

Strategic Series-7001

# **Introduction to Custom Screens**

Version 9.0

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# Notes

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# Workbook

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## Custom Screens

The Custom Screens feature allows you to create your own custom screens. People-Trak provides a very large number of fields to track information in all of the modules. In each module, these fields have been arranged into screens that are based on a general category of the information. For example, personal fields have been grouped on the Personal screen, status fields have been grouped on the Status screen, compensation fields have been grouped on the Compensation screen, etc.

These groupings, though logical, do not necessarily reflect the way in which you work or the way in which work flows through your organization. For example, to perform a standard new hire process or termination, you must enter information on a number of different screens. If you wish to have a simpler screen dedicated to new hires or termination, it can be made with the Custom Screens feature.

The Custom Screens feature in People-Trak allows you to create concise and task-specific data entry screens called custom screens. The custom screens are developed to reflect how the work or information actually flows through your organization. Well-designed custom screens can even emulate the various forms that circulate through your organization. When data entry custom screens match the forms, data entry is faster, more efficient, and less prone to error. It also makes it quite easy to utilize outside labor since a data entry clerk need only understand the specific custom screen and not the entire product.

Once created and activated, custom screens can be incorporated into multiple-screen workflows or used as simple workflows all by themselves. Once the custom screen is added to a workflow, it can be accessed when that workflow is open.

The Custom Screen feature in People-Trak takes advantage of the parameter-driven design of People-Trak. When you place a field on a custom screen it takes on all of the data entry attributes that apply to that field when it appears in its regular place on the standard screens. If the field is a date field, it will be supported by the Select Date popup. If the field is supported by a table, it will be supported by that same table in the custom screen. The same applies for the formatting, casing, length, and other attributes of the field.

The custom screens respond to field customization exactly like the standard data entry screens. If you change a field name or support data or other attribute, that change is immediately reflected in any custom screen that uses that field.

Custom screens are not designed to replace the standard data entry screens, but to supplement them. Custom screens can contain any number of different fields from any of the various screens from within the module. These screens can also contain several other object types. Once you have the objects specified, you can use the Preview feature to easily design the layout of your screen. You can move, size and edit objects while in preview mode.

Custom screens can be used to add new records from scratch or to modify existing information. They are powerful and flexible. Custom screens are not permanent. If you create a custom screen and it later needs to be changed, you can modify the custom screen to meet your evolving needs.

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The Custom Screens screen provides a list of the current custom screens on the left and a data entry area to the right. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of custom screens.

## Details

Details for a custom screen include naming the custom screen, assigning it to a category and defining the screen type.

## Objects

The following are object types available to use on a custom screen. Descriptions for each object type are also defined.

### Button

Used for placing a button on the screen that will then execute the specified button trigger when clicked.

### Heading 1

Used to place a heading on the screen with a colored background. In the default People-Trak style, this heading is in 14-point text with a background of the dark color associated with the selected color scheme.

### Heading 2

Used to place a heading on the screen with a colored background. In the default People-Trak style, this heading is in 12-point text with a background of the dark color associated with the selected color scheme.

### Heading 3

Used to place a heading on the screen with a transparent background. In the default People-Trak style, this heading is in 14-point text.

### Heading 4

Used to place a heading on the screen with a transparent background. In the default People-Trak style, this heading is in 12-point text.

### Field

Used for placing actual fields on the screen.

### Frame

Used to place and name a frame around fields in order to group them on the screen. Field object rows that follow the Frame object row will be placed in the frame. When a grid object is selected, fields from that grid are defaulted as field object rows that are displayed vertically inside the frame.

### Grid

Used to place a grid on the screen. Field object rows that follow the Grid object row will be placed in the grid. When a grid is added and you select the grid name in the Object Name field, all fields in that grid are automatically added in the rows that follow the grid. You can then choose to delete one or more of the fields and/or rearrange the fields.

**Note:** You cannot mix fields from different grids in one grid on the custom screen.

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## HTMLLabel

Used to place formatted HTML label text on the screen in order to provide directions or added information. This object is edited with the HTML Editor and uses a style sheet for its formatting (specified in Desktop Setup).

## Hyperlink

Used to place a hyperlink on the screen, which uses a button trigger to perform the actions.

## Label

Used to place non-formatted label text on the screen in order to provide directions or added information. This object is edited with the Simple Editor.

## Line

Used to place a line on the screen.

## Picture

Used to place a picture on the screen, with an optional button trigger to perform actions.

## Screen

Used for placing a button on the screen that will then display the specified screen when clicked.

**Note:** Screens may only be nested in this way up to seven levels deep. For example, the Personal screen has a button that displays the Dependents screen, which has a button that displays the Dependents Address screen. This example is three levels deep.

# Defining and Updating Object Properties

You can update an object's properties in either the main Custom Screens screen or preview mode. On the main screen, highlight the object in the grid and then click the Properties button. In preview mode, select the object and then press F1. Both of these methods display the Object Properties screen for the selected object. Each object type has its own unique Object Properties screen with the object properties that pertain to that object. The following is the Object Properties screen for a field object:

This is the most complex Object Properties screen. The following are field descriptions for all fields that can be on an Object Properties screen. The actual name of the field will vary slightly based upon the object properties screen on which it is being displayed. Several of these fields are also available on the main Custom Screens screen.

## Object Type

The type of object. This field is for display only.

## Object Name

The name of the object. This field is only used with the Button, Field, Grid, Hyperlink, Picture and Screen object types, and is supported by a popup based on the object type chosen. The Button, Hyperlink and Picture object types can all select button triggers; the only difference in these three objects is the presentation of the button on the screen itself.

For Grid objects, it is important to use the popup to select the grid name because this information is necessary when doing any update field actions within triggers. After entering

the grid name, all fields in that grid are automatically added in the rows that follow the grid. You can then choose to delete one or more of the fields and/or rearrange the fields.

## Caption

For all objects except Picture, this is the caption to display for the object on the screen. The Picture object has a Select File popup that allows you to select the jpg or bmp file you want to place on the screen; after the picture file is chosen and preview mode has been accessed, this Caption field will have the text '<Picture Attached>' rather than the path to the image.

**Note:** The following Left, Top, Width and Height fields are in pixels.

## Left

Allows you to move the object's location horizontally on the screen. The reference point for this value is the left-most side of the object.

## Top

Allows you to edit the object's location vertically on the screen. The reference point for this value is the top side of the object.

**Note:** When adding certain objects to a Custom Screen, you may notice that the Left and Top fields are set to -1. This lets the system know that these coordinates need to be calculated. This calculation will happen when first going into preview mode or when saving.

## Width

Allows you to adjust the width of the object. When you increase the width, the right side of the object will move to the right. When you decrease the width, the right side of the object will move to the left.

## Height

Allows you to adjust the height of object. When you increase the height, the bottom of the object will move downward. When you decrease the height, the bottom of the object will move upward.

## Modifier

For a Field object, this is the row modifier of the field and is supported by the Select Row Modifier popup. For a Grid object, this is the number of rows in the grid, including the caption row. This field is not used with the other object types.

**Note:** The Select Row Modifier popup screen shows codes 1-10, but higher row numbers can be manually entered as well. The popup also allows you to use "+" to access the last row on the grid, New 1 to insert a new top row and New + to insert a new bottom row. Non-grid fields can only have a row modifier of blank or 1.

## Display Only

A check box that allows you to specify whether or not the field is display only on this custom screen. Select the check box to make the field display only. Clear the check box to make the field editable. If the Required check box is selected, you cannot select this check box. This field is only used with the Field object type. Derived fields are for display only.

## Required

A check box that allows you to specify whether or not an entry in this field is required on this custom screen. Select the check box to make the field required. Clear the check box to make

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the field not required. If the Display Only check box is selected, you cannot select this check box. This field is only used with the Field object type.

## Field Settings

The following properties are only applicable for Field objects and are only shown when editing the properties of a Field object.

**Note:** The following Caption Left, Caption Top and Caption Width fields are in pixels.

### Display Only

A check box that allows you to specify whether or not the field is display only on this custom screen. Select the check box to make the field display only. Clear the check box to make the field editable. If the Required check box is selected, you cannot select this check box. Derived fields are for display only.

### Required

A check box that allows you to specify whether or not an entry in this field is required on this custom screen. Select the check box to make the field required. Clear the check box to make the field not required. If the Display Only check box is selected, you cannot select this check box.

### Caption Left

Allows you to adjust the location of the field's caption horizontally. The reference point for this value is the left side of the caption.

### Caption Top

Allows you to adjust the position of the field's caption vertically. The reference point for this value is the top side of the caption.

### Caption Width

Allows you to adjust the width of the field's caption. The caption will expand to the right when edited.

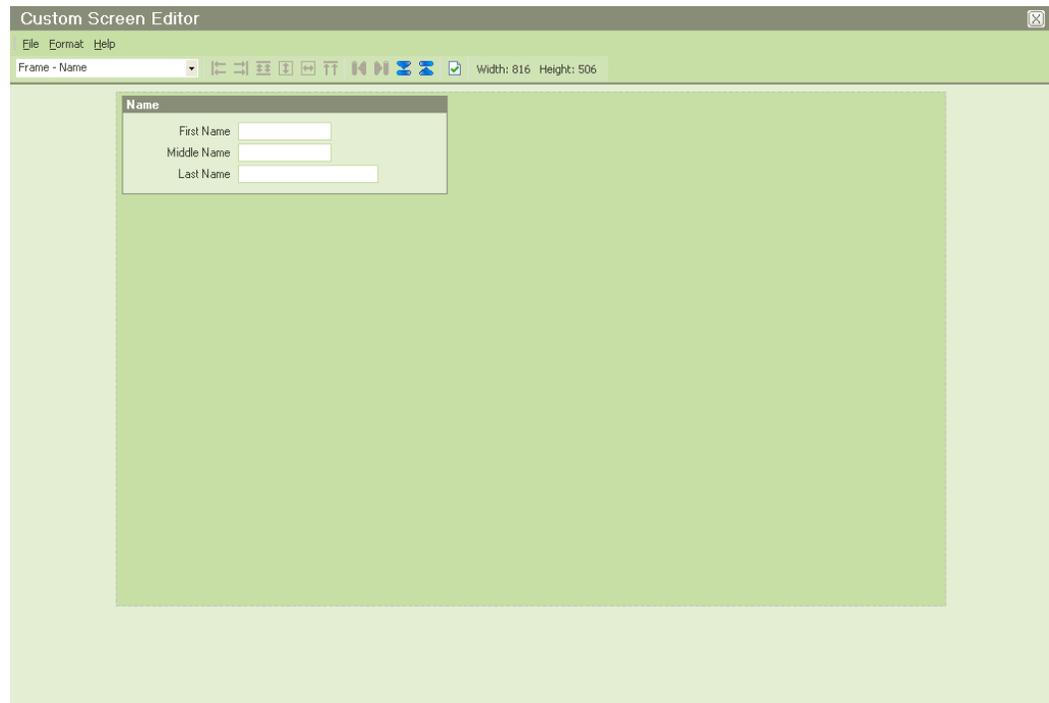
### Caption Alignment

The alignment of the field's caption. This field is supported by the Select Alignment popup.

## Using Preview Mode

The Preview feature is the most powerful feature used with custom screens. It allows you to easily design the layout of your screen. Preview mode is accessed from the main Custom Screens screen by clicking the Preview button. When you first enter preview mode for a custom screen, the locations of the objects are automatically calculated. You can then move and size the objects.

When you enter preview mode for a custom screen, the Custom Screen Editor screen is displayed and has a list of objects in the Object dropdown and the custom screen on the right. A sample Custom Screen Editor screen is shown below.



There are several ways to edit the layout of your screen using preview mode. The details of every object on your screen can be edited. This section covers how to select and edit objects in preview mode. Tab order is also discussed here.

## Selecting Objects

You can select a single object by doing one of the following:

- Click the object name in the Object dropdown.
- Click the object itself on the screen on the right.

You can select multiple objects by doing one of the following on the screen on the right:

- Hold down the CTRL key while selecting the individual objects.
- Using the mouse, right-click on a field object. This will select both the Field and its Caption
- Select a point to the upper left of the first desired object. Hold down the shift key while pressing the left button on the mouse. While doing so, drag the provided frame from the upper left starting position until all desired objects are within the frame (i.e. lassoed). Then release the key and mouse. This will select all the “lassoed” objects, just as if they were selected individually.

## Editing Objects

After objects have been selected, there are several different ways to edit them. They are:

- Move or size the object(s) using the mouse.
- Move or size the object(s) using key combinations.
- Move or size the objects using the alignment tools on the Format menu and Tool Bar. (This is only available when multiple objects have been selected.)

- Edit object properties using the F1 key.  
(If multiple objects have been selected, the first object selected is edited.)

Each of these methods is described below.

### Mouse

The most common way to edit objects is to simply click-and-drag an object to the position or size you'd like. When you first click on an object to select it, you will see the object highlighted in red with red squares in each of the corners and on the sides.

If you move the cursor to anywhere inside the object, the cursor will turn to two crossed lines with arrows pointing in four directions. An example of this is shown below:



When the cursor looks like the above example, you can drag and drop the object to any location you desire.

If you move the cursor to one of the red squares around the outside of the object, the cursor will turn to a line with arrows on either end. This line will either be vertical, horizontal or diagonal depending on which red square you are hovering over. It is indicating what direction the object will be sized. For example, the following example shows that the object will be sized vertically.



When the cursor looks like the above example (or one of the other two direction lines), you can drag the object to be the size you desire and then release.

**Note:** The cursor will vary based on the operating system being used. For example, the cursors shown above are in black, whereas these cursors are white outlined in black in the Vista operating system.

### Key Combinations

After an object has been selected, SHIFT + ARROW keys will change the size of the object, while CTRL + ARROW keys will move the object. These hot keys are much more precise. It is best to move the object to the general area and size using the click-and-drag procedure, and then specify the location and size using the hot keys.

### Alignment Tools

There are several alignment tools available in preview mode. These tools are found both on the Format menu and on the Tool Bar. These tools are only available after you have two or more objects selected. The first object selected is the controlling object. The subsequent objects selected will be aligned to the controlling object. A description of each tool is given below.

- Align to Left
- Align to Right
- Align Spacing
- Align Height
- Align Width
- Align to Top
- Align to Bottom

Align to Left aligns objects to the left side of the controlling object. Align to Right aligns objects to the right side of the controlling object. Align Spacing sets spacing between the objects to be the same as the spacing between the controlling object and the second object selected. Align Height sets height of the objects to be the same as the controlling object. Align Width sets width of the objects to be the same as the controlling object. Align to Top aligns objects to the top of the controlling object. Align to Bottom aligns objects to the bottom of the controlling object.

### Screen Sizing Tools

There are four screen sizing tools available in preview mode. These tools are found both on the Format menu and on the Tool Bar. A description of each tool is given below along with the key combinations that perform the same task. As you change the screen height and width, those settings are updated on the right side of the Tool Bar. If the Screen Type for the custom screen does not allow sizing of the screen in width or height, that sizing tool will not be available.

- Decrease Screen Width
- Increase Screen Width
- Increase Screen Height
- Decrease Screen Height

Decrease Screen Width decreases the screen width. ALT + Left Arrow performs the same task. Increase Screen Width increases the screen width. ALT + Right Arrow performs the same task. Increase Screen Height increases the screen height. ALT + Down Arrow performs the same task. Decrease Screen Height decreases the screen height. ALT + Up Arrow performs the same task.

## Tab Order

When you hover over a field in preview mode, the name of the field is displayed in a tooltip. In the tooltip, there is also a number listed after the field. This is the tab order. The tab order is determined by the order in which the fields are currently displayed in the grid. This may or may not be the order in which you wish to have the cursor move through the fields during data entry when using the TAB or ENTER key. To adjust tab order on the screen, exit preview mode and then use the Row Down/Row Up buttons to get the fields in the order in which you want them to be entered.

## Saving and Restoring

When you are doing a lot of work in preview mode, we recommend that you save your work periodically using the Save option on the File menu. Then, if you make changes that you really didn't want, you can use the Restore option on the File menu to restore the screen to the last save.

A screen can be appended or inserted in the current custom screen

**Note:** If you just want to copy an existing custom screen, use the Copy Custom Screen option on the File menu. The Copy Custom Screen only allows you to copy custom screens, not standard screens. The Append Screen and Insert Screen features allow you to create complex custom screens from any existing screens, including standard screens and custom screens.

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## Appending and Inserting Screens

People-Trak allows you to take an already existing screen (standard, or custom ) and append it to or insert it in your current custom screen. This feature is best used when you want to make a new custom screen similar to a screen that already exists. You can copy the specifications of the pre-existing screen into your new screen and then make the changes you desire. This way, you don't have to start from scratch every time you need to make a new custom screen.

**Note:** If you just want to copy an existing custom screen, use the Copy Custom Screen option on the File menu. The Copy Custom Screen only allows you to copy custom screens, not standard screens. The Append Screen and Insert Screen features allow you to create complex custom screens from any existing screens, including standard screens and custom screens.

## Recalculating Object Positions

There might be times when you have moved objects around on a custom screen, saved those changes and then decided you want to start over. The Recalculate Object Positions option on the File menu allows you to do this. This option recalculates the left and top positions of all objects on the custom screen so they will be vertically aligned down the left side of the screen. The field and frame objects will also have their width and height recalculated.

**Note:** There are times when you may not want to use this feature. If you have a two-column screen and want to keep it that way, you do not want to recalculate the object positions because that would create one single column of objects aligned down the left side of the screen.

## Use in Workflows

A custom screen is displayed within a workflow. First, the custom screen must be added to the workflow. Then, it can be accessed when that workflow is open.

All of the information in the fields placed on the custom screen is displayed. If the custom screen is long, scroll bars are automatically activated. You would then enter or update data as you would on any other screen.



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# Lesson 1

## Custom Screens 1: Basics

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This lesson covers how to add, delete and copy custom screens. It then shows how to create a simple custom screen and include it in a workflow.

### Tutorials

**Add, Delete and Copy:** shows how to add, delete and copy custom screens.

**Create a Simple Custom Screen:** shows how to create a simple custom screen with frames and fields.

**Using a Custom Screen in a Workflow:** shows how to use the custom screen you created in a workflow.

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## Tutorial 1.1 – Add, Delete and Copy

This tutorial demonstrates how to add, delete and copy a custom screen. These functions are available with some of the other tools as well.

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 they are not, select the **Training** button.
3. Select the **Strategic Toolkit** option.
4. Click **OK**.

The Login screen is displayed.

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

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

Let's start by creating a custom screen.

7. On the **Tools** menu, select **Custom Screens**.

The Custom Screens screen is displayed. The Custom Screens screen provides a list of the current custom screens on the left and a data entry area on the right. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of custom screens. Let's get started and create a custom screen.

8. On the **File** menu, select **New Custom Screen** or on the Tool Bar, click the **New Custom Screen** button to start a new custom screen.

A default name will be assigned. The name is NEW-#, where “#” is the next available, unused number.

9. Change the name of the screen to **My Custom Screen**, but do not change anything else yet.

The reason you did not waste any time completing the custom screen is that you are going to learn how to delete custom screens, and the screen you just created is the one that must go.

10. Make certain that your custom screen is the currently selected screen. On the **File** menu, **Delete Custom Screen** or on the Tool Bar, click the **Delete Custom Screen** button to delete your custom screen.

The following message is displayed:

Delete the current Custom Screen?

11. Click **Yes** and say goodbye to your custom screen.

Now let's create another new custom screen and try the copy feature, which is very helpful when you want to create a screen that is very similar to another screen.

12. Create a new custom screen. Change the screen name to **My Custom Screen**, but do not bother to change anything else. Click the Save button to save your changes.

13. On the **File** menu, select **Copy Custom Screen**.

A new screen is created named My Custom Screen-1 and all of the settings in My Custom Screen (not much in our case) are copied to this new screen. At this point you would typically rename this new screen and change any settings that you desire. We won't bother to do all of that as that is pretty straightforward.

14. Delete the **My Custom Screen** and **My Custom Screen-1** screens.

15. Close the **Custom Screen** screen.

16. Continue with the next tutorial.

## Tutorial 1.2 – Create a Simple Custom Screen

A custom screen is a list of objects that determine what is on the screen and what it looks like. There are many different objects available. We will start by learning how to use frames and fields to create a simple custom screen.

17. On the **Tools** menu, select **Custom Screens** and create a new custom screen using what you learned in the prior lesson. Name the custom screen **My Name and Address**.

As with documents, the Category field is used for security. With screens, the Category field also determines the category in which notes are stored for this screen. The Category is defaulted to User but can be changed to any of the pre-defined categories.

18. In the **Category** field, select **Personal**.

The Screen Type field allows you to select the type of custom screen that you are creating. The screen type chosen controls what screen sizing is available.

19. In the **Screen Type** field, click the popup button.

The Standard screen type uses the standard People-Trak size screen and allows you to have variable height with scroll bars. The Popup screen type gives you the ability to size the screen to any size you desire. The Maximum screen type allows you to use the maximum space allowed in People-Trak screens.

20. Select **Standard**.

The Screen Width and Height fields show the default screen size in pixels for this screen type. The Screen Width is display only but the Screen Height is not, which allows you to create a much longer screen, if necessary.

21. In the **Object Type** column on the first blank row in the grid, select the popup button to display a list of the valid object types. Select a **Frame** for the first object.

For each object type, some of the remaining columns are used to provide details. For a Frame object, the only relevant column is typically the Caption. We will get fancier with a Frame object in a later tutorial and use the Object Name column at that time, but not now.

22. In the **Caption** column, enter **Name**.

Now let's pick some fields that will be placed within the frame.

23. In the **Object Type** column on the second row in the grid, select a **Field** object.

24. In the **Object Name** column, click the popup button to display a list of the fields in the **Personnel Management** module. Select the **First Name** field.

The Caption column is automatically set to the caption currently associated with this field. (In the case of the First Name field, the caption is set to First Name.) This can be changed, if desired, but we have no need to make a change at this time, so just leave the field as is.

Similar to what we saw in form templates, the Left and Top fields are set to -1 to let the system know that these coordinates need to be calculated. This calculation will happen

when first going into preview mode or when saving. The Width and Height fields contain the width and height of the field in pixels. We'll learn more about these attributes later. Let's pick some more fields.

25. Add the **Middle Name** and the **Last Name** fields to your custom screen. When complete, you should have a frame and three fields.

Now let's add another Frame.

26. Select the **Frame** object and then set the **Caption** to **Address**.
27. Add the following **Fields**:

**Address 1**  
**Address 2**  
**City**  
**State**  
**Zip Code**

You should now have two frames and two collections of fields. We will just take a quick look at Preview to see how this looks. We will actually move and size the fields in another lesson.

28. Click **Preview**.

The Custom Screen Editor screen is displayed. Everything looks good.

29. Close preview mode.

Note that the -1 values have now been calculated to be the correct pixel coordinates.

In the next tutorial, we will see how this custom screen looks "live and in action".

30. Close the **Custom Screens** screen, saving your changes.
31. Continue with the next tutorial.

## Tutorial 1.3 – Using a Custom Screen in a Workflow

Custom screens, like all other screens, are displayed within a collection of one or more screens known as a workflow. We just created a new custom screen. Now we have to put it on a workflow so that we can see it and use it. You will learn more about workflows in a later lesson. For this tutorial, we will just walk you through what you need to do to get your custom screen onto a workflow.

1. On the **Tools** menu, select **Workflows**. On the Tool Bar, click the **New Workflow** button to create a new workflow. Change the **Workflow Name** to **My Name and Address Workflow**. Leave the **Show on Menu** check box selected so that this workflow will show up on the **Workflows** menu.

We need to add your new screen to the workflow.

2. On the **Screens** tab, in the **Screen Name** field, click the popup button to display a list of the available screens. Select the **My Name and Address** screen. Close the **Workflows** screen, saving your changes. We now have a workflow with your screen.
3. Open the **Workflows** menu. Your new workflow should be present. Select the workflow and open **Donald Stern's** record.

Note that all of his name and address information is displayed in your new screen.

4. Close the record.

That is a simple, single-screen workflow using your customized screen.

Now, most people would like to use their custom screens along with other screens within People-Trak. Let's learn how to add a screen to an existing workflow.

5. On the **Tools** menu, select **Workflows**. Select the **Standard - Employee** workflow.

This is the standard workflow for the Personnel Management module.

6. Click the **Screens** tab.
7. Click on the **Status** screen row. On the Tool Bar, click the **Insert Row** button and insert your newly-created **My Name and Address** screen as the second screen in the **Standard - Employee** workflow.
8. Close the **Workflows** screen, saving your changes.
9. Use the **Open Employee** shortcut to open **Donald Stern's** record within the **Standard - Employee** workflow.

When the record is displayed, the second screen will be your customized screen and the rest of the screens will be the standard screens that come with People-Trak.

10. Click through the screens to check this out.
11. Close **Donald's** record.
12. This concludes this tutorial and lesson.

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# Lesson 2

## Custom Screens 2: Preview

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This lesson covers how to use preview mode to make adjustments to your custom screen. It also covers how to change the tab order of the fields on your custom screen.

### Tutorials

**Using Preview Mode:** demonstrates how to move and size some of the objects you have placed on the custom screen.

**Object Properties:** demonstrates how to make changes to the location and size of objects on a screen by using the Object Properties screen.

**Alignment Tools:** takes you on a tour of the alignment tools available in preview mode.

**Tab Order:** demonstrates how to change the order in which you wish to have the cursor move through the fields during data entry.

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## Tutorial 2.1 – Using Preview Mode

We have used preview mode before, but now we are going to actually move and size some of the objects you have placed on the custom screen.

1. On the **Tools** menu, select **Custom Screens**. Select your **My Name and Address** custom screen.
2. Click the **Preview** button to activate preview mode.

In preview mode, you should see your screen based on the calculations and assumptions made by the Custom Screens process. With a simple screen such as this, everything should look pretty good.

The first time that you use preview mode with a new screen, the various calculations and assumptions are made. For example, in your screen, the fields were placed in the frames correctly and the spacing was consistent. If we make another change, such as adding an additional field, the calculations will not be redone and we will need to use the features in preview mode to adjust the screen. Since that is what we are here to learn, let's add another field to the screen.

3. Close preview mode.
4. In the first blank row in the grid (after the **Zip Code** field), add the **Country** field. Now, click the **Preview** button and take a look at the screen.

The Country field now overlaps the bottom of the Address frame because the Address frame height was not recalculated. Well, preview mode can be used to fix the problem, and we'll do that now.

5. Activate the **Address** frame object by either selecting **Frame - Address** in the **Object** dropdown on the Tool Bar or clicking on the outside edge of the **Address** frame on the screen on the right. Now move the cursor to the bottom of the frame until the up/down arrow cursor appears. Click and hold the mouse button down and slowly drag the bottom of the frame downward until the **Country** field is within the frame. Click off the frame to deactivate movement.

The screen looks OK now, but how would you like People-Trak to 'fix' screens for you after you have added one or more fields after the initial preview? It can!

6. Close preview mode, saving your change.
7. Add the **County** field below the **Country** field in the grid.
8. Click the **Preview** button.

Just like with the Country field, the County field is added below the frame it should be included within.

9. Leaving the **County** field outside of the frame, close preview mode.
10. On the **File** menu, select **Recalculate Object Positions**.

This option recalculates the left and top positions of all objects on the custom screen so

they will be vertically aligned down the left side of the screen. The field and frame objects also have their width and height recalculated.

11. Enter preview mode.

The County field is now included in the frame automatically. This recalc option can also be used to save yourself some grief when you have made a lot of changes to a screen and just want a ‘do over’.

**Note:** There are times when you may not want to use the Recalc Object Positions feature. If you have a two-column screen and want to keep it that way, you do not want to recalculate the object positions because that would create one single column of objects aligned down the left side of the screen.

When creating form templates, we learned how to drag, drop, and nudge objects. We will be refreshing your memory by moving a few objects around in this custom screen.

Let’s start by moving the Zip code field.

12. Click on the **Zip** field using the right mouse button.

Both the Zip field and its caption are highlighted.

13. Click and drag the **Zip** field and its caption up so that it is aligned horizontally with the **State** field. You can align the right edge of the **Zip** field with the right edge of the **City** field.

Now that the Zip field has been moved, the Country and County fields are too low and the frame is too low. As we have seen previously, moving multiple fields can be done with a few clicks.

14. Right click on the **Country** field to select the field and caption. Hold down the **CTRL** key and right click on the **County** field to select the field and caption as well.

15. Move the **Country** and **County** fields and their captions up under the State field.

16. Select the **Address** frame that should be too long now that we have moved the fields up. Hold down the **SHIFT** key and press the **UP ARROW** key. This will move the bottom of the frame up one pixel at a time. You can use the **DOWN ARROW** key to extend the frame downward one pixel at a time. Finally, you can use the **RIGHT ARROW** key and the **LEFT ARROW** key to expand or contract an object horizontally. Try them now as you clean up your screen and prepare it for use.

The actual size of the screen itself can also be changed if the screen type chosen allows it. In our case, we are using a Standard screen, so we can change the height to whatever we desire. If we make the screen shorter, it won’t make any difference if the screen is used as a primary screen because a primary screen has a fixed minimum size. If we make the screen longer, a scroll bar will be available.

Let’s assume that our screen is going to be used as a primary screen as well as a sub screen. With sub screens, making the screen smaller does affect the actual screen size. Let’s make the screen smaller now. The technique is similar to the sizing you just did of the frame, except the ALT key is used instead.

17. Hold down the **ALT** key and press the **UP ARROW** key a couple times to move the bottom of the screen up a bit, decreasing the screen height.

**Note:** Screens with a type of Popup also allow you to change the width of the screen. The **ALT + LEFT ARROW** and **ALT + RIGHT ARROW** key combinations move the right side of the screen left and right, respectively.

These functions are also available as buttons on the Tool Bar.

18. Find the two blue buttons for **Increase / Decrease Screen Height** on the Tool Bar and give each one a try. Then use the appropriate buttons to size the screen to the size of the data area.

**Tip:** When you are doing a lot of work in preview mode, we recommend that you save your work periodically using the Save option on the File menu. Then, if you make changes that you really didn't want, you can use the Restore option on the File menu to restore the screen to the last save.

19. Stay in preview mode for the next tutorial.
20. Continue with the next tutorial.

## Tutorial 2.2 – Object Properties

All of the moves and sizing tasks that you just performed were recorded in the object's property settings. Let's take a look at how to see these properties for each object on the custom screen.

1. Either select **Field - County** in the **Object** dropdown or click on the **County** field on the screen on the right to activate it.
2. Press the **F1** key.

The Field Object Properties screen for the County field is displayed.

Note that the Object Type and Field Name fields are display only. You can only change those settings from the object grid on the main screen.

The Left, Top, Width and Height fields are in pixels and are updated when objects are moved or sized in preview mode, or you can update these fields here in this screen. These fields can also be updated on the main Custom Screens screen. The Left and Top numbers are relative to a 0/0 starting point, which is in the upper left corner of the screen.

3. Record the value of the **Left** field and close the **Field Object Properties** screen.
4. Now drag the **County** field to the right.
5. Press the **F1** key to display the **Object Properties** screen again.

Note that the value of the Left field has been updated to reflect the movement of the object.

To restore your screen, simply update the coordinate back to the value you recorded.

6. In the **Left** field, enter the number you recorded. Click the **Apply** button to apply the change.

You can see that the change took effect.

The calculations and assumptions that the Custom Screens process makes also prevents an object from being placed outside the viewable area of the screen.

We can simulate this problem now.

7. Press **F1** again and change the **Top** field for the **County** field to **1000**. Click the **Apply** button to apply the change.

The County field is moved down to the bottom edge of the screen. If you decreased your screen height significantly in the last tutorial, it may even be "missing" altogether. We can look at the object grid and see how the details for this field have been modified.

8. Close preview mode, saving your changes.
9. Look at the entries in the **Top** column for the objects.

When you get to the County field, the Top entry really makes a big jump to something around 500. The 1000 you entered was adjusted to what the normal screen maximum is.

10. Change the **Top** column for the **County** field to **250**, which is much closer to the **Top** entry for the **Country** field. Open preview mode.

The County field should be almost exactly where it needs to be.

11. Nudge the **County** field back to where it belongs.
12. Stay in preview mode for the next tutorial.
13. Continue with the next tutorial.

## Tutorial 2.3 – Alignment Tools

You have already seen several different ways to move objects on your custom screen. Let's take a look at some really slick alignment tools that will save you a lot of time and effort.

1. Right click on the **County** field on the screen on the right.

As expected, the County field and its caption are automatically highlighted.

2. Click and drag that field and its caption down toward the bottom of the screen and keep it highlighted.
3. Make the **County** field a lot bigger by moving the mouse down to the lower right-hand corner of that field until the cursor becomes a diagonal with arrows on both ends. Now drag down and to the right.
4. Click in the empty area off to the right of the **County** field to deselect it.

Now, let's not only get this field and its caption back to "about" where they belong, let's get them back to exactly where they belong and back to the right size!

First, let's get the County caption back where it belongs.

5. Click on the **State** caption. Now, hold down the **CTRL** key and click on the **Country** caption and then the **County** caption.

Notice the difference in the way these fields are now highlighted. The State caption looks different from the other captions because it is the "controlling" object. Every other highlighted object will align to that.

We are now ready to use the alignment tools, which are available on the Tool Bar (and also on the Format menu). The graphic for each button is pretty self-explanatory.

6. Take a moment and move your mouse over each button on the Tool Bar. As you right click on each button, a tooltip description will display.

Now that you are familiar with the alignment buttons, let's start clicking!

7. On the Tool Bar, click the second button, which aligns objects to the right.

The County caption is now right aligned to where the State caption is. The three objects should still be highlighted.

8. On the Tool Bar, click the third button, which sets spacing between objects.

Voilà! The County caption is back where it belongs!

Now do similar steps for the County field.

9. Click on the **State** field. Now, hold down the **CTRL** key and click on the **Country** field and then the **County** field.

This time, we want those fields left aligned and then spaced correctly.

10. On the Tool Bar, click the first button, which is the left align button. Then click the spacing button.

The County field is now back where it belongs. But it is still way too big. Let's fix that.

11. On the Tool Bar, click the fourth button, which sets the height of the selected objects.

The County field should now be the same height as the State field.

There is only one thing left to do, make the County field the right width. If we did this right now with the State field selected, the Country and County fields would also get set to the State field length, which is not what we want.

12. Click on an empty area of the screen to deselect the objects.

13. Click on the **Country** field. Hold down the **CTRL** key and click on the **County** field.

14. On the Tool Bar, click the fifth button, which sets the width of the selected objects.

The County field should now be the same width as the Country field.

The only alignment tool we haven't tried yet is the one that aligns fields at the top. I think you can tell from the graphic which one that is. We won't try that one but you know how to use it now.

15. Click on an empty area of the screen to deselect the objects.

16. Save your changes and stay in preview mode for the next tutorial.

17. Continue with the next tutorial.

## Tutorial 2.4 – Tab Order

Tab order is the order in which the cursor moves through fields when the TAB or ENTER key is used. Tab order is determined by the order in which the fields were selected or are currently displayed in the grid. This may or may not be the order in which you wish to have the cursor move through the fields during data entry.

It is important to be able to see the tab order while in preview mode, and you can.

1. Hover over any **Field** object on the screen on the right.

A tooltip is displayed with the field name followed by a colon and a number. As you learned earlier, the number is the tab order for the field. When you use the TAB key or ENTER key to move through the fields on the screen, the cursor will follow the tab order. The first field is tab order 1, the second field tab order 2, etc.

The tab order is determined by the order in which the fields are currently displayed in the grid. This may or may not be the order in which you wish to have the cursor move through the fields during data entry. When you created the screen and initially selected the fields, you selected Middle Name as the second field.

2. Hover over the **Middle Name** field, you can see that it is tab order **2**. The **Last Name** field was the third field and if you hover over that field, you can see that the tab order is **3**.

Now, after having created our screen, we may have decided that the tab order is wrong. Perhaps we would prefer the cursor to tab to fields as they appear on our screen. We can fix this quite easily. Again, tab order is determined by the order in which the fields are currently displayed in the grid.

3. Close preview mode.
4. Click anywhere on the **Middle Name** row in the grid. On the Tool Bar, click the **Row Down** button to push the **Middle Name** field in the grid down one row so it is now the third field listed in the grid. When complete, go back into preview mode. Now hover over the **Middle Name** field and the tab order should be **3**.

You can adjust tab order on any custom screen that easily.

In this particular example, we have created a strange situation. The tab order does not match the field order on the screen. Let's take a look.

5. Close preview mode and **Custom Screens** screen, saving your changes.
6. Use the **Open Employee** shortcut to open **Donald Stern's** record within the **Standard - Employee** workflow and display your custom screen. Press the **TAB** key a few times.

Note that the cursor moves in a different order than the order in which the fields are actually displayed. At some point you may wish to have tab order and field order be different. However, the most common use of adjusting tab order is when you have initially selected fields that do not end up being placed in the order in which you selected them. (I had you select the fields in the proper order, but I will not always be around to help you.)

Tab order, like field location, can be changed on any custom screen whenever you wish to do so.

7. Close the open record.
8. Continue with the next tutorial.

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# Lesson 3

## Custom Screens 3: Additional Settings

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This lesson covers how to use the Display Only and Required attributes of a field to control data input on a custom screen. The lesson concludes by showing you how to add screen help to a custom screen.

### Tutorials

**Display Only and Required:** demonstrates how to use the Display Only and Required attributes of fields on your custom screen to control data input.

**Adding Screen Help:** shows how to add screen help to a custom screen.

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## Tutorial 3.1 – Display Only and Required

Let's see how the Display Only and Required attributes of fields on your custom screen allow you to control data input.

1. Open a record to verify that the name and address information are displayed on both the **Personal** screen (the first screen) and your **My Name and Address** screen (the second screen). Close the record.
2. On the **Tools** menu, select **Custom Screens** and then select the **My Name and Address** screen.
3. Open preview mode.
4. Click on the **First Name** field on the right. Press **F1** to display the **Field Properties** screen and select the **Display Only** check box. Click **Apply** to apply those changes. Do this same procedure for the **Middle Name** and **Last Name** fields.

Now, let's specify that we want all of the address fields to be required. We could use the F1 key, but there is a faster way to make these changes.

5. Close preview mode.
6. For each of the address fields, select the **Required** check box in the **Objects** grid.

As you can see, you can change the Display Only and Required attributes of fields on your custom screen using either the Objects grid on the main screen or the F1 key when in preview mode.

7. Close the **Custom Screens** screen, saving your changes.
8. Open **Donald Stern's** record.

Note that the name and address fields on the Personal screen (the first screen) do not share the attributes we just set for the same fields that appear on your screen.

9. Go to the second screen.

On this screen, the name fields are now for display only and the address fields are required.

You can tell that the name fields are for display only because the data is displayed in gray. In addition, the cursor jumps over these fields when you use the TAB or ENTER key. (The cursor will position to a display-only field if you use the mouse, but will not allow editing.)

You can tell that the address fields are required because you cannot clear the value of a required field. Try it.

10. Attempt to clear the **Address 1** field and then leave. You will not be able to do so.

And, of course, if you attempt to leave the screen with any required field blank (even one you did not position to), your attempt will fail.

This tutorial demonstrates the ability to set display only and required attributes by screen.

In this example, we used the same fields on two different screens in the same workflow. On one screen, the attributes were set and on another they were not. You could just as easily create a single screen workflow that provides display-only information for a particular user or group of users.

11. Close the record.

Let's do some housekeeping.

12. On the **Tools** menu, select **Custom Screens** and then select the **My Name and Address** screen.
13. Remove all of the **Display Only** and **Required** selections in the **Objects** grid.
14. Save your changes and stay in the **Custom Screens** screen.
15. Continue with the next tutorial.

## Tutorial 3.2 – Adding Screen Help

Each of the screens within People-Trak is provided with screen help. This help provides a basic description of the screen and what it is used for. This help can be activated in one of two ways. You can press **SHIFT + F1** (the F1 key alone displays field help for the current field). Or you can use the **Show Screen Help** button on the Toolbar.

You should still be in the My Name and Address screen.

1. Click the **Help** button to display the help text for the screen.

Because we created this screen from scratch, the help text is blank.

2. Select the **Edit** button.

The Help Editor is displayed.

3. Enter the following text:

**This screen is used to enter personal information regarding the employee's name and address**

Remember, from this point forward, this is the text your users will see when they seek help for this screen. Your users are counting on you.

4. Close the **Help Editor**, the **Topic Name: My Name and Address** screen and **Custom Screens** screen, saving your changes.

Time to test your screen help.

5. Open **Donald Stern's** record. Select your **My Name and Address** screen. Press **SHIFT + F1** to display the screen help. You should see the help you just created. Close the screen and try displaying your help using the **Show Screen Help** button on the Toolbar. Close the screen.

That's it. You can add or change screen help whenever you need to.

6. Close **Donald's** record.
7. Continue with the next tutorial.

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# Lesson 4

## Custom Screens 4: More Objects

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This lesson covers some more objects available in custom screens.

### Tutorials

**Displaying Other Screens:** shows you how to use the screen object to display other screens.

**Using Labels:** demonstrates how to use the label object on your custom screen.

**Buttons: A Sneak Preview:** shows how to use buttons on your screen to trigger actions.

**Captions, Lines, Pictures and Hyperlinks:** demonstrates how to use these objects to give your custom screen some pizzazz.

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## Tutorial 4.1 – Displaying Other Screens

A very powerful capability of custom screens is the ability to display any other screen that is within the module. This is accomplished with the Screen object. Screen objects are essentially buttons that are associated with the name of a screen. When you create a screen object, you select the screen you want to display. This puts a button on your screen. You can then position the button wherever you wish. When your custom screen is displayed, you can click on the button to display the specified screen. Let's give it a try.

1. On the **Tools** menu, select **Custom Screens** and then select the **My Name and Address** screen.
2. Position to the first blank row in the objects grid. In the **Object Type** field, click the popup button to display a list of the available objects. Select the **Screen** object. In the **Object Name** column, click the popup button to display a list of the available screens. Select the **Personal** screen.

The screen code is placed in the Object Name column and the name of the screen is placed in the Caption column.

3. Enter preview mode.

You should see a button with the caption Personal. This is the screen object we have just created. The screen object can be sized and positioned just like the other objects you have learned about so far. Try it now.

4. Make the **Personal** button taller and wider. Close preview mode, saving your change.
5. For the **Screen** object, change the **Caption to Personal Screen**. Enter preview mode and make certain that the button is large enough for the caption. Close preview mode.

Let's take a look at this screen now.

6. Close the **My Name and Address** screen, saving your changes.
7. Open **Donald Stern's** record. Select your custom screen.

This screen contains personal information about the employee and a button to display the Personal screen provided with People-Trak. Now for some interesting results.

8. Change **Donald Stern's Last Name** to **Sternz**. Now click on the button to display the **Personal** screen.

This screen displays the employee's Last Name. Note that the Last Name field shows the latest change to Donald's last name. It appears as Sternz. Because the Personal screen is a sub screen on your custom screen, it displays the latest available information.

9. Close **Donald's** record, saving your changes.
10. Return to the **Custom Screens** process and select the **My Name and Address** screen we have been working on.

It's time to add another screen.

11. In the next blank row, add another **Screen** object. This time, select the screen we are currently working on. Yes, we are going to display this screen as a sub screen on itself. Use preview mode to make certain everything looks right and to make any necessary adjustments. If you don't see this new screen object as a button in the screen on the right, just select it in the **Object** dropdown to find it and then drag that button down so it is visible. Close preview mode, saving your changes. Close the **Custom Screens** screen, saving your changes.
12. Open **Donald Sternz's** record. Select your custom screen. Click on the screen button to display this very same screen as a sub screen. Other than the size of the screen (sub screens do not fill the workflow area), the screen is the same. Close the screen.
13. Change **Donald's** last name back to **Stern**. Open the sub screen again and note that the change is there as well.

Now for something really interesting. On the sub screen, there is... another button for the same screen.

14. Click on the screen button.

We are now displaying a sub screen on a sub screen on a main screen, all of which are the same screen.

15. Reposition the topmost screen to view the original sub screen.

But wait... the sub screen is there again. You could click the button and then click it and then click it again, but eventually People-Trak will become angry and shut down. In actuality, there really is no reason to nest the screen on top of itself once, let alone three or four times. If the information is displayed and can be edited once, that is sufficient.

16. Close all of the nested screens, and then close **Donald Stern's** record, saving your changes.
17. Continue with the next tutorial.

## Tutorial 4.2 – Using Labels

There are two types of label objects. There are label objects that are actually part of the field objects. These are known as caption labels. Then there are dedicated, stand-alone labels that are used to present information to the user. You learned about them just briefly in previous training. We'll work with them a bit more now.

Working with People-Trak, you have probably seen that most screens are fairly dense and that we try to capture as much information on a given screen as possible. This technique is in contrast to the “wizard” method where you can present lots of text and then collect just one or more pieces of information. With People-Trak, you can have it your way. You can create screens with fewer fields and more text. The way to do that is to use label objects.

1. Start a new custom screen. Name the screen **Wizard Screen** and put it in the **Personal** category. In the **Screen Type** field, select **Popup** because we are going to use this screen as a popup screen and would like to size it accordingly.

**Note:** This doesn't mean that this screen can only be used as a popup screen. If the screen is used as a primary screen, it will be sized according to the minimum screen size for primary screens.

Now let's get started.

Labels usually look best displayed within a frame.

2. So, begin by adding a **Frame** object. Do not add a **Caption** for the frame. Now, before adding the Label object, enter preview mode and size the frame so that it is about half the size of the available space. Size the screen itself (using the **ALT** key plus arrow key combination or the screen sizing buttons on the Tool Bar) so that the borders around the frame are about one-quarter of an inch. Then close preview mode, saving your changes.
3. Add a **Label** object to the screen.

The Caption column for the Label object is defaulted to Sample Caption. This is done to ensure that you can see the label in preview mode. We will leave that placeholder there for now and replace it in a bit.

4. Enter preview mode and size the label object so that it is just inside the left, top, and right borders of the frame. Leave about an inch between the bottom of the label object and the bottom of the frame object. Close preview mode, saving your changes.
5. Now add two **Field** objects. Select the **Termination Date** and **Termination Reason** fields. Enter preview mode and move the two fields to the available space below the label object. Line them up vertically and center them horizontally. Close preview mode, saving your changes.

Now we can finally add the text of the label.

6. In the **Caption** column for the **Label** object, click the two-arrow popup button to display the **Simple Editor**.

This is where you can enter a very large amount of text.

7. Enter the following text:

**This screen is used to terminate an employee. Please complete each field carefully. In the termination date, enter the date when the employee's termination was effective. Remember, in some instances, this is not the last day the employee worked. Sometimes employees are terminated officially some number of days after they are asked to leave the premises. After the date has been entered, complete the termination reason field. The termination reason field is supported by a list of the approved and valid termination reasons. Select the appropriate reason. And before continuing, please make sure you are terminating the right employee.**

8. Click **OK**.
9. Enter preview mode and see how the wizard looks now. You may need to move a few objects around or size the label. When complete, close preview mode, saving your changes.
10. Select the **My Name and Address** screen we have been working on in prior lessons. Add a new **Screen** object at the bottom of the list of objects. Select the **Wizard Screen** we have just created and then set the **Caption** to **Terminate**. Use preview mode to adjust the size and location of the screen object. Close preview mode, saving your changes. Close the **Custom Screens** screen, saving your changes.

Now let's see how it works.

11. Open **Donald Stern's** record. Move to your custom screen. Click the **Terminate** button. Your very own termination wizard screen is displayed. You have a meaningful message with instructions for completing just two fields. Close the screen without terminating **Donald Stern**. We need him around for future lessons. Close **Donald Stern's** record.

You have now created a wizard style screen using a label and just two fields. You can actually create screens with any number of fields and in fact, you can create screens that do not have any fields at all. These would be known as message screens. We'll build one now.

12. Select the **Custom Screens** option and create a new custom screen. Name the screen **PANIC** and put it in the **Personal** category. In the **Screen Type** field, select **Popup** because this screen is going to be a popup.
13. Add a **Frame** object and a **Label** object. Add the following text to the **Label** object:

**PANIC. The sky is falling. Please run around and scream nonsensical phrases while waving your arms wildly and achieving absolutely nothing meaningful. PANIC.**
14. Enter preview mode. Size the **Frame** object so that it can contain about two or three lines of normal text. Center the **Label** object within the frame. Size the screen itself to just larger than the **Frame** object. Close preview mode. Save your screen.
15. Select the **My Name and Address** screen and add a new **Screen** object. Select the **PANIC** screen. Set the **Caption** of the **Screen** object to **PANIC**. The only thing left is to try it. Close the **Custom Screens** screen, saving your changes.
16. Open **Donald Stern's** record. Select your custom screen. Now... click the **PANIC** button. There are your explicit instructions. Please comply.

In reality, text-only screens can be useful for providing information. In addition to Label objects, you can use HTMLLabel objects. The HTMLLabel object is used for formatted text, is edited with the HTML Editor and uses a style sheet for its formatting (specified in Desktop Setup); whereas, the Label object is used for non-formatted text, is edited with the Simple Editor and uses the standard PT style or the alternate style. You will get to play with the HTMLLabel object a bit later.

17. Close **Donald's** record.
18. Continue with the next tutorial.

## Tutorial 4.3 – Buttons: A Sneak Preview

Buttons are very powerful objects that can perform a wide variety of tasks. Button objects refer to button triggers that are created with the Button Triggers tool. We will be learning a great deal about button triggers later, but we will learn just enough at this time so that you know how to use a button object in a custom screen.

1. Select the **Custom Screens** option and select the **PANIC** screen we created in the last tutorial.
2. On the first blank row, add a new **Button** object. Leave the **Object Name** blank for now. Set the **Caption** to **SCREAM**. Open preview mode, find the **SCREAM** button, and then position it where it is quite easy to find. Close preview mode, saving your changes.

Now, we would normally use the Object Name column to select the button trigger to execute, but we do not have one yet. We'll need to create one now.

3. Close the **Custom Screens** screen, saving your changes.
4. On the **Tools** menu, select **Button Triggers**. On the Tool Bar, click the **New Trigger** button to create a new button trigger. Set the **Trigger Name** to **SCREAM** and set the **Button Caption** to **SCREAM**.
5. Click the **Actions** tab.

Button triggers can perform a number of actions. Again, we'll learn about these later. Just follow along as we create a trigger and make notes for future reference.

6. In the first blank row in the **Actions** grid, click the popup button to display a list of the available action types. Select the **Update Field** action.

This action is used to force the contents of a field to a specific value. For example, you could set the value of the City field to a specific city or the value of the Country field to a specific country.

When you selected the Update Field action, the cursor moved to the second row.

7. Click back in the first row and then click the **Detail:1** button.

The Update Field screen is displayed.

8. In the **Field Name** field, click the popup button to display a list of the available fields. Select **Last Name**. Set the **New Value Type** field to **Value**. Set the **New Value** field to **Ahhhhh**.
9. Close the **Update Field** and **Button Triggers** screens, saving your changes.
10. Select the **Custom Screens** process and select the **PANIC** screen. Position to the **SCREAM** button object and use the button on the **Object Name** column to display a list of the available button triggers. Select the button named **SCREAM** that we just created.

We now have a button object that executes a button trigger when the button is clicked. All we need to do now is try it out.

11. Close the custom screen, saving your changes.

12. Open **Donald Stern's** record. Select your **My Name and Address** screen. Click the **PANIC** button to display the **PANIC** screen you created. The **SCREAM** button object should be visible. Click the **SCREAM** button.

This will execute the trigger that will change Donald Stern's Last Name to Ahhhhhh, which is essentially a scream. There is no Last Name field on the PANIC screen, but there is one on the screen below that.

13. Close and save the **PANIC** screen so you can see the **Last Name** field. Click the **Save Employee** button.

The Last Name should now be Ahhhhhh. We have had a moment of panic and we have screamed.

14. Just to provide a little more information about the **Update Field** action, move to the **Personal** screen.

Note that Last Name field there also reflects our moment of panic. Setting a field with a trigger is the same as typing the value in directly.

15. Change **Donald's Last Name** back to **Stern**.

16. Close **Donald's** record, saving your changes.

17. Continue with the next tutorial.

## Tutorial 4.4 – Captions, Lines, Pictures and Hyperlinks

People-Trak provides four different caption objects to allow you to have “headings” on your custom screens. A line object is also available, which gives you the ability to draw lines. A picture object allows you to add pictures to your custom screens. And last, but not least, there is also a hyperlink object, which allows you to add a hyperlink to your screen. So many objects, so little time! We will take a look at each of these objects in this tutorial to get familiar with them. In a later lesson, you will be putting these all together to make a really cool screen.

1. Start a new custom screen. Name the screen **Fun with Objects** and put it in the **Personal** category. Leave the **Screen Type** field set to **Standard**.

Now let’s get started. Let’s first see what the differences among the headings are.

2. So, begin by adding a **Heading 1** object with a **Caption** of **Heading 1**.
3. Next, add **Heading 2**, **Heading 3** and **Heading 4** objects with the same-named **Heading**.
4. Enter preview mode.

The Heading 1 and 2 objects have the dark color of your selected scheme as their background; whereas, Heading 3 and 4 objects have a transparent background. Also notice the difference in the font size of the heading text.

As with all objects, you can resize these headings to be any size you want and you can move them anywhere on the screen.

5. Practice moving and resizing the objects.
6. Add a **Line** object. There is no **Caption** needed for a line object.
7. Enter preview mode.

The line defaults to a thickness that makes it easiest to resize in any direction you want. You can make the line thinner if you want.

8. Highlight the line object on the right.

Let’s make the line thinner.

9. Move the cursor over either the top or bottom red box in the middle of the line until it changes into an up/down arrow, and then drag the line down or up (depending on which red box you selected) to make the line thinner.

Let’s make the line thicker again. We can either do the same method in the other direction or use the nudge technique. Let’s do a refresher on the nudge technique.

10. With the line still highlighted, hold down the **SHIFT** key while pressing the **DOWN ARROW** key.

The line will now become thicker.

Now, let’s make the line longer.

11. Move the cursor over the right side of the line until it changes into a left/right arrow, and then drag the line to the right.
12. Practice resizing and moving the line.
13. Close preview mode, saving your changes.
14. Add a **Picture** object to the screen.
15. In the **Object Name** field, click the popup button.

As you can see, you can select one of the button triggers just like you could with the Button object. This allows you to have your picture act as a button. We won't be doing that until a bit later. For now, our picture will be simply that... a picture.

16. Click **Cancel** to close that screen without making a selection.
17. In the **Caption** field, click the popup button.

The Select Field screen is displayed.

18. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **PETE&PETUNIA.JPG**.
19. Add a **Hyperlink** object to the screen.
20. In the **Object Name** field, click the popup button.

As with the Button and Picture objects, you can select any button trigger. Typically a hyperlink is used to link to a website or another part of a document. In People-Trak, you can have it do any of the button trigger actions available. So, you have the choice of what you want your button to look like: a regular button (using the Button object), a picture (using the Picture object) or text underlined and in blue (using the Hyperlink object).

21. Select any button trigger.

The button trigger's description is defaulted as the Caption but can be changed.

22. In the **Caption** field, enter: **This is what a hyperlink looks like**.

23. Open preview mode.

The picture and hyperlink have been added to the screen and can be moved and resized as needed. The hyperlink uses the standard formatting of having the text in blue and underlined.

This was just a quick look at the caption, line, picture and hyperlink objects to get you familiar with them. You can see that these objects allow you to create a very customizable screen.

24. Close preview mode and close the Custom Screens screen, without saving your changes.
25. This concludes this tutorial and lesson.

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# Lesson 5

## Custom Screens 5: Grids

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This lesson covers how to add and modify grids on your custom screen.

### Tutorials

**Adding a Grid:** shows how to add a grid to your custom screen.

**Modifying a Grid in Preview Mode:** demonstrates how to modify the grid in preview mode.

**Using Multiple Grids:** demonstrates how to add another grid to your custom screen so you now have multiple grids on one screen.

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## Tutorial 5.1 – Adding a Grid

A grid is added to a screen in two steps. The first step is to select a grid object and the second is to specify the fields that will make up the columns in the grid. Let's do this now.

1. On the **Tools** menu, select **Custom Screens** to start a new custom screen. Name the screen **About Grids** and leave it in the **User** category. Leave the **Screen Type** field set to **Standard**.
2. In the **Object Type** column of the first row in the grid, click the popup button to display a list of the available objects. Select **Grid** as the object.
3. Click the **Preview** button.

Unfortunately, the following message is displayed:

You have defined a grid with no fields.

This message is just letting you know that you have only completed the first of two steps in creating a grid. You must not only specify a grid object, but you must also specify the fields that will become the columns on the grid. Let's specify a field now.

4. Click **OK** to close the message.
5. In the second row in the grid, select the **Field** object. In the **Object Name** field, click the popup button to display a list of the available fields. Select the **Last Name** field from the **Personal** category.

The following message is displayed:

You cannot use a non-grid field within a grid.

An employee only has one Last Name, so it will always be an individual field.

6. Click **OK** to close the message.

You can easily tell if a field is a non-grid field by looking at the row modifier popup options. A non-grid field will only have an option of 1.

7. Use the popup button in the **Object Name** field to select the **Property Type** field from the **Status** category.

The following message is displayed:

You cannot add a field to a grid where the grid name has not been specified.

Ok, let's fix that by specifying a grid name. First, we need to delete the field row that we are currently on.

8. Click the **Delete Row** button on the Tool Bar.
9. In the **Object Name** column of the **Grid** row, select the popup.

The Container screen is displayed with the Grid container type object highlighted and a list of the available grids within Personnel Management listed.

10. Select the **Company Property** grid and select **OK**.

The Company Property grid and its fields are returned to the Objects grid.

11. Now try to preview the grid again.

This time it should work. Note that the number of rows is 10.

12. Select the grid and press **F1**.

13. Change the number of **Height in Rows** to **4** and click **Apply** to apply the change. Click anywhere off the grid to be able to see it again.

You will see the number of rows in the grid change to 4. Note that the number of rows specified is not the total number of rows that are in the grid, but the total number of rows that will be displayed at one time. If there happen to be 16 rows available, the first four will be visible when the screen is initially displayed and the others can be shown using the scroll bars.

Let's put this new screen on a workflow and see what happens.

14. Close the **Custom Screens** screen, saving your changes. Use what you have learned to add this new screen onto the **Standard - Employee** workflow. Make it the first screen, above **Personal**. Then open **Donald Stern's** record and take a look at your screen.

As you can see, Donald has been assigned several pieces of property.

15. Close **Donald Stern's** record and return to the **About Grids** screen you just created. Let's add another field to the grid in the first available blank row. This time, pick the **Dependent First Name** field from the **Personal** category.

The following message is displayed:

You cannot mix fields in a grid from different grids.

You were instructed incorrectly to select fields from two separate grids. A single grid cannot correctly store (and allow editing of) data from two different underlying database tables in People-Trak. In our example, we have attempted to juxtapose the Property Type field from the Company Property grid with the Dependent First Name field from the Dependents grid. While the report writer can actually do this and produce a reasonably meaningful result, the custom screens feature cannot. There is just no way to display and allow this data to be edited correctly. When you select fields for a grid on a custom screen, all of the fields in the grid must be from the same underlying table (normally indicated by coming from the same existing grid).

16. Delete the **Field** row you just added.

As you saw earlier, entering the grid name defaults all of the fields in that grid onto the custom screen grid. If you don't want all these fields or want to rearrange them, you can do so. Let's delete a field to demonstrate this.

17. Delete the **ID or Number** row. When complete, use preview mode to take a look at the screen.

## Tutorial 5.2 – Modifying a Grid in Preview Mode

We currently have a four-column grid that is ready to be adjusted.

1. Click on the grid to activate the grid for sizing. Now move the cursor to the right edge of the grid. When the cursor crosses the right edge, it will change to a left/right arrow. With the left/right arrow displayed, hold down the mouse button and carefully drag the right edge of the grid to the right. We do not want to move the grid; we want to make the grid wider. Drag the right edge about three-quarters of the way across the available space. Click off the grid to redisplay the grid image.

The grid should now include all four columns. However, the fourth column is abnormally wide. That is because the last column in a grid automatically expands to fill the available space. We dragged the grid farther than necessary, so the column expanded. We can fix this by bringing the right edge of the grid back to the left.

2. Drag the right edge back to the left. It might take a few tries.
3. Click the grid, size it down and then click off the grid to check your progress. Repeat the process until the grid looks about right. If you bring the grid too far to the left, the last column will be too narrow or will disappear altogether. At this point, you should try to set the width of the last column, which is a date field, to the same width as the third column, which is also a date field. Remember, you can use the nudge keys if you wish.

You can also size the grid vertically. Note that there are currently four rows in our grid.

4. Use the mouse to drag the bottom of the grid down. Press **F1** to see the properties for this object.

The Height in Rows has been changed to the number of rows the grid now holds. It was automatically adjusted for you.

The grid itself can also be moved using the same techniques used for moving other objects.

5. Activate the grid by clicking on it and then use the mouse or the nudge keys to move the grid.

You learned in earlier tutorials that you can set the display width of field objects. Well, this is also true for the column width of field objects used in grids. Here is how you do it.

6. First, make certain that the grid itself has not been activated for movement. Now, click in the header area of the first column of the grid, which will highlight that header. Hover over the column separator line between the first and second column. The cursor will change to a left/right arrow. Click and hold the mouse button down and drag the column to the right. Release the button to check your results. You can click and drag and click and drag until the column is just the width you want.

The grid itself is not automatically sized when you size a column. When you expand a column, space is taken from the last column to accommodate the change. Eventually, you may make the last column or even earlier columns invisible. If this happens, simply activate the grid for movement and expand (or contract) the grid as necessary. Normally, grid sizing goes hand in hand with column sizing.

7. Expand each of the columns in your grid. Note that the last column cannot be directly sized. You can only expand or contract the last column by sizing the grid itself. Continue until you have your grid sized satisfactorily.

The expansion or contraction of the column width does not actually increase or decrease the number of characters or digits that can be entered. You can make a column such as the **Property Type** column, which is a 15-character field, as wide as you wish, but it will still only take 15 characters during data entry unless you use Screen/Field Customization to expand the capacity of the field itself. Let's try this now.

8. Expand the width of the **Property Type** column to something very large. Size the grid so that all four columns are still visible, even with a very wide **Property Type** column. Close preview mode. Close the **Custom Screens** screen, saving your changes.

9. Open **Donald Stern's** record. Select your **About Grids** custom screen. In the first blank row in the **Property Type** column, enter characters until no more characters are allowed.

The default size of the **Property Type** field is 15 characters and it remains 15 characters regardless of how wide you make the column. You can increase the capacity of the column using something you have learned before. Keep reading for a refresher.

10. Close **Donald Stern's** record.

11. 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.

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

The **Standard - Employee** workflow is displayed in customization mode with your custom screen showing.

13. In the **Property Type** column, press the **F1** key. Change the length of the field from **15** to **50** characters. Close the **Field Properties For: Property Type** and **Company Property** screens, saving your changes.

In the Field Customization process, changing a field will change it throughout all screens that include it. In this case, when you changed the **Property Type** field length (capacity) while on your custom screen, it also changed it on the base **Company Property** screen as well. Let's check it out.

14. Select the **Status** screen. Click the **Property** button.

The **Company Property** screen is displayed. Note that the **Property Type** column is 50 characters there as well.

15. Close the **Field Customization** screen, saving your changes.

16. Close **Screen/Field Customization**

17. Open **Donald Stern's** record again. Select your custom screen. In the **Property Type** field, enter characters until no more are allowed.

This time, the capacity of the field and the physical size of the field match a little better.

This scenario remains the same if reversed. If you decrease the capacity of a field using the Screen/Field Customization process, the width of the field remains the same unless you change it with the Custom Screens process. Or, if you decrease the width of the field with the Custom Screens process, the capacity of the field is not decreased unless you do it manually using the Screen/Field Customization process.

You cannot adjust row height or create multi-line rows. If you need to store more characters, you will need very wide columns.

18. Close **Donald Stern's** record.
19. Continue with the next tutorial.

## Tutorial 5.3 – Using Multiple Grids

You can create more than one grid on a screen. We'll update your latest custom screen to use two grids.

1. On the **Tools** menu, select **Custom Screens**. Select the **About Grids** custom screen.

As you learned earlier, you can define a grid by adding a grid object and specifying the name of the grid. The fields in that grid will then be automatically defaulted for you, and you can remove any that you do not want included. A grid is considered complete when there are no more field objects listed, or when an object other than a field object is added. So, to add a second grid to our sample screen, we need only add a grid object and specify the name of the grid. We are going to add some fields from the Dependents grid.

2. In the first blank row, select a **Grid** object. In the **Object Name** column, use the popup to select the **Dependents** grid.

All of the fields in the Dependents grid are added. Let's just include the name fields in our grid on this screen.

3. Use the **Delete Row** button to delete all but the following fields:

**Dependent First Name**  
**Dependent Middle Name**  
**Dependent Last Name**

4. Use preview mode to view our two grids. You might need to adjust grid location if they are overlapping.

However, there are no overall grid headings to clarify the contents of the grid. We'll fix that.

5. Close preview mode. In the **Caption** column for the first **Grid** object, enter **Company Property**. In the **Caption** column for the second **Grid** object, enter **Dependent Information**. Now preview again. Again, you may need to do some tidying up to make things look right.

This time, it is very obvious what information the respective grids contain. You can use a grid caption on any grid at any time. Normally, a caption is useful when there are two or more grids, or when a grid is mixed with stand-alone field objects.

6. Close preview mode.

Let's add one more grid.

7. Add a **Grid** object in the first blank row and use the **Object Name** popup to select the **Event History** grid.

The Event History grid is returned to the Objects grid. We will leave the fields alone.

8. In the **Caption** field, enter **Event History**.
9. Use preview mode to review the screen.

As you can see, you have run out of room on the screen. You have two options when

using a Standard screen like we are: make the screen longer (which will turn on scrolling) or make the grids shorter. Let's make the grids a bit shorter.

10. Select the **Dependent Information** grid, press **F1** and change the **Height in Rows** setting to a smaller number. Do the same for the **Event History** grid. Adjust as necessary to get all grids to fit on the screen.

11. Close preview mode, saving your changes.

Your screen provides information from three separate database tables displayed in three separate grids.

12. Close the **Custom Screens** screen.

It's time to take a look at this thing.

13. Open **Donald Stern's** record.

Wow! Look at all that information on your About Grids screen. Of course, there is some extra room and that means we could add one or more additional grids. We'll skip that journey, but we have one more thing to learn.

14. Close **Donald Stern's** record and return to your **About Grids** custom screen. Note that the **Captions** for the three columns on the **Property** grid have backslashes (“\”) in them. Now, enter preview mode and see that these same columns have two line headings and that the height of the heading area is greater than on the other two grids. Also, the headings break at the position of the backslash character.

15. Close preview mode and remove the backslash characters. Make sure you have at least one space between each word in the caption. Preview again.

This time, all of the captions are single line. These single-line captions may or may not look better to you, but at least you now know how to control them. Add backslash characters and the captions break. Take out the backslash characters and the captions stay a single line. If just one column caption breaks, the entire heading will expand. (The single line captions are simply centered in the available space.)

Multi-line captions are limited to two lines. If you add a second backslash character, it will be ignored and will simply become part of the heading.

16. Close preview mode and close the **Custom Screens** screen.

17. Use the **Workflows** process to update the **Standard - Employee** workflow. Remove the **About Grids** screen from the workflow. Close the **Workflows** screen.

18. This concludes this tutorial and lesson.

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# Lesson 6

## Custom Screens 6: More Features

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This lesson covers even more features when working with custom screens.

### Tutorials

**Modify an Existing Screen:** demonstrates how to use the Append Screen option to create a custom screen by appending screens and modifying them.

**Additional Screen Options:** shows you how to use Insert Screen and frame features to create a custom screen by inserting screens and frames and modifying them.

**Create and Use a Template:** demonstrates how to create a screen header template for use on multiple screens.

**Screen Objects as Tabs:** demonstrates how to use screen objects as tabs to access the primary screens of all modules.

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## Tutorial 6.1 – Modify an Existing Screen

One of the most common tasks you will perform with the Custom Screens process is modifying an existing screen. This is how you do it.

1. On the **Tools** menu, select **Custom Screens**.
2. On the **File** menu, select **New Custom Screen** or on the Tool Bar, click the **New Custom Screen** button to start a new custom screen.
3. Change the name of this new screen to **Personal with Photo**.
4. Leave the **Category** and **Screen Type** fields set to their defaults.
5. On the **File** menu, select **Append Screen**.

The Select Screen screen is displayed.

6. Select the **Personal** screen.

The objects that make up the Personal screen are loaded into the grid. Since we had nothing in our custom screen before this append, an insert would have accomplished the same result as we see now. An append adds the contents of the selected screen to the end of the current custom screen; an insert adds the contents of the selected screen at the current cursor location in the current custom screen.

7. Scroll the list of objects and use the **Delete Row** button to delete the last two screen objects, **ID** and **Communication**.
8. Click the **Preview** button to display the screen.

You can see that our custom screen looks just like the standard Personal screen.

A common request among some of our customers is to have the Employee Photo visible on the Personal screen. By default, we have placed the Employee Photo field on the ID screen along with the Employee Signature and Employee BarCode. However, if our customers want the photo on the Personal screen, they get it.

First, we need to make some room for the photo by opening up space in the Demographics frame.

9. Click on the **Demographics** frame to activate it.
10. Drag the right edge of the frame to the right until it lines up with the right edge of the buttons just above. When the position looks good, click off the frame to deactivate the object.

Now, we'll add the photo.

11. Close preview mode, saving your changes. Scroll the list of objects until you see the **Disabled** field (it is near the bottom of the list). Insert a blank row just after the **Disabled** field.
12. In the **Object Type** column of the new blank row, select the **Field** object.

13. In the **Object Name** field, use the popup to select the **Employee Photo Image** field.

Now we have to position the Employee Photo Image within the Demographics frame.

14. Open preview mode.

15. In the **Object** dropdown, select **Field - Employee Photo Image**.

The Employee Photo field is activated and highlighted on the screen to the right.

16. Drag the **Employee Photo Image** field onto the **Demographics** frame and arrange it as you see fit. Make sure to leave ample room on the left side of the photo for the Select/Clear Image buttons. Close preview mode, saving your changes.

17. Close the **Custom Screens** screen, saving your changes.

18. On the **Tools** menu, select **Workflows**. On the Tool Bar, click the **New Workflow** button to create a new workflow. Change the **Workflow Name** to **New Personal Screen**. Leave the **Show on Menu** check box selected so that this workflow will show up on the **Workflows** menu.

We need to add your new screen to the workflow.

19. Click the **Screens** tab. In the **Screen Name** field, click the popup button to display a list of the available screens. Select the **Personal with Photo** screen. Close the **Workflows** screen, saving your changes.

We now have a workflow with your screen.

20. Open the **Workflows** menu. Select the **New Personal Screen** workflow and open **Donald Stern's** record.

Note that all of his information including his photo is displayed in your new screen.

21. Close the record.

That is a simple, single-screen workflow using your customized personal screen.

22. Continue with the next tutorial.

## Tutorial 6.2 – Additional Screen Options

In an earlier lesson, we created a simple screen from scratch by adding frame objects and selecting individual fields. We also mentioned that we would get fancier and use the Object Name column with frames in later training. The time has come!

1. On the **Tools** menu, select **Custom Screens**.
2. On the **File** menu, select **New Custom Screen** or on the Tool Bar, click the **New Custom Screen** button to start a new custom screen.
3. In the first row of the **Object Type** column, select a **Frame** object.
4. In the **Object Name** column, click the popup button.

This time, the Container screen is displayed with two container object types to choose from: Frame and Grid. Frame is highlighted and a list of the available frames within Personnel Management is available to select from. Since we will be choosing a frame for our screen, we can leave Frame highlighted.

5. Select the **ID and Name** frame and select OK.
6. In the first row of the **Object Type** column, select a **Frame** object.
7. In the next blank row, add another **Frame** object
8. In the **Object Name** column, click the popup button and select the **Address** frame.
9. Preview your screen.

That's it. You can create a small screen from existing frames in just a few minutes. But that's not all you can do. You can put frames from different screens together for your own customized screen and append and insert different screens as well. Let's use a few of these screen features to create a hybrid of the Personal screen and the Status screen.

10. Close preview mode.
11. On the **File** menu, select **Append Screen** to append the **Status** screen to the bottom of your working screen.
12. Use preview mode to take a look at your screen.

You can actually use this screen in a workflow. The vertical scroll bars will be activated and you will be able to scroll the screen up and down when it is displayed.

13. Close preview mode.

Now let's use the Insert Screen option, which allows you to insert an existing screen anywhere you choose in your custom screen. Let's try this.

14. Position the cursor to the top of the **Status** screen (there will be a frame labeled **Current Status**).

This is where we are going to insert another screen.

15. On the **File** menu, select **Insert Screen** and insert the **Company Property** screen into the location specified.
16. Use preview mode to confirm the results.
17. Close preview mode, delete this screen, and close the **Custom Screens** screen.
18. Continue with the next tutorial.

## Tutorial 6.3 – Create and Use a Template

Over the years, we have had many requests to have workflows that repeat certain information at the top of each screen. For example, some users would like to repeat the job code or department code or location code or all of the above at the top of each screen. Of course, this is information above and beyond the information we already show. This is now something we can show you how to do.

1. Create a new custom screen. Name the screen **Screen Header** and put it in the **Personal** category. Leave the **Screen Type** field set to **Standard**.
2. Add a **Frame** object and set the **Caption** to **Header Information**.
3. Add the following **Fields**:

**Job Code**  
**Job Title**  
**Department Code**  
**Department Name**

4. Use preview mode to align the fields toward the top of the frame as shown below:

<b>Job Code</b>	<b>Department Code</b>
<b>Job Title</b>	<b>Department Name</b>

5. Drag the frame up so that you have a nice, tidy standard header. This is your new screen header template. Close preview mode and save your screen.

Now, let's use this template.

6. Create a new custom screen. Name the screen **New Personal** and put it in the **Personal** category. Leave the **Screen Type** field set to **Standard**.
7. Use the **Append Screen** option to append your **Screen Header** screen to the current custom screen. Then use the **Append Screen** option again to append the **Personal** screen.
8. Use preview mode to confirm that you now have a **Personal** screen with a standard screen header. Save your new screen.
9. Create a new custom screen. Name the screen **New Status** and put it in the **Status** category. Leave the **Screen Type** field set to **Standard**.
10. Use the **Append Screen** option to append your **Screen Header** screen to the current custom screen. Then use the **Append Screen** option again to append the **Status** screen.
11. Use preview mode to confirm the screen. Close the **Custom Screens** screen.

We could repeat this step for each of the ten main screens in the Personnel module, but we won't.

12. Use the **Workflows** process to update the **Standard - Employee** workflow. Put your **New Personal** screen and your **New Status** screen in place of the standard screens. Close the **Workflows** screen, saving your changes.

13. Open **Donald Stern's** record within the **Standard - Employee** workflow.

Note that the New Personal and New Status screens exhibit the standard screen header that you have created. (The other screens do not, because we did not put the header there.)

Now, the New Personal and New Status screens are a bit long and require scrolling, but anyone who knows how to tweak a screen can fix that. You can try that another time.

14. Close **Donald's** record.
15. Use the **Workflows** process to update the **Standard - Employee** workflow. Replace your **New Personal** and **New Status** screens with the standard screens. Close the **Workflows** screen, saving your changes.
16. Continue with the next tutorial.

## Tutorial 6.4 – Screen Objects as Tabs

Another question we sometimes receive is whether we have the ability to arrange all of the first level screens in a module in tabs. Technically, we are not fond of tabs when you need more than one row. As there are 11 screens in the Personnel module, we have decided not to utilize tabs, but continue to provide a dropdown to select screens. However, you can use buttons to simulate a tab-based interface. Here is how to do it.

1. Create a new custom screen. Name it **Tab Interface** and put it in the **Personal** category. Leave the **Screen Type** field set to **Standard**.
2. Add a **Frame** object and then the following **Fields**:

**Employee ID**  
**Full Name**  
**Hire Date**  
**Job Code**  
**Job Title**

3. Use preview mode to align the fields to the top of the screen so that they are easy to read. This is the new screen header. Close preview mode.

At this point, you would want to add screen objects for every primary screen. To save you some time, we will do just the first three.

4. Add **Screen** objects for the **Personal** (EMP-1), **Status** (EMP-2) and **Compensation** (EMP-3) screens.
5. Use preview mode to size the buttons to the same height and width. Then align the buttons into a row just below the screen header. Remember to use the alignment tools to make your life easier. If you were doing a button for every primary screen, you could stagger the buttons a little or use any technique you desire to simulate a tab-based interface.
6. Close preview mode. Close the **Custom Screens** screen, saving your changes.
7. Use the **Workflows** process to insert this screen into the **Standard - Employee** workflow as the first screen. (Normally, this powerful screen would be a single-screen workflow, but we'll learn about that later.) Close the **Workflows** screen, saving your changes.
8. Open **Donald Stern's** record.

The fields on the header are populated and you should have an array of buttons that will allow you to display any screen within the Personnel module with a single click. Try it.

9. Display the **Personal** screen and close it. Then display the **Status** screen and close it. Display them all if you wish.

The whole point is that everything is in one place with a header that lets us know what record we are working on.

Of course, you could add or subtract fields from the header. Or you could align the buttons vertically. Or you could take the Personal screen and simply align all of the other screens vertically on the far right side and have a single screen with buttons (or tabs) to get to any other screen.

10. Close **Donald's** record.
11. Exit People-Trak.
12. This concludes this tutorial and lesson.