How to Edit a Pull Down Menu

Overview:

Every pull down menu in the Appilistic database is capable of containing user specified values. Some automatically reflect the data entered into the database, e.g. all menus of names and the Town Filter menu. Others can be edited directly, e.g. Marital Status, Units and Schools/Facilities.

Cautions:

1. As a general rule hide, do not delete, any categories that you no longer require.

2. You may edit the text of an existing category, but only if the underlying meaning is unchanged. For example, it would be OK to change "Single" to "Never Married". It would NOT be OK to change "Single" to "Widowed", even if you no longer intended to use the "Single" category, as this would change the meaning of existing data links in the database.

3. Make a backup copy of the data file before making significant configuration changes.

Procedure:

1. Open the database with an administrator level User Name and Password.

2. At the **Main Menu,** go to the bottom of the yellow navigation area: Click on **Configuration**.

3. In the grey configuration panel, click on **System Configuration.**

4. This brings you to the **System Variables and Configuration** Panel, containing all the pull down menus under their appropriate headings.

5. To Edit a pull down menu, click on the tab with the appropriate heading, for instance:

   a. clicking on **Education**, shows the two **User Editable Pulldown Menus.**

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User Editable Pulldown Menus:

Schools / Facilities   Achievements

Reordering Pulldown Menu Selections:
1) Use the ListOrder field to override the default alphabetic ordering.
2) Duplicate numbers are sorted alphabetically.
3) The lowest numerical value shows up at the top of the list.
4) Close and reopen the editing panel to see effects of changes.

Instructions and Warnings:
1) DO NOT alter the meaning of existing Pulldown Menu Selections. Hide them and/or create new selections.
2) DO NOT delete existing Pulldown Menu Selections. Hide them to prevent continued usage. Unused selections will eventually disappear from reports.

3) For "Achievements", ListOrder (from low to high) also establishes the relative level (from low to high) of the achievement, e.g. college degrees should have a higher list order than a high school diploma. Getting this relationship correct is very important when running demographics reports as only the highest achievement is counted.
4) Duplicate ListOrder numbers should NOT be used for "Achievements.
5) For "Achievements", carefully copy and paste an existing value of the desired Pulldown Name. This field must be exact, including spelling and case, or your entry will not be recognized.

b. Be sure to read and follow the **Instructions and Warnings** (circled in yellow) given under each heading before proceeding. It is important not to delete or edit the meaning of existing pulldown menu selections.

c. Then select which pull down you are going to edit.

Another way to Edit Pulldown Menus:

Some pull down menus may also be edited directly in the related database module.

1. Open the database with a staff level User Name and Password.

2. At the **Main Menu,** in the yellow navigation area: Click on **Education**, (or whichever heading is appropriate).

3.

4. In the yellow navigation area, click on **Admin. Tools;** this brings you to the **Define or Edit Education and Job Training** Panel:

a. Be sure to read and follow the **Instructions and Warnings** (circled in yellow) given under each heading before proceeding. It is important not to delete or edit the meaning of existing pull down menu selections.

b. ⮕ Then select which pull down you are going to edit.