

Basics Series-4012

# Screen/Field Customization

Version 9.0

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## Notes

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# Workbook

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## Screen/Field Customization

The data entry screens for People-Trak have been designed to meet the needs of a wide variety of Human Resources organizations. For this reason, the Screen/Field Customization feature has been provided. This feature lets you modify field names, field attributes, and support tables so that the screens work the way you want them.

Changes that you make to fields cascade throughout the software. For example, if you change the length of a field, that field length will be reflected in any documents, screens, tables, and batch processing processes.

When you select the Screen/Field Customization option on the Administration menu, you will receive a popup where you can select which workflow you want to use for screen/ field customization. This gives you flexibility as to what view you want to use when doing customization. If a field is changed using one workflow, it still affects all workflows that contain that field. After your selection, that workflow will be opened in Screen/Field Customization mode.

**Note:** If the standard workflow is the only workflow available, you won't receive the popup. Screen/Field Customization will be run using the standard workflow.

## Field Properties

When you press F1 in order to edit a field, the Field Properties screen will appear. The Field Properties screen includes an overall description of the field as well as areas where the field is used.

In addition, the Properties and Attributes for the field are defined. Below is a list and summary of each of those fields on the Field Properties screen.

### Field ID

The Field ID is the database field identifier for this field. It is displayed for reference purposes only, so it cannot be changed. The Field ID is also shown in Customization Mode on every field's tool tip to assist you and possibly your People-Trak Support Representative in identifying the field. For example, you may be working with your Support Representative to create a report. You may have customized your copy of People-Trak, but your Support Representative does not have your copy. If Field Names have been changed, your Support Representative may need to refer to the Field ID to assist you.

### Table Name

The Table Name shows the name of the table in which the current field belongs. Like the Field ID, it is not editable and is only included in Field Properties for reference use.

### Field Name

The Field Name is the name you use to uniquely identify the field. This is the value that you select when creating queries, templates, and report definitions. The Field Name should not be confused with the Screen Caption. The Field Name is not displayed on the screen, while the Screen Caption is. The length of the field name is not limited to the same degree as the Screen Caption. However, it is wise to keep the field names to a reasonable length so that the

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fields can be easily recognized and easily entered. When the field name is changed, it is changed wherever it is referenced.

## Category

The Category is the pre-defined category to which this field belongs. This category is used to secure fields as well as group fields in the Select Field screen. This field is for display only.

## Screen Caption

The Screen Caption is the phrase that is displayed adjacent to a text box or check box, or in the header of a grid. The Screen Caption can be changed to any desired phrase. The viewable length of the caption is limited to the space provided on the corresponding data entry screen. You cannot enter more characters than the space allows.

The Screen Caption can be split into two lines. Enter the caption and use a backslash where you wish to split the caption. For example, if you wish to split the caption “Review Date” onto two lines in a grid header, enter the caption as shown below.

```
Review\Date =          Review
                   Date
```

**Note:** The Screen Caption can be one or two lines, but no more. For non-grid fields like Address 1, the split caption will only go to two lines on reports; the “\” is treated like a space on screens. Grid fields can have two-line captions on screens as well as reports.

## Field Length

The Field Length field allows you to mandate the number of characters that can be entered into the current field. The maximum length is determined by a parameter within People-Trak or by the field type itself. If you enter a length that is greater than this parameter, an error message will be displayed and the entry will be rejected.

The format of numeric fields is determined by the field length specified in this field and the decimal places entered in the Decimal Places field. For example, if the length of the field is seven and the number of decimal places is two, the format of the field will be:

```
#####.##
```

The decimal point is included in the length of the field so the actual number of allowed digits is one less than the total length.

**Note:** If you decrease the field length, existing data is not destroyed or truncated.

## Field Type

The Field Type field is a display-only field that indicates the type of the field. The field type is determined by the underlying database and cannot change. Thus, you cannot change a text field to a date field or a date field to a numeric field. The valid field types are listed below and then defined.

- Color
- Currency
- DateTime
- File
- Font
- Memo
- Numeric

- Object
- Path
- Text

## Color

Color fields are used to capture the color attribute for some particular feature. Color fields do not store actual color names, but reflect the color actually selected. To change the color, use the color popup to select the new color with the mouse.

## Currency

Currency fields are used to store positive or negative numbers with or without decimal places. Two values determine the actual format of a currency field: the length of the field and the number of decimal places.

###.##	Length = 6, decimal places = 2
#####	Length = 6, decimal places = 0
#####.##	Length = 9, decimal places = 2
#####.####	Length = 10, decimal places = 4

The field length and decimal places for currency fields are user defined and can be modified with the Screen/Field Customization feature. Thus, if the default #####.## format of the Pay Rate field is not acceptable to you, you can change it to any reasonable length with up to four decimal places.

Currency fields differ from numeric fields in that when a document is run, a currency symbol appears next to the currency field, but not next to the numeric field. The currency symbol is defined in Company Setup.

## Date

Date fields are also widely used in People-Trak. Date fields are the only fields that have the option of using “real-time” formatting. This means that the field is formatted as you enter it. People-Trak is shipped with the Auto-Delimit feature turned on in User Setup. Auto Delimit is a check box that allows you to specify whether or not you want date delimiters automatically entered for you when entering a date. If this check box is selected, only numbers can be entered in a date field and the delimiter specified in the PC’s regional date format setting is automatically entered in the correct positions. If this check box is not selected, numbers and a delimiter of “.”, “/” or “-” can be entered in a date field, and the field is formatted to the PC’s regional 10-character date format after it is entered. For example, if you type in “3.4.9” and press ENTER, the date will be formatted to 03-04-2009 if the PC’s date format is m-d-yyyy, mm-dd-yyyy or some variation of that.

Date fields are also supported by the date popup. It uses a calendar to allow you to pick a date using a series of mouse clicks for the month, day, and year. Some date fields are also supported by the date variables popup, which allows you to select from a list of date variables.

## File

File fields store the full file name of a file. File fields work just like a text field in that any value can be keyed. However, when a file is entered, it is validated to determine if it actually exists. You cannot record a file that does exist or cannot be validated. File fields are supported by the file popup.

## Font

A font field is actually composed of three different fields: font name, font style, and font size. When a font is specified for a particular feature it requires all three entries to define the font. To change or set a font, use the font popup to select the three desired attributes.

## Memo

Memo fields are text fields that can be over 255 characters. Regular text fields have a maximum of 255 characters. In a memo field, you can enter the text in the field itself or use the multi-line editor popup to enter more than a single line of text. The maximum size of a memo field is 2 GB of data.

## Numeric

Numeric fields are used to store positive or negative numbers with or without decimal places. Two values determine the actual format of a numeric field: the length of the field and the number of decimals.

###.##	Length = 6, decimal places = 2
#####	Length = 6, decimal places = 0
#####.##	Length = 9, decimal places = 2
#####.####	Length = 10, decimal places = 4

The field length and decimal places for most numeric fields are user defined and can be modified with the Screen/Field Customization feature. Thus, if the default #####.## format of the Standard Hours field is not acceptable to you, you can change it to any reasonable length with up to four decimal places.

The numeric separator and decimal symbol can be based on the PC's regional settings or the company's settings. For documents, the company's settings are always used for numeric fields. In Company Setup these fields are currently inactive and set to display only.

## Object

Object fields are used to store images. An example is the Employee Photo ID field.

## Path

Path fields store a directory path. Path fields work just like a text field in that any value can be keyed. However, when a path is entered, it is validated to determine if it actually exists. You cannot record a path that does exist or cannot be validated. Path fields are supported by the path popup.

## Text

Text fields are the most common type of field. They vary in length from one character to 255 characters and can contain almost any printable character on the keyboard. In a text field, you can enter the text in the field itself or use the multi-line editor popup (if available) to enter more than a single line of text.

Many text fields are supported by tables. Tables are user-defined lists from which values can be selected. When a field is supported by a table, the table popup button will be displayed adjacent to the field itself.

There are a number of attributes that can be assigned to text fields. These attributes determine how the contents of the field are displayed when the field is first retrieved from the database and immediately after a change has been made.

- Email
- Hyperlink
- None
- Proper Case
- Social Security
- Telephone
- Upper Case

Email causes the contents of the field to be validated for relevance as an email address. This also enables the Email popup to be displayed.

For a Hyperlink, no formatting is done on the field, but this setting sets the Popup Type to Hyperlink, which makes this field a hyperlink to whatever website, ftp site or file is in the field.

None causes the field to remain as keyed. No action is taken on the field.

Proper Case causes the contents of the field to be formatted according to standard proper case rules. Except for certain ethnic conventions (such as those used for Irish and Scottish names), this normally means that the first character of each word is set in upper case with the remainder of the name in lower case. Other phrases, particularly those used in an address such as RR, PO, etc., follow normal case conventions.

Social Security causes the contents of the field to be formatted in one of the following ways. The actual format that you use is defined for the company using the Company Setup process.

United States	###-##-####
Canadian	###-###-###

Telephone causes the contents of the field to be formatted in one of the following ways. The actual format that you use is defined for the company using the Company Setup process.

```
(###) ###-####
###.###.####
### ### ####
###-###-####
```

Upper Case causes the contents of the field to be forced to upper case.

**Note:** Attributes for text fields can be changed using the Screen/Field Customization feature. The single quotation mark, double quotation mark, and bracket characters are not allowed in a text field. If these character keys are pressed, the keystrokes will be discarded.

## Time

Time fields are used to store a time. The actual format used is based on the company's settings. For documents, the company's settings are always used for time fields.

Time fields are supported by the time popup. It uses an hour list, minute list, and AM/PM indicates to allow you to pick a time using mouse clicks rather than keying the time directly.

## Yes/No

Yes/No fields use check boxes to capture the Yes or No value.

## Edit Attributes

The Edit Attributes field is used to either format or validate the entry. The edit attributes that are available are determined by the Field Type. The Yes/No object type only has Upper Case as its Edit Attribute. The DateTime and Text fields have edit attributes as described below. The rest of the field types only have None for their Edit Attribute.

### DateTime Fields

There are two valid edit attributes for DateTime fields: “date” to indicate date fields and “time” to indicate time fields.

People-Trak is shipped with the Auto-Delimit feature turned on in User Setup. Auto Delimit is a check box that allows you to specify whether or not you want date delimiters automatically entered for you when entering a date. If this check box is selected, only numbers can be entered in a date field and the delimiter specified in the PC’s regional date format setting is automatically entered in the correct positions. If this check box is not selected, numbers and a delimiter of “.”, “/” or “-” can be entered in a date field, and the field is formatted to the PC’s regional 10- character date format after it is entered. For example, if you type in “3.4.9” and press ENTER, the date will be formatted to 03-04-2009 if the PC’s date format is m-d-yyyy, mm-dd-yyyy or some variation of that.

Date fields are also supported by the date popup. It uses a calendar to allow you to pick a date using a series of mouse clicks for the month, day, and year. Some date fields are also supported by the date variables popup, which allows you to select from a list of date variables.

Time fields are used to store a time. The actual format used is based on the company’s settings. For documents, the company’s settings are always used for time fields.

Time fields are supported by the time popup. It uses an hour list, minute list, and AM/PM indicates to allow you to pick a time using mouse clicks rather than keying the time directly.

### Decimal Places for Currency and Numeric Fields

The field title Edit Attributes is changed to Decimal Places for currency and numeric fields. The field is supported by a list of the valid decimal places. A maximum number of four decimal places are allowed.

#### Format

The Format field is a display-only field that indicates the data entry format for currency and numeric fields. Two values determine the actual format of a numeric field: the length of the field and the number of decimal places.

###.##	Length = 6, decimal places = 2
#####	Length = 6, decimal places = 0
#####.##	Length = 9, decimal places = 2
#####.####	Length = 10, decimal places = 4

#### Popup Type

The Popup Type field indicates the type of popup (if any) that is used to support data entry in the field. This field is for display only. The following are the valid popup types

- Color
- Date
- Document
- Email

- Field
- File
- Font
- Hyperlink
- Path
- Multi-Line Editor
- Table
- Time

## Support Table

The Support Table field indicates the support table (if any) that is used to support data entry in the field. Tables can only be used to support Text type fields. The default support tables are shown in this field, but can be changed. This is a very powerful feature. If you have a field that is not supported by a table, you can support that field with any desired table, including one of the user-defined tables.

Complex tables contain a number of fields. There is special process within People-Trak to cause the additional fields to be added to other fields on the data entry screen. When you support a field with a complex table that was not initially designed to support that field, the special process will not be performed. Only the initial field from the table will be placed into the field that you have indicated.

Multi-line type fields are normally supported by the multi-line editor popup. This popup allows you to key freeform text into the field. If you specify a support table for a multi-line text field, the table popup supersedes the multi-line editor popup.

## Audit

The Audit check box is used to show and to change the audit status of the current field. If the field is selected, this field will be audited. If not, the field will not be audited. Auditing is a feature in People-Trak that enables you to record information about changes to the database. When a field is audited, the date of the change, the time of the change, the user who made the change, the field name, the record name, the before value, and the after value are all written to an audit record from which reports can be written.

Fields can be activated or deactivated on this screen or by using the Audit Setup option on the Setup menu.

## Display Only

The Display Only check box is used to set the field to display only. Select the check box to make the field display only. Clear the check box to make the field editable. This field is selected and display only if the Fixed Display Only box is selected.

## Fixed Display Only

The Fixed Display Only check box is selected if the field is a People-Trak fixed display only field or cleared if not. This field is display only and can only be changed using the Set Display Only Attribute utility, which requires contacting your Support Representative. The Age field on the Personal screen of the Personnel Management module is an example of a Fixed Display Only field because it is calculated based on the date entered in the Birth Date field. Fields that are returned from a map are also set to fixed display only.

## Not Used

The Not Used check box is used to cause the field not to be used. When a field is set to “not used”, the field and its caption will be removed from the data entry screen. There will be an open spot on the screen where the field was formerly positioned. This feature is useful when People-Trak has provided more fields than you actually need and you would rather not see the fields that are not used. No data is deleted when this check box is selected and you can reactivate this field at any time.

**Note:** The field security feature can also cause fields to be removed for a specific user. This particular feature removes the field for all users.

## Required

The Required check box is used to set the field to required. Select the check box to make the field required. Clear the check box to make the field not required.

People-Trak also allows you to make any field a required field. This is a very powerful feature that works as follows. If you position to a required field, you cannot leave that field unless you have specified a non-blank value. If you position to the field inadvertently and do not wish to specify a value, you will not be able to leave the field until you provide some type of entry. In some instances, the only way you will be able to continue processing is to enter a temporary value.

If you have a required field on a screen and do not enter a value in that field, you will not be able to leave the screen until a value is entered. Even if you do not position directly to that field, you will not be able to continue processing until that field is given a non-blank value. If you have a dozen required fields on a screen, you will not be able to leave the screen until a non-blank value has been specified for each and every field.

**Note:** This feature is very attractive, but it is also very powerful. General data entry fields that are set for required will still be required when used in custom screens. If you really do not intend for a field to be entirely required, do not use this feature or it will be very frustrating.

## Encrypted

The Encrypted check box is used to specify that the field be encrypted when saved to the database. If selected, the data in the field will be encrypted when writing to the database and unencrypted when fetching from the database. This allows you to protect sensitive data. Only text fields can be encrypted. This field is display only and can only be changed using the Encrypt Field utility, which requires contacting your Support Representative. People-Trak is shipped with the Social Security field encrypted.

## Masked Text

The Masked Text check box is used to mask the text in the field when displaying it. Select the check box to mask the text in the field. Clear the check box to not mask the text in the field. Passwords are a good example of fields for which you would want to mask the text when displaying them. People-Trak is shipped with all passwords masked.

## Modifying Field Help

When a field is customized, the associated help may no longer apply. You can modify the Help Text associated with the field from within Screen/Field Customization. By selecting the Edit Help button, you can change the Help Text as desired using the Help Editor. For the purpose of consistency and readability, it is recommended that you attempt to use the same styles that have been used in the original help. Once editing is complete and saved, the updated text is displayed in the Help Text area.

## Screen Properties

When you press SHIFT + F1 in order to edit the Help Text on a screen, the Screen Properties screen will appear. The Screen Properties screen includes an overall description of the screen's properties, a listing of the screen objects, and areas where the screen is used.

## Modifying Screen Help

When a screen is customized, the associated help may no longer apply. You can modify the Help Text associated with the screen from within Screen/Field Customization. By selecting the Edit Help button, you can change the Help Text as desired using the Help Editor. For the purpose of consistency and readability, it is recommended that you attempt to use the same styles that have been used in the original help. Once editing is complete and saved, the updated text is displayed in the Help Text area.

## Notes

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# Lesson 1

## Screen/Field Customization 1

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This lesson covers some of the screen/field customization features in People-Trak.

### Tutorials

**Change the Screen Caption:** demonstrates how to change a screen caption on a data entry screen. Examples are provided for text boxes, check boxes and grid headings.

**Change the Field Name:** shows how to change the name by which the field is identified in documents and templates.

**Change Edit Attributes:** demonstrates how to modify edit attributes such as length, case and decimal places.

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## Tutorial 1.1 – Change the Screen Caption

Screen/Field Customization is a powerful tool that allows you to customize People-Trak quickly and easily. In this tutorial, you will learn how to access the Screen/Field Customization feature and change a screen caption.

1. Start People-Trak by double-clicking on the **People-Trak Trainee** icon on your desktop (or as instructed).

The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.
3. Click **OK**

The Login screen is displayed.

4. In the **User ID** field, enter **DEMO**.
5. In the **Password** field, enter **DEMO**.

The Organizer desktop is displayed with the Personnel Management module selected.

6. On the **Administration** menu, select **Screen/Field Customization**.

The Screen/Field Customization popup screen is displayed, which allows you to select the workflow to use for screen/field customization. This gives you flexibility as to what view you want to use when doing customization. If a field is changed using one workflow, it still affects all workflows that contain that field.

**Note:** If the standard workflow is the only workflow available, you won't receive the popup. Screen/Field Customization will be run using the standard workflow.

7. Highlight **Standard - Employee** and click **Customize** to use that workflow for customization.

The screens from the Standard - Employee workflow, which is the standard workflow for the Personnel Management module, are displayed. You can navigate through these screens just as if a record was active, and you can display sub screens using the provided buttons. However, you cannot key any data as all of the screens are in display-only mode.

8. In the **Address 1** field, press **F1**.

The Field Properties For: Address 1 screen is displayed.

Within Screen/Field Customization you can update the field properties, see where the field is used, and modify Help Text using the Edit Help button.

9. Close the **Field Properties For : Address 1** screen by clicking the **Close** button or the **X** button.

If changes had been made on the screen, the Close button would automatically save those changes. As usual, the X button will ask you if you want to save or not.

10. On the **Edit** menu, select **Field Properties** to display the **Field Properties For: Address 1** screen again.

You can use either the menu option or the F1 key. Now let's customize.

11. Start by changing the **Screen Caption** to **Addr 1**. Close and save your changes.

You can see that the change is reflected immediately. However, you may not believe me.

12. On the **File** menu, select **Exit** to exit the **Field Customization** feature. Close **Screen/Field Customization**.

13. Open any record and find the field formerly labeled as **Address 1** and note that it is now labeled **Addr 1**.

That is all it takes to customize a screen caption. However, there are a few more things to learn.

14. Close the record.

15. Select the **Screen/Field Customization** option again and use the **Standard - Employee** workflow for customization.

**Note:** We will be going in and out of Screen/Field Customization in this tutorial and other tutorials coming up. Rather than repeat the instruction of using the Standard - Employee workflow every time you do Screen/Field Customization, we will assume that step going forward.

16. In the **Addr 1** field, press **F1** and change the **Screen Caption** back to **Address 1**. Close the **Field Properties For: Address 1** screen, saving your change.

17. In the **Screen** dropdown, select **Status**.

18. The **Active** check box should already be highlighted, so press **F1** to display the field properties screen for it.

The Active field is a check box, but can be customized in the same way.

19. Change the **Screen Caption** from **Active** to **Still Working**. Close the **Field Properties For: Active** screen, saving your change.

Again, you can see that the caption is changed immediately.

20. Close the **Field Customization** screen. Close **Screen/Field Customization**.

21. Open a record and select the **Status** screen. Note that the caption on a check box changes exactly like the caption on a text box.

22. Close the record.

23. Select the **Screen/Field Customization** option again.

24. On the **Status** screen, click the **Event History** button to display that sub screen.

25. In the **Date** field, press **F1** to display the field properties screen.

When you are changing the screen caption on a grid you are actually changing the column heading for that field on the grid.

26. Change the **Screen Caption** from **Date** to **Event Date** and then close the **Field Properties For: Date** screen, saving your change.

Once again, the column change is clearly and immediately visible.

27. Close the **Event History** screen.

28. Close the Field Customization screen. Close **Screen/Field Customization**.

People-Trak is an integrated solution. Customization changes made to fields are reflected throughout People-Trak including custom screens, reports, and batch processing processes. Let's take a look at how changes to screen captions are reflected in reports.

When you select a field for use in an adhoc report, the caption that will be used for the report is the current value of the screen caption. Let's demonstrate this.

29. Create a new **Adhoc Report** containing two fields: **Full Name** and **Address 1**. Give the report a name and explorer category so you can find the report. Do not add a query. Test the report and note that the caption for the **Address 1** field is indeed **Address 1**. Close and save the report. You will be using this report again in the next tutorial.

30. Using what you have just learned, change the **Screen Caption** for the **Address 1** field to **Address\One**.

The “\” character allows you to split the caption into two lines. For non-grid fields like Address 1, the split caption will only go to two lines on reports; the “\” is treated like a space on screens. Grid fields can have two-line captions on screens as well as reports.

**Note:** Captions can be one or two lines, but no more.

31. Return to the report you have just created, and run it again.

There will be no difference, because the Screen Caption was Address 1 when the report was created. That caption will remain with the report unless you change the caption using the Design Mode feature.

32. Close the **Document Viewer** and the **Explorer**.

33. Create a new **Adhoc Report** that uses the **Address 1** field. Run the report.

The column heading will reflect the change you made to the screen caption, with “Address” on the first line and “One” on the second line. This new caption will remain a permanent part of this report even if you change the screen caption in the future.

34. Close the **Document Viewer** and the **Adhoc Reports** screen. Close the **Explorer**.

35. Select the **Screen/Field Customization** option and change the **Screen Caption** for the **Address 1** field back to the correct value of **Address 1**. Close the **Field Properties For: Address 1** screen, saving your change.

36. Close the **Field Customization** screen. Close **Screen/Field Customization**.
37. Continue with the next tutorial.

## Tutorial 1.2 – Change the Field Name

Let's practice "Field Customization" a little more. The field name for a field is what you use when you reference the field in various places throughout People-Trak. For example, when you search for a field to use in an adhoc report, you look for the field name, not the screen caption you learned about in the last tutorial.

The field name is typically changed when you change the use of a field and need to look for the field by a name that reflects its use. For example, if you change the Payroll Number field on the Personal screen to be used as the Department Name, you would change both the screen caption and the field name. You would not want to search for a field named Payroll Number when the use of the field is Department Name. Let's change a field name now.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. In the **Payroll Number** field, press **F1** to display the field properties screen. Change both the **Field Name** and the **Screen Caption** from **Payroll Number** to **Dept. Name**. Close the **Field Properties For: Payroll Number** screen, saving your changes.

You can see that the Screen Caption has been changed, but what about the Field Name? We'll find out.

3. Close the **Field Customization** screen
4. Close Screen/Field Customization.
5. Click the **Open Employee** shortcut to start an employee lookup and then click the **Advanced** tab.
6. In the **Field Name** field, click the popup button to display a list of the available fields. Look for the **Payroll Number** field in the full list of fields and then check the shorter list in the **Personal** category.

You will not find the field, because its name has been changed. The field will now be listed as Dept. Name in appropriate alphabetic order in the full list and in the Personal category.

7. Look for the **Dept. Name** field in both locations.
8. Close the **Select Field** screen and the **Lookup** screen.

We will now see how these changes are reflected in adhoc reports.

9. Open the report that you created in the prior tutorial. Add the **Dept. Name** field from the **Personal** category to the report. Run the report. Note that the column heading reflects the change. Close the **Document Viewer** and the **Adhoc Reports** screen. Close the **Explorer**.
10. Select the **Screen/Field Customization** option and change the **Field Name** and the **Screen Caption** back to **Payroll Number** and then open your report.

What has happened to the field name? It has been changed back to Payroll Number. Reports and other documents actually save the field ID. At the time the report is opened, the field ID is used to retrieve the current field name. If you add a field to the report, the field name is displayed, but when the report is saved, the field ID is what is actually

stored. This feature enables you to change field names without concern for reports that have already been created.

11. Run the report.

The screen caption is not changed because as we have demonstrated in the previous tutorial, the screen caption does not change dynamically. You must use Design Mode to change a caption once the field has been selected.

12. Close all open screens and return to the **Organizer** desktop.

13. Continue with the next tutorial.

## Tutorial 1.3 – Change Edit Attributes

Fields have a number of attributes such as length, edit criteria and format. In this tutorial, we will show how to change these.

One of the more frequently updated field attributes is length. This is the number of characters or digits that can be entered into the field. The length of most fields can be either decreased or increased as desired. Here's how to do it.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. In the **Address 1** field, press **F1** to display the field properties screen. Change the **Field Length** from **25** to **30**. Close and save the change, and then exit the **Field Customization** screen.
3. Close **Screen/Field Customization**.
4. Open a record and change the **Address** to 30 **X**'s. Close and save the record.
5. Select the **Screen/Field Customization** option again.
6. In the **Address 1** field, press **F1** to display the **Field Properties For: Address 1** screen. Change the **Field Length** back to **25**. Close and save the change, and then exit the **Field Customization** screen.
7. Close **Screen/Field Customization**.

The field that you entered at a length of 30 characters is not actually changed. The 30 characters are still stored in the database just as you entered them. However, if you select the record for editing, you will only see the first 25.

8. To prove that the 30 characters are still there, change the **Field Length** of the **Address 1** field back to **30** and then open and verify the record. You will note that your 30 **X**'s are still there even though the **Field Length** has been changed back and forth between **25** and **30**. Close the record.

All fields have a maximum length. You cannot change the length to a value greater than this maximum. For example, the maximum length of the Address 1 field is 50. If you try to set the length for this field to 51, you will receive an error and the new length will be rejected. You can take my word for it, or you can try it yourself.

Another edit attribute that you can set is the case attribute. Text fields can be assigned one of seven different case attributes: Email, Hyperlink, None, Proper Case, Social Security, Telephone and Upper Case. By default, the Address 1 field is set to Proper Case. This means that the first character of each word is capitalized. This is a typical setting for name and address fields. However, let's assume that you prefer to have this field set to Upper Case.

9. Select the **Screen/Field Customization** option.
10. In the **Address 1** field, press **F1** to display the field properties screen. Change the **Edit Attributes** for the **Address 1** field from the **Proper Case** to **Upper Case**. Close and save your change.

11. Open a record and clear the **Address 1** field. Enter any combination of upper and lower case letters. Then press **ENTER**.

Note that the entire text is converted to upper case.

12. Close the record, without saving your change.
13. Select the **Screen/Field Customization** option again and change the **Edit Attributes** for the **Address 1** field to **None**. Close and save the change. Close **Screen/Field Customization**.
14. Open a record and clear the **Address 1** field. Enter any combination of upper and lower case letters. Then press **ENTER**.

You will see that with the None attribute, the text is left just as you enter it.

15. Close the record, without saving your change.
16. Select the **Screen/Field Customization** option again.
17. Select the **Compensation** screen. In the **Change Amount** field, press **F1** to display the field properties screen.

We'll now learn about formatting.

Numeric fields have a format attribute that determines how the numeric data is displayed or printed. The format is determined by a combination of the length of the field and the number of decimal places. You can see the format for the Change Amount field in the Format field on the Field Properties For : Change Amount screen.

Notice that the field that used to be labeled Edit Attributes has been changed to Decimal Places. This change will always occur with numeric fields because numeric fields cannot have edit attributes, but they do have decimal places.

18. Change the number of **Decimal Places** from **2** to **4**.

Note that the Format for the field switches from “#####.##” to #####.####”. Because you have not increased the length of the field, but you have increased the number of decimal places, the number of places to the left of the decimal is decreased. If you really need 9 places to the left of the decimal, you could increase the length of the field by 2.

19. Close the Field Properties For: Change Amount screen, saving your changes. Close the Field Customization screen. Close Screen/Field Customization.
20. Open a record and select the **Compensation** screen. Note that the data in the **Change Amount** column is now displayed with four, rather than two, decimal places. Close the record.

As with all customization, these changes can be changed back or modified at any time. In general, however, most customization is performed when People-Trak is initially implemented.

21. This concludes this tutorial and lesson.

## Notes

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# Lesson 2

## Screen/Field Customization 2

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This lesson covers more field customization features in People-Trak.

### Tutorials

**Change a Support Table:** shows how to change the support table that is used to assist data entry in a particular field. Includes instructions for adding a user-defined table to any field that does not yet have a table.

**Activate the “Not Used” Feature:** shows how to make certain fields “not used”. When a field is not used, it is completely removed from the data entry screen.

**Using Required Fields:** demonstrates how to make certain fields “required”. When fields are required, you cannot leave the field without keying a value. In addition, you cannot leave the screen if the field has not yet been entered.

**Usage Information:** shows how to utilize the usage information provided for a field.

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## Tutorial 2.1 – Change a Support Table

In this tutorial, you will learn how to use Field Customization to change the table that supports a field.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. Select the **Standard-Employee** workflow.
3. In the **Address 1** field, press **F1** to display the field properties screen.

We will now see how to add a support table to a field that is not currently supported by a table.

4. Click in the **Support Table** field.

It is blank because there is no table support for this field. We will change that.

5. Click the popup button to display a list of the available tables. Scroll down the list and select **User Table 7 - Personnel**.

Note that the Popup Type field has also been populated with a value of Table, which is for display only.

6. Close the **Field Properties For: Address 1** screen, saving your changes.
7. Close the **Field Customization** screen. Close **Screen/Field Customization**.
8. On the **Tools** menu, select **Maintain Tables**.

The Maintain Tables screen is displayed with the All Tables category open.

9. In the list of tables on the right, select **User Table 7 - Personnel**. Click **Edit**.
10. Add the three lines shown below to **User Table 7 - Personnel**.

**100 Main Street**  
**1001 Maple Street**  
**202 Elm Street**

11. When complete, close and save the table. Close the **Maintain Tables** screen.
12. Open a record and click in the **Address 1** field.

Note that the field now has a table popup button because the field is supported by a table.

13. Open the table by clicking on the popup button. You should see the three entries that you made. Select one of the entries to complete the field.

This example is an exaggeration; you cannot successfully support the Address 1 field with a table. However, it does demonstrate that any text field can be supported by a table, even if it does not make sense. It also demonstrates the reason why there are user-defined tables. You can use these extra tables to provide support where it was not originally designed.

14. Close the record, without saving your change.

As we have discussed before, People-Trak is an integrated product, so changes that are made to a field are valid in that field throughout People-Trak. The table support that we added to the Address 1 field is available in any application that uses Address 1.

15. On the **Administration** menu, select **Screen/Field Customization** and remove table support from the **Address 1** field. Then remove table support from the **City** field.
16. Close the **Field Properties For: Address 1** screen, saving your changes.
17. Close the **Field Customization** screen. Close **Screen/Field Customization**.
18. Open a record and position to the **City** field.

You will note that a table no longer supports the field at all.

19. On the **Administration** menu, select **Screen/Field Customization** and make another change to the table support for the **City** field. Change the supporting table to the Country table and then confirm that the feature works by opening a record and trying it out.

As you can see, you can support any text field with any of the available tables. Or you can drop table support from any table by clearing the table for that field.

20. Before continuing with the next lesson, change the supporting table for the **City** field back to the **City** table.
21. Continue with the next tutorial.

## Tutorial 2.2 – Activate the “Not Used” Feature

People-Trak provides a powerful feature that allows you to disable fields completely. There are times when the organization will decide that certain fields will not be used at all. Rather than leaving the fields on the data entry screens and skipping (or tripping) over them, you can cause them to disappear. Here’s how.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. In the **Screen** dropdown, select **User Fields**. In the **User Text 6** field, press **F1** to display the field properties screen. Select the **Not Used** check box. Close the **Field Properties For: User Text 6** screen, saving your change. Repeat this step for the **User Text 8**, **User Date 5**, and **User Dollar 7** fields. When complete, close the **Field Properties** screen.
3. Close **Screen/Field Customization**.
4. Open a record and select the **User Fields** screen.

You will note that the fields you set to “not used” are gone from the screen just as if they do not exist. These fields are not only gone from the screen, they are gone everywhere else. Let’s check this out.

5. Close the record.
6. Click the **Open Employee** shortcut to start the lookup process. Click the **Custom** tab. In the **Field Name** field, click the popup button to display the list of available fields. Select the **User** category. Look for the fields that you disabled. Do you see them? No. They are gone. Abandon the lookup.
7. Create a new **Adhoc Report**. Try to select one of these fields for a report. You cannot, because they are gone. Close the report.

If there is data stored in a field that you disable, the data is not lost. The underlying data structure in the database is unchanged; you have merely caused the field to be invisible. Let’s demonstrate this fact.

8. Open a record and take a look at the **Address 1** field for that record. Close the record and use the **Screen/Field Customization** tool to set the **Address 1** field to Not Used.
9. Close the **Field Properties for: Address 1** screen.

The following message is displayed:

Check the 'Usage' section to see the features that depend on this field.

We know already know that there are a few areas, such as the Personal screen that use the Address 1 field, so we will not bother looking into field usage for this particular field. Field usage will be covered in an upcoming lesson.

10. Select **OK**
11. As with the User fields, it is understood that upon disabling this field, it can no longer be added to new documents, custom screens, or other type of specification. However, any pre existing documents or specifications that contain the field will still run with the field

and its data. This is why it is extremely important to verify the areas where the field is used. What could be worse than disabling a field that you may be using on a daily basis?

12. Now open the record again and position to the **Personal** screen. The field is gone, but is the data? Use **Screen/Field Customization** to reactivate **Address 1**. Then return to the employee record and see what appears. The field and the data are both back.
13. Use the **Screen/Field Customization** tool to set the **Home Phone** field to **Not Used**.
14. Close the **Field Properties for: Home Phone** screen.
15. Select **OK** when the usage message appears.
16. Close the Field Properties and Screen/Field Customization screens.

Let's see what happens when we run an adhoc report with a disabled field.

17. From the **General** category, select the **Home Phone List** report.
18. Select the **Report Definition** tab.

Note that the Home Phone field has remained within the definition.

19. Run the report

All employee home phone numbers are there. As we mentioned earlier, disabling a field does not erase data.

20. Try to add a second **Home Phone** field to this report. You cannot, because the field is disabled and gone.
21. Close the **Adhoc Reports** screen and the **Explorer** without saving your changes.
22. Use **Screen/Field Customization** to reactivate **Home Phone**.
23. Continue with the next tutorial.

## Tutorial 2.3 – Using Required Fields

People-Trak provides another powerful feature that allows you to cause specific fields to be required. When a field is required, you cannot leave the field without providing a value, and you cannot leave a screen that uses that field without providing a value. Here's how it works.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. In the **Address 1** field, press **F1** to display the field properties screen.
3. Select the **Required** check box.
4. Close the **Field Properties For: Address 1** screen, saving your changes.
5. Close the **Field Customization** screen.
6. Close **Screen/Field Customization**.
7. Open an employee record, clear the **Address 1** field and press **ENTER**.

The following message is displayed:

This is a required field that must be entered.

8. Click the **OK** button to acknowledge the message.

The prior value is restored. That is because required fields must have a value. You must supply a value or you cannot leave the field. You may be thinking that you can fool People-Trak. You are thinking that you will just click the Close button and close the record and bypass the feature.

9. Try it by clearing the field again and clicking the Close button. Nope, can't do it! Clear the field again and then go ahead and try to select another record or another screen or a popup. By now you understand, required fields are ... required. Close the record.
10. On the Tool Bar, select the **New Employee** button to start a new record. Click **Create** to create this record from scratch.
11. Enter an **Employee ID** and a few other fields, but DO NOT position to the **Address 1** field. Now, try to save the record.

Do you think you can sneak by that required field lurking below? The answer is NO. The following message is displayed:

The following field is required, but has not been completed:  
Address 1

12. Click the **OK** button to acknowledge the message.

The cursor is placed right into the Address 1 field. You know what happens now. You do not get out of this field, you do not pass GO, and you do not collect 200 dollars unless you provide a value.

13. Enter **XXX** into the field as a temporary value and close the record, saving your changes.

Required fields work exactly as advertised and should be used with discretion.

14. To save yourself further grief, use the **Field Customization** tool to change the **Address 1** field back to not required by clearing the **Required** check box.

There are two more check boxes below the Required check box that we will just discuss briefly before moving on to the usage information in the next tutorial.

The Encrypted check box is used to specify whether or not you want the field encrypted in the database for security purposes. Only text fields can be encrypted. People-Trak is shipped with the Social Security field encrypted. You can only change the Encrypted setting using the Encrypt Field utility, which requires a password from your Support Representative.

The Masked Text check box is used to specify whether or not you want the text of the field masked with asterisks when it is displayed. People-Trak masks all password fields for security purposes.

15. Close the **Field Properties For: Address 1** screen.
16. Close the **Field Customization** screens.
17. Close **Screen/Field Customization**.
18. Delete the employee you created.
19. Continue with the next tutorial.

## Tutorial 2.4 – Usage Information

Important usage information about a field is provided on the field properties screen. Let's take a look.

1. On the **Administration** menu, select **Screen/Field Customization**.
2. In the **Last Name** field, press **F1** to display the **Field Properties For: Last Name** screen.

On the top left hand side of the screen, you will see a pane that contains an overview as well as a tree view list of usage items for the Last Name field.

3. Click the “+” sign adjacent to **Usage** to expand the tree.

Note that for this field, usage items include field triggers, report definitions, table maps, and templates.

4. Click the “+” sign adjacent to **Report Definitions** to display the names of reports that include the Last Name field in the report definition.
5. Select the **Absences by Department** report.

To the right of the overview and usage pane, there is a help text pane. This pane provides additional details, if they have been defined, about each usage item. If you would like to view the help for a specific usage item, simply select that item in the list and the help text will be displayed in the help text pane.

Now that we have an idea as to where this field is used, let's take a look at how the usage is updated when the Last Name field is added to a new document.

6. Close the **Field Properties For: Last Name** screen.
7. Close the **Field Customization** screen.
8. Close **Screen/Field Customization**.
9. From the **Documents** menu, select **Adhoc Reports** and create a new adhoc report named **Last Name Use**.
10. On the **Report Definition** tab, select the **Last Name** field and run the report.
11. Close the **Document Viewer, Adhoc Reports** screen, and the **Explorer**.

When we return to Field Customization, we should see our new report under Report Definitions. Let's return to **Screen/Field Customization** and see what has happened.

12. In the **Last Name** field, press **F1** to display the field properties screen.
13. Click the “+” sign to expand **Usage** and **Report Definitions**.

Our Last Name report is listed with the other reports containing the last name field.

14. Close all open screens, without saving your changes and exit **People-Trak**.
15. This concludes this tutorial and lesson.

# Notes