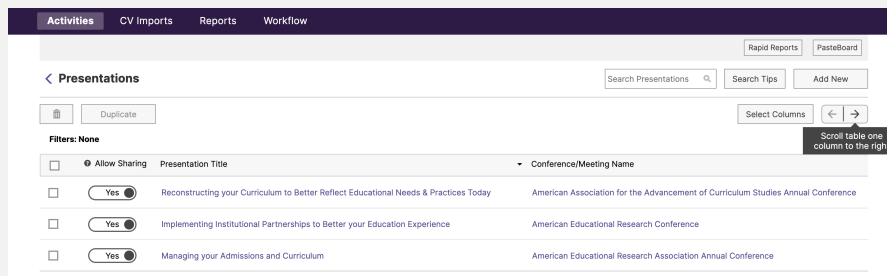


SUMMARY SCREENS

August 11, 2021 18:03

Overview

When you select a dynamic screen from the Main Menu of the **Manage Activities** or **Manage Data** utilities, a summary screen displays all the records entered for the user on that screen.



Summary screen from the **Presentations** screen.

The above screen shot outlines the various features available on a Summary Screen:

- 1. Search:** Enables you to search for records containing the contents of the search field. All records, which reference the search contents in any field, will continue to display on the summary screen once you have entered a search.
- 2. Delete:** The Delete button will be grayed out until you have selected one or more records. Once you have selected at least one record, this button will be viable.
- 3. Add a New Item:** Enables users with access to add new records for the specific screen.
- 4. Select Columns:** Users can select which columns they want to see based on the data entry or data review task at hand. The user's column selections persist from session to session, so they can effectively set their own preferred views for each activity screen.
 - The column settings selected by someone who can only manage their own activities only apply to them.
 - If a user is managing data on behalf of someone else and adjusts the column settings, they *will not* replace the preferences set by that person they're managing data for, but they *will* travel with that person managing data, effectively becoming their preferred Manage Data summary screen columns for the given activity type.
 - As a top-level administrator you can [set column defaults](#) for each summary screen that users will see until they select their own preferences.

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Users can also scroll through the columns displayed on the summary screen to confirm which activities they've added to the system and check their records for completeness, and can click on a column header to sort or filter by that column.

Note: We determine the availability of the **Add a New Item, Edit, Copy** and **Delete** functions on the Summary Screen based on whether there are one or more read-only, hidden, or locked fields on the screen, and whether we have put an override in place to allow users to add and delete records. For more information, see [Screen, Field and Data Settings](#).

By default, summary screens display records in reverse chronological, alphabetical order, based on the record's end date, beginning date, and summary screen text. This is true regardless of which dates, if any, are actually visible on the summary screen. We display records without dates at the top of the summary screen in alphabetical order. For more information about record dates, see [Dates](#).

Each line on the summary screen display truncates at sixty characters. The truncation technically occurs to summary display *lines*, not to fields. This is an important distinction if multiple fields display on the same line. If a field contains a line break, the line break carries through to the summary screen and the truncation occurs *after* we consider the line break.

For more information on Summary Screen customizations, read [Supported Customizations - Summary Screens](#).

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