

Simply Personnel Personnel Manager

Screen Designer

Simply Personnel: Screen Designer

This document provides step-by-step guide for users to give an easy understanding on using the screen designer on your system.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk and select the option to open a support ticket.

Thank you

The Simply Personnel Team.

Screen Designer

Simply Personnel contains a powerful feature called the Screen Designer, which allows you to modify the design of the Employee Tabs.

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

New Fields can be added to the tabs.

Existing Fields that you do not want to use can be hidden.

Existing Field Names can be renamed.

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

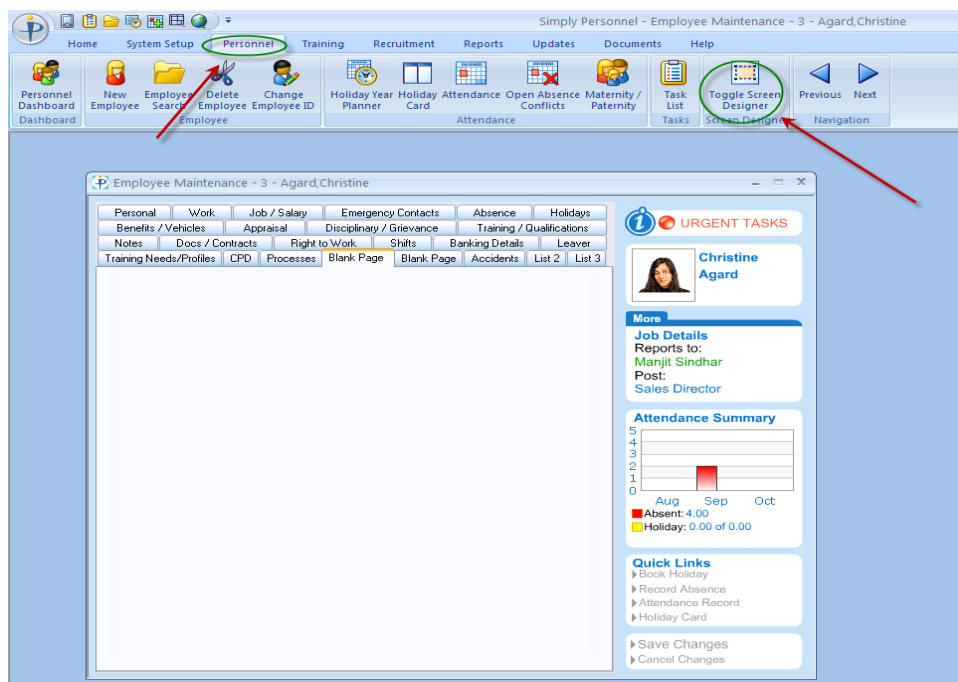
The Screen Designer allows you to tailor Simply Personnel to the exact needs of your organisation.

Entering Screen Designer

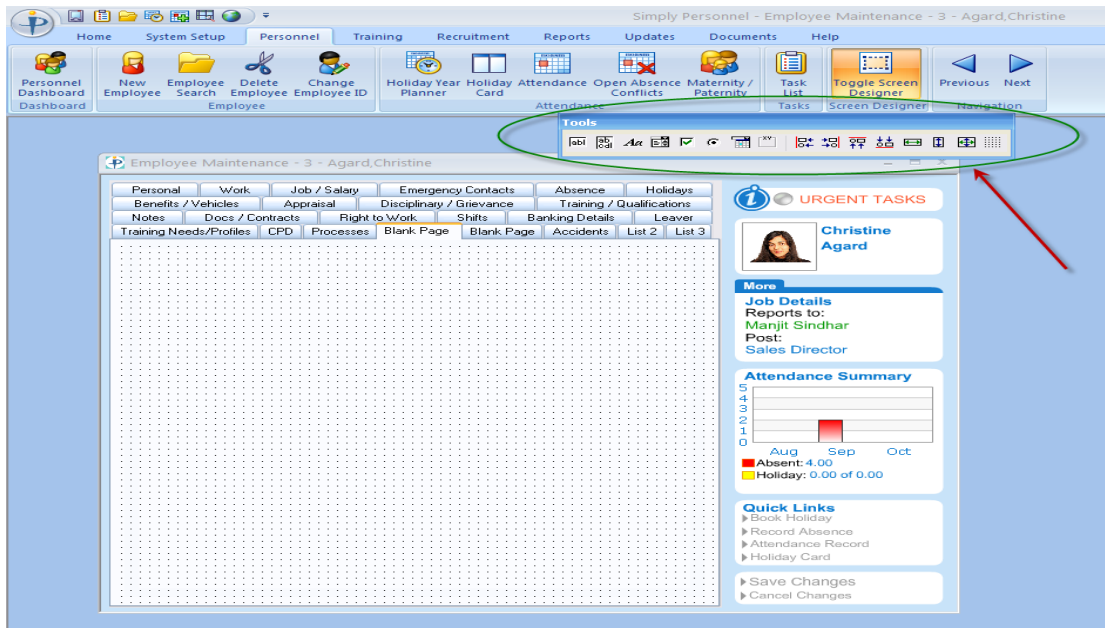
To use screen designer select an employee's record using Employee Search on your dashboard.

It doesn't matter which employee you select as any changes to the tabs on this record will be show on all employees' records.

Once you are 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.

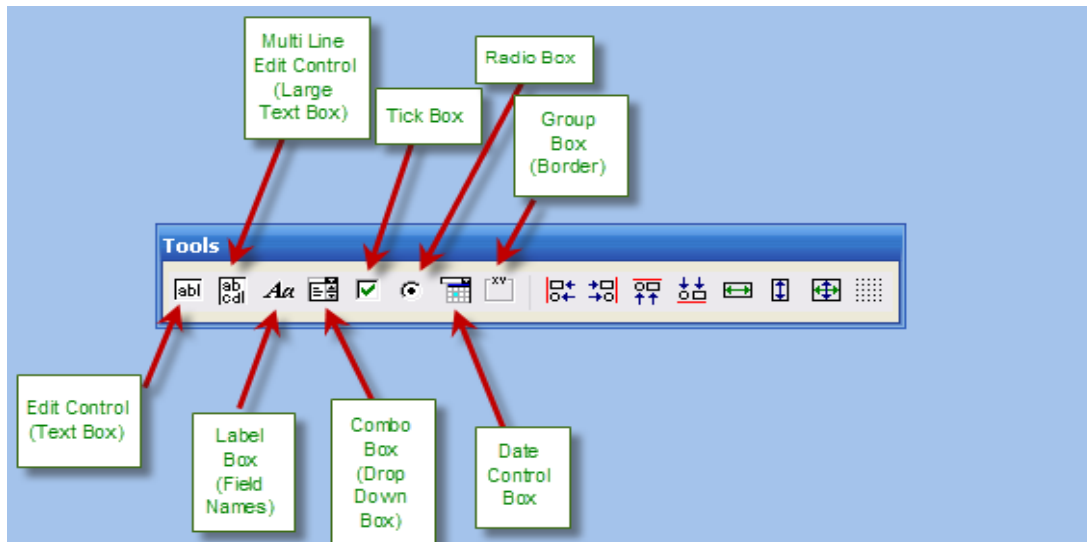


Once you've done this a floating toolbar will appear. This is the Screen Designer Toolbar used to create your page.

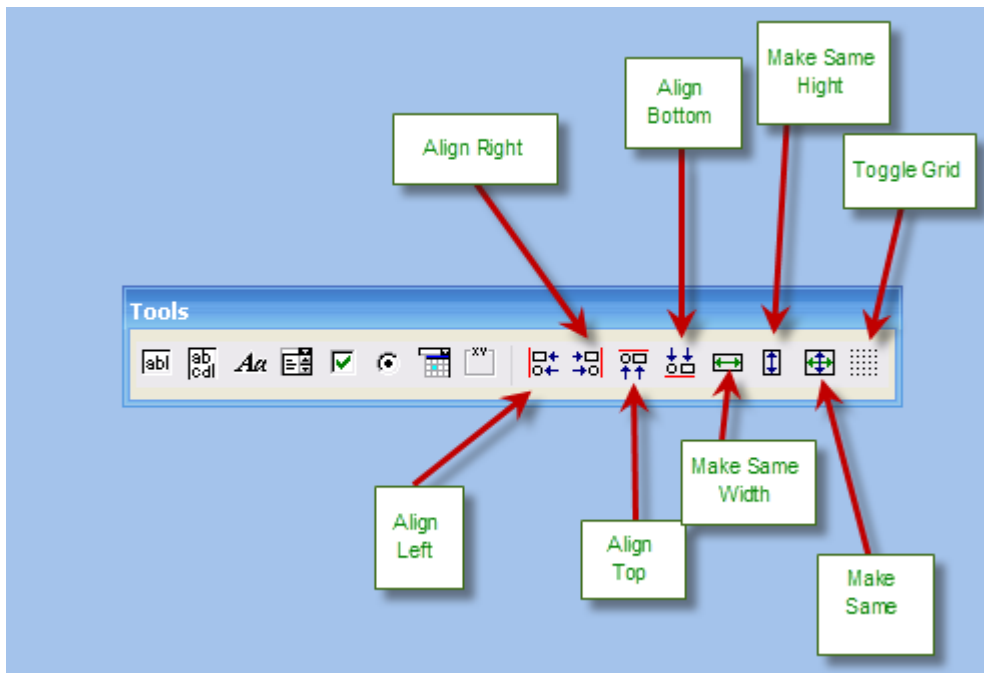


Toolbar Options

The Screen Designer toolbar contains the following functions on the left hand side to build your page,



On the right hand side are functions to straighten and align the fields you create,



Details of Functions Listed Below: -

Edit Control - This type of control allows you to type characters & numbers with the box. Most of the fields you see on the other tabs are edit control boxes for example, Surname, Firstname, NI Number, etc.

Multiline Edit Control - This type of control allows you to type characters and numbers on more than one line. An example of this would be anywhere in the system you see 'Notes'.

Label Control - This allows you to name a field on the screen. Labels are used to describe corresponding edit control boxes.

Combo Box Control - This will allow you to select from a list of pre-defined entries, for example, the Nationality Field is a Combo Box Control.

Tick Box - This allows you to add a box which you may wish to Tick if relevant.

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

Date Control - This type of control allows you to add date field, which will bring up a calendar to select day, month & year.

Group Box - This is simply a frame, which contains a label, and can be used to enhance the aesthetic look of your screen.

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 any Control onto a Tab

Select a tab on the employee's record. Then Select Toggle Screen Designer (see above).

If you want to add a control over an existing control first you will need to hide that control. To do this select the relevant control, left click, then right click and then remove the check from the 'Visible' option. If you are Screen Designing on a blank page this will not apply.

Select the type of control you require by clicking the left mouse button on the control, keep the left click held down, and drag the control onto the tab. 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 you wish to move by clicking on it with your mouse. 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 you require.

Resizing a Control

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

Note: To resize a Combo Box Control you may only drag on of the upper handles, i.e., upper left, middle and right handles. Resizing vertically alters the size of the drop down area, not the box itself.

If you have more than one control that you want to make the same height and width as each other, resize one control to the required size.

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

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

Now left click on the Make Same Width, Make Same Height or Make Same Size buttons on the toolbar and this will make them the same.

Using the Grid

To help you design your screen layout you 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, This will be done automatically when you select toggle screen designer.

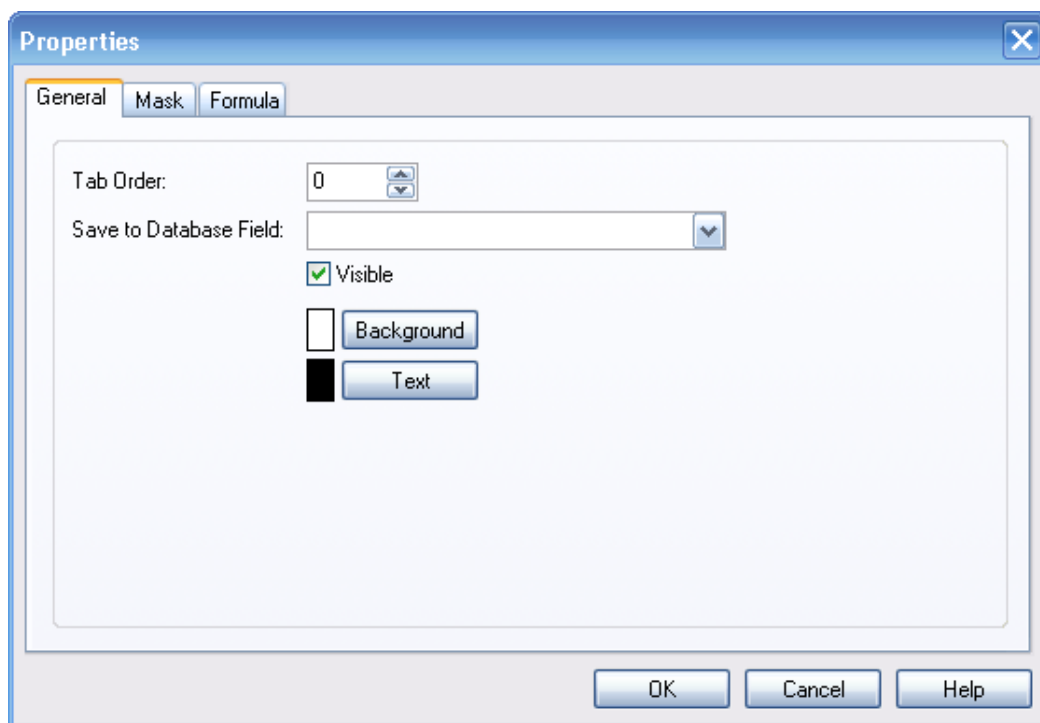
Deleting a Control

To delete a control, select the control so that the handles appear and press the 'Delete' key on your keyboard.

You will not be able to delete the existing controls that Simply Personnel have created.

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, you will then see a similar screen,



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

****Database Field - This is the list of database fields available for you to store the entered data into. You must select a database field otherwise the data you enter will not be saved. You can rename your database later, to make it easier to report on and you will also know which Databases you have already used****

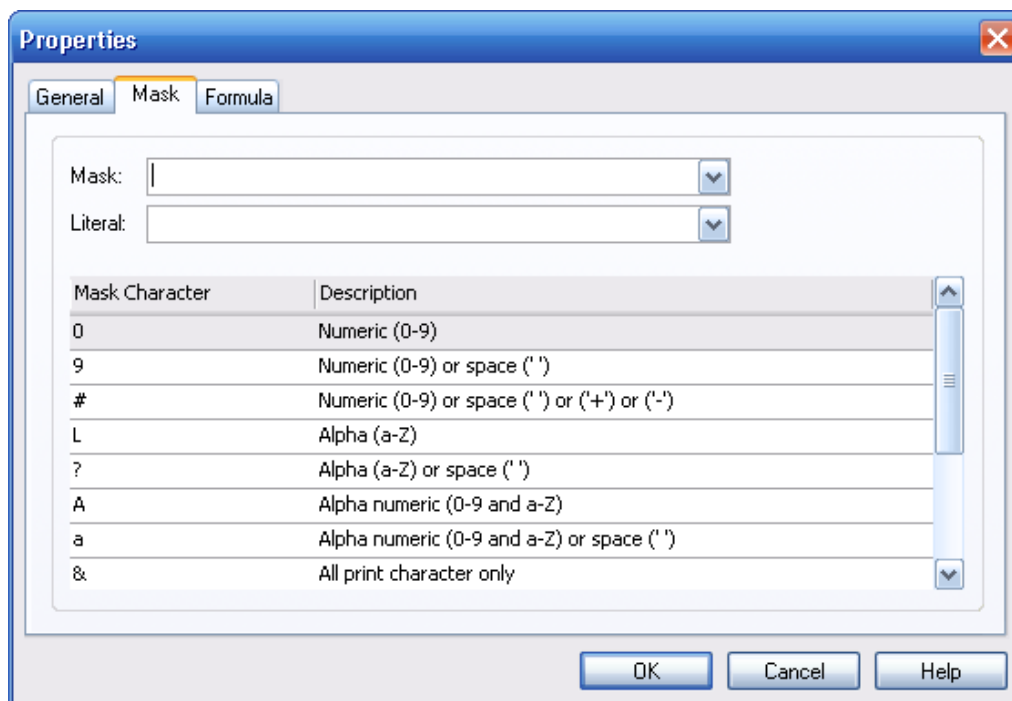
You should NOT link the same database field to more than one screen designed control as this could result in the data in the first control getting replaced by the data in the second. In Other words, every control box must have its own database.

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

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

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

Mask Tab (This is optional)



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 you will either type the mask you wish to use, or select one of the predefined masks.

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

When you enter a mask character you will see an underscore appear and when you 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.

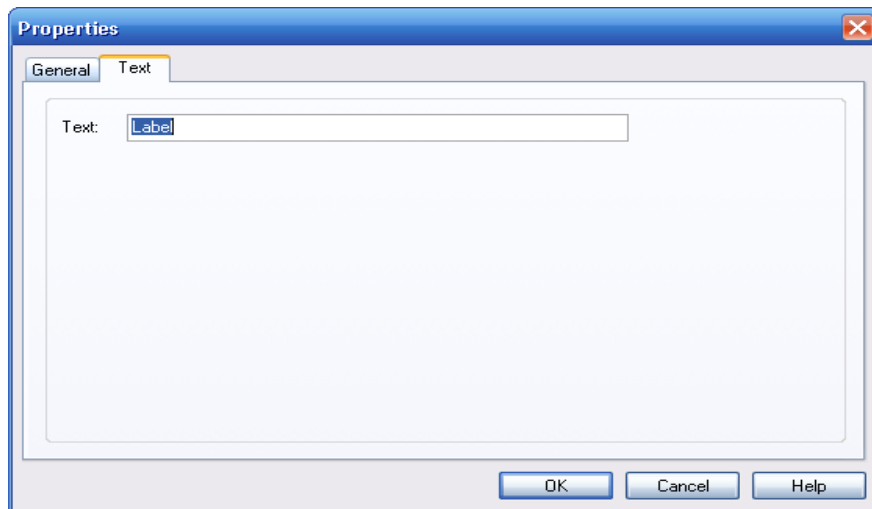
The characters available for the masks and their descriptions are given below.

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 you add a mask to an edit control, in order for the mask to be applied, you not only have to exit the screen designer but you 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.

Label Control

If you use the label control and select its properties you will see the label tab as follows, (Left Click, then right Click with toggle screen designer on)



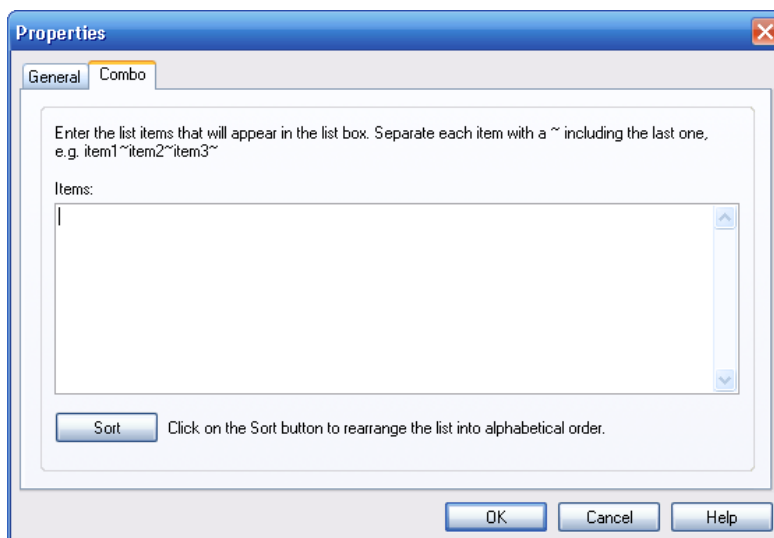
You should fill in the name of the label you have created on this text tab and click 'OK'.

Once you have created your new screen you will be able to rename the database field which you have linked to the new controls. (See further below)

By doing this you 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).

Drop Down Box

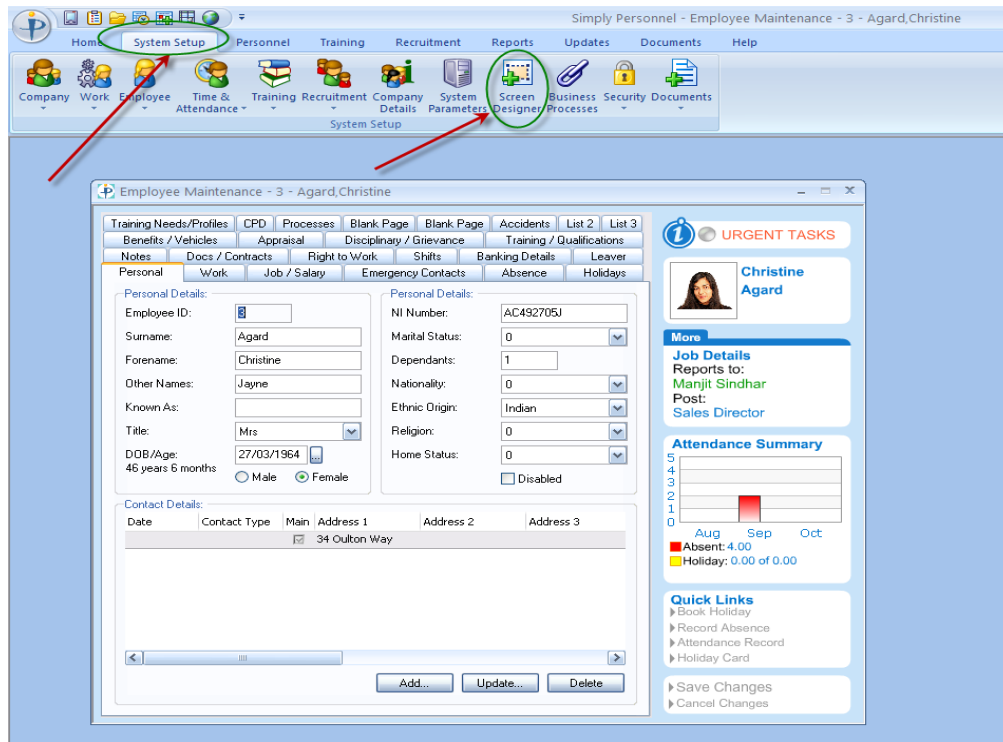
To Create Entries in your drop down box, left click, then right click on your 'Combo Box' and Select the 'Combo' tab,



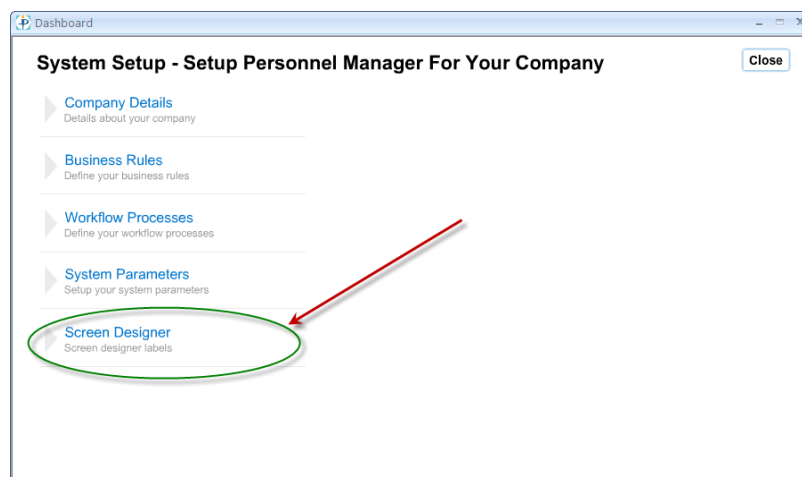
Press ~ then type the first item required in your drop down followed by another ~ then repeat the process for the other items and ensure a ~ is placed at the end of the last item.

Renaming Database Fields

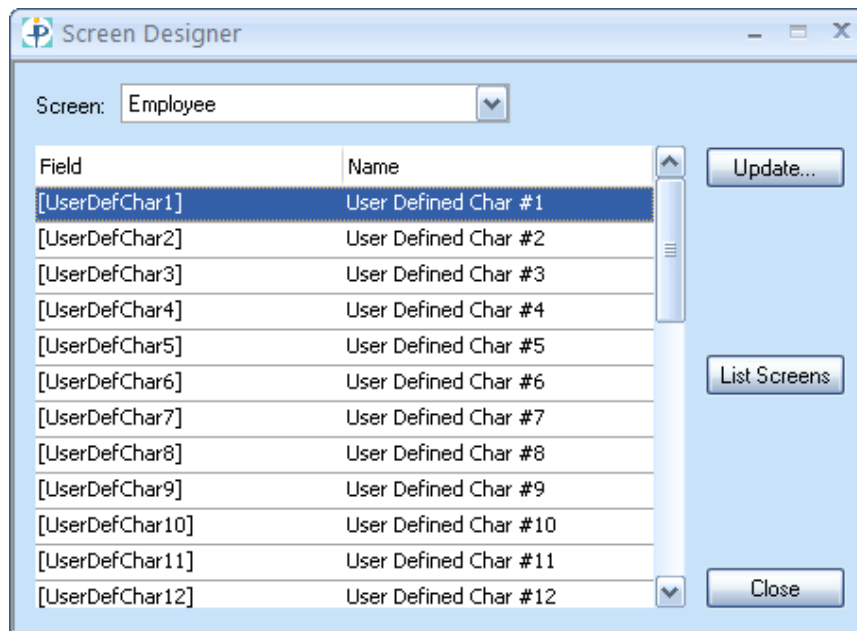
To rename the database fields access Screen designer by accessing one of the methods below: -



Or from your Dashboard Select system Setup then as Below: -



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

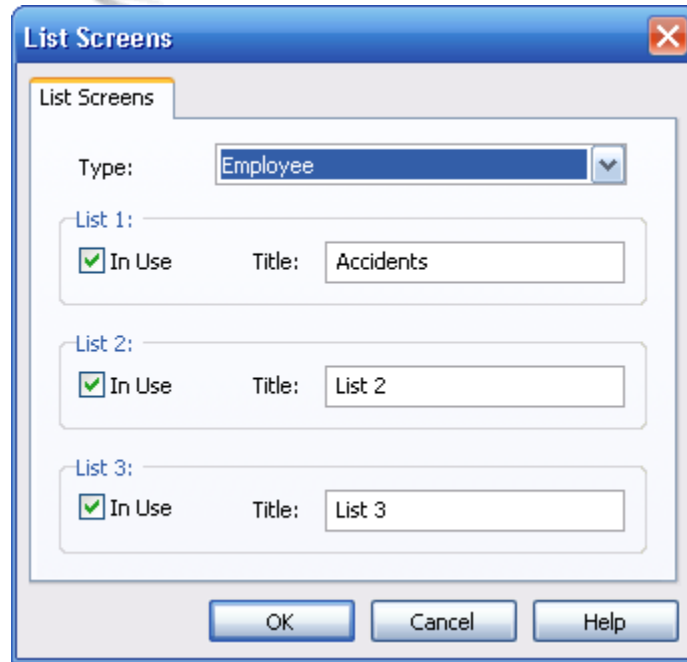


You should then select the relevant database field and click the update button (or double click), you will then have the option to change the name of the database field to something more relevant i.e. the new control box name.

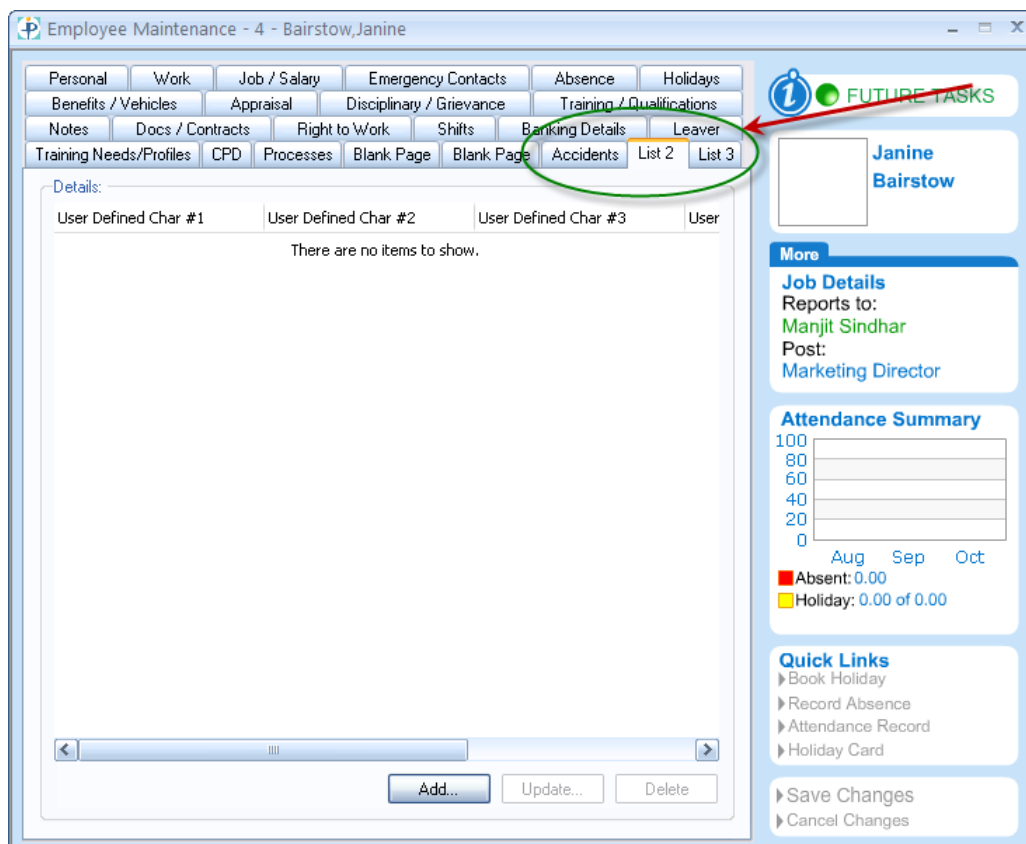
****It is recommended that when you add a database field to a control box that you make a note of which field you have linked it to so that you are able to change the field name to something relevant to help with report creation****

Dynamic User Defined Lists

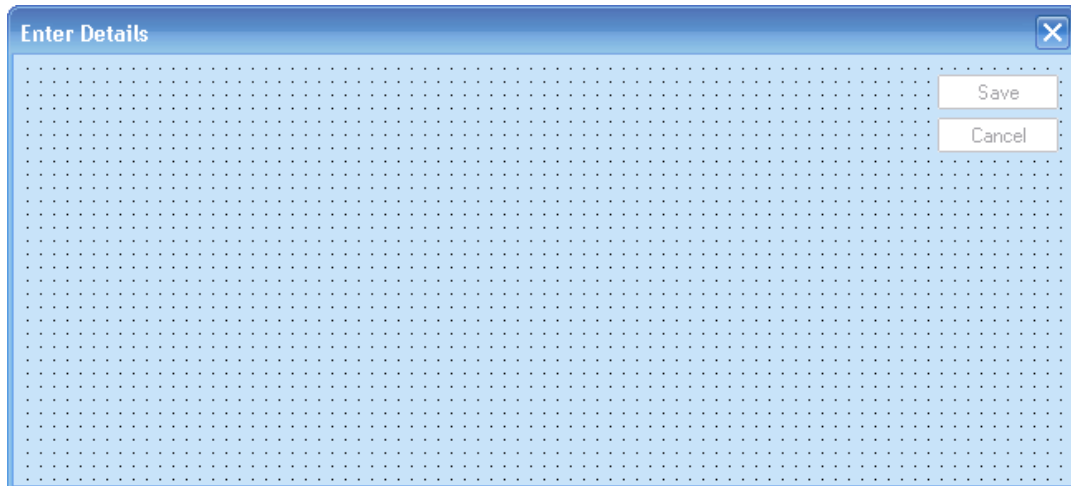
Three employee screens have been added to Employee Maintenance. These screens allow users to create their own list/history screens similar to the Job History list. These screens will first need to be enabled using the Screen Designer option above. On the right of the screen that appears will be a button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



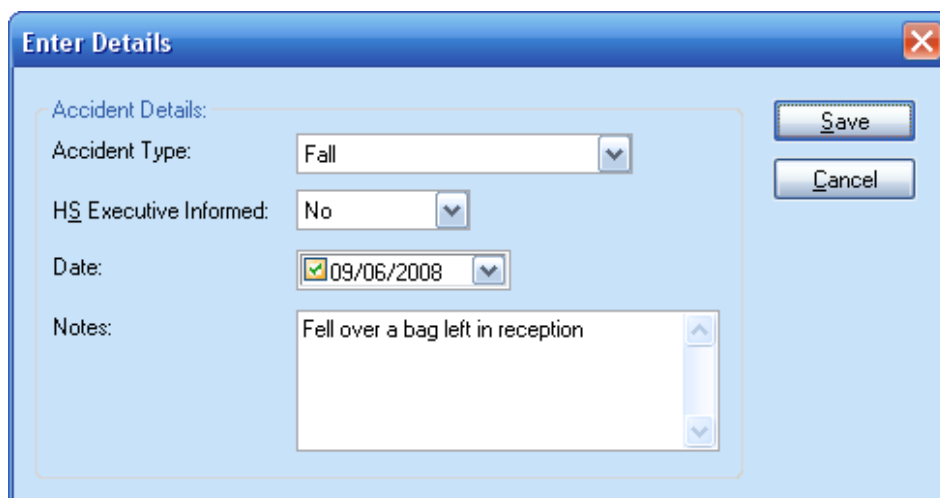
To enable a list screen, click on the “In Use” check box. Enter the screen’s title and click on OK. The next time an Employee Maintenance screen is opened the new screen(s) will be visible.



The Add, Update and Delete buttons work the same as the other list screens except you 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.



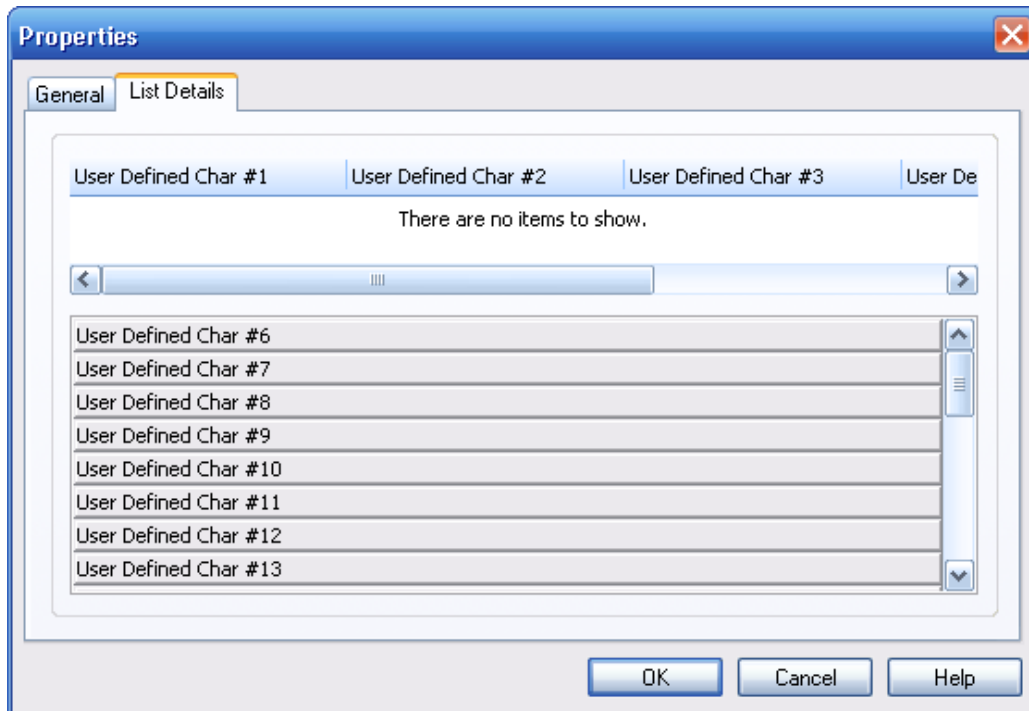
You would then design these in the same way as you would on the blank pages (see above, for how to do this, see below for an example)



Column Headings

The column headings on the lists 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.

With Toggle Screen designer on Left Click on the List, then Right Click and Select 'List Details' tab,



Drag (Left Click and keep your finger down) the headings you don't want to the bottom part of the box and visa versa for the heading you do want.

You can also rearrange size and order by left clicking (keep held down) and move.

Once the columns headings have been set up, click on the OK button and exit the screen designer.

Please note that if you are storing dates then the date formats cannot be changed.

If you have any further question about the screen designer then please contact our Support Team via email or phone on support@simplypersonnel.co.uk or 0870 145 8270