhaps I also like to look at On Hand quantities for the order line, so I'll also open that form by clicking the button on the Customer Order Lines form:



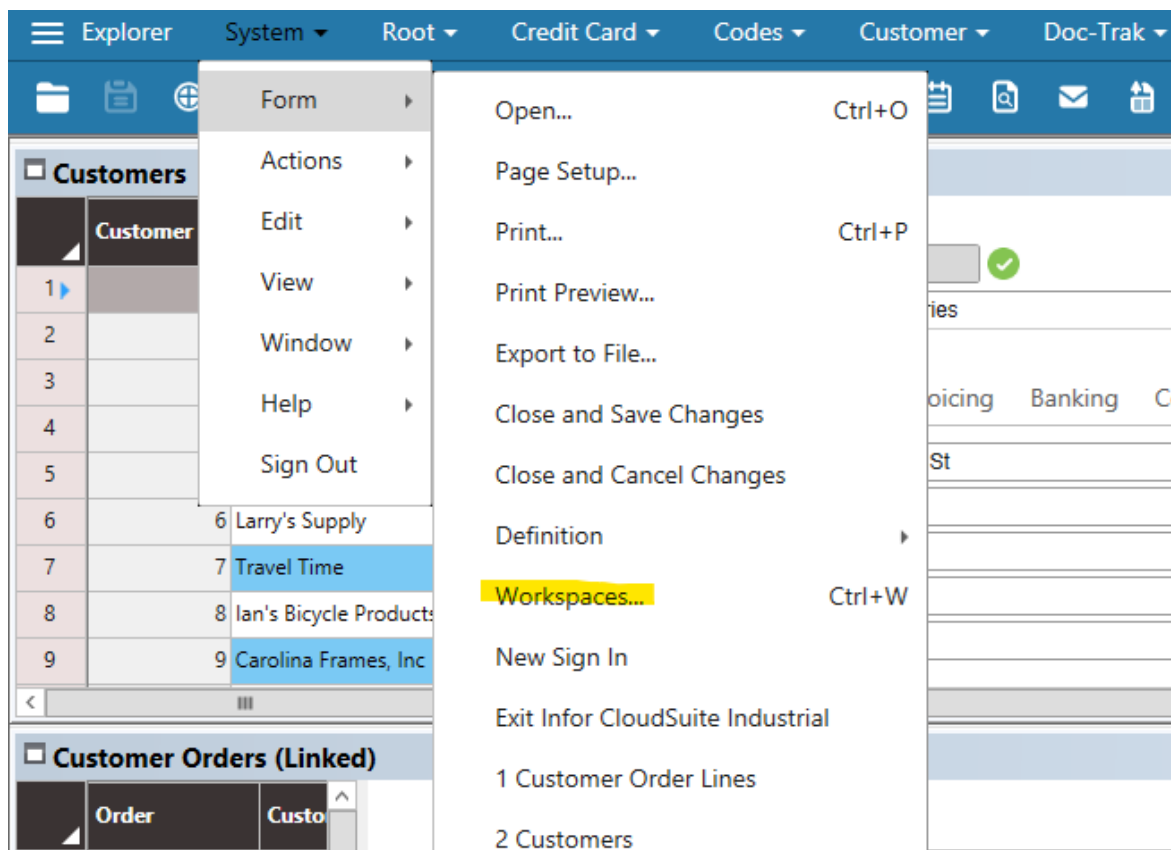
Now I'll arrange these forms so I can see the relevant data on each.



Because the forms are linked, when I select a different customer in the first form, it will automatically change the listing of customer orders to those of that customer in the second form, cascading on to the other linked forms and changing their displayed data as well.

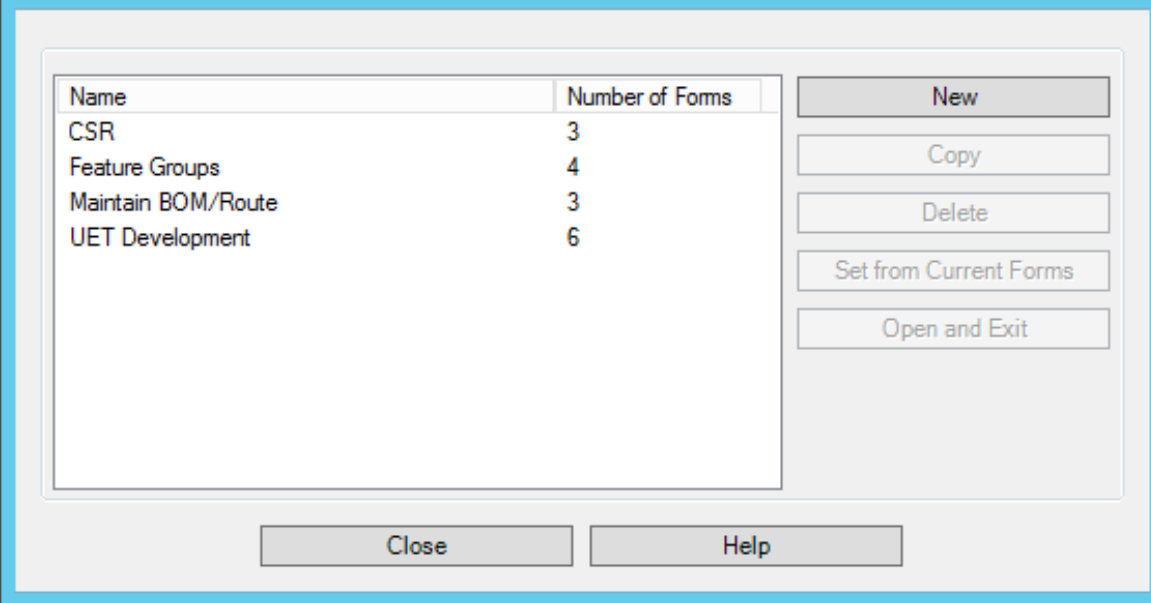
So, how do I save this layout for future use? I don't want to go through the trouble of opening and re-positioning these forms every time I want them.

So here's the key. Under your System menu, Form sub-menu is the "Workspaces..." selection. Also available with the hot-key "Ctrl-W".

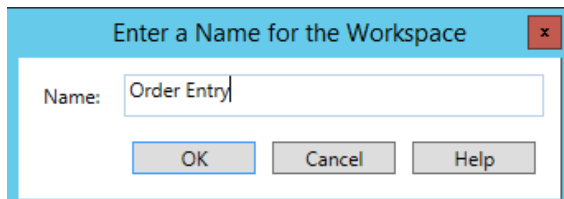


Selecting that will open the Workspace tool:

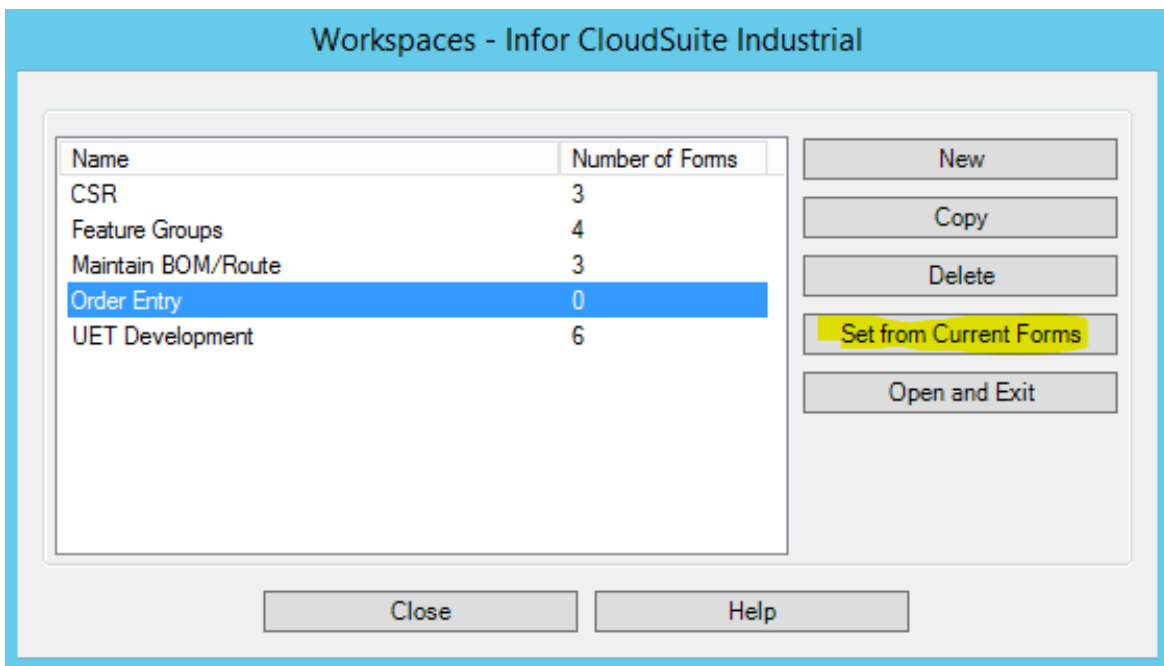
Workspaces - Infor CloudSuite Industrial



We want to have SyteLine remember your current layout of forms in a new workspace, so click the "New" button and enter a name for your new workspace:

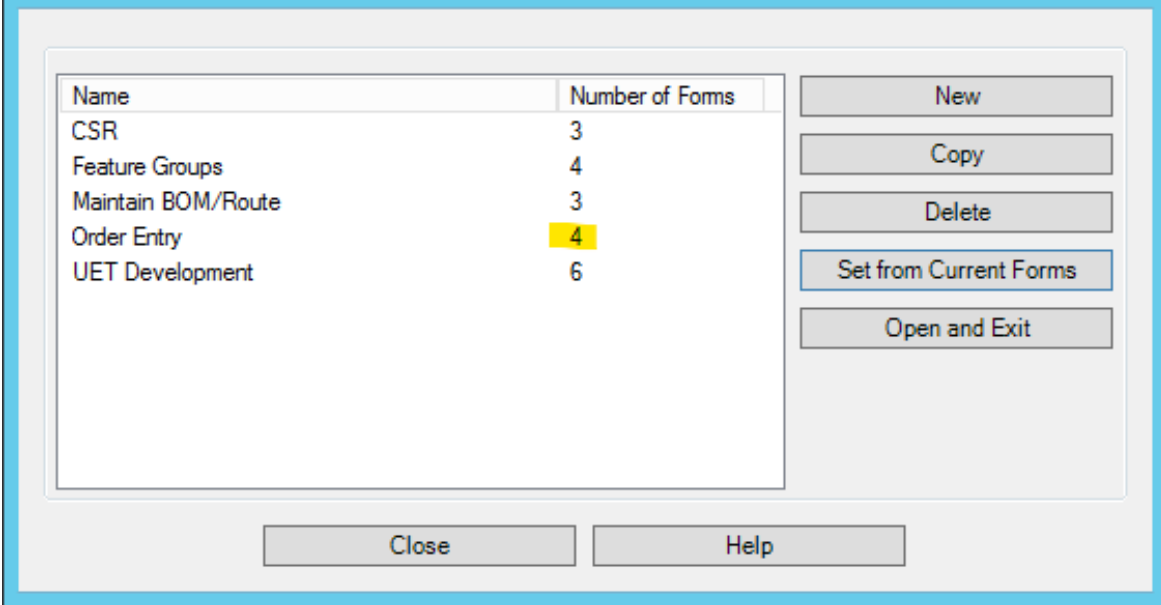


That workspace now appears on your list of available workspaces. But notice that the "Number of Forms" is zero. We still need to tell SyteLine to remember the layout. So, highlight your new workspace and click the button, "Set from Current Forms".



You'll now see that the number of forms matches the number of forms you had open in SyteLine.

Workspaces - Infor CloudSuite Industrial



Now test it out. Close the Workspace tool and close all your open forms in SyteLine. Now hit “Ctrl-W” to open the workspace tool, highlight your new workspace and hit the “Open and Exit” button.

Voila! There’s your workspace, arranged and linked just like you designed it!

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