

Simply Personnel – Screen Designer

Simply Personnel

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Simply Personnel 12.8.0.1

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-Training Workbook-



Introduction to Simply Personnel Screen Designer

This document provides step-by-step guide for employee users to give an easy understanding on using the Screen Designer feature within Croner Simply Personnel.

A user can create / amend bespoke tabs, add fields, drop down boxes, history screens and more.

Screen Designer

Simply Personnel contains a powerful feature called the Screen Designer, which allows the user to modify the design of the Employee Tab Folders.

There are also 2 blank tab folders (by default these are labelled Blank Page), which can be used to store additional details that are specific to bespoke requirements.

New Fields can be added to the tab folders.

Existing Fields that are not used use can be hidden.

Existing Field Names can be renamed.

Fields can have their background and text colours changed to highlight them.

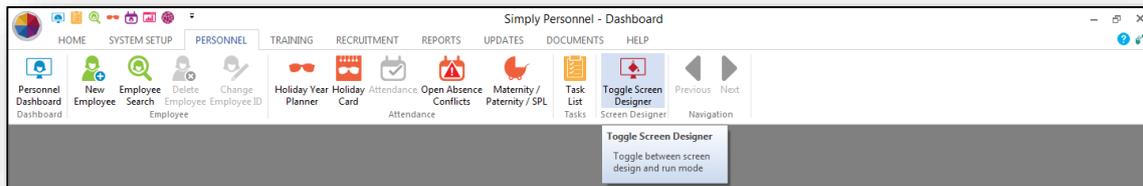
The Screen Designer allows the user to tailor Simply Personnel to the exact needs of a userr organisation.

Entering Screen Designer

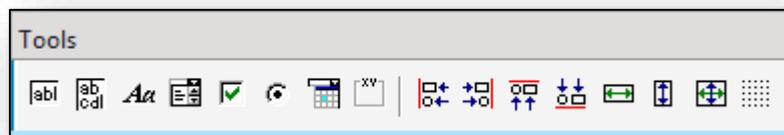
To use screen designer select an employees record using the amend employee section on the main dashboard.

It does not matter which employee is selected as any changes to the tabs on that employees record will be show on all employees records.

Once on an employees record enter the screen designer mode by clicking on the Personnel tab in the top at the top of the screen and select Screen Designer.

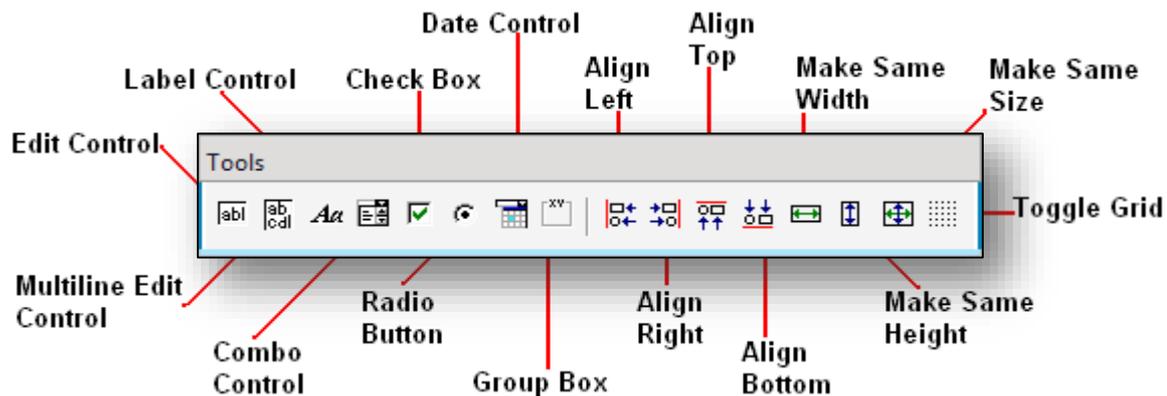


Once selected, a floating toolbar will appear. This is the Screen Designer Toolbar, and gives the user a visible indication that they are currently in Screen Designer Mode.



Toolbar Options

The Screen Designer toolbar contains 8 types of controls and many design buttons: -



Edit Control - This type of control allows a user to type character fields into, e.g. most of the fields a user sees on the tab folders are edit controls, Surname, Firstname, NI Number, etc.

Multiline Edit Control - This type of control allows a user to type notes fields.

Label Control - This type of control allows a user to name a field on the screen. Labels are used to describe corresponding edit controls.

Combo Box Control - This type of control allows a user to select from a list of pre-defined entries, e.g. the Nationality Field is a Combo Box Control.

Check Box - This type of control allows a user to add yes/no fields, e.g. the Disabled field.

Radio Button - Adding several of these controls allows a user to select a value from multiple options, e.g. the male/female buttons.

Date Control - This type of control allows a user to add date fields.

Group Box - This is a simply a frame, which contains a label, and can be used to enhance the aesthetic look of a user screen. Group Boxes are used to display a box and a group description around a related group of controls, e.g. the Emergency Contact page uses 4 Group Boxes, 2 grouping the Emergency Contact details, and the other 2 grouping the Medical Details.

Align Left - Use this button to align the left hand side of two or more controls.

Align Right - Use this button to align the right hand side of two or more controls.

Align Top - Use this button to align the top edge of two or more controls.



Align Bottom - Use this button to align the bottom edge of two or more controls.

Make Same Width - Make the width of two or more controls the same.

Make Same Height - Make the height of two or more controls the same.

Make Same Size - Make both the height and width of two or more controls the same.

Toggle Grid - This will toggle the grid on and off when the Screen Designer is active. The grid cannot be seen when the Screen Designer is not active.

Inserting a Control onto a Tab Folder

Select a tab folder on the employees record. Make sure the user is in Screen Designer Mode.

If a user is wanting to add a control over an existing control first a user will need to hide that control. To do this select the control, left click and then remove the check from the Visible option.

Select the type of control a user requires by clicking the left mouse button on the control, keep holding down, and drag the control onto the tab folder. Release the mouse button to drop the control in the required place.

Moving a Control

Once placed on the tab folder, a control can easily be moved around the screen.

Select the control to move by clicking on it. Handles will appear on the control. The mouse pointer will change to a black cross with arrows on each end. Hold down the left mouse button and drag and drop the control to the position a user requires.

Resizing a Control

Select the control to resize, so that handles appear on it. To resize the control horizontally or vertically place a mouse pointer over one of the handles on the side of the control, the mouse pointer will change to a double arrowhead. Drag the arrowhead to resize the control. A user can resize both horizontally and vertically at the same time by dragging one of the corner handles.

Note: To resize a Combo Box Control a user may only drag one of the upper handles, i.e., upper left, middle and right handles. Resizing vertically alters the size of the drop down area of the control.

If a user has more than one control that a user wants to make the same height and width as each other, resize one control to the required size.

Select all the other controls a user wants resized (do this by holding down the Ctrl key and left clicking on them).

The first control a user select will be the one that the other controls will be resized to match.

Now left click on either the Make Same Width, Make Same Height or Make Same Size buttons on the toolbar.

Using the Grid

To help a user design a screen a user can choose to display a grid. This can help in lining up controls into rows and columns. Select the Show Grid option from the View Menu.

As well as the Screen Designer, Simply Personnel shows X and Y co-ordinates of each control at the bottom of the screen on the status bar. (A user must have the status bar displayed. Select Status Bar from the View Menu if the status bar is not displayed).

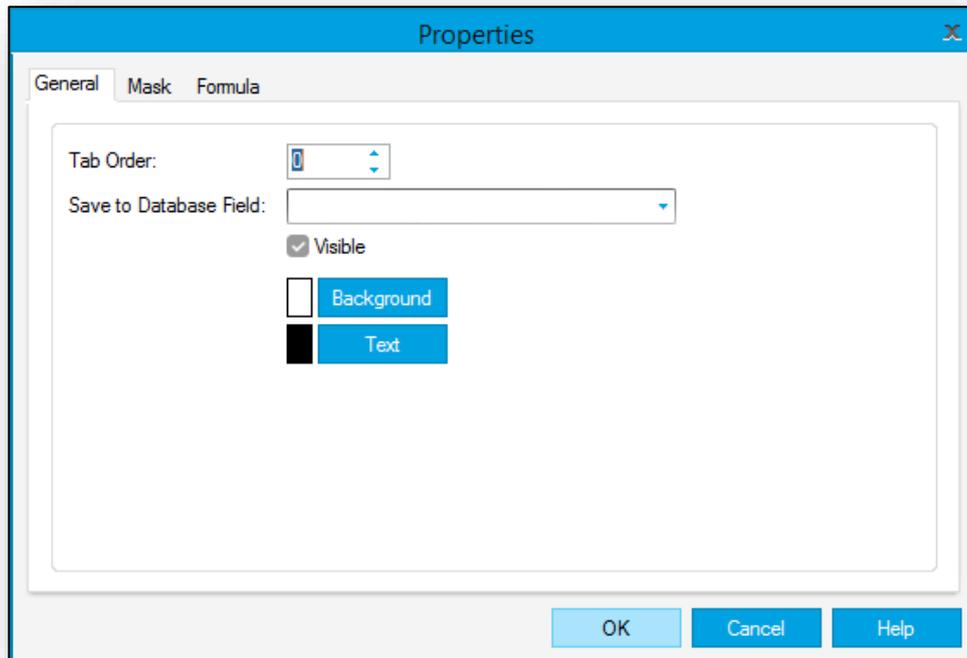
Deleting a Control

To delete a control, select the control so that the handles appear, ensure the cursor is positioned over the control (cursor changes to black cross with arrows) and press the DELETE key on a user keyboard.

A user will not be able to delete the existing controls.

Edit Control Properties

To edit a control select the control by left clicking on it so it becomes highlighted and then right click on the control, a user will then see a similar screen,



Tab Order - The Tab Order Determines the order in which a users controls are accessed when the user presses the TAB key.

Database Field - This is the list of database fields available for a user to store the entered data into. A user must select a database field otherwise the data a user enter will not be saved.

A user should not link the same database field to more than one screen designed control as this could result in the data in the first control getting replaced by the data in the second.

Visible - Clear this check box to make the field invisible.

Background Colour - Left click this button and select the colour a user wish to use as the background for the control.

Text Colour - Left click this button and select the colour a user wish to use for the text for the control.

Mask Tab

Edit controls can have masks applied to them to prevent users from entering invalid values. To apply a mask to an edit control, when viewing the control's properties, click on the Mask tab.

There will be two editable drop down boxes along with a list that describes the mask characters that can be used.

Mask - This drop down box is where a user will either type the mask a user wish to use, or select one of the predefined masks.

Literal - This drop down box is where a user enter the literal characters / place holders that the user will see when they type in the masked control. As a user enter the mask in the first box a user should see the literal characters / place holders appear in this box.

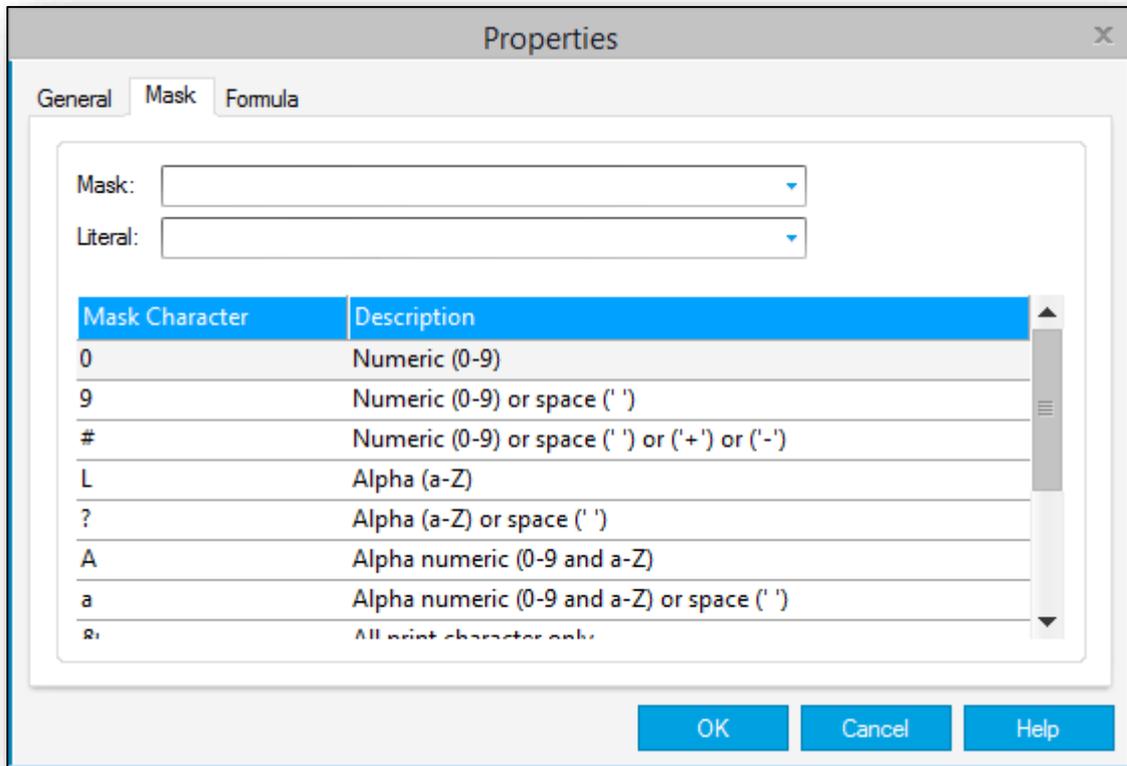
When a user enter a mask character a user will see an underscore appear and when a user enter a non-mask character, the same character will appear. The underscore character is the place holder for where the user can type when the screen designer has been switched off. The Literal field must "match" the Mask field and if it does not then the resulting mask may be invalid and not work correctly.

The characters available for the masks and their descriptions are given below.

Mask Character	Description
0	Numeric (0-9)
9	Numeric (0-9) or space (' ')
#	Numeric (0-9) or space (' ') or ('+') or ('-')
L	Alpha (a-Z)
?	Alpha (a-Z) or space (' ')
A	Alpha numeric (0-9 and a-Z)
a	Alpha numeric (0-9 and a-Z) or space (' ')
&	All print character only
>	Forces character to be upper case (A-Z)
<	Forces characters to be lower case (a-z)
H	Hex digit (0-9 and A-F)
X	Hex digit (0-9 and A-F) and space (' ')

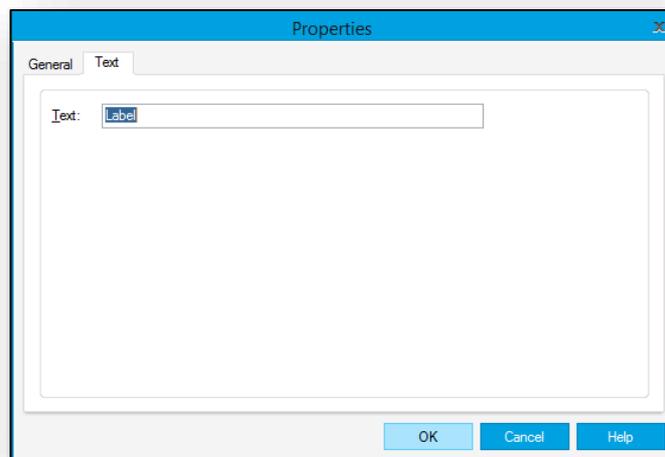
When a user add a mask to an edit control, in order for the mask to be applied, a user not only have to exit the screen designer but a user also have to close the window, e.g. Employee Maintenance screen, and open it again. This is because the masks are set when the controls are created when the screens appear.

The mask tab looks as follows:



Label Control

If a user uses the label control and selects its properties a user will see the label tab as follows:



A user should fill in the name of the label a user have created on this text tab.

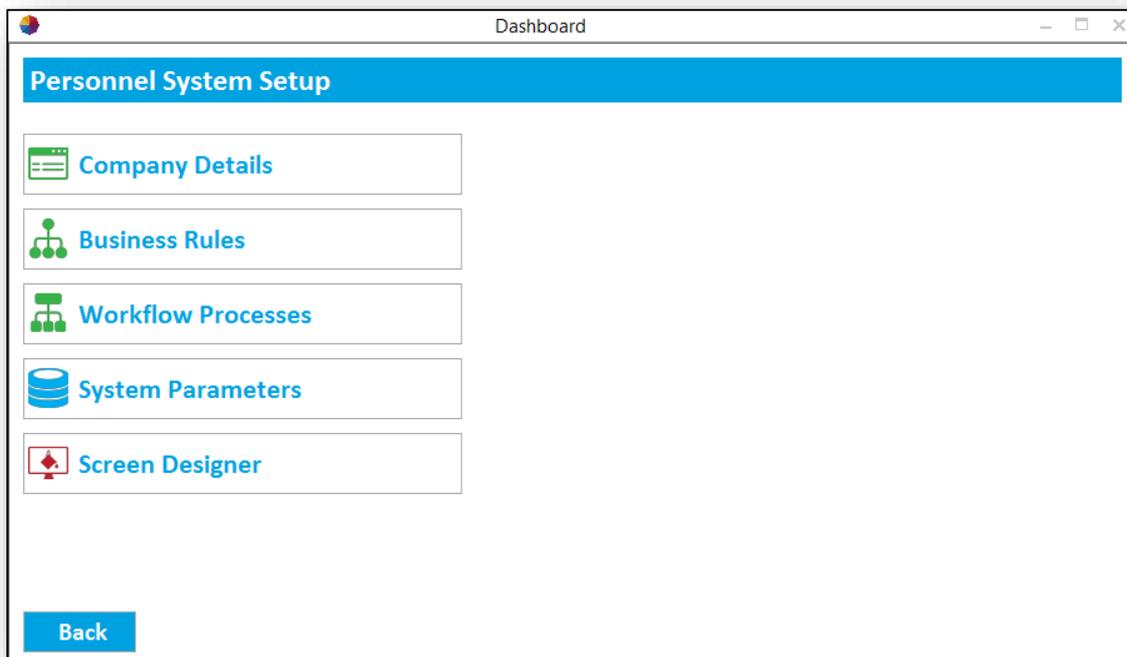
To leave the screen designer mode, repeat the steps of clicking View and the Screen designer.

Once a user has created a new screen or amended a previously created screen a user will be able to rename the database field which a user have linked to the new controls.

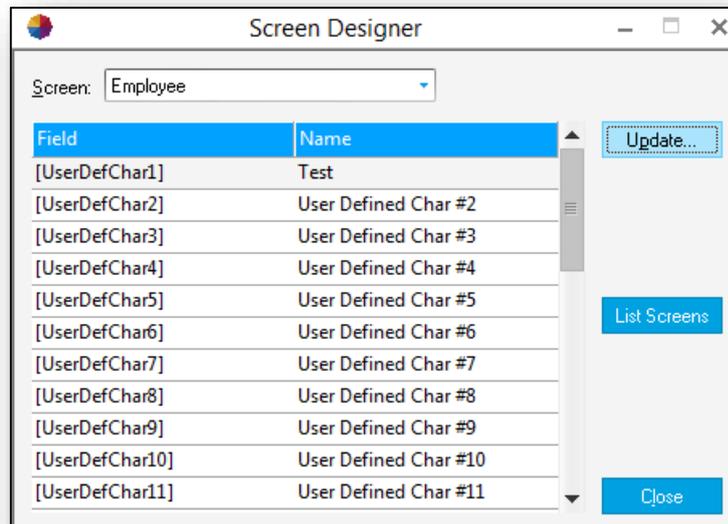
By doing this a user will change the names of the database fields in Simply Answers so it is easier to create a report which includes the new controls (see Simply Answers Manual).

Renaming Database Fields

To rename the database fields access Screen designer by accessing System Setup -> Screen Designer :



Once a user have gone through these steps a user will see the following screen,



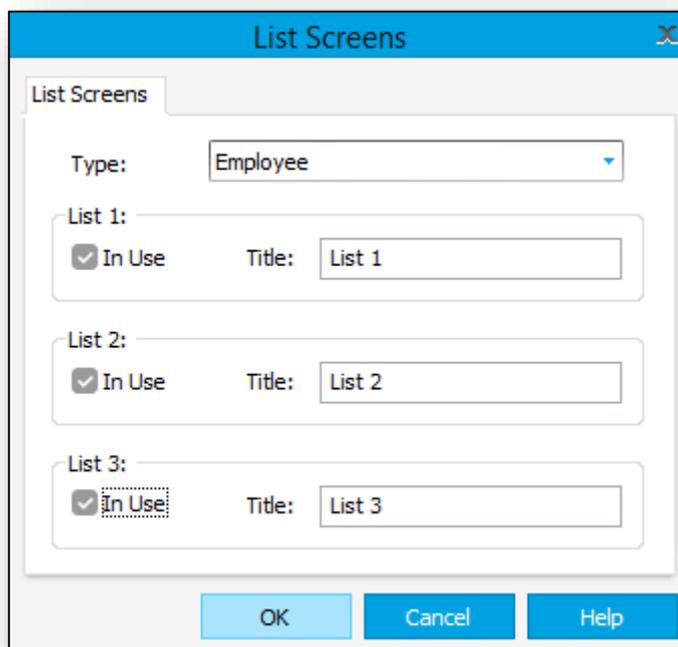
A user should then select the relevant database field and click the update button, a user will then have the option to change the name of the database field to something more relevant e.g the new control box name.

It is recommended that when a user add a database field to a control box that a user make a note of which field a user have linked it to so that a user are able to change the field name to something relevant to help with report creation.

Dynamic User Defined Lists

Employee Screens

Three new employee screens have been added to Employee Maintenance. These screens allow users to create their own list/history screens similar to the Job History list. These screens will first need to be enabled using the Screen Designer option on the Tables menu. On the right of the screen that appears will be a button labelled “List Screens”. Click on this button and the screen shown below will appear.

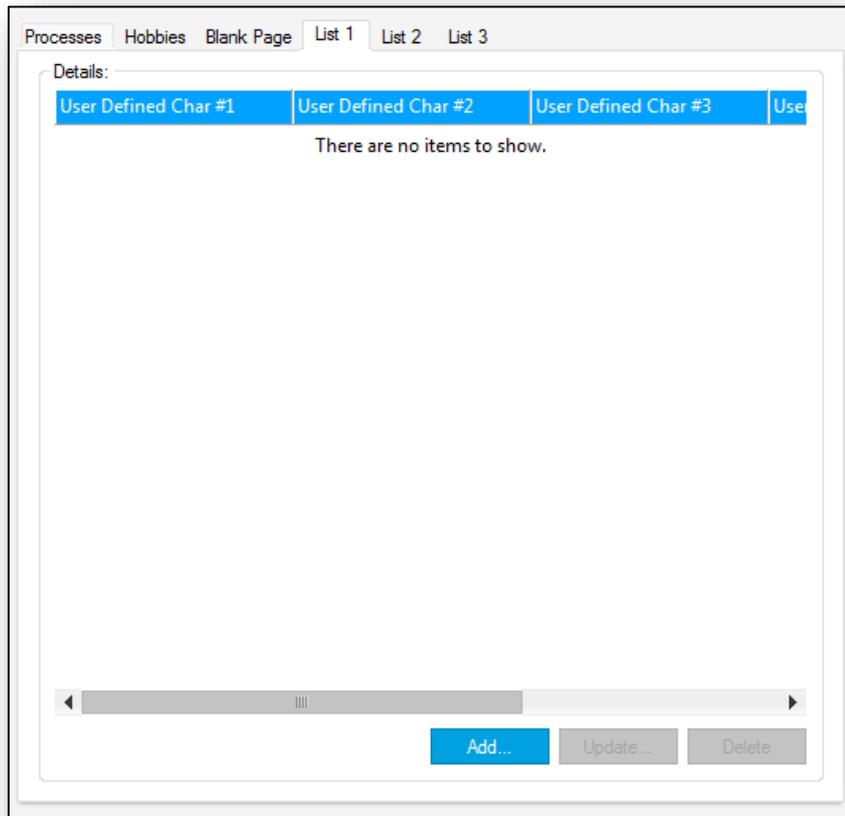


The screenshot shows a dialog box titled "List Screens" with a close button (X) in the top right corner. The dialog has a tab labeled "List Screens". Below the tab, there is a "Type:" dropdown menu currently set to "Employee". Underneath, there are three sections for defining lists:

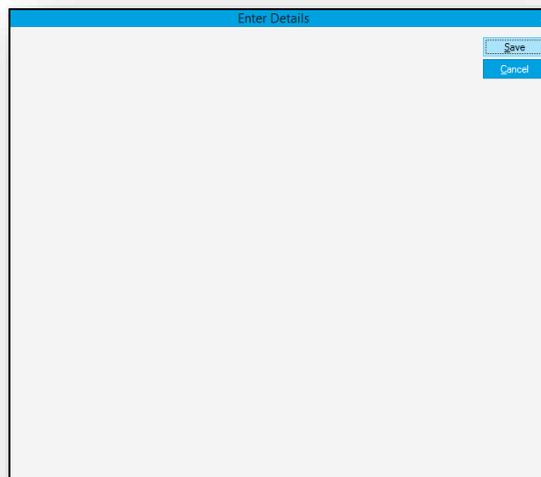
- List 1:** An "In Use" checkbox is checked, and the "Title:" text box contains "List 1".
- List 2:** An "In Use" checkbox is checked, and the "Title:" text box contains "List 2".
- List 3:** An "In Use" checkbox is checked, and the "Title:" text box contains "List 3".

At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

To enable a list screen, click on the “In Use” box to put a tick in it. Enter the screen’s title and click on OK. The next time an Employee Maintenance screen is opened the new screen(s) will be visible.

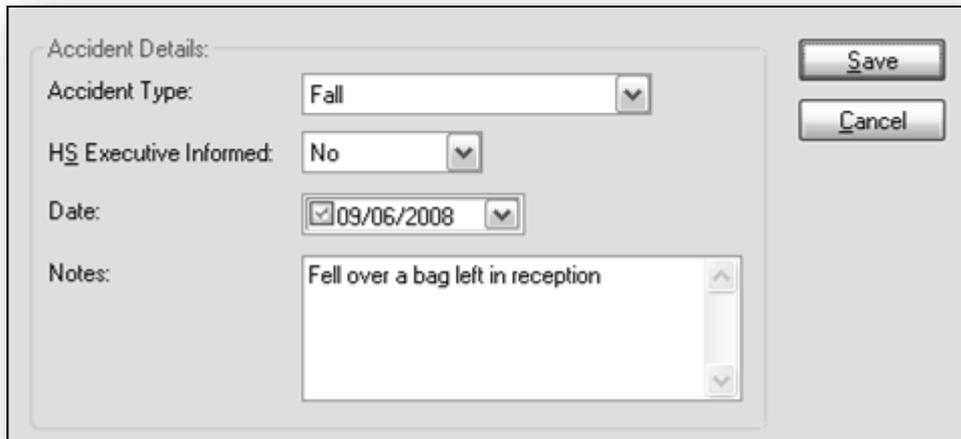


The Add, Update and Delete buttons work the same as the other list screens except that the user will need to first create the displayed forms using Screen Designer. Switch on the Screen Designer and click on the Designer button that will appear on the screen. A blank form will appear and the Screen Designer can be used to add the required controls.



The fields will need to be linked to database fields and these fields will be used when populating the list. The form can also be resized to allow the controls a user need to be added. Each for has a maximum of 20 character and 10 number fields available to store data in.

Once all the changes have been made, exit the screen designer and the form can be used as any of the others in the application.



Accident Details:

Accident Type: Fall

H&S Executive Informed: No

Date: 09/06/2008

Notes: Fell over a bag left in reception

Save

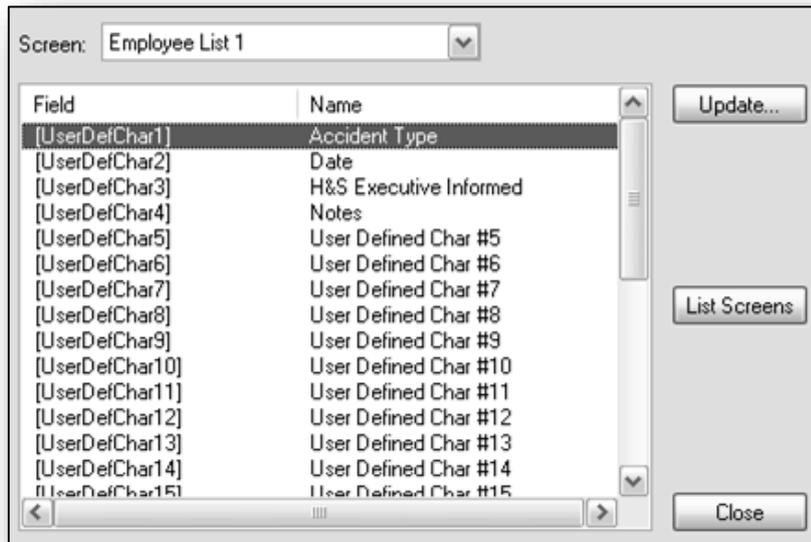
Cancel

Click on the Add button to add a new set of data to the list, the Update button to change some existing data and the Delete button to remove it.

Column Headings

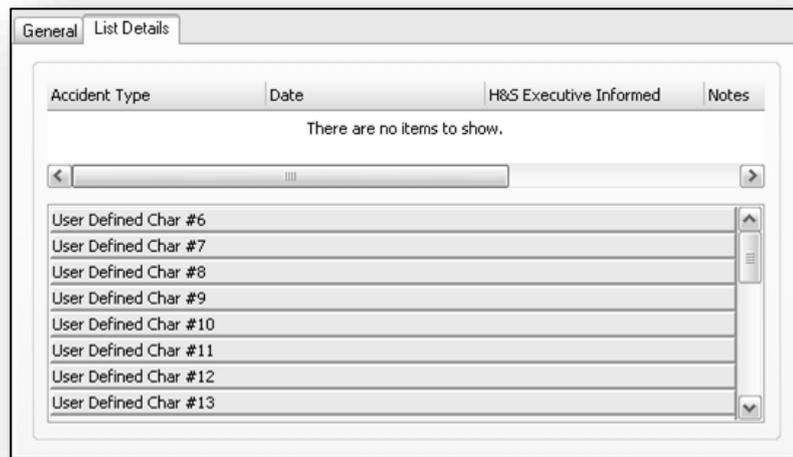
The column headings on the list in Employee, Course, Delegate, Applicant and Vacancy Maintenance can be customised to show the data from the corresponding database tables. This will allow users to decide which fields they want to see when looking at the list screens, which is not only useful for the new dynamic list screens but also for the existing ones where they may want to see screen designed data or hide the default fields.

The screen designed data will first need to be given an alias using the Screen Designer option from the Tables menu. This is the same option that is used when giving the fields user friendly names for using in Simply Answers or when actually linking controls to fields. The alias entered will be used for the column headings on the lists.

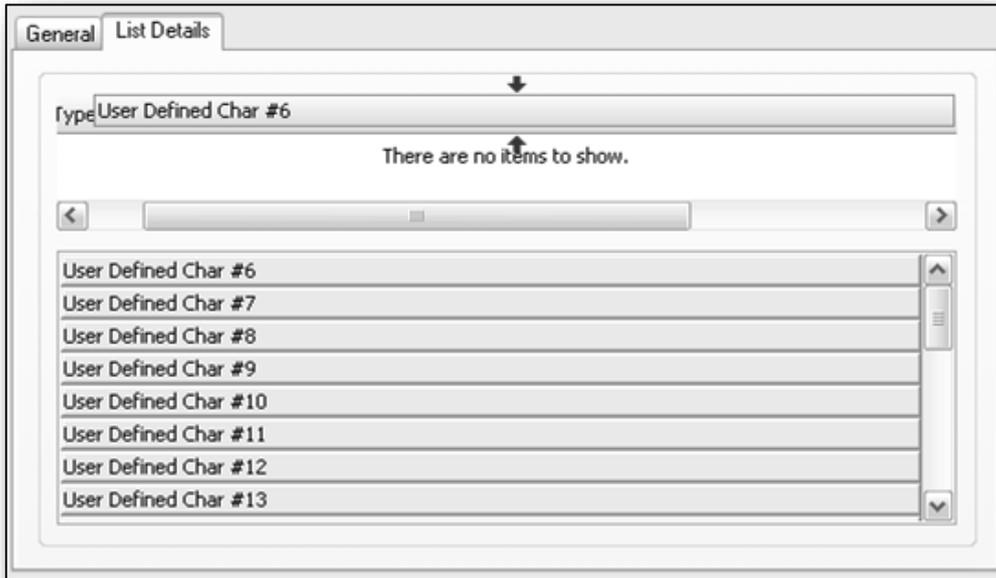


Once all the required aliases have been configured then the lists themselves will need to have the column headings set up. This is done by viewing the list a user want to update and then switching on the screen designer. Left click on the list control to select it and then right click on it to view the properties. Select the List Details screen to change the column headings.

The screen that appears will show the current column headings at the top and the ones available to add in a list below this.

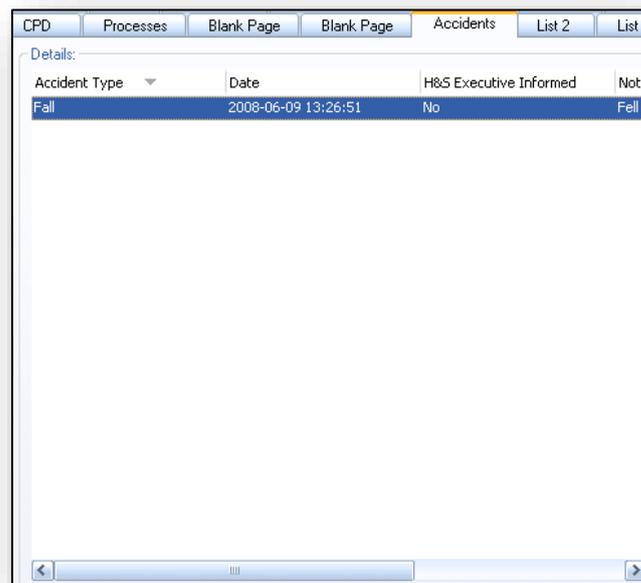


Drag and drop a column from the list to the column headings to add it. Two red arrows will indicate a valid position where a user can drop the column.



Drag and drop the columns from the headings to the list to remove it. The columns can be reordered by dragging and dropping the headings to a new position. Again, two red arrows will indicate where the column can be dropped.

Once the columns headings have been set up, click on the OK button and exit the screen designer. Clicking on the column headings to sort the list in ascending order based on that column's data. Click on it again to sort in descending order. A grey arrow on the column heading will indicate the current column being used to sort and the sort order





Please note that if a user are storing dates then the date formats cannot be changed and when sorting they will be sorted based on their text values and not the actual dates. The reason for this is that the sorting is performed based on the database field type which, for dates, will be text and not an actual 'date' data type.