

Summation has supplied many of the more commonly used fields in the default forms for the database, but you may find you need additional fields (or a custom form). You may want more fields than provided by default or custom fields we did not think of.

Note:

Adding a new field is recommended over renaming an existing one. You may rename a system field by mistake, which will be populated with data you neither expected nor wanted. System fields in the Form Editor are identified with a # sign at the beginning their name (e.g. #Date, #TOE). System fields are automatically populated with system information.

TUTORIAL STEPS

1. Fields are added through the Form Editor. To access the Form Editor, select "Options --> Utilities", then select the "Create or Modify Forms "options.

This will launch a separate window called the Form Editor. Now you will want to decide where you want your new field to reside.

2. You may need to reorganize the form to fit the custom field. The Form may be resizable just like any window, by dragging the cursor near the corners to bring into view the resize cursor (the thin black line with arrows on either end). Click and drag to resize the form if necessary.
3. A light line around fields denotes a frame grouping of selected fields on the form. To resize the frame, click your cursor on the line until small black squares surround the frame, then click and drag them.
4. On the small floating toolbar, click on the button denoted with an 'ab'.
5. Click on the form where you want to place the new field. A small dialog box will open, listing the currently available fields in the selected form.
6. Click on the "New" button to create a new field.

7. Assign a name and data type to the new field.

A field NAME must not contain any special characters or spaces, and must be less than 8 characters long, because Summation references the field name internally. The field label may be customised to the users preference.

8. Once you have assigned a name and label, you need to select a data type. It is important to put some thought into selecting a field data type, since you cannot change the data type on a field once it has been created.

If you are unsure of which data type to assign to your field, click on the radio button next to each option to view a brief description in the bottom portion of the dialog box.

9. Click "Create New Column". When prompted that the column was created successfully, click "OK".
10. Click "Close" to return to the Field List dialog.

If you should need to create multiple fields follow steps 7 through 9 until all fields have been created.

11. The new field should be one of the choices and will be selected by default. Click "OK" to select the new field and place it on the form.

To adjust the field's position on the form, click and drag it to a different location.

To adjust the field label and the field box individually, click anywhere on the form to unselect them. Then click back on the item you want to resize or reposition.

12. When you have successfully created, sized and positioned all custom fields, click on the "Save" icon in the toolbars. If your database contains data in it, you will be prompted to copy data to new table structure, click "OK".
13. Close the Form Editor by selecting "Exit" from the "File" menu.
14. Click "Close" to close the utilities dialog.