

Understanding the User Field Copy Behavior in PS8

Introduction

PS8 provides a mechanism to safe guard your data when having multiple user defined fields with identical names but defined with different types by creating a copy of the user defined field. While this behavior preserves any existing data without the possibility of data loss, it can cause confusion on which field actually stores the data and cause an abundance of additional user defined fields to be created.

When a user creates a user defined field, the field definition is stored in two places within PS8. First, since the new field will be available for all projects, it is stored in the *Configuration* file (.psc) of the user who created the new field. Secondly, the field is also stored with the project (.psp) as data is entered into the field. This second means of storage ensures that when sharing project files (i.e. using a central project repository), that other users will be able to open and view projects without initially having any new user defined field definitions present in their local configuration file.

PS8 Approaches

There are two separate approaches that PS8 will take on “merging” user-defined fields with altering data types. Of the two approaches, which are described below, scenario #2 will cause PS8 to create additional user-defined fields within your local configuration file.

Scenario 1: Duplicate User Defined Field with the Same Data Type But Contain Different Values

In this scenario, a user-defined field exists in both the project and in a local configuration file. Both fields are assigned the same user-defined data type (pick list or commonly known as a drop down list), but the values associated with the configuration file’s field definition differs from the value stored in the field associated with the project.

For example:

User defined field with the same data type and different values	
Configuration File User Defined Field Values	Project File User Defined Field Values
A	D
B	E
C	F

When the project is opened, PS8 will examine the fields and their associated data types. If the data types match, then the values stored in the project file are merged into values associated with the user-defined data type stored in the configuration file. Using the above example, once the project file is opened, the user-defined field’s dropdown list will contain the following values:

- A
- B
- C
- D
- E
- F



This situation most commonly occurs when different users create the same user defined field but assign altering values to the user-defined data type associated with the new field.

Scenario 2: Duplicate User Defined Field with Differing Data Type

In this scenario, a user-defined field exists in both the project and in a local configuration file. However, the data type associated with the field differs between that which is stored in the configuration file and that which is stored in the project file. This scenario causes PS8 to create copies of user defined fields as projects are opened.

For example:

User defined field with the different data types	
Configuration File User Defined Field Data Type	Project File User Defined Data Type
Text	Integer

When the project is opened, PS8 will examine the fields and their associated data types. Since the data types do not match between the configuration and project files, PS8 will create a new user defined field for the field stored within the project file and append the name with “Copy x”, where *x* represents the incremental number of the field created. For instance, if this is the first time, then the field will be appended with Copy 1.

This situation can be compounded if the user defined field issue is not resolved and the project is subsequently saved. Future attempts to open the project file will cause additional user defined Copy fields to be created.

Cleaning Up the User Defined Field Behavior in PS8

The following section describes the process for resolving this behavior within PS8.

Cleanup for Scenario 1

With regards to Scenario 1 above, cleanup is minimal. The worst case scenario is that you end up with additional values in your user-defined data type associated with a user defined field. The following steps will aid you in removing the additional values:

1. Open all projects.
2. Display the user defined field in the appropriate spreadsheet (for example, if it is a Project level user defined field, then you would display that field within the *Project List* view).
3. Verify that no project currently uses the value you wish to remove. If the value is being used, then replace the value with the desired value from the dropdown list.
4. Save the projects.
5. Select Define, Fields...
6. Click the User Types... button.
7. Select the User defined Data Type and click the Edit... button.
8. Select the row selector box (the gray cell to the left of the Value) and hit Delete.
9. Click OK, then Close, then OK to return to PS8.
10. Select File, Save All (if you are prompted to save your configuration file, then save the file).

At this point, your PS8 environment is cleansed. However, other users that have access to the PS8 projects may still have the additional values stored within their configuration files. If their file is not cleansed, then there is the likelihood that the values will be re-created the next time you open the project(s).



For additional users, it is important that they follow the succeeding steps to prevent the re-introduction of field's values.

1. Start PS8 and create a new project. (Do not open any existing projects).
2. Select Define, Fields...
3. Click the User Types... button.
4. Select the User defined Data Type and click the Edit... button.
5. Select the row selector box (the gray cell to the left of the Value) and hit Delete.
6. Click OK, then Close, then OK to return to PS8.
7. Select File, Save As...
8. Within the Save As dialog box, change the Save as type dropdown list to **Configuration (*.PSC)**.
9. Save the PS8.PSC file (this file is generally found in the C:\Program Files\Scitor\PS8 directory).

It is strongly recommended that both set of steps are done at approximately the same time. This will ensure that the unwanted values associated with the data type are exterminated.

Cleanup for Scenario 2

The cleanup for Scenario 2 is similar to scenario 1, but requires additional analysis depending on the number of "copy" fields that were created. The following steps will aid you in removing the additional copy fields:

1. Open all projects.
2. Display the user defined field along with the copy fields in the appropriate spreadsheet (for example, if it is a Project level user defined field, then you would display that field within the *Project List* view).
3. Reconcile the user defined field so that it contains the required values which may be spread across the different copy fields. Please note that this may require a change to the field's associated data type or the creation of a new user defined field if the values are extremely different. For example, you cannot store alpha characters within an Integer field.
4. Save the projects.
5. Select Define, Fields... and change the Field category drop down list to the category where the copy fields reside.
6. Select the row selector box for all the copy fields (the gray cell to the left of the Value) and hit Delete.
7. Click OK, then Close, then OK to return to PS8.
8. Select File, Save All (if you are prompted to save your configuration file, then save the file).

For additional users, it is important that they follow the succeeding steps to prevent the re-introduction of the additional field(s).

1. Start PS8 and create a new project. (Do not open any existing projects).
2. Select Define, Fields... and change the Field category drop down list to the category where the copy fields reside.
3. Select the row selector box for all the copy fields (the gray cell to the left of the Value) and hit Delete.
4. Click OK, then Close, then OK to return to PS8.
5. Select File, Save As...
6. Within the Save As dialog box, change the Save as type dropdown list to **Configuration (*.PSC)**.
7. Save the PS8.PSC file (this file is generally found in the C:\Program Files\Scitor\PS8 directory).

It is strongly recommended that both set of steps are done at approximately the same time. This will ensure that the unwanted copy fields are exterminated.