

2020

Unlocking the Secrets of CIS Software



Quality Management

STARTS WITH YOU

CIS

www.cissoftware.com

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2/1/2020

Unlocking the Secrets of CIS

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Introduction

It was sixteen years ago when CIS Software was born from a FrontPage Access database system. It started as a solution for handling simple nonconformity and corrective action. With the input from our clients and our consultants it became the Total Management Solution that we offer today.

Today it resides in the cloud and uses SQL and the most current Microsoft server operating systems. It can be accessed worldwide, and it allows for the user to take total control of their systems. Users can now create their own systems within the CIS Software online framework and have their systems become secure, back-up regularly and most importantly, useful!

The challenges associated with customizing and building databases, input forms, reporting forms and editing forms is the ability to vision the future the way you want it to be and have the necessary skill sets to make that vision become a reality. CIS software provides these tools and this booklet will help guide you through necessary steps that will enable you to create your visions.

We strongly suggest that you purchase a Test Bed if you do not already have one since practice makes perfect and sometimes, we do make mistakes. Mistakes on a Test Bed are fine but on the live system could cause some frustrations with the users.

By working through this guide, you will become more familiar with tools available and how they all interrelate with each other. You may find that once you have mastered these tools that your CIS Software system will double or triple in size filled with useful databases and reporting features that help make your company better.

Let's get started...

Definitions

Database:

An organized collection of data including tables, queries, reports and the ability for human interface with the data by using input and edit pages and user controls. One could imagine a database as a table of information. However, it is important to also imagine that certain cells in this table could be acquiring data from other database tables. In some instances, this gets very complex. Often it is best to plan these tables and their interaction with each other by drawing the fields or by using a software designed for this function such as Microsoft InfoPath Designer.

Database Field:

Is a space allocated and defined for a particular type of data. One could envision it like a cell in a spreadsheet. It could be defined to accept specific information such as (not limited to):

- Dates
- E-mails
- Currency
- Numbers
- Text
- Text and numbers
- Memo
- Weights, temperatures, measurements
- Foreign field data
- Uploaded data by the user
- Calculations performed

Fields may be required fields. These fields require the user to input that specific data before the record can be inserted (saved). Non required fields may be left blank prior to insertion into the database.

Foreign Field

A field that gets its data from a field or collection of fields in another table. For example, in a database there may be a field that allows one to select a manager from a list of managers. In this instance that selection field goes to the foreign table where the manager's names and information is recorded and displays the names from the name field to be selected. This is an important and complicated part of working with tables and databases where they become interrelated with each other. It is also the beauty

of working with these tables because data may only be entered once and then selected when required by other databases.

For example, if we were wanting to import data into the above example, we would not import the name of the manager but rather the other table's Record ID number that corresponds to the manager's Name. It is also equally important to understand that if we were to delete a manager from the manager's table then all the corresponding records that used the manager as a foreign field would immediately become blank. That is the reason that in CIS we can only suspend users. However, when you create your own databases it is important to know that user's permissions should be set to avoid deletion of records that could be part of a foreign field.

Field Name

Each field is given a unique name and cannot have spaces or illegal characters such as #,\$,%,&*,(,),@ as part of the name. In the CIS system there should not be two fields with the identical name. Each field name is assigned a global field number starting with the number one for the first field created. There are hundreds of created fields when you start with CIS. Often, we want to have a field name that makes sense to us such as "responsible manager". For the field name we would use an underscore instead of a space such as "responsible_manager".

Field Caption

Each field is assigned a caption or a phrase to be displayed in the input, edit and table headings for that specific field. The caption should not contain illegal characters and spaces. For example:

Field Name = responsible_manager

Caption = Select the Responsible Manager

Database Record:

A collection of fields. The data in the fields is inserted into a database to become a record.

	Peter Sanderson	TQMS Inc.	peter.sanderson@outlook.com	NNN-NNN-NNNN					
Database	→→→	John Doe	ABC Inc.	John.doe@outlook.com	NNN-NNN-NNNN				
		Mary Smith	BBD Inc.	mary.smith@outlook.com	NNN-NNN-NNNN				
Record	→→→	<table border="1"><tr><td>Peter Sanderson</td><td>TQMS Inc.</td><td>peter.sanderson@outlook.com</td><td>NNN-NNN-NNNN</td></tr></table>				Peter Sanderson	TQMS Inc.	peter.sanderson@outlook.com	NNN-NNN-NNNN
Peter Sanderson	TQMS Inc.	peter.sanderson@outlook.com	NNN-NNN-NNNN						

A database is like a spreadsheet table and therefore when we create a new database, we call it creating a new table. The record is like a row of information in the table. Each row is assigned a database record ID sequentially starting with the number one (normally). When foreign fields interrelate with each other it will store the record ID selected and then it goes to the foreign field to get the actual data.

Input Form

The input form is used to insert a record into the database table by the user. In CIS there is a default Input Form that would automatically display all the fields in their priority so that the data may be entered and inserted into the database record. However, CIS also allows the administrator to create custom input forms so that the input form would contain only the fields that they want to be inserted and the other fields in the database table would not be displayed in this insert form by design. However, it is important to note that fields that are not displayed in the insert form must not be required fields or the record will not be inserted (saved).

By creating different user controls, one can create different input forms for different user-types in the CIS system. This may be useful depending on the processes you design and the type of input you require form various user types. We find this extremely useful for the edit form.

Edit Form

The edit form is used to edit a record previously inserted into the database table by the user. In CIS there is a default edit Form that would automatically display all the fields in their priority so that the data may be edited as desired. However, CIS also allows the administrator to create custom edit forms so that the edit form would contain only the fields that they want to be edited and the other fields in the database table would not be displayed in this edit form by design. However, it is important to note that fields that are not displayed in the edit form must not be required fields or the record will not be revised (saved).

By creating different user controls, one can create different edit forms for different user-types in the CIS system. This may be useful depending on the processes you design and the type of input you require from various user types.

For example:

1. A manager user-type creates a record for a procedure review using insert form
2. A reviewer user-type edits using edit form one and either approves or disapproves with comments
3. An approver user-type then edits using edit form two and either approves or disapproves with comments

Additionally, one can have certain previously entered data displayed in an edit form so that it may not be edited or modified, and that the user type may only edit the fields that they have permission to edit. In order to accomplish this type of scenario one would need to create multiple user controls and edit forms for the same database table.

User Control

We create a User Control for people to interface with a database table such as:

1. Assigning permissions to user-types
 - a. Permission to insert records
 - b. Permission to edit records
 - c. Permission to delete records
 - d. Permission to program
2. Create a unique grid and list view to allow users to view the records with only the information that is important to them and in their required order
3. Create unique filters and search boxes to allow user-types to search and query records
4. Create custom input and edit forms for user-types
5. Hide/show fields
6. Plus, additional programming, often performed by our programmers when requested

As mentioned earlier, one can have multiple user controls for the same database table in order to have different grid displays or different edit forms for different user types.

User-Types

A user types defines a user or group of users when they log into CIS Software. Additionally, user type's access and permissions are determined when creating pages and user controls. Furthermore, user types may be displayed as foreign fields to be selected.

User types should be well thought out before creating and revising your system. For example, you may want a user type called purchaser so that only purchasers are displayed in a particular input form.

A person may have multiple user types assigned to their name and e-mail. It is advisable that they always sign in under their manager user-type so that they will receive the action items on their home page. However, once user types are determined it is possible to have the programmers revise the action item list and calendar reporting to include your new user types, when required.

Pages

Pages are like a web page whereby the user control settings such as the grid/list view and database input/edit tools are displayed for a specified database table for a single user type or groups of user types on the specific page. The page is how we interact with the database table. Again, if one creates multiple user controls then one would also need to create a unique page and assign each page to a different user control as well as set the user type access permissions on each page.

Pages also have settings for user-type access. If a page does not allow access to a specific user type, then that user type would not even see that page when logging into CIS.

Pages may also be set as folders so that a page is under it like in a menu system.

In the example below, the following are folders (menu tabs):

1. Data Input
 - a. Nonconformity Reports (NCR)
 - b. Corrective Action Request (CAR)
 - c. Safety
 - d. Preventive Action
 - e. Inspection
 - f. Demo
2. Reports and Graphs
3. RMA
4. Management Tools
5. Work Order

In the example below, the following are Pages are under the Non-Conformity Reports (NCR) Folder (with user controls assigned to them):

1. NCR Details
2. Edit NCR

3. Print NCR Records
4. Print Management Summary
5. Trucking Issues

Folder	Data Input	Reports And Graphs	RMA	Management Tools	Work Order
Folder	Non-Conformity Reports(NCR)		NCR Details		
	Corrective Action Request(CAR)		Edit NCR		
	Safety		Print NCR Records		
	Preventive Action		Print Management Summary		
	Inspection		Trucking_Issues		
	Demo				

Portal

A portal is a page and user control that does not require a user to have a login to your system. The portal normally would only have an insert function and can be accessed on a website such as a link from the company website. Some uses for portals are:

1. Customer feedback entered directly into your customer feedback table
2. Customer request for quotation entered into your newly created quotation customer table
3. Customer orders entered into your work order table
4. Request for samples entered into your sample shipping table

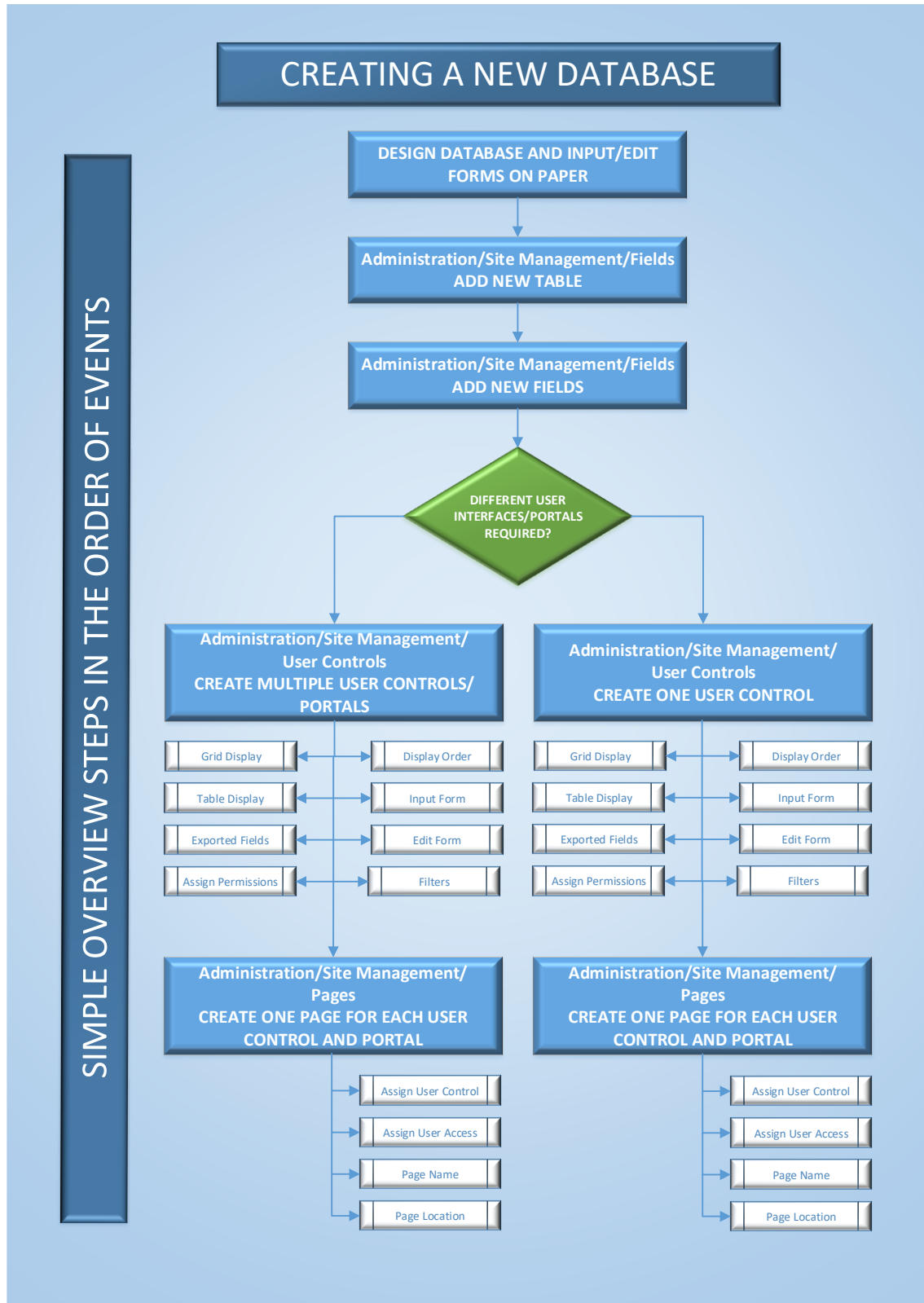
Modules

The modules section in Administration was originally designed for the future to allow the programmers to copy a complete module from one system to another. However, with current changes and revisions to our technology we decided that this approach would not be used and therefore it is no longer required to make a module before a table.

Track Changes

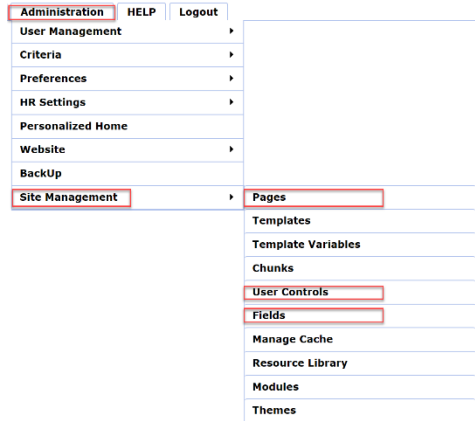
When we create a new database table, we have the option to track the changes and revisions to the table. By adding track changes CIS automatically creates four fields in the table to track the dates and the changes that are made. The track changes can be reviewed in Reports and Graphs under Track DB History.

Programming Modules Overview



The Big Three

The three main modules that we use to revise and to create new tables and databases are found under the administration then site management. These are:



1. Fields
2. User Controls
3. Pages

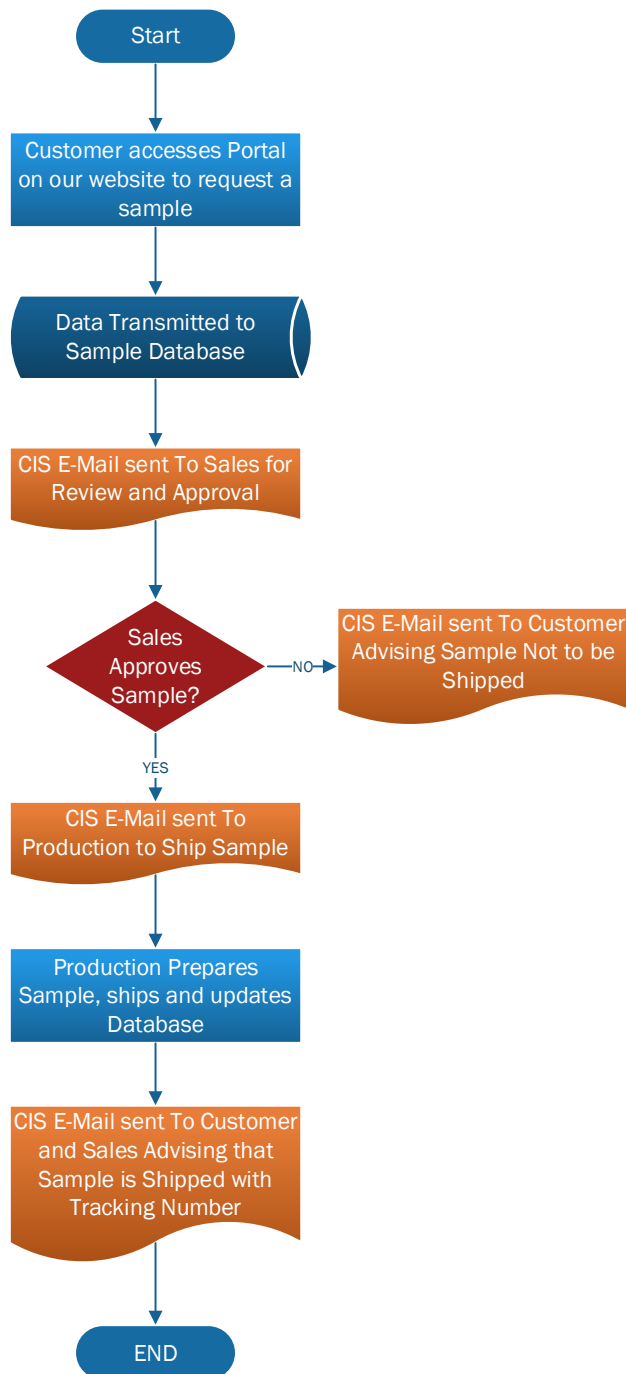
Once you learn the ins and outs of these three modules you will then be able to take control of your system. Working with them at first may be slightly overwhelming but we assure you that practice makes perfection and after you have created a few tables, input and edit forms you will be on your way to mastering this system.

We create and modify tables and their fields in the field's module. However, having a table only defines the places where data is stored and how the data interrelates with other tables such as in foreign fields. Without a user control and a page to display the user control we cannot access the table. Therefore, the flow to create a working database would be as follows:

1. Create a new table in Fields Module
2. Create the fields for the new table in Fields Module
3. Create a new user control for the table in User Controls Module
4. Create Insert and Edit forms in User Controls Module
5. Design the list and grid views that you want to view the records in User Controls Module
6. Assign permissions to insert, edit, delete and program by User Types in User Controls Module
7. Add any filters or search criteria for the grid and list display in User Controls Module
8. Hide any fields that you wish to hide in User Controls Module
9. Create a folder (tab) to display your table (on a page) in the Page Module
10. Create a page under the folder to display the table and assign a user control in the Page module
11. Assign permissions by current user types to view the page in the Page Module
12. Position the folder and page in the desired menu tab location in the Page Module
13. Close Browser and re-open to view new database

Putting the tools into Action

Let's say we want to design a system that will allow our customers to request a sample of our products using our website and that the sample request is transmitted into our system, reviewed, approved, processed, and shipped. We create a plan:

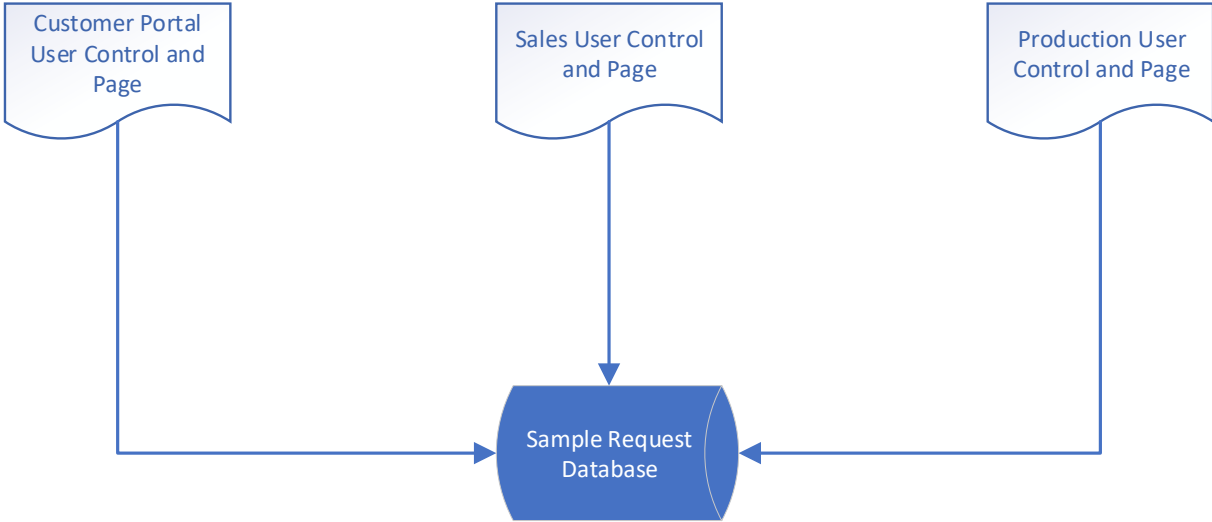


Multiple pages and user controls

As mentioned in definitions, it is possible and often desirable to create multiple user controls and pages in order to restrict access to certain fields in an insert or edit form and/or to create a completely different looking page for different users.

Below is an example of one possible scenario.

- A customer portal user control and page are created to allow customers to request a sample product be shipped to them for evaluation and the request goes directly into your sample request table without having to log in to your CIS and also without having access to the majority of fields in your sample request Table.
- Sales can review the request then edit the record without having the ability to change the data that the customer entered. The Sales would have access to additional fields in the table such as final approval, date approved and assigning it to production.
- Production would have access to only production fields and be able to enter the shipping information including any comments.



Creating a Database Table

Before you revise a database table that exists, we recommend that you learn all about the tables and fields so that you understand the vast possibilities available.

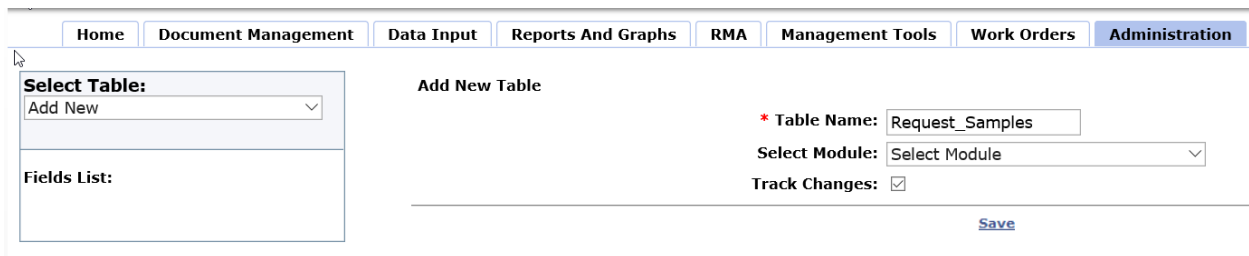
Creating a New Database Table

Here we will create a new table named **Request_Samples** to be used by customers to request a sample and then by sales to approve it and finally by operations to create and ship out the sample.

Go to Administration/Site management/Fields

On the left it defaults to “Add New” under the select table option. Therefore, just leave that as is. Then enter the name of the new table in the Table Name Field and do not select anything under the Select Module option.

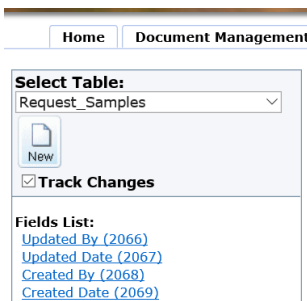
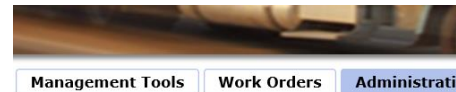
Finally, since this is an important process that could potentially fail because of a lack of action taken we may want to select track changes so that we can review what went wrong in the future.



The screenshot shows the 'Add New Table' form in the Administration module. The navigation tabs include Home, Document Management, Data Input, Reports And Graphs, RMA, Management Tools, Work Orders, and Administration. The 'Select Table:' dropdown is set to 'Add New'. The 'Fields List:' section is empty. The 'Table Name:' field contains 'Request_Samples'. The 'Select Module:' dropdown is set to 'Select Module'. The 'Track Changes:' checkbox is checked. A 'Save' button is visible at the bottom right.

Finally, we click save and the following message is displayed:

At this point the table is created with the four fields required to track changes. Care should be given to these fields when creating custom insert and edit forms and report forms. They should not appear.



The screenshot shows the configuration for the 'Request_Samples' table. The 'Select Table:' dropdown is set to 'Request_Samples'. The 'Track Changes' checkbox is checked. The 'Fields List:' section contains four fields: 'Updated By (2066)', 'Updated Date (2067)', 'Created By (2068)', and 'Created Date (2069)'. A 'New' button is also visible.

1. **Updated By** – Text box capturing user who updated the record.
2. **Update Date** – Date of revision.
3. **Created By** – Captures user who created (insert) the record.
4. **Created Date** – Date record created.

Planning the Fields

Very few people have such a dimension to their thought process that enables them to begin adding fields without first taking the time to think out the process and writing it down so that they can look at it, revise it until it finally meets their expectations. It is strongly recommended that we write this down in some manner that makes sense to you. In addition to writing down the fields it is also important to write down the actions such as send an e-mail based on a trigger.

Request_Samples Table Plan

Note – *Italic* means field is a required field

Process Step One

Fields to be entered by Customer using the Portal:

- **Date Requested** – *Date Field*
- **Date Required** – *Date Field*
- **Select Sample Required** – *Selectable Foreign Field: Product Code Criteria multiple selections*
- **Customer Name** – *Text Box*
- **Contact Name** – *Text Box*
- **Contact E-Mail** – *E-mail*
- **Shipping Address Street** – *Text Box*
- **Shipping City** – *Text Box*
- **Shipping State** – *Text Box*
- **Shipping Zip Code** – *Text Box*

E-mail to be sent to Sales Customer Service when customer clicks Insert (Save)

Process Step Two

Fields to be entered by Sales Customer Service using Edit Form. All portal fields are available and can be edited.

- **Date Reviewed** – *Date Field*
- **Approve Sample Request** – *Yes/No*
- **Sales Approval** – *Drop Down Foreign Field of Sales Personnel*
- **Assign Sample to** – *Selectable Foreign Field User's Table – Only Operations Personnel Selectable*

E-mail sent to selected operations person when record is updated and Sample Request Approved. This e-mail is an order to ship. E-mail sent to customer when sample is not approved advising them.

Process Step Three

Completed by Operations:

- **Date Samples packaged and shipped** – *Date Field*
- **Packaged By** - *Selectable Foreign Field User's Table – Only Operations Personnel Selectable*
- **Shipping Company** – *Selectable Foreign Field User's Table – Only Shipping Supplier Selectable*
- **Tracking Number** – *Text Box*
- **Comments** – *Memo Field*
- **Archive Record** – *Archive Button*

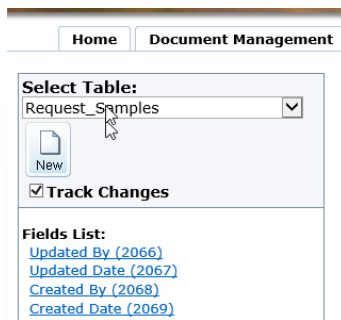
E-mail sent to customer and Sales Customer Service advising of shipping information and confirmation that sample was shipped.

Notes: All the above may be completed by the CIS Administrator Customer except for the creation of the four e-mails and the conditions for them to be sent throughout the process. This would be a request for our programmers to do after all the above is complete.

Now that the plan is completed the actual creation of the fields may begin.

Field Creation

Now that the plan is complete the database fields may be created. Go to Administration/site management/fields. Select the new database table "Request_Samples".



The first four fields for tracking are already there and they can be ignored for now. Click "NEW" to create the first field in the plan. An add field input form will appear to the right. The first field is Date Requested however this field name may be popular in other tables. Therefore, it is preferred to name the field in a manner that will make sense to you. Since it is a request sample table a good system would be to start any similar field names that may exist in other tables with something unique to this table such as "RS" or rsdaterequested. Field names may not have spaces or illegal characters. It could be rs_date_requested if preferred. In

this case the name will be rsdaterequested.

The following options may be selected or entered for each field created:

Save Field in Table

This normally must be selected by a check mark so that the field is saved in the table when data is entered. If it is not checked and that field appears in any grid or list view, insert or edit form or report form the system will throw an error.

Include in Export List

Check this option if you want the data from this field to be included in the excel export table that may be exported from the grid or list view. Normally all fields should be included however there will be no error if some or all of the fields are not selected to be included in the export list.

Caption

A limited amount of text may be entered here, and that text will appear next to the field data entry and in reports and grid/list views. For example, we could enter:

- Enter date requested
- Enter date
- Date requested

Note:

- You may not enter a long sentence here since if it is too long the system may throw an error during the display of the insert or edit screen
- Try to keep the caption as short as possible but ensure that it makes sense
- The caption may easily be modified later if required
- Do not use illegal characters such as %\$# if possible

Required

Check this if the field is required to be completed. Caution should be exercised when deciding if a field is required. When a field is required the record will not insert or save unless the expected data for the field is entered or selected. As an example, the first field that we made (date requested) is certainly a required field since we want the customer to enter this date. However, fields to be completed later by the customer service cannot be required since they cannot be completed when the record is first inserted and therefore the system will request that these fields need to be completed even if they are not displayed on the insert screen.

Is Unique

This is generally never selected because it may interfere later in your database. However, with that said, if the unique field is checked then no two of the same data can be entered in that field. For example, this may be used for a password or username field. Once a username is entered then the system would not allow the same username to be entered again.

Active Flag

This should always be checked since it means that the field is active or available in the system. If the field is not active then it may not appear in any input, edit forms, grid or list views or reports without the system throwing an error screen.

Control Types

The control type is how the data appears in the input and edit screens or how the data is presented which is determined by the type of data for that specific field. For date requested we would want the date field that presents us with a calendar to select the date on the input and edit screen. The control type is directly related to the next selection of data type. These two should be considered together. For example, the user control “DateControl” will display the calendar to select a date and the data type should therefore be “datetime”. Here are some guidelines ([Blue is Used by Programmers Only](#)).

ActionButton	When a new field to be used as an action such as initiating script. Mostly used by our programmers
ASPHidden	To make a field hidden so that its value is there but hidden to browser. Mostly used by our programmers such as the primary field ID or a calculation whereby we can store a specific value.
ASPUpload	To upload a file
ASPCalendar	Large Calendar on the page
AutoCompleteFilter	Automatically pop-ups data when entering a letter or number. This is used in foreign fields where there are large numbers of data to select such as customers.
AutoCompleteFilterMultipleSelect	Multiple selection automatically pop-ups data when entering a letter or number. This is used in foreign fields where there are large numbers of data to select such as customers.
Captcha	Verify a person is a person who is completing a form such as a portal. Programming required.
CheckBox	Displays one checkbox for a yes/no or black/white selection
CheckBoxList	Displays the multiple options in a check box format
DateControl	Displays a small calendar to select the date.
DivCheckBoxList	Displays the multiple options in a check box format but allows you to manage columns and height and width including scroll bars.
DoPostBackLink	This is used by our programmers to post back, as verified by a breakpoint in the code-behind.
DropDownList	Displays multiple data in a drop-down list but only one may be selected.
ListBox	Displays multiple data in a list box and by pressing control key multiple selections may be selected.
CascadingDropDown	CascadingDropDown is an ASP.NET AJAX extender that can be attached to an ASP.NET DropDownList control to get automatic population of a set of DropDownList controls. Each time the selection of one the DropDownList controls changes, the CascadingDropDown makes a call to a specified web service to retrieve the list of values for the next DropDownList in the set. Parent Ideas must be used.
Color Picker	Displays a color chart to select color.
HTMLEditor	Displays an HTML Editor Box.
ImageButton	Put an image instead of a button to perform actions. Programmer’s assistant may be required.
LinkButton	Put a link instead of a button to perform actions. Programmer’s assistant may be required.
Literal	In insert or edit page it simply shows a label or instructions as written.
Label	Insert a label.

Password	Password field. Hidden so that when typed a star appears and not the password.
RadioButtonList	Displays the multiple options in a round radio button format but only allows one check box to be selected
TextArea	Displays an area like a paragraph to enter text
TextBox	Displays one line to enter text (normal field entry style)
UpDown	Adds an up/down button to set priority.

Data Types

The data type is related to the control type and should be carefully selected to meet the field intention. The following are guidelines:

Button	Only used by our programmers
Cancel	Cancel entry in insert or edit. Can select image button then cancel.
Date	Date format
Datetime	Date Time Format
Decimal	Decimal Format
Delete	Delete Function
Edit	Edit Control button such as at the top of the grid.
Insert	Insert Control
Bigint	If required to store long number such as longer than 6 digits. The bigint data type is intended for use when integer values might exceed the range that is supported by the int data type.
Int	If required to store a number (small digit to not use so much storage memory). The int data type is the primary integer data type in SQL Server.
Long	More than Bigint
Select	Select command such as in the grid to select in edit mode.
Text	Text format
Update	Update command
Varchar	Variable characters and numbers and illegal characters
Encrypted	Encrypts the data as stored in the database
Phone/fax	Phone fax format
Email	E-mail Format
Currency	Currency Format
SSN	Social Security Number
URL	URL (website Format)
nText	Used to write in different languages. Allows those different characters.
nVarchar	Used to write in different languages. Allows those different characters.

Max Length

Leave blank or specify a maximum length for the data.

Validation String

Leave blank or enter a validation string. Generally used by our programmers or trained SQL programmers. Some examples of a validation string are as follows. Many others can be found on search engines.

Email Address: `^[a-zA-Z0-9_\-\.]+\@([\[[0-9]{1,3}\.][0-9]{1,3}\.][0-9]{1,3}\.)([a-zA-Z0-9\-\._]+\.)?([a-zA-Z]{2,4}|[0-9]{1,3})(\?)?$`

Zipcode/Only Number: `^\d+$`

If you want to show error message with validation string it can like:

Number or decimal value Validation: `^([0-9\.\,]+)$` - *Error Message: Only 0 to 9 and . Allowed*

Mask String

Leave blank or enter a mask string. Generally used by our programmers or trained SQL programmers such as `###-###-####`.

Width

Leave blank or enter the width of the field. In CIS if you make the field width larger, then the input and edit forms will be a bigger size on the right. Personally, we like a size between 300 and 400.

Grid Align

Select in the grid how it should be aligned (None, left, center or right). Generally, none is selected.

Wrap Grid Cell Data

When using a grid, select yes or no to wrap the grid data.

Grid Format

Grid format would be how the format of the data in the grid. For example, dates could be `MM/dd/yyyy`.

Priority

Priority is the order in which the fields will be displayed in the table as well as in the default insert and edit forms. For example, CIS will automatically create an insert and edit form and will display the fields

to be inputted in the order of priority (1,2,3,4,5....20). Of course, a custom insert and edit field can be created and then the fields may be displayed in any order.

Hint: It is always wise to plan to add a field later on that you may want to have it inserted between the priorities of the existing fields. Therefore when prioritizing your fields, skip numbers such as 5,10,15,20,....120. Therefore you may create two additional fields later on between 20 and 25 by numbering them 21 and 22.

Help Tool

Enter any specific instructions for that field that will pop-up when the user clicks on the little blue help button. In order for the blue help button to be available to the users the Tooltip With Image Icon check box must be selected.

Default Value

The default value would be the value displayed. For example, it could be select one or check one. Also, for dates the default value could be "now" which would be the current date. Note in foreign fields, the default value must be entered in the foreign field and not in the field table.

Example of Date Requested Field Set-Up

Edit Field

Field Name:

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Footer Template: ?

Foreign Fields

Often foreign fields are used in check box, drop down, radio buttons and any other field whereby options are presented to the user and they may select one or more of these options such as part numbers in the system, customers, managers, and so on.

Creating a foreign field is easy when the table with the data (customers, part numbers etc.) already exists in your system. However, if the database table does not exist it must be created with a user control and then a new page in the menu system must be created with the user control assigned to it. Once in your system, normally under administration/criteria then the data can be entered so that it will appear in the foreign field selection box. For example, if a field wants to select from inventory location, then an inventory database would need to be created and all available inventory locations entered into that database table.

In our above database plan the first foreign field would be in the Portal whereby the customer can select from the various product codes. In order to create this field in the database, we would create the new field by selecting new in the Request Samples table. We would give the field a name such as RS_Product_Code and complete the first part of the field definition as follows up to Foreign Field.

Select Table:
Request_Samples

Track Changes

Fields List:
[Updated By \(2066\)](#)
[Updated Date \(2067\)](#)
[Created By \(2068\)](#)
[Created Date \(2069\)](#)
[Date Requested \(2070\)](#)

Add Field

* **Field Name:** RS_Product_Code

Save Field in Table?

Include In Export List?

* **Caption:** Product Code

Required: ?

Is Unique? ?

Active Flag: ?

Control Type: DropDownList

Data Type: bigint

AutoPostBack:

Validation String: ?

Mask String: ?

Width: 300

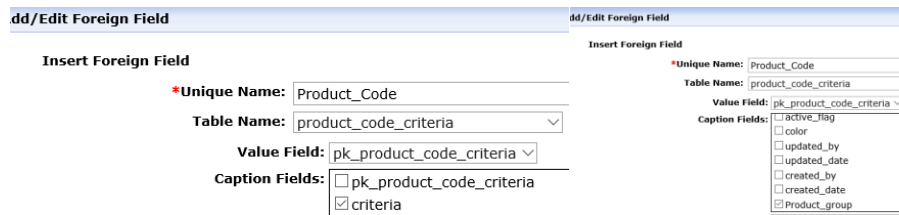
Foreign Field: Select Foreign Field [Add New](#) ?

Foreign fields may be created and used in multiple tables. For example, if we already have used the product code in another table, then that foreign field will be selectable. However, if this is the first time that this foreign field is required or if we want to use a foreign field but with different sorts or field information, we would have to create new. Take note that when a new foreign field is created and saved, it still must be selected after it is created as follows:

1. Click add new next to the foreign field (see above).
2. Give the foreign field a unique name such as Product_Code.
3. Select the existing table which is product code criteria. If you are not certain of the table name, then go to the Administration/Site Management/Pages and select the applicable page then find

the user control name. Once that is found then go to the Administration/Site Management/User Controls and select the user control to see the applicable table.

4. Once the table is selected, the applicable fields will be displayed with check boxes. The check boxes allow us to display that information as selectable.
 - a. For example, Product Code/Update Date could be selected and that would be displayed in the foreign field selection field.
 - b. Often this is used to show more information in the selectable field such as customer and their state if there are multiple customers with the same name but different locations. Without selecting the state, city or other additional identifier then Customer ABC would be displayed five times if they had five entries in the user table with different locations and there would be no way for the user to determine which customer is which.
5. In this instance Criteria and Product Group is displayed:



6. In the caption string we could separate the data with something such as a hyphen.
7. `[[criteria]][[Product_group]]` – We could add this to separate the two fields in the display:

`[[criteria]] - [[Product_group]]`

8. We also can decide on the order. If we want the data to displayed by group then by product, we would specify this in the order as follows: `Product_group, criteria`.
9. Finally, we could have a default option such as Pick One, Select One, or something such as that. Once completed we save:

Insert Foreign Field

***Unique Name:**

Table Name:

Value Field:

Caption Fields:

- pk_product_code_criteria
- criteria
- active_flag
- color
- updated_by
- updated_date
- created_by

Caption String:

Condition:

Order By:

Default Option:

Static Prefix Value List:

Static Prefix Caption List:

Static Suffix Value List:

Static Suffix Caption List:

Static Separator:

[Save](#)

10. At this point the foreign field is created but we still must select it:

Mask String:

Width:

Foreign Field: [Edit](#)

Grid Align:

Wrap Grid Cell Data?

Grid Format:

Priority:

11. Finally, we select the priority. Note that we had set the default display when we created the foreign field so you cannot put a default value in the Default Value field at the bottom. Once completed select Save.

The screenshot shows a configuration window for a field. On the left, there are various settings: Grid Align (None), Wrap Grid Cell Data? (Yes), Grid Format, Priority (15), Help Tooltip (Select the product that you require a permitted.), Event Name, Function Name, Footer Template, and Attributes (Add New Attribute). On the right, there are dropdown menus for Caption String ([[criteria]]), Condition, Order By (criteria), and Default Option (Select One). Below these are fields for Static Prefix Value List, Static Prefix Caption List, Static Suffix Value List, and Static Suffix Caption List, along with a Static Separator field and an Update button. A red box highlights the 'Default Value' field on the left, and a red arrow points to it from the 'Default Option' dropdown menu.

Field Name: RS_Product_Code

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Width:

Foreign Field: [Edit](#) ?

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip: Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Footer Template: ?

Foreign Field Without Pointing to a Table

You may create a local foreign field that can be used in a drop down or checkbox list by creating a foreign field without selecting a table name. Instead, you can put the selections in the Static Value and Caption list. Take care to match the data type in the selection such as VarChar versus Int or bigint. The separator is normally a comma that separates the values or selections. The value and caption may be different. For example, if you wanted a number system whereby Very Good, Good, Bad Very Bad correspond to 10, 7, 4, 0 the the values would be the numbers and the captions would be the words.

Follow the example below:

Example of Drop Down:

Add Record
* Indicates required field

Question 1 - Do you make daily checks
On the lift truck as required by procedure WI-002?

Select One
Yes
No
N/A

Edit Field

Field Name: QQ3
Save Field in Table?
Include In Export List?
* Caption: QQ3
Required:
Is Unique?
Active Flag:
Control Type: DropDownList
Data Type: varchar
AutoPostBack:
Validation String:
Mask String:
Width: 200
Foreign Field: YesorNo
Grid Align: None
Wrap Grid Cell Data? Yes
Grid Format:
Priority: 0
Help Tooltip:
Default Value:
Event Name:
Function Name:
Footer Template:
Attributes: [Add New Attribute](#)

Add/Edit Foreign Field

Edit Foreign Field

*Unique Name: YesorNo
Table Name: Select Table
Value Field:
Caption Fields:
Caption String:
Condition:
Order By:
Default Option: Select One
Static Prefix Value List: Yes,No,N/A
Static Prefix Caption List: Yes,No,N/A
Static Suffix Value List:
Static Suffix Caption List:
Static Separator:
Update

Select	Attribute Key	Attribute Value	Unique Name	Action
--------	---------------	-----------------	-------------	--------

Example of Check Box:

Add Record

* Indicates required field

Question 1 – Do you make daily checks On the lift truck as required by procedure WI-002?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
---------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------

Edit Field

Field Name: QQ3

Save Field in Table?

Include In Export List?

* Caption: QQ3

Required:

Is Unique?

Active Flag:

Control Type: **CheckBoxList**

Data Type: varchar

Max Length: 0

Validation String:

Mask String:

Repeat Column: 200

Foreign Field: YesorNo [Edit](#)

Grid Align: None

Wrap Grid Cell Data? Yes

Grid Format:

Priority: 0

Add/Edit Foreign Field

Edit Foreign Field

*Unique Name: YesorNo

Table Name: Select Table

Value Field:

Caption Fields:

Remove Default for check box lists

Caption String:

Condition:

Order By:

Default Option:

Static Prefix Value List: Yes,No,N/A

Static Prefix Caption List: Yes,No,N/A

Static Suffix Value List:

Static Suffix Caption List:

Static Separator: ,

[Update](#)

Record ID Number Field

Every database table creates a number when a record is added, starting at one. However, to display the record ID number we must create an ID field in the new database that we are creating. The ID number is important to know, especially when we want to call out only certain record in a foreign filed. For example, if we want to display only Laboratory Employees in a drop-down selection box, we will have to know the ID number of the Laboratory User Types.

The ID field must be named as follows pk_tablename. So, the name of the field is pk_ followed by the name of the table you created. For example, in the user_type table, the field for ID would be pk_user_type. The filed setting should be as follows:

Select Table:
user_type

Fields List:
[Updated By \(1749\)](#)
[Updated Date \(1750\)](#)
[Created By \(1751\)](#)
[Created Date \(1752\)](#)
[ID \(2039\)](#)
[Type name \(1\)](#)
[Landing page \(2\)](#)

Edit Field

Field Name: pk_user_type

Save Field in Table?

Include In Export List?

*** Caption:** ID

Required:

Is Unique?

Active Flag:

Control Type: TextBox

Data Type: bigint

Max Length: 0

Validation String:

Mask String:

Width:

Grid Align: None

Wrap Grid Cell Data? Yes

Grid Format:

Priority: 0

Help Tooltip:

Default Value:

Render in HTML? No

The caption could be anything. Normally we use I.D. No. but let's say you wanted to number laboratory reports then you could use the unique record ID and the Caption could be Laboratory No.

Once we have the ID, it can be displayed in the grid or list view.

Displaying only Certain Records or Users in a Selectable Field


Once we have the record ID (pk_tablename) created we can use the ID numbers to filter the types of data to be displayed in any foreign field. For example, this is the grid display of user types:

ID	Type name	Landing page
1	Administrator	/admin/home
2	Manager	/admin/home
3	User	/admin/home
4	Customer	/admin/home
5	Supplier	/admin/home
6	Subcontractor	/admin/home
13	Supervisor	/admin/home
14	Operations	/admin/home
15	Sales Person	/admin/home
16	HR Assistant	/admin/employee_details
17	HR Consultant	/admin/home
18	Receiving Inspector	admin/inspection_details
19	Company Administrator	/admin/home

From this table we can take note of the user types that we would want selectable in specific field. For example, let's make a field so that it displays only the names of Operations and Receiving Inspector. That would be **ID numbers 14 and 18**.

In the table fields where we want to have this selectable field, we would create a field and in this case, we named it Operations_personnel. Take note of the data and other settings. We then click new to open a new foreign field box:

Select Table:
test

 New

Track Changes

Fields List:

Add Field

* **Field Name:** Operations_personnel

Save Field in Table?

Include In Export List?

* **Caption:** Select All Operational Persons

Required:

Is Unique?

Active Flag:

Control Type: DropDownList

Data Type: bigint

AutoPostBack:

Validation String:

Mask String:

Width:

Foreign Field: Select Foreign Field Add New

Grid Align: None

Wrap Grid Cell Data? Yes

Grid Format:

Attributes: Add New Attribute

We create the new foreign filed named Operations_Personnel. We link to the table "users" since that is where the names of the people are kept but we put on a condition that it should only display the names

if they are user types 14 and 18 and also that they are current and not suspended. You will want to keep this code to copy it often:

fk_user_type in (14,18) and is_active=1

Add/Edit Foreign Field

Insert Foreign Field

*Unique Name: Operations_personnel

Table Name: users

Value Field: pk_users

Caption Fields:

- domain_name
- Title
- Department
- name
- is_active
- pfdoc
- allow_car_due_date

Caption String: [[name]]

Condition: fk_user_type in (14,18) and is_active=1

Order By: name

Default Option:

Static Prefix Value List:

Static Prefix Caption List:

Static Suffix Value List:

Static Suffix Caption List:

Static Separator:

[Save](#)

Once we create this foreign field you must also select it afterwards since it will not be auto selected when you create it new. The good news is that you may use this foreign field often in other tables. Caution: If you change the foreign field, it will change in all tables.

PostBack:

ion String:

ask String:

Width:

Foreign Field: Operations_personnel [Edit](#)

Grid Align: None

Cell Data? Yes

The field will then display only operational and receiver user types as follows:

* **Select All Operational Persons:**

- Bill Horricks
- Bretta Kelly
- Doug Sharp
- John Patterson

[Save](#) [Cancel](#)

Example of the balance of ALL the fields:

Portal Fields

The following pages show the field set-up for the above planned database table.

Date Requested

Edit Field

Field Name:

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Footer Template: ?

Date Required

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	U
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirect
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Footer Template: ?

Select Sample

Field Name: RS_Product_Code

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String:

Mask String:

Width:

Foreign Field: [Edit](#) ?

Grid Align:

Wrap Grid Cell Data?

Grid Format:

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value:

Event Name:

Function Name:

Footer Template:

Customer Name

Edit Field

Field Name: rscustomername

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

... ?

Contact Name

Add Field

* Field Name:

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type: ▾

Data Type: ▾

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ▾ ?

Wrap Grid Cell Data? ▾

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML? ▾

Function Name: ?

Contact E-Mail

Note: Once e-mail data type is selected, CIS automatically completes the validation string. Also, under Default Value we entered: *Must be a Valid E-Mail Address*

Add Field

*** Field Name:**

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length:

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedire
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_De

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

Street Address

Add Field

* Field Name:

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	U
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_2
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirect
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_:
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Add Field

*** Field Name:**

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip: Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

State

Add Field

* Field Name:

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	Uni
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_cl
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_ac
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirect
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_ac
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Descri

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

Zip (Postal) Code

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

Sales Customer Service Fields

Date Reviewed

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type: ▾

Data Type: ▾

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ▾ ?

Wrap Grid Cell Data? ▾

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	U
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: × ?

Event Name: ?

Function Name: ?

Footer Template: ?

Approve Sample Request

Add Field

*** Field Name:**

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Caption Left Align

Caption Right Align

No Caption

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	U
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_;
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirect
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_;
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Desc

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

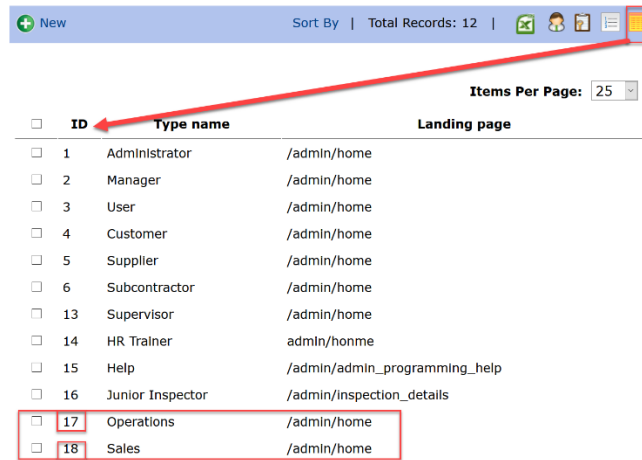
Event Name: ?

Assign Sample

This field requires a foreign field to be created to include operations personnel only. Therefore, we create a new foreign field as follows:

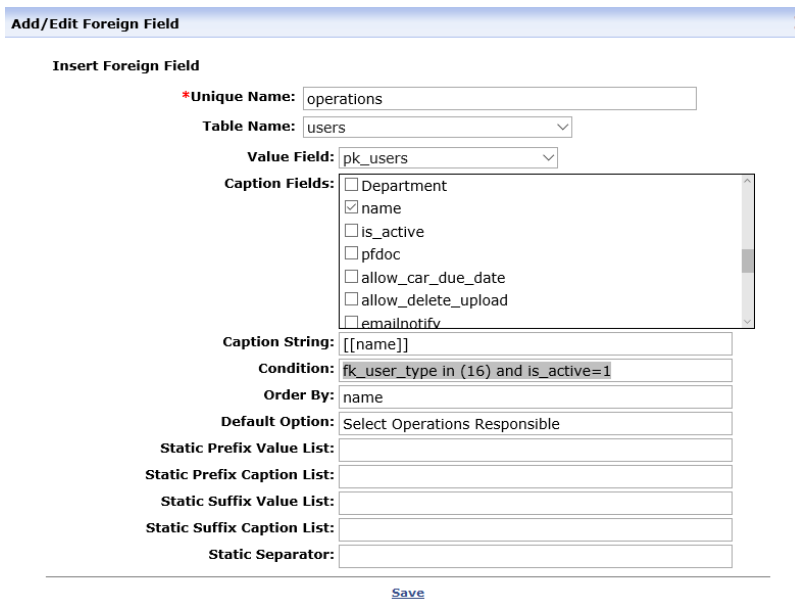
- Table = Users
- Caption Field = Name
- Condition: fk_user_type in (16) and is_active=1

To complete the condition, we must consult the user type GRID VIEW to find the user type number for Operations. Then we can insert that user number (16) in our formula as shown above.



ID	Type name	Landing page
1	Administrator	/admin/home
2	Manager	/admin/home
3	User	/admin/home
4	Customer	/admin/home
5	Supplier	/admin/home
6	Subcontractor	/admin/home
13	Supervisor	/admin/home
14	HR Trainer	admin/honme
15	Help	/admin/admin_programming_help
16	Junior Inspector	/admin/inspection_details
17	Operations	/admin/home
18	Sales	/admin/home

Finally, we can add a default option and save the foreign field. Remember, we can use this foreign field later on for other tables that we create.



Add/Edit Foreign Field

Insert Foreign Field

*Unique Name: operations

Table Name: users

Value Field: pk_users

Caption Fields:
 Department
 name
 is_active
 pfdoc
 allow_car_due_date
 allow_delete_upload
 emailnotifv

Caption String: [[name]]

Condition: fk_user_type in (16) and is_active=1

Order By: name

Default Option: Select Operations Responsible

Static Prefix Value List:

Static Prefix Caption List:

Static Suffix Value List:

Static Suffix Caption List:

Static Separator:

[Save](#)

Assign Sample Continued...

To complete this field, we must select the foreign field that we just created:

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Width:

Foreign Field: [Edit](#) ?

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value
<input type="checkbox"/>	onclick	import_usertypes_change(this.value); import_usertype
<input type="checkbox"/>	onclick	return check_corrective_action() check_corrective
<input type="checkbox"/>	onclick	return CancelAndRedirect() CancelAndRedire
<input type="checkbox"/>	onclick	return check_corrective_action_CF() check_corrective
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value); Get_Problem_De

Priority:

Help Tooltip: **Tooltip With Image Icon**

Default Value: ?

Event Name: ?

Function Name: ?

Sample Approved By

This is another foreign field like the assign sample above.

ID	Type name	Landing page
1	Administrator	/admin/home
2	Manager	/admin/home
3	User	/admin/home
4	Customer	/admin/home
5	Supplier	/admin/home
6	Subcontractor	/admin/home
13	Supervisor	/admin/home
14	HR Trainer	admin/home
15	Help	/admin/admin_programming_help
16	Junior Inspector	/admin/Inspection_details
17	Operations	/admin/home
18	Sales	/admin/home

Add/Edit Foreign Field

Insert Foreign Field

*Unique Name: sales

Table Name: users

Value Field: pk_users

Caption Fields:

- domain_name
- Title
- Department
- name
- is_active
- pfdoc
- allow_car_due_date

Caption String: [[name]]

Condition: fk_user_type in (15) and is_active=1

Order By: name

Default Option: Samples Approved by

Static Prefix Value List:

Static Prefix Caption List:

Static Suffix Value List:

Static Suffix Caption List:

Static Separator:

[Save](#)

Sales Approval Continued...

Edit Field

Field Name: rssalesperson

Save Field in Table?

Include In Export List?

* Caption:

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Width:

Foreign Field: [Edit](#) ?

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Footer Template: ?

Attributes: [Add New Attribute](#) ?

Operation's Fields

Date Samples Packaged

Add Field

*** Field Name:**

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type: ▾

Data Type: ▾

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Foreign Field: ▾ [Add New](#) ?

Grid Align: ▾ ?

Wrap Grid Cell Data? ▾

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedire
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_De

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?

Packaged by

This is a selectable foreign field off operations personnel only. Same as sample above in Sales Entries.

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Width:

Foreign Field: [Edit](#) ?

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

<input type="checkbox"/>	onclick	import_usertypes_change(this.value),	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des
<input type="checkbox"/>	onchange	Get_Problem_Description_CF(this.value);	Get_Problem_Des
<input type="checkbox"/>	onchange	Get_Problem_Description_NM(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?





Event Name: ?

Function Name: ?

Shipping Company

This is also a foreign field from the user's table and with the condition of Supplier – shipping only to display only shipping companies to select.

Record has been saved successfully.

New Sort By | Total Records: 13 |    

Items Per Page: 25

<input type="checkbox"/>	ID	Type name	Landing page
<input type="checkbox"/>	1	Administrator	/admin/home
<input type="checkbox"/>	2	Manager	/admin/home
<input type="checkbox"/>	3	User	/admin/home
<input type="checkbox"/>	4	Customer	/admin/home
<input type="checkbox"/>	5	Supplier	/admin/home
<input type="checkbox"/>	6	Subcontractor	/admin/home
<input type="checkbox"/>	13	Supervisor	/admin/home
<input type="checkbox"/>	14	HR Trainer	admin/honme
<input type="checkbox"/>	15	Help	/admin/admin_programming_help
<input type="checkbox"/>	16	Junior Inspector	/admin/inspection_details
<input type="checkbox"/>	17	Operations	/admin/home
<input type="checkbox"/>	18	Sales	/admin/home
<input type="checkbox"/>	19	Supplier Shipping	/admin/home

Add/Edit Foreign Field

Insert Foreign Field

*Unique Name:

Table Name:

Value Field:

Caption Fields:

- domain_name
- Title
- Department
- name
- is_active
- pfdoc
- allow_car_due_date

Caption String:

Condition:

Order By:

Default Option:

Static Prefix Value List:

Static Prefix Caption List:

Static Suffix Value List:

Static Suffix Caption List:

Static Separator:

[Save](#)

Shipping Company continued...

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required:

Is Unique?

Active Flag:

Control Type:

Data Type:

Max Length:

Validation String:

Mask String:

Width:

Foreign Field: [Add New](#)

Grid Align:

Wrap Grid Cell Data?

Grid Format:

Attributes: [Add New Attribute](#)

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon


Default Value:

Event Name:

Function Name:

Tracking Number

Add Field

 * **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width:

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	U
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes_
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_;
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirect
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_;
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

Comments

Add Field

* **Field Name:**

Save Field in Table?

Include In Export List?

* **Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

Max Length: ?

Validation String: ?

Mask String: ?

Width: **Height:**

Grid Align: ?

Wrap Grid Cell Data?

Grid Format: ?

Attributes: [Add New Attribute](#) ?

Select	Attribute Key	Attribute Value	
<input type="checkbox"/>	onclick	import_usertypes_change(this.value);	import_usertypes
<input type="checkbox"/>	onclick	return check_corrective_action()	check_corrective_
<input type="checkbox"/>	onclick	return CancelAndRedirect()	CancelAndRedirec
<input type="checkbox"/>	onclick	return check_corrective_action_CF()	check_corrective_
<input type="checkbox"/>	onchange	Get_Problem_Description_NCR(this.value);	Get_Problem_Des

Priority:

Help Tooltip:

Tooltip With Image Icon

Default Value: ?

Render in HTML?

Function Name: ?

Footer Template: ?

Archive

Creating the archive field is one step. Please note that additional work is required to actually archive the records. See How to Archive. The field name MUST ALWAYS BE archive_flag and the properties must be as shown below.

Edit Field

Field Name: archive_flag

Save Field in Table?

Include In Export List?

*** Caption:**

Required: ?

Is Unique? ?

Active Flag: ?

Control Type:

Data Type:

AutoPostBack:

Validation String: ?

Mask String: ?

Caption Left Align **Caption Right Align** **No Caption**

Grid Align:

Wrap Grid Cell Data?

Grid Format: ?

Priority:

Help Tooltip:
 Tooltip With Image Icon

Default Value: ?

Event Name: ?

Function Name: ?




Footer Template: ?

Attributes: [Add New Attribute](#) ?

Field Priority Example

We can verify the priority numbers that we entered in creating each field by ensuring that the fields are in the proper order on the left side of the field module (Select Table). If one or more are not in the correct order you can edit the fields and correct them. Also note the unique field numbers are displayed here as well with the field caption (not the field name). If you are maintaining notes, it is good to have the field name with the caption and number for future references that will come in handy when creating input forms, report forms and such.

Select Table:
Request_Samples

New Rename Delete

Track Changes

Fields List:

[Updated By \(2066\)](#)
[Updated Date \(2067\)](#)
[Created By \(2068\)](#)
[Created Date \(2069\)](#)
[Date Requested \(2070\)](#)
[Enter Date Sample Required \(2073\)](#)
[Product Code \(2071\)](#)
[Enter Company Name \(2072\)](#)
[Enter Your Name \(2074\)](#)
[Enter E-Mail \(2075\)](#)
[Street Address \(2076\)](#)
[City \(2077\)](#)
[State \(2078\)](#)
[Zip \(Postal\) Code \(2080\)](#)
[If your real complete Captcha \(2079\)](#)
[Date Sales Review \(2081\)](#)
[Approve Sample Request? \(2082\)](#)
[Assign Sample To \(2083\)](#)
[Sales Person \(2084\)](#)
[Date Sample Packaged \(2085\)](#)
[Packaged By \(2086\)](#)
[Shipping Company \(2087\)](#)
[Tracking Number \(2088\)](#)
[Comments \(2089\)](#)
[Archive Flag \(2097\)](#)

Creating the User Table

Portal User Table

The next step to completing our sample database system as planned earlier is to create a User Control and Page for the Portal. Go to Administration, Site Management and then User Controls. This module defaults to the “Add New Control” option at the top.

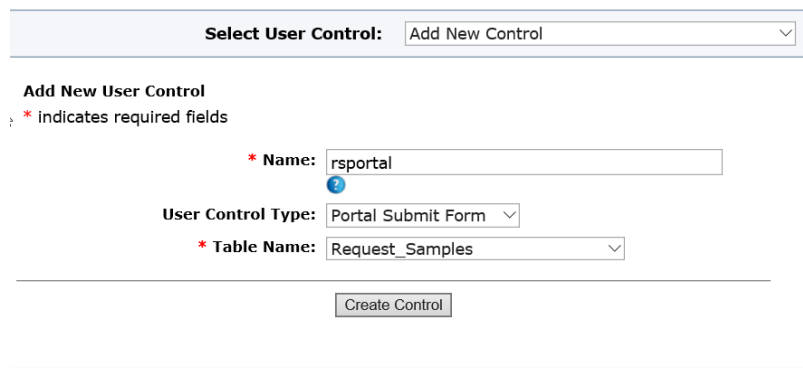


Select User Control: Add New Control

Below we can complete the User Control name. If we were to make only one user control, we would normally name it the same name as the table, so it is not confusing. However, in this example, we will be making multiple user controls, so we need to differentiate between them. Below is a suggestion:

- User Control for Portal: rsportal
- User Control for Sales: rssaes
- User Control for Operations: rsoperations

Enter the name for the portal and select “Portal Submit Form” in the User Control Type and finally select the table to submit the information which is “Request_Samples”. Finally click “Create Control”.



Select User Control: Add New Control

Add New User Control
* Indicates required fields

* Name: rsportal

User Control Type: Portal Submit Form

* Table Name: Request_Samples

Create Control

Portal WARNING:

Once a portal is created for the first time, the link to your system will be changed. When we set-up CIS on a unique IP address for you we provide you with a default link such as:
<http://companyABC.continuousimprovementsoftware.com>.

However, once we create a portal then there may be multiple pages to link to and the default link is disabled automatically once a Portal is created. Therefore the link to login to the system would be changed by adding a forward slash and login after the original link such as:
<http://companyABC.continuousimprovementsoftware.com/login>.

Please take note of this so to advise all personnel before you add a Portal so that they can access your CIS system and login.

The new control will be displayed as follows:

The screenshot shows a configuration window for a user control named 'rsportal'. The window has a title bar with a mouse cursor icon and a dropdown menu for 'Select User Control:' set to 'rsportal'. Below the title bar are four tabs: 'Common Property', 'List/Grid View Property', 'Add/Edit/Form View Property', and 'Hide/Show Fields'. The 'Common Property' tab is active, showing fields for 'Name' (rsportal), 'User Control Type' (Portal Submit Form), 'Table Name' (Request_Samples), 'Condition', and 'Order By'. On the right side, there are six rows of dropdown menus for 'Inserting Method', 'Inserted Method', 'Updating Method', 'Updated Method', 'Deleting Method', and 'Deleted Method', all set to 'none'. Each dropdown has a green plus icon and a blue pencil icon. Below these are radio buttons for 'Login Required', 'Login Not Required', and 'Hide After Login'. The 'Login Not Required' option is selected. A 'Remove AJAX' checkbox is checked and highlighted with a red box. Below it is a 'JS Content' text area. At the bottom right, there is a 'Select Module' dropdown and a note: 'Please make sure if you want to change module for usercontrol because it may change whole permission.' An 'Update' button is at the bottom center.

Since this is a Portal then we can almost leave it as is for the moment since we can try the default input form and we do not need to check Login Required. We only check the box marked Remove AJAX.

A portal will have no need for an edit form, filters and/or any grid displays since it is only an input form to add a record. Once we create the page we can see if we are happy with the default input form. Otherwise we can customize it later. So, the next step would be to select the fields to hide in the insert and show only those fields that we want the customer to complete as per our plan above.

Basically, **we will hide** in Insert the following fields and they all **must not be required fields** in order to hide them otherwise the record would never save.

- Updated by
- Update date
- Created by
- Created date
- Date Reviewed
- Approve Sample Request
- Sales Approval
- Assign Sample to
- Date Samples packaged and shipped
- Packaged By
- Shipping Company
- Tracking Number
- Comments
- Archive Record

Select User Control:

Common Property	List/Grid View Property	Add/Edit/Form View Property	Hide/Show Fields
Hide In Insert: <input type="checkbox"/> State (2319) <input type="checkbox"/> Zip (Postal) Code (2320) <input type="checkbox"/> If you are Real Enter Captcha (2321) <input checked="" type="checkbox"/> Date Sales Reviewed Request (2322)	<input type="checkbox"/> Street Address (2317) <input type="checkbox"/> City (2318)	<input checked="" type="checkbox"/> Assign sample to (2324) <input checked="" type="checkbox"/> Sales Person (2325) <input checked="" type="checkbox"/> Date Sample Packaged (2326)	Hide In Item: <input type="checkbox"/> Updated By (2305) <input type="checkbox"/> Updated Date (2306) <input type="checkbox"/> Created By (2307) <input type="checkbox"/> Created Date (2308)
Hide In Save: <input type="checkbox"/> Updated By (2305) <input type="checkbox"/> Updated Date (2306) <input type="checkbox"/> Created By (2307) <input type="checkbox"/> Created Date (2308)	<input type="checkbox"/> Date Requested (2311) <input type="checkbox"/> Date Sample Required (2312) <input type="checkbox"/> Product Code (2313) <input type="checkbox"/> Customer Name (2314)	<input type="checkbox"/> Enter Your Name <input type="checkbox"/> Enter E-mail	Show In Export: <input checked="" type="checkbox"/> Updated By (2305) <input checked="" type="checkbox"/> Updated Date (2306) <input checked="" type="checkbox"/> Created By (2307) <input checked="" type="checkbox"/> Created Date (2308)
Hide In Edit: <input type="checkbox"/> Updated By (2305) <input type="checkbox"/> Updated Date (2306) <input type="checkbox"/> Created By (2307) <input type="checkbox"/> Created Date (2308)	<input type="checkbox"/> Date Requested (2311) <input type="checkbox"/> Date Sample Required (2312) <input type="checkbox"/> Product Code (2313) <input type="checkbox"/> Customer Name (2314)	<input type="checkbox"/> Enter Your Name <input type="checkbox"/> Enter E-mail	Sort In Sort By: <input checked="" type="checkbox"/> Updated By (2305) <input checked="" type="checkbox"/> Updated Date (2306) <input checked="" type="checkbox"/> Created By (2307)

Remember to update these changes to the user control.

Regular User Table

Now that the Portal User Table is completed, we can create the other two tables, one for the sales personnel and another for operations.

- User Control for Portal: rsportal
- User Control for Sales: rssaes
- User Control for Operations: rsoperations

When creating the new User Control, we would give the user control a name and choose the "Autointerface" control type and select the table Request_Samples.

Sample Picture of rssaes User Control

Add New User Control

* indicates required fields

* Name:

User Control Type:

* Table Name:

Once completed we must select Login required and Remove AJAX for both sales and operations.

The screenshot shows the configuration interface for a user control named 'rssales'. At the top, 'Select User Control:' is set to 'rssales'. Below this are four tabs: 'Common Property', 'List/Grid View Property', 'Add/Edit/Form View Property', and 'Hide/Show Fields'. The 'Add/Edit/Form View Property' tab is active. On the left, there are fields for 'Name' (rssales), 'User Control Type' (AutoInterface), 'Table Name' (request_samples), 'Condition', and 'Order By' (rsdaterequested desc). On the right, there are dropdown menus for 'Inserting Method', 'Inserted Method', 'Updating Method', 'Updated Method', 'Deleting Method', and 'Deleted Method', all set to 'none'. Below these are radio buttons for 'Login Required' (selected), 'Login Not Required', and 'Hide After Login'. Under 'Login Required', there are checkboxes for various user types: Administrator, Company Administrator, Customer, HR Assistant, HR Consultant, Manager, Operations, Receiving Inspector, Sales Person, Subcontractor, Supervisor, and Supplier. Below these are sections for 'Allow Add for:', 'Allow Edit for:', 'Allow Delete for:', and 'Allow Programming for:', each with the same set of checkboxes. On the right side of the configuration, there is a 'Remove AJAX:' checkbox (checked) and a 'JS Content:' text area. Below that is a 'Select Module:' dropdown menu. At the bottom center, there is an 'Update' button.

Insert/Edit Forms

The first thing we would want to do is create a custom input and edit form for both user controls (sales and operations).

Therefore, we should refer to our plan and make a few decisions:

1. Do we want the sales personnel to be able to edit the data that the customers entered? We could have the data displayed but not able to edit. For this example, we will not allow editing of the customer's data.
2. Can sales enter data on behalf of a customer? If yes, then they need all fields accessible in the add form.
3. Do we want the sales personnel to be able to edit the data that the operations entered? We could have the data displayed but not able to edit. For this example, we will not allow editing of the operation's data. Keep in mind that since we will make the field display the data entered only, then there will be no data entered in the operation's fields until operations has entered it. But the advantage is that if the sales wants to refer to the record or review it they will see the operation's entries. For this example, we will not allow editing of the operation's data.

In the User Control we select Add/Edit/Form View Property and then select the insert template first. Since in the insert template only those fields up to operation's review need to be added. We can get

creative by adding a table with four columns and many rows to create a fancy form or we could keep it simple. For the insert, we will create a simple custom form and a more complex one for the edit.

NOTE: When creating User Controls, you may not see the controls that you just created until you refresh that module. To refresh just click on another module such as documentation then go back to User Controls to see the modules you just created.

Insert Form Creation

Check - Custom Form Item Template then click Load System Item Template. CIS will automatically create an insert form as follows (Fields in order of priority set in Fields Table). Remember to click update.

Item Template
Insert Template
Edit Template

Enter Title:

Enter Image Path For Insert Button: ... Hide Insert Button

Custom Form Insert Template Load System Item Template

Home
Insert

html			A	A ²		A ²	H								
			B	<i>I</i>	<u>U</u>										

((updated_by:2066))	[[updated_by:2066]]
((updated_date:2067))	[[updated_date:2067]]
((created_by:2068))	[[created_by:2068]]
((created_date:2069))	[[created_date:2069]]
((rsdaterequested:2070))	[[rsdaterequested:2070]]
((rsdaterequired:2073))	[[rsdaterequired:2073]]
((RS_Product_Code:2071))	[[RS_Product_Code:2071]]
((rscustomername:2072))	[[rscustomername:2072]]
((rscontact:2074))	[[rscontact:2074]]

Update

At this point it is best to get familiar with the HTML code because afterwards we may need to work with it. It is also used to troubleshoot.

Standard View	HTML Code View
((updated_by:2066))	Continued...
[[updated_by:2066]]	<td
((updated_date:2067))	class="FrmCaption">((RS_Product_Code:2071))</td>
[[updated_date:2067]]	<td
((created_by:2068))	class="FrmInput">[[RS_Product_Code:2071]]</td>
[[created_by:2068]]	</tr>
((created_date:2069))	<tr>
[[created_date:2069]]	<td
((rsdaterequested:2070))	class="FrmCaption">((rscustomername:2072))</td>
[[rsdaterequested:2070]]	<td
((rsdaterequired:2073))	class="FrmInput">[[rscustomername:2072]]</td>
[[rsdaterequired:2073]]	</tr>
((RS_Product_Code:2071))	<tr>
[[RS_Product_Code:2071]]	<td class="FrmCaption">((rscontact:2074))</td>
((rscustomername:2072))	<td
[[rscustomername:2072]]	class="FrmInput">[[rscontact:2074]]</td>
((rscontact:2074))	</tr>
[[rscontact:2074]]	<tr>
((rsemail:2075))	<td class="FrmCaption">((rsemail:2075))</td>
[[rsemail:2075]]	<td class="FrmInput">[[rsemail:2075]]</td>
((rsstreet:2076))	</tr>
[[rsstreet:2076]]	<tr>
((rscity:2077))	<td class="FrmCaption">((rsstate:2078))</td>
[[rscity:2077]]	<td class="FrmInput">[[rsstate:2078]]</td>
((rsstate:2078))	</tr>
[[rsstate:2078]]	<tr>
((rszip:2080))	<td class="FrmCaption">((rszip:2080))</td>
[[rszip:2080]]	<td class="FrmInput">[[rszip:2080]]</td>
((rscaptcha:2079))	</tr>
[[rscaptcha:2079]]	<tr>
((rsdatereviewed:2081))	<td class="FrmCaption">((rsdatereviewed:2081))</td>
[[rsdatereviewed:2081]]	<td class="FrmInput">[[rsdatereviewed:2081]]</td>
((rssiapproval:2082))	</tr>
[[rssiapproval:2082]]	<tr>
((rsoperations:2083))	<td class="FrmCaption">((rsoperations:2083))</td>
[[rsoperations:2083]]	<td class="FrmInput">[[rsoperations:2083]]</td>
((rssiapproval:2084))	</tr>
[[rssiapproval:2084]]	<tr>
((rsdatepackaged:2085))	<td class="FrmCaption">((rsdatepackaged:2085))</td>
[[rsdatepackaged:2085]]	<td class="FrmInput">[[rsdatepackaged:2085]]</td>
((rspackageby:2086))	</tr>
[[rspackageby:2086]]	<tr>
((rsshippingcompany:2087))	<td class="FrmCaption">((rsshippingcompany:2087))</td>
[[rsshippingcompany:2087]]	<td class="FrmInput">[[rsshippingcompany:2087]]</td>
((rstrackingnumber:2088))	</tr>
[[rstrackingnumber:2088]]	<tr>
((rscomments:2089))	<td class="FrmCaption">((rscomments:2089))</td>
[[rscomments:2089]]	<td class="FrmInput">[[rscomments:2089]]</td>
((archive_flag:2097))	</tr>
[[archive_flag:2097]]	<tr>Continues...

The HTML Code is important since often when we revise or modify the insert or edit forms using the online editor the proper html code may not always be applied correctly. The following are some important areas to look at when the form is not working properly.

FrmCaption followed by the field name and field number will display the Field's Caption in Bold font.

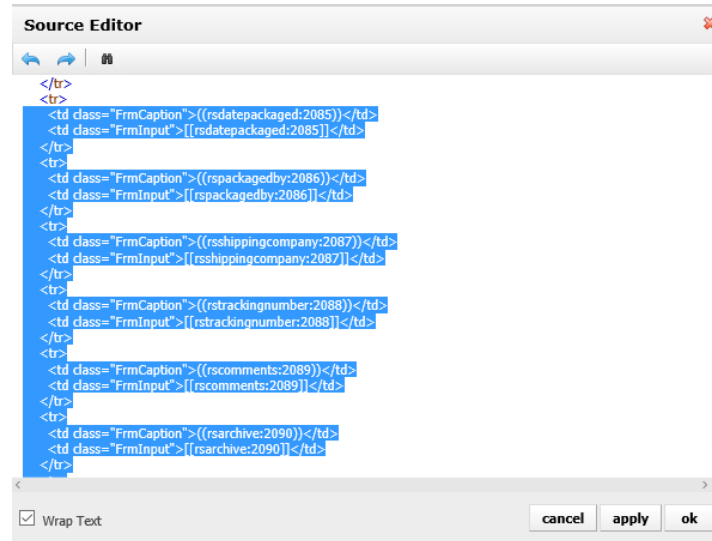
FrmInput followed by the field name and field number will display the field data to be entered or edited.

However, if we want the field data to be displayed and that the user cannot edit the data, we can place an equal sign in front of the field name such as seen below:

```
<td class="FrmCaption">((rscustomername:2072))</td>
<td class="FrmInput">[[=rscustomername:2072]]</td>
```

Therefore, we will remove the operation's fields from the insert template since when sales add a record, they do not need to see the subsequent fields for operations.

We shall delete the HTML Code by placing the cursor at the beginning of the code to be deleted then holding down the shift key we click at the end of the code to be deleted, then delete. Then click apply and ok.



```
Source Editor
</tr>
<tr>
<td class="FrmCaption">{{rsdatepackaged:2085}}</td>
<td class="FrmInput">[[rsdatepackaged:2085]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rspackagedby:2086}}</td>
<td class="FrmInput">[[rspackagedby:2086]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rsshippingcompany:2087}}</td>
<td class="FrmInput">[[rsshippingcompany:2087]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rstrackingnumber:2088}}</td>
<td class="FrmInput">[[rstrackingnumber:2088]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rscomments:2089}}</td>
<td class="FrmInput">[[rscomments:2089]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rsarchive:2090}}</td>
<td class="FrmInput">[[rsarchive:2090]]</td>
</tr>
 Wrap Text
cancel apply ok
```

We also want to delete the first four fields that are used for tracking entries and the captcha filed since it will not work with login and is intended for portal.



```
Source Editor
<table align="center" border="0" cellspacing="0" cellpadding="0">
<tbody>
<tr>
<td class="FrmCaption">{{updated_by:2066}}</td>
<td class="FrmInput">[[updated_by:2066]]</td>
</tr>
<tr>
<td class="FrmCaption">{{updated_date:2067}}</td>
<td class="FrmInput">[[updated_date:2067]]</td>
</tr>
<tr>
<td class="FrmCaption">{{created_by:2068}}</td>
<td class="FrmInput">[[created_by:2068]]</td>
</tr>
<tr>
<td class="FrmCaption">{{created_date:2069}}</td>
<td class="FrmInput">[[created_date:2069]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rsdaterequested:2070}}</td>
<td class="FrmInput">[[rsdaterequested:2070]]</td>
</tr>
<tr>
<td class="FrmCaption">{{rsdaterequired:2073}}</td>
<td class="FrmInput">[[rsdaterequired:2073]]</td>
</tr>
</tbody>
</table>
```

At this point our insert template looks like this and the yellow highlighted fields are the required fields.

((rsdaterequested:2070))	[[rsdaterequested:2070]]
((rsdaterequired:2073))	[[rsdaterequired:2073]]
((RS_Product_Code:2071))	[[RS_Product_Code:2071]]
((rscustomername:2072))	[[=rscustomername:2072]]
((rscontact:2074))	[[rscontact:2074]]
((rsemail:2075))	[[rsemail:2075]]
((rsstreet:2076))	[[rsstreet:2076]]
((rscity:2077))	[[rscity:2077]]
((rsstate:2078))	[[rsstate:2078]]
((rszip:2080))	[[rszip:2080]]
((rsdatereviewed:2081))	[[rsdatereviewed:2081]]
((rssalesapproval:2082))	[[rssalesapproval:2082]]
((rsoperations:2083))	[[rsoperations:2083]]
((rssalesperson:2084))	[[rssalesperson:2084]]

Note: In order to see the actual add record input form as seen above, it was necessary to create the page and insert the user control which is the next step (see pages).

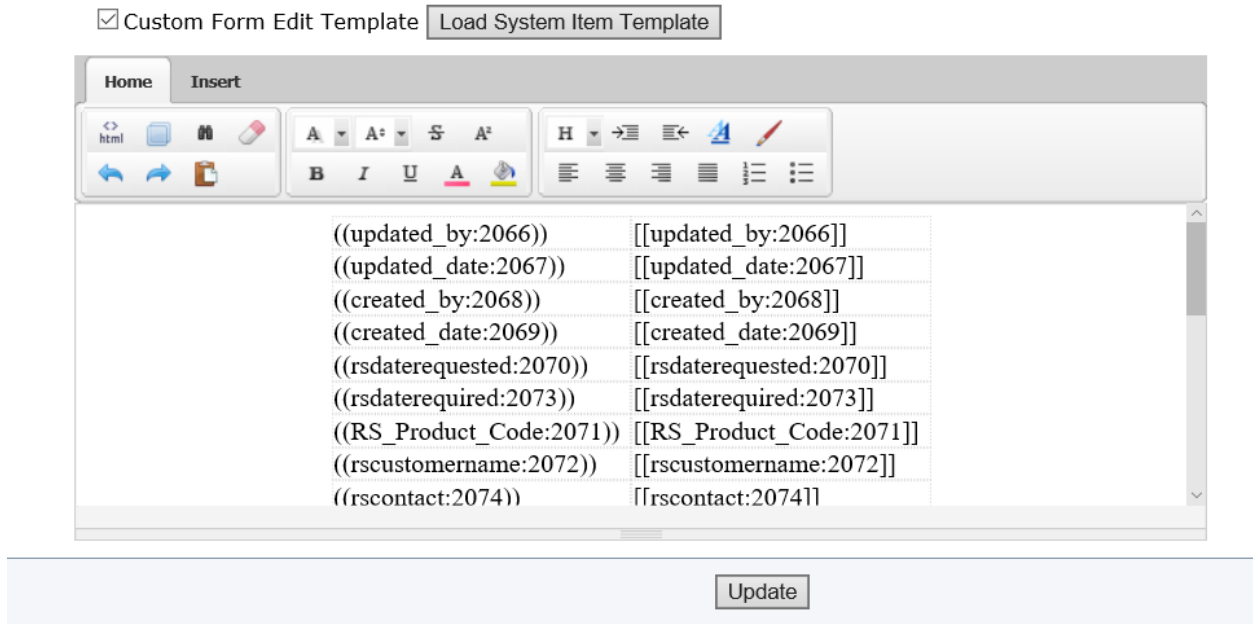
The Operations should not have an insert form. Therefore, select hide insert button for operations. They would only need an edit form.

The User Edit Form Using CIS Editing Tools

To create the edit form for sales we would click on the Administration/Site Management/User Controls and select the user control rssales. Then select Add/Edit/Form View Property and finally click on edit template.

In this example we shall create a custom edit form that is fancier than the previous insert template form. This will require more work but may be more suitable or eye friendly.

Click the Custom Form Template and then Load System Item Template and CIS will load the template.

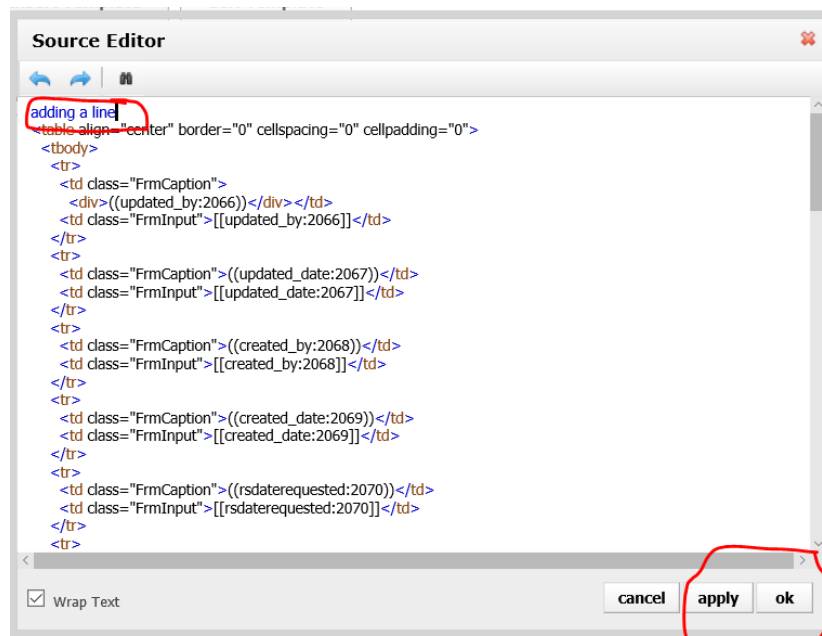


There are many options on how to best edit these templates and some may be preferable depending on your comfort level with HTML Code.

The following is a simple plan, but we prefer to use Microsoft Word.

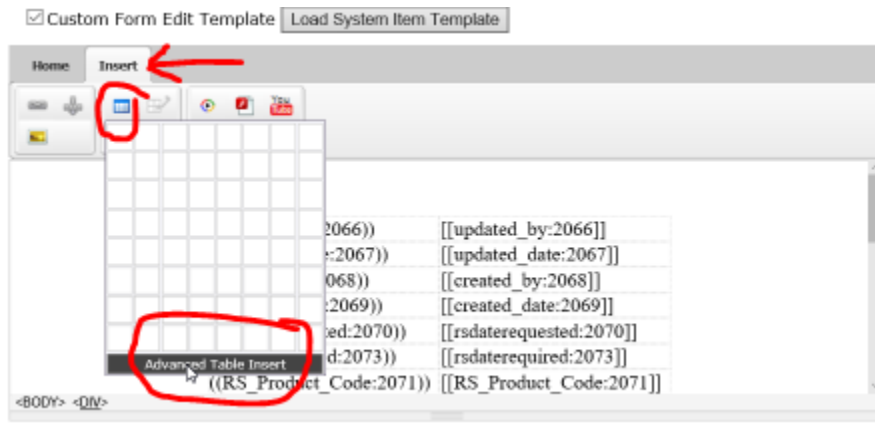
Using the CIS editing tool, the first step is to push the table down so that we can add our own table above and make four columns instead of two. Since we cannot get the cursor above the table that was created what we need to do is add a line in the html code to free a cursor space.

Click on html<> and then a line on top such as “**adding a line**” then press enter, apply and ok.

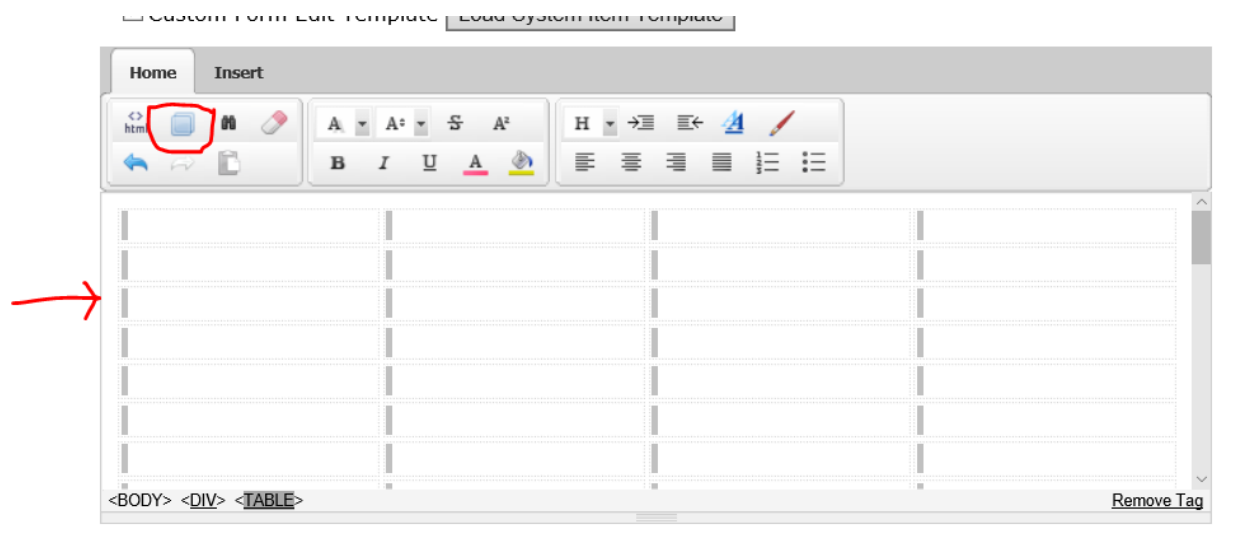


This frees a line for us to add our own table. What we will do is create our own table then put the fields and captions where we want and then finally delete the table that CIS added. We will add a table with 22 rows and four columns. If there are too many rows, they can be deleted easier than adding rows.

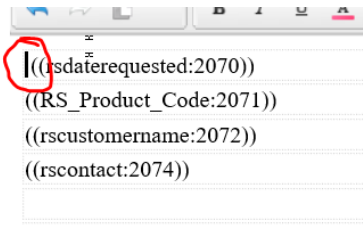
Place the cursor above the table as in the picture below and select Insert then table then advanced options on the bottom of the squares:



Then we can select the columns and rows that we want. Also notice that there are many other options such as spacing, padding, borders and so on. Once we have the table settings the way we want we can select insert and then the table is inserted above the original. At this point it is best to work full screen.



Now that we have a full screen, we can move fields and captions to where we want by highlighting them and moving them by left click, hold and drag to the cell that we desire. Be careful when highlighting and moving that there is no blank space in front or behind the fields or captions.



Notice below how we used multiple colors and spacing to differentiate the different input departments. But there are extra cells and the original cells remaining from the template.

The best way to clean this up is in the HTML. See code on following page. Since we want to delete the empty cells and the old template that CIS inserted, we will highlight these areas in the html and delete. These are shown highlighted on the following pages.


```

<div>
<table style="width:100%;">
<tbody>
<tr>
<td style="vertical-align:top"><font color="#0000cd"> ((rsdaterequested:2070))</font></td>
<td style=""><font color="#0000cd">[[rsdaterequested:2070]]</font></td>
<td style="vertical-align:top"><font color="#0000cd">((rsdaterequired:2073))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rsdaterequired:2073]]</font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((RS_Product_Code:2071))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[RS_Product_Code:2071]]</font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
<td style="vertical-align:top"></td>
</tr>
<tr>
<td style=""><font color="#0000cd">((rscustomername:2072))</font></td>
<td style=""><font color="#0000cd">[[rscustomername:2072]]</font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((rscontact:2074))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rscontact:2074]]</font></td>
<td style="vertical-align:top"><font color="#0000cd">((rsemail:2075))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rsemail:2075]]</font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((rsstreet:2076))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rsstreet:2076]]</font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((rscity:2077))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rscity:2077]]</font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((rsstate:2078))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rsstate:2078]]</font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
<td style="vertical-align:top"><font color="#0000cd"> </font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#0000cd">((rszip:2080))</font></td>
<td style="vertical-align:top"><font color="#0000cd">[[rszip:2080]]</font></td>
<td style="vertical-align:top"></td>
<td style="vertical-align:top"></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#800000"></font></td>
<td style="vertical-align:top"><font color="#800000"></font></td>
<td style="vertical-align:top"><font color="#800000"></font></td>
<td style="vertical-align:top"><font color="#800000"></font></td>
</tr>
<tr>
<td style=""><font color="#800000">((rsdatereviewed:2081))</font></td>
<td style=""><font color="#800000">[[rsdatereviewed:2081]]</font></td>
<td style=""><font color="#800000">((rssiapproval:2082))</font></td>
<td style=""><font color="#800000">[[rssiapproval:2082]]</font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#800000">((rsoperations:2083))</font></td>
<td style="vertical-align:top"><font color="#800000">[[rsoperations:2083]]</font></td>
<td style="vertical-align:top"><font color="#800000">((rssiapproval:2084))</font></td>
<td style=""><font color="#800000">[[rssiapproval:2084]]</font></td>
</tr>
<tr>
<td style="vertical-align:top"><font color="#006400"></font></td>

```



```

<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption"></td>
<td class="FrmInput"></td>
</tr>
<tr>
<td class="FrmCaption">((rscomments:2089))</td>
<td class="FrmInput">[[rscomments:2089]]</td>
</tr>
<tr>
<td class="FrmCaption">((rsarchive:2090))</td>
<td class="FrmInput">[[archive_flag:2097]]</td>
</tr>
</tr>
</tr>
</tbody>
</table>

```

Once applied and saved we are left with the following:




The last things to consider is if we want some data to be un-editable by the sales people. In case it should be the operations data and we will add an equal sign in from of the data field.



```


((rsdatereviewed:2081)) [[rsdatereviewed:2081]] ((rssiapproval:2082)) [[rssiapproval:2082]]
((rsoperations:2083)) [[rsoperations:2083]] ((rssiapproval:2082)) [[rssiapproval:2082]]
((rsdatepackaged:2085)) [[rsdatepackaged:2085]] ((rsoperations:2084)) [[rsoperations:2084]]
((rsshippingcompany:2087)) [[rsshippingcompany:2087]] ((rsdatepackaged:2085)) [[rsdatepackaged:2085]]

```

Finally, since comments can be large, we can add the comment field under the table and do not forget to click update:


Updated Message: 

Pre-Render Method:  

Enter Image Path For Cancel Button:  Hide Cancel Button

Item Template Insert Template Edit Template

Enter Title:

Enter Image Path For Update Button:  Hide Update Button

Custom Form Edit Template

Home Insert

Undo Redo Text B I U Color Align Indent Outdent Table Link Image






((rsdaterequested:2070))	[[rsdaterequested:2070]]	((rsdaterequired:2073))	[[rsdaterequired:2073]]
((RS_Product_Code:2071))	[[RS_Product_Code:2071]]		
((rscustomername:2072))	[[rscustomername:2072]]		
((rscontact:2074))	[[rscontact:2074]]	((rsemail:2075))	[[rsemail:2075]]
((rsstreet:2076))	[[rsstreet:2076]]		
((rscity:2077))	[[rscity:2077]]		
((rsstate:2078))	[[rsstate:2078]]		
((rszip:2080))	[[rszip:2080]]		
((rsdateviewed:2081))	[[rsdateviewed:2081]]	((rssalesapproval:2082))	[[rssalesapproval:2082]]
((rsoperations:2083))	[[rsoperations:2083]]	((rssalesperson:2084))	[[rssalesperson:2084]]
((rsdatepackaged:2085))	[[rsdatepackaged:2085]]	((rspackagedby:2086))	[[rspackagedby:2086]]
((rsshippingcompany:2087))	[[rsshippingcompany:2087]]	((rstrackingnumber:2088))	[[rstrackingnumber:2088]]
((rscomments:2089)): [[rscomments:2089]]			

< BODY > < DIV >

Once completed, we can have a look at it to see if it needs any adjustments.

Edit Record

* Indicates required field

* Date Requested:	<input type="text" value="02/22/2016"/>	* Enter Date Sample Required:	<input type="text" value="02/23/2016"/>
			
* Product Code:	<input type="text" value="/Manuals Print 588"/>		
* Enter Company Name:	<input type="text" value="TQMS"/>		
* Enter Your Name:	<input type="text" value="Peter Sanderson"/>	* Enter E-Mail:	<input type="text" value="peter.sanderson@outlook.com"/>
* Street Address:	<input type="text" value="616 Loucks Dr."/>		
* City:	<input type="text" value="Russell"/>		
* State:	<input type="text" value="Ontario"/>		
* Zip (Postal) Code:	<input type="text" value="K4R1B7"/>		
Date Sales Review:	<input type="text" value="02/22/2016"/>	Approve Sample Request?:	<input checked="" type="checkbox"/> Sample Approved - Check Box
			
Assign Sample To:	<input type="text" value="Gary Ehrlick"/>	Sales Person:	<input type="text" value="Mike Fritz"/>
			
Date Sample Packaged:		Packaged By:	
Shipping Company:		Tracking Number:	
Comments::			
Save	Cancel		

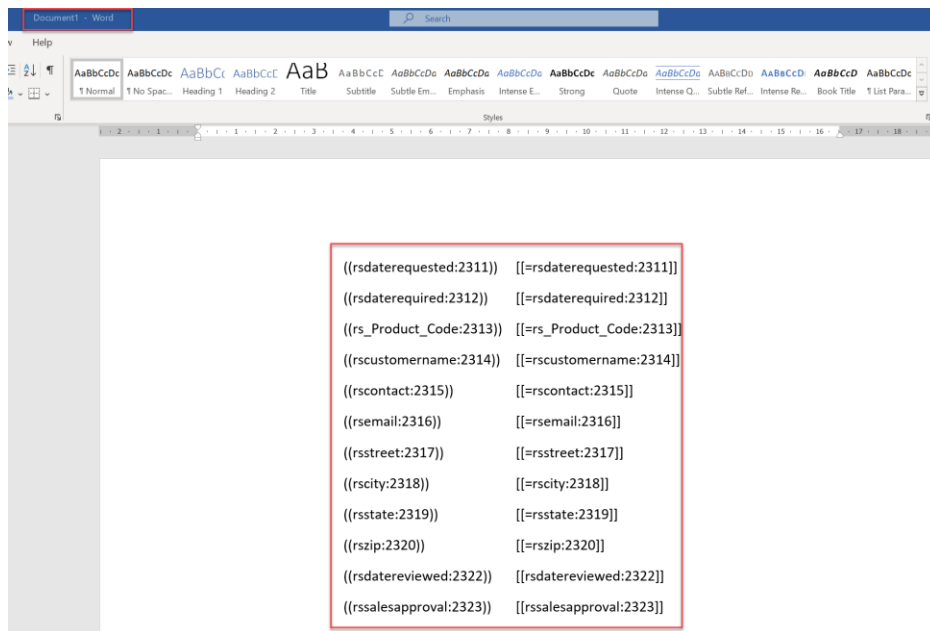
The User Edit Form Using Microsoft Word

The first thing to do is copy the complete list of fields and captions from the default edit screen and paste it into a word document. Often it is easier to do this when working with two screens. One word screen may have the Fields and Field Captions and the other screen may have a new Word Document to be used to create the form.

Field Caption: `{{rsdaterequested:2311}}`

Field to be edited: `[[rsdaterequested:2311]]`

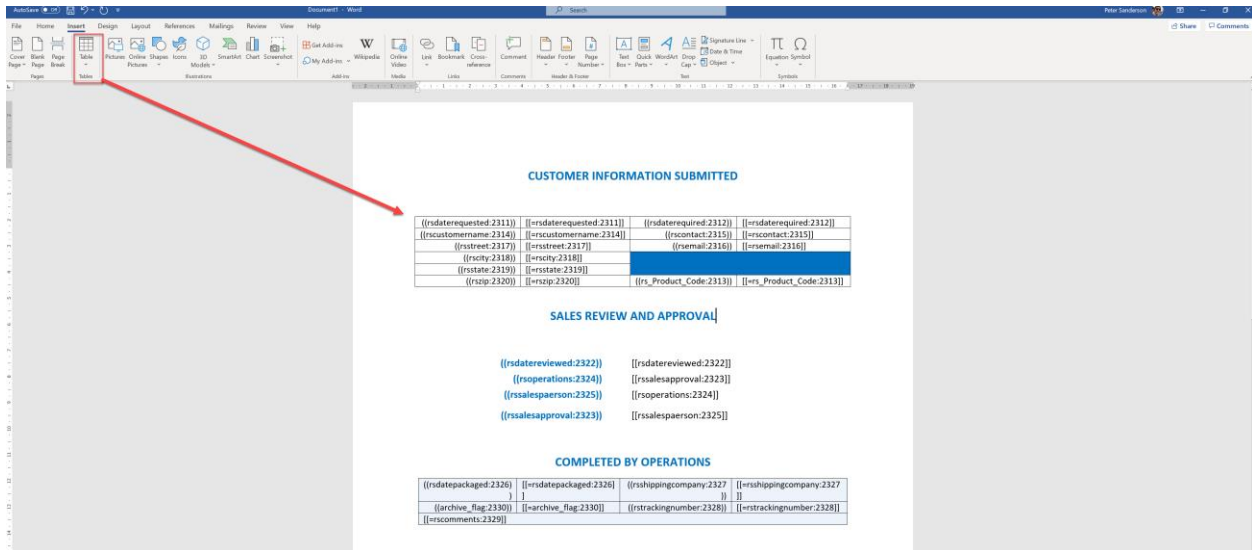
Field to be displayed only: `[[=rsdaterequested:2311]]`



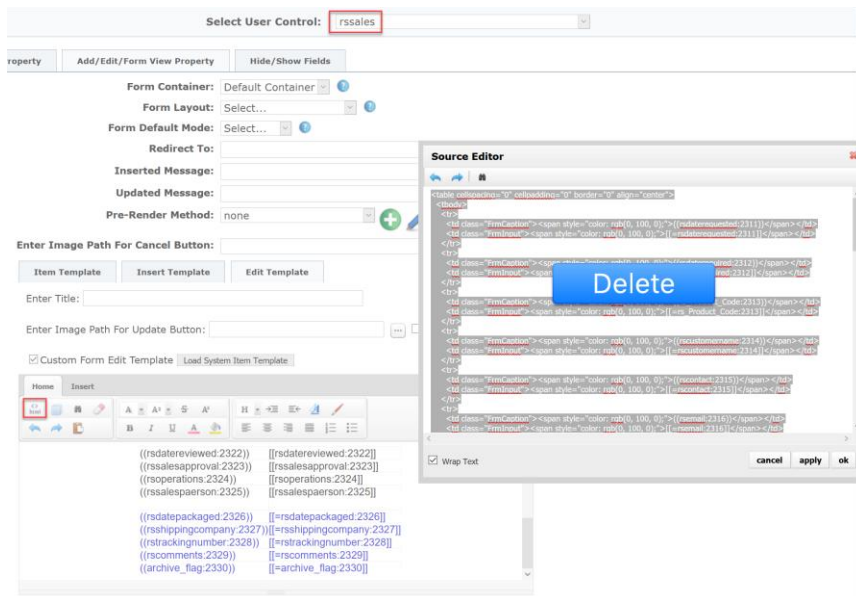
Now that we have a list of all the field captions and fields, we can design the form anyway we want using the tools of Microsoft Word.

CUSTOMER INFORMATION SUBMITTED

<code>((rsdaterequested:2311))</code>	<code>[[=rsdaterequested:2311]]</code>	<code>((rsdaterequired:2312))</code>	<code>[[rsdaterequired:2312]]</code>
<code>((rscustomername:2314))</code>	<code>[[=rscustomername:2314]]</code>	<code>((rscontact:2315))</code>	<code>[[rscontact:2315]]</code>
<code>((rsstreet:2317))</code>	<code>[[=rsstreet:2317]]</code>	<code>((rsemail:2316))</code>	<code>[[=rsemail:2316]]</code>
<code>((rscity:2318))</code>	<code>[[=rscity:2318]]</code>		
<code>((rsstate:2319))</code>	<code>[[=rsstate:2319]]</code>		
<code>((rszip:2320))</code>	<code>[[=rszip:2320]]</code>	<code>((rs_Product_Code:2313))</code>	<code>[[rs_Product_Code:2313]]</code>



Once we have completed our design, we go back to the CIS edit form and delete ALL the HTML AND APPLY. This will leave a blank edit box. **REMEMBER TO COPY THE ORIGINAL HTML IN THE CASE THERE IS AN ERROR.**



Then we simply copy the word file by highlighting all the form and then paste it into the edit box of the Form Edit (NOT THE HTML BOX).

HIGHLIGHT AND COPY

CUSTOMER INFORMATION SUBMITTED

[[rsdaterequested:2311]]	[[rsdaterequested:2311]]	[[rsdaterequired:2312]]	[[rsdaterequired:2312]]
[[rscustomername:2314]]	[[rscustomername:2314]]	[[rscontact:2315]]	[[rscontact:2315]]
[[rsstreet:2317]]	[[rsstreet:2317]]	[[rsemail:2316]]	[[rsemail:2316]]
[[rscity:2318]]	[[rscity:2318]]		
[[rsstate:2319]]	[[rsstate:2319]]		
[[rszip:2320]]	[[rszip:2320]]	[[rs_Product_Code:2313]]	[[rs_Product_Code:2313]]

SALES REVIEW AND APPROVAL

[[rsdatereviewed:2322]]	[[rsdatereviewed:2322]]
[[rsoperations:2324]]	[[rsoperations:2324]]
[[rssalespaerson:2325]]	[[rsoperations:2324]]
[[rssalesapproval:2323]]	[[rssalespaerson:2325]]

COMPLETED BY OPERATIONS

[[rsdatepackaged:2326]]	[[rsdatepackaged:2326]]	[[rsshippingcompany:2327]]	[[rsshippingcompany:2327]]
[[archive_flag:2330]]	[[archive_flag:2330]]	[[rstrackingnumber:2328]]	[[rstrackingnumber:2328]]
[[rscomments:2329]]			

Select User Control: rssales

Form Container: Default Container

Form Layout: Select...

Form Default Mode: Select...

Redirect To:

Inserted Message:

Updated Message:

Pre-Render Method: none

Enter Image Path For Cancel Button:

Item Template Insert Template Edit Template

Enter Title:

Enter Image Path For Update Button:

Custom Form Edit Template Load System Item Template

Home Insert

Paste Form Here

Once pasted in, don't forget to update.

Select User Control: rssales

Form Container: Default Container

Form Layout: Select...

Form Default Mode: Select...

Redirect To:

Inserted Message:

Updated Message:

Pre-Render Method: none

Enter Image Path For Cancel Button:

Item Template Insert Template **Edit Template**

Enter Title:

Enter Image Path For Update Button:

Custom Form Edit Template Load System Item Template

Home Insert


CUSTOMER INFORMATION SUBMITTED


[[rsdaterequested:2311]]	[[rsdaterequested:2311]]	[[rsdaterequired:2312]]	[[rsdaterequired:2312]]
[[rscustomername:2314]]	[[rscustomername:2314]]	[[rscontact:2315]]	[[rscontact:2315]]
[[rsstreet:2317]]	[[rsstreet:2317]]	[[rsemail:2316]]	[[rsemail:2316]]
[[rscity:2318]]	[[rscity:2318]]		
[[rsstate:2319]]	[[rsstate:2319]]		
[[rszip:2320]]	[[rszip:2320]]	[[rs_Product_Code:2313]]	[[rs_Product_Code:2313]]

<BODY> <P>

Update

The final edit form in CIS for the sales personnel will be as follows:



Welcome, **Prutha Admin - CIS Tester (Administrator)** 

Last Login: 02/14/2020 11:02:33

Home
Document Management
Quality Input Data
Accident/Incident
Reports And Graphs

Edit Record

* Indicates required field

* Date Requested:	Jun. 13, 2019	* Date Sample Required:	06/20/2019
* Customer Name:	Warehouse A	* Enter Your Name:	John Doe
* Street Address:	111345	* Enter E-mail:	peter.sanderson@outlook.com
* City:	1		
* State:	1		
* Zip (Postal) Code:	1	* Product Code:	SKU002: Fine Penicillium

SALES REVIEW AND APPROVAL

Date Sales Reviewed Request:

Assign sample to: Approve Sample Request?


Sales Person:

Approve Sample Request?:

COMPLETED BY OPERATIONS

Date Sample Packaged:	Jun. 13, 2019	Shipping Company:	UPS
Archive Flag:	0	Tracking Number:	458798

[Save](#) [Cancel](#)

 CIS 2020- Continuous Improvement Softwa

Common issues with Add/Edit Forms

Before calling for help, check the following:

- In the HTML View, verify spelling and spacing of all fields. Once an edit/add form is created and then an additional change is made, there often is an issue that can be seen in the HTML View.
- Extra code is sometimes added when using the simple word processing like interface, so it is always necessary to view the html code. The best way to determine if it is extra is to look at other lines and see if they are all consistent such as the highlighted example below:

```
<td><span style="color: rgb(0, 100, 0);">((rsdatepackaged:2085))</span></td>  
<td><span style="color: rgb(0, 100, 0);">[[=rsdatepackaged:2085]]</span></td>  
<td><span style="color: rgb(0, 100, 0);">((rspackagedby:2086))</span></td>  
<td><span style="color: rgb(0, 100, 0);">[[=rspackagedby:2086]]</span></td>
```

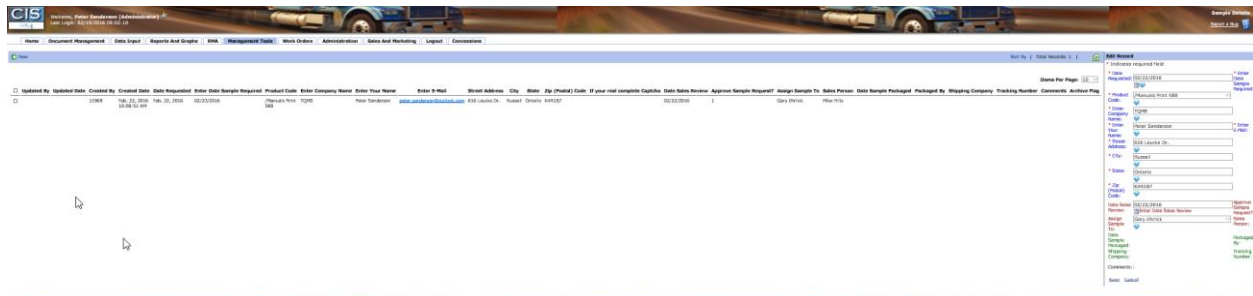
```
<td style="vertical-align:top"><span style="color: rgb(0, 100, 0);">((0000&^%rstrackingnumber:2088))00vnn</span></td>  
<td style="vertical-align:top"><span style="color: rgb(0, 100, 0);">[[=rstrackingnumber:2088]]
```

- Other issues are the field numbers are not correct.

Grid/List View Creation

Once the add/edit forms are created the grid view can be created as well. A custom grid and list view will enhance the usability, scrolling and appearance of your CIS System.

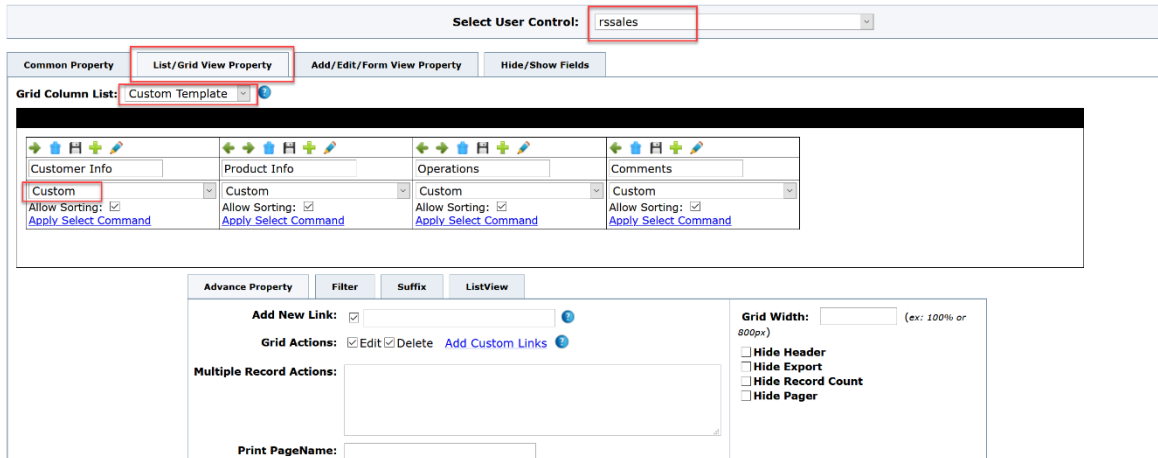
For example, the standard list view of the rssaes user tables will look like below and is not very user friendly and would require far too much right/left scrolling.



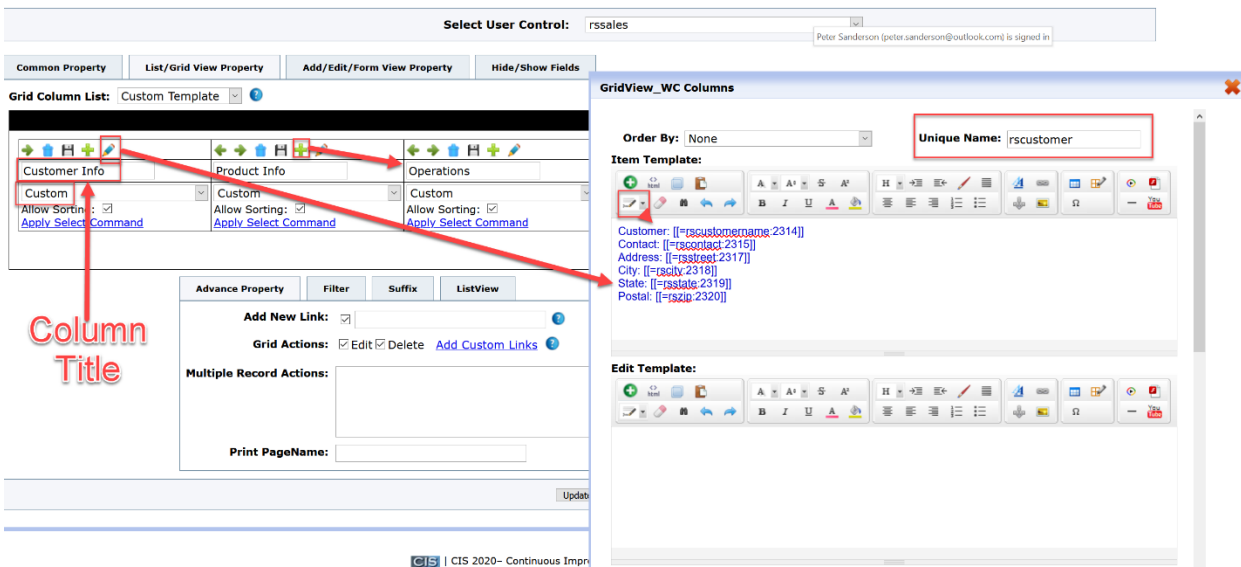
Therefore, it is always best to design a unique grid and list view to be used. In some cases the grid view could contain the highlighted information of each record while the list view contains more details.

Create Grid View

In the User Control, click the List/Grid View Property then select Custom Template. Once selected the little box appears. Give the column a Title such as Customer Info as seen below. By clicking the + button, you can create new columns and give each one a title such as seen below; Product Inf, Operations and Comments.



Where it says Please Select, select custom and a pop-up box will appear to create the custom grid view. Note that once completed, click the edit button to access it for editing purposes.



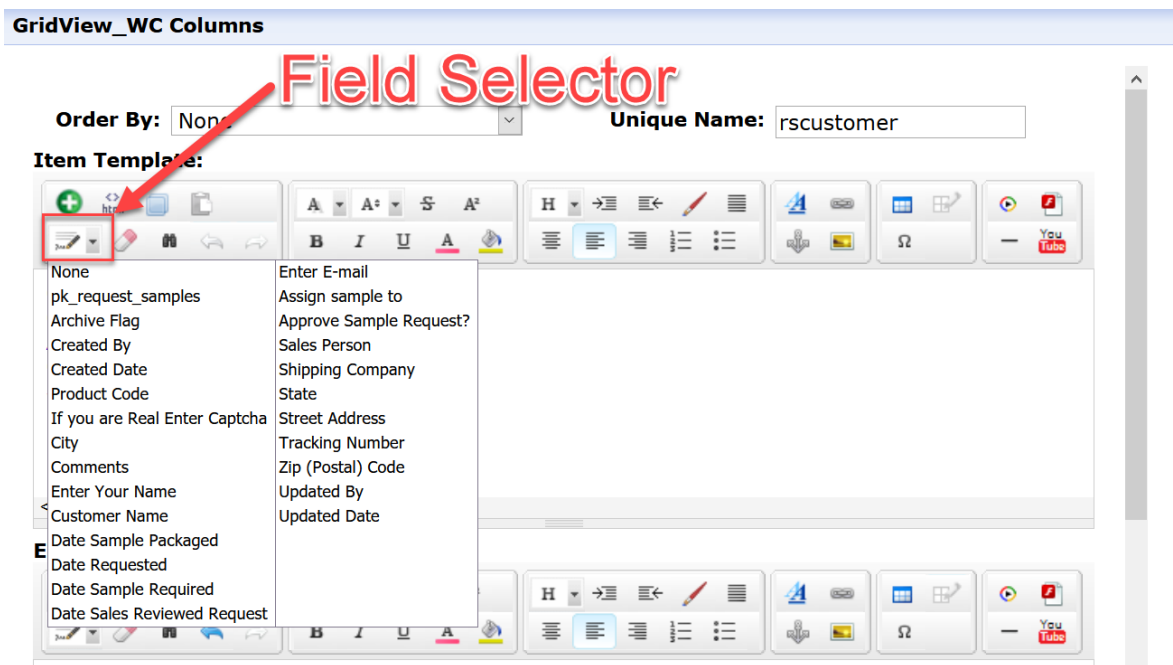
Scroll to the top of the Grid view Columns Box to the item template.

In the item template we can click on full screen to create our template. We can then select the fields we wish to be displayed and include any titles or other information to be displayed in that one column. For example, above we have selected Six Fields to be displayed under customer info.

Customer: [[rscustomername:2314]]
Contact: [[rscontact:2315]]
Address: [[rsstreet:2317]]
City: [[rsstate:2318]]
State: [[rsstate:2319]]
Postal: [[rszip:2320]]

We typed the heading (caption) and then selected the field we want displayed by clicking the field selector. It will put the field name and number wherever the cursor is located.

In the display grid view, there are many options such as font size, justification and colors. Pictures, links and tables can also be inserted. Once completed we exit full view and give the template a name then scroll down to the bottom and save.



Finally, to complete the grid template we ensure that all the column names are correct, click the save icons on the top left and then update the user control on the bottom.

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Below is a look at how this grid set-up appears which is much nicer than the standard default.

Customer Info	Product Info	Operations	Comments
<input type="checkbox"/> Customer: Warehouse A Contact: John Doe Address: 111345 City: 1 State: 1 Postal: 1	Product Requested: SKU002: Fine Penicillium Date Required: 06/20/2019 Approved: Yes	Assigned To: Doug Sharp - peter.sanderson@outlook.com Date Packaged: Jun. 13, 2019 Shipping Company: UPS Tracking Number: 458798	
<input type="checkbox"/> Customer: Delta Contact: John Doe Address: Loucks Dr City: Russell State: 10 Postal: K4R1B7	Product Requested: Sample Product 1 Date Required: 05/24/2019 Approved: Yes	Assigned To: Doug Sharp - peter.sanderson@outlook.com Date Packaged: May. 15, 2019 Shipping Company: UPS Tracking Number: 56678899	
<input type="checkbox"/> Customer: Debra Contact: Debra Address: Loucks Dr City: Russell State: 10 Postal: K4R 1B7	Product Requested: Sample Product 2 Date Required: 05/24/2019 Approved: Yes	Assigned To: Bretta Kelly - bretta@cissoftware.com Date Packaged: May. 09, 2019 Shipping Company: Fed-Ex Tracking Number: 45445454586	
<input type="checkbox"/> Customer: Chantal Contact: Chantal Address: 333 City: Boston State: Ma	Product Requested: Sample Product 2 Date Required: 04/30/2019 Approved: Yes	Assigned To: John Patterson - peter.sanderson@outlook.com Date Packaged: Shipping Company: Tracking Number:	

Create List View

In the User Control click on List/Grid Property then List View (bottom far right). This editing screen works the same as the grid view and a list view may be created. Below is an example of a simple list view with no headings or titles and just data. Also, you may use word editing and create a form for the grid view if you like.

Select User Control: rssales

Common Property | **List/Grid View Property** | Add/Edit/Form View Property | Hide/Show Fields

Grid Column List: Custom Template

Customer Info	Product Info	Operations	Comments
Custom	Custom	Custom	Custom
Allow Sorting: <input checked="" type="checkbox"/>	Allow Sorting: <input checked="" type="checkbox"/>	Allow Sorting: <input checked="" type="checkbox"/>	Allow Sorting: <input checked="" type="checkbox"/>
Apply Select Command	Apply Select Command	Apply Select Command	Apply Select Command

Advance Property | Filter | Suffix | **ListView**

Field Selector

Customer: [[=rscustomername]]
Sample Requested: [[=rs_Product_Code:2313]]
Required Date: [[=rsdaterequired]]
Operations: [[=rsoperations:2324]]
Date Shipped: [[=rsdatepackaged]]
=====

Update

This is how the simple set-up looks. List and grid views can be customized to be as simple or as complex to meet your needs. The only limitation is your time and imagination.

CIS Welcome, Prutha Admin - CIS Tester (Administrator)
Last Login: 02/14/2020 11:02:33

Home | Document Management | Quality Input Data | Accident/Incident | Reports And Graphs | Management Tools | Food Safety | Administration | HELP | Logout

New Sort By: Date Requested | Total Records: 19 | Items Per Page: 25



Customer Info	Product Info	Operations	Comments
Customer: Warehouse A Contact: John Doe Address: 111345 City: I State: 1 Postal: 1	Product Requested: SKU002: Pine Penicillium Date Required: 06/20/2019 Approved: Yes	Assigned To: Doug Sharp - peter.sanderson@outlook.com Date Packaged: Jun. 13, 2019 Shipping Company: UPS Tracking Number: 458798	
Customer: Delta Contact: John Doe Address: Loucks Dr City: Russell State: 10 Postal: K4R1B7	Product Requested: Sample Product 1 Date Required: 05/24/2019 Approved: Yes	Assigned To: Doug Sharp - peter.sanderson@outlook.com Date Packaged: May. 15, 2019 Shipping Company: UPS Tracking Number: 566678899	
Customer: Debra Contact: Debra Address: Loucks Dr City: Russell State: 10 Postal: K4R 1B7	Product Requested: Sample Product 2 Date Required: 05/24/2019 Approved: Yes	Assigned To: Hetta Kelly - hetta@cisoftware.com Date Packaged: May. 09, 2019 Shipping Company: Fed-Ex Tracking Number: 45445454586	
Customer: Chantal Contact: Chantal Address: 333 City: Boston	Product Requested: Sample Product 2 Date Required: 04/30/2019 Approved: Yes	Assigned To: John Patterson - peter.sanderson@outlook.com Date Packaged: Shipping Company: Tracking Number:	

As a final note for this section, to complete the plan we would create a user table for the operations in the same manner as we did for the sales. Of course, the options and looks may be quite different depending on the needs of operations.

Grid Actions

By selecting Add Custom Links in the Grid Actions we can add other actions such as the archive (see archive).

More importantly we can add actions when multiple records are selected such as delete or archive.

Advance Property	Filter	Suffix	ListView
Add New Link: <input checked="" type="checkbox"/> <input type="text"/> 			
Grid Actions: <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete 			
<input type="text" value="[[Edit` Select]] [[Delete` Delete]] [[Edit` Archive]]"/>			
Multiple Record Actions: <input type="text" value="[[Delete` Delete]] [[Edit` Archive]]"/>			
Print PageName: <input type="text"/>			
			Grid Width: <input type="text"/> (ex: 100% or 800px) <input type="checkbox"/> Hide Header <input type="checkbox"/> Hide Export <input type="checkbox"/> Hide Record Count <input type="checkbox"/> Hide Pager

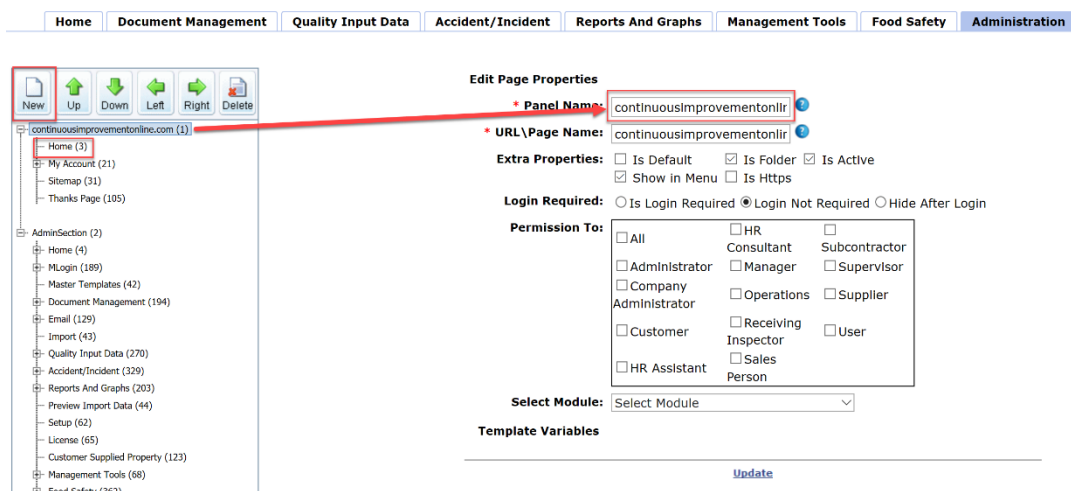
Pages/Menu Tabs

Now that we have the database table with the fields and the user controls, we can make the pages and folders so that they will appear in CIS as well as that the Portal is available at an address of our choice.

Portal Page

Go to Administration/Site Management/Pages. Then expand the folders on the left by clicking the plus sign. When we create the first portal user control, CIS creates a “Home Page” under the folder named after your admin link which in this case is continuousimprovementonline.com.

The Home page under the cisdemo.net above is actually a portal that was created months ago in this demo system. Therefore, we must add a new page for the new portal for sample request. To do this it is important that we click on the folder that we want the home page to be under (continuousimprovementonline.com) and ensure that it is highlighted, and the page is displayed on the right.



Click New to add a new page under that folder. A Blank page will be displayed on the right. We then give the page a name and, in this case, we will name it customer_sample_request. Since this is a portal for visitors, they can access it without a username and password but only using a unique link on the internet. This link can be added to any website or blog. The link will always be the original link to your CIS followed by a forward slash and the name that we enter in the next field (url/page:).

In this case it is: http://cisdemo.continuousimprovementonline.com/NAME_WE_GIVE

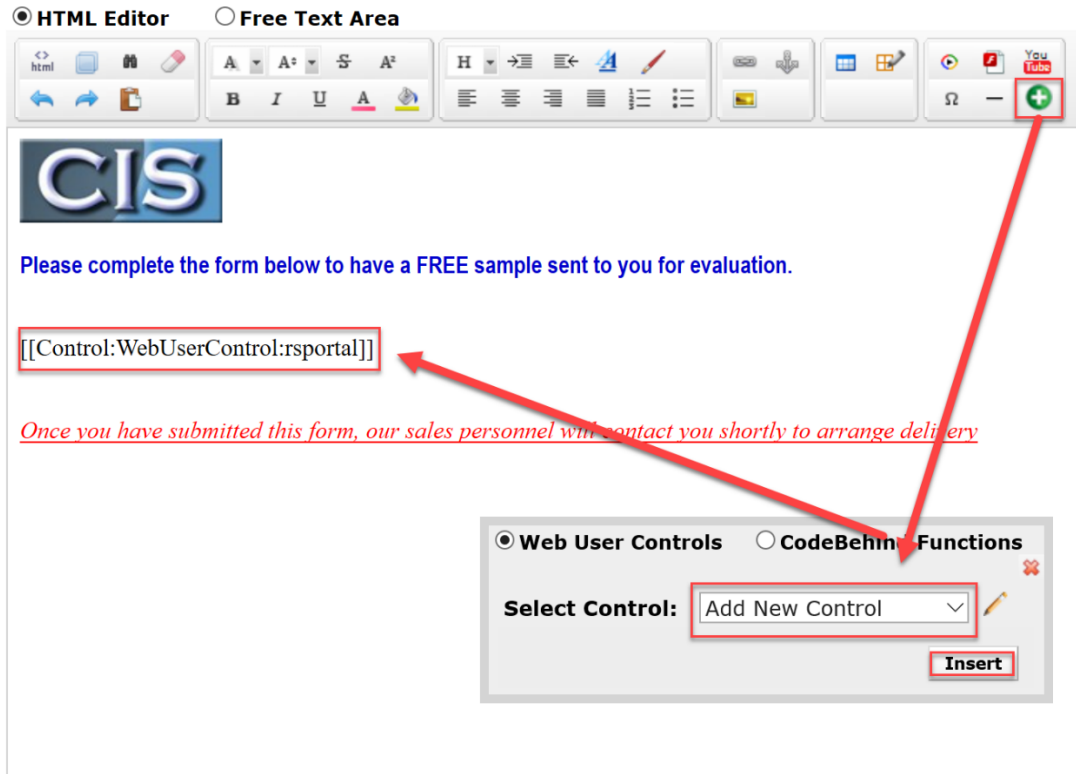
For the request sample page, we can name it customer_sample_request. The page is default, Active and Show in Menu. Login is not required and access to All should be selected.

The resource is a web page and the Portal_Visitor should be the template selected. Page title that will be displayed plus the page details may be entered.

In the html editor, we can put in anything we want but we must insert the User Control for the portal (rsportal). In the example below a table with two rows and one column was inserted and a welcome

statement was entered into the first row with instructions and then the user control was inserted into the second row. To insert the user control, place the cursor in the second row (or wherever you want the input fields to begin), click the green plus sign and scroll down and select the user control and click insert. Since this is the page displayed online, you may type or insert anything on the top of the user control which displays the input screen such as seen below with the “Please complete the form...”

You may insert a link to other documents, videos or insert a logo or pictures.



IMPORTANT PORTAL NOTE: If this is the first portal created the new login for your CIS system will be changed to include /login after the original link.

We complete the page by clicking save. The page setup is shown below:

Edit Page Properties

* **Panel Name:** ?

* **URL\Page Name:** ?

Extra Properties: Is Default Is Folder Is Active
 Show in Menu Is Https

Login Required: Is Login Required Login Not Required Hide After Login

Permission To:

<input checked="" type="checkbox"/> All	<input type="checkbox"/> HR Consultant	<input type="checkbox"/> Subcontractor
<input type="checkbox"/> Administrator	<input type="checkbox"/> Manager	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Company Administrator	<input type="checkbox"/> Operations	<input type="checkbox"/> Supplier
<input type="checkbox"/> Customer	<input type="checkbox"/> Receiving Inspector	<input type="checkbox"/> User
<input type="checkbox"/> HR Assistant	<input type="checkbox"/> Sales Person	

Resource Type: ?

Select Template: ?

Page Title:

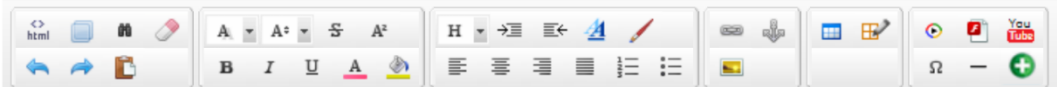
Descriptions: ?

Keywords: ?

Robots: ?

Select Module:

HTML Editor **Free Text Area**



Please complete the form below to have a FREE sample sent to you for evaluation.

[[Control:WebUserControl:rsportal]]

Once you have submitted this form, our sales personnel will contact you shortly to arrange delivery

Once saved, remember to close the browser completely (ALL BROWSER PAGES!) and then we can go directly to the portal using the address we entered which in this case is:

https://tqms.continuousimprovementonline.com/customer_sample_request



Please complete the form below to have a FREE sample sent to you for evaluation.

Add Record

* Indicates required field

* Date Requested:	<input type="text" value="02/18/2020"/>	
* Date Sample Required:	<input type="text"/>	
* Product Code:	<input type="text" value="Sample Product 1"/>	
* Customer Name:	<input type="text"/>	
* Enter Your Name:	<input type="text"/>	
* Enter E-mail:	<input type="text"/>	
* Street Address:	<input type="text"/>	
* City:	<input type="text"/>	
* State:	<input type="text"/>	
* Zip (Postal) Code:	<input type="text"/>	

[Save](#) [Cancel](#)

Once you have submitted this form, our sales personnel will contact you shortly to arrange delivery

At this point we can go back and revise the page to be exactly formatted and the way we want. We could even add a link or the html code to a help video on you tube or screencast so that they understand how to complete the portal. In this case, we went to our Screencast site and found the video we wanted to insert. We requested the size to be 426 x 240 and then copied the code. On the page editor, we clicked html and inserted that code at the bottom. As a finishing touch, we highlighted everything and centered it.



Please complete the form below to have a FREE sample sent to you for evaluation.

Add Record

* Indicates required field

* Date Requested:	<input type="text" value="02/18/2020"/>
* Date Sample Required:	<input type="text"/>
* Product Code:	<input type="text" value="Sample Product 1"/>
* Customer Name:	<input type="text"/>
* Enter Your Name:	<input type="text"/>
* Enter E-mail:	<input type="text"/>
* Street Address:	<input type="text"/>
* City:	<input type="text"/>
* State:	<input type="text"/>
* Zip (Postal) Code:	<input type="text"/>

[Save](#) [Cancel](#)

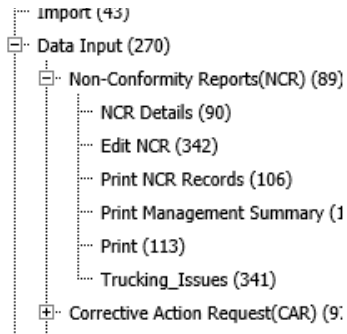
Once you have submitted this form, our sales personnel will contact you shortly to arrange delivery



Folders and Pages

Folders are really a tab in the menu system with actual pages under the tab. For example:

Date Input is a folder with Non-Conformity Reports (NCR) folder under it and then the pages: NCR Details, Edit NCR, Print NCR Records, Print Management Summary, Print and Trucking Issues.



It is not necessary to have a folder if the page you wish to add will reside in an existing folder. However, in this case we will create the folder named “Request Samples” and it will be under Management Tools as an example. So, we must highlight Management tools then select new and create the page as follows:

Edit Page Properties

* **Panel Name:** Management Tools

* **URL \Page Name:** admin/management

Extra Properties: Is Default Is Folder Is Active
 Show In Menu Is Https

Login Required: Is Login Required Login Not Required Hide After Login

Permission To:

<input type="checkbox"/> All	<input checked="" type="checkbox"/> HR	<input type="checkbox"/> Subcontractor
<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Manager	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Company Administrator	<input checked="" type="checkbox"/> Operations	<input type="checkbox"/> Supplier
<input type="checkbox"/> Customer	<input type="checkbox"/> Receiving Inspector	<input type="checkbox"/> User
<input checked="" type="checkbox"/> HR Assistant	<input checked="" type="checkbox"/> Sales	<input type="checkbox"/> Person

Select Module: Select Module

Template Variables

[Update](#)

We create the folder as follows:

- Panel Name: Customer Sample Request
- URL\Page Name: admin/customer_sample_request
 - Since this page should reside within the CIS system and require a login like all other pages in CIS, the URL should be admin/*page name (no spaces)*
- Properties: Is Folder, Is Active and Show in Menu
- Login is required
- Permission: in this case it is to be used by the sales and operations. Therefore, the folder could be given access to the user type administrator, sales and operations only. No other user type would see this folder or even know it exists
- No module to select
- Click Save

Edit Page Properties

* **Panel Name:** ?

* **URL\Page Name:** ?

Extra Properties: Is Default Is Folder Is Active
 Show in Menu Is Https

Login Required: Is Login Required Login Not Required Hide After Login

Permission To:

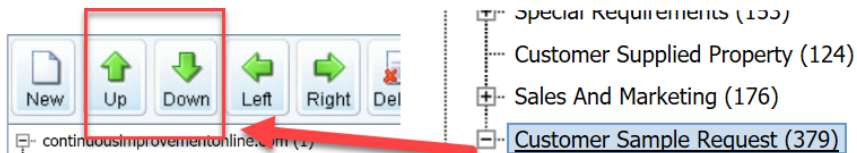
<input type="checkbox"/> All	<input type="checkbox"/> HR	<input type="checkbox"/> Subcontractor
<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Consultant	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Company Administrator	<input type="checkbox"/> Manager	<input type="checkbox"/> Supplier
<input type="checkbox"/> Customer	<input checked="" type="checkbox"/> Operations	<input type="checkbox"/> User
<input type="checkbox"/> HR Assistant	<input type="checkbox"/> Receiving Inspector	
	<input checked="" type="checkbox"/> Sales Person	

Select Module: ▾

Template Variables

[Update](#)

The folder will appear and be the last folder under the Management Tools. You can move the folder up or down by highlighting it and clicking the Up/Down buttons. This will determine the position in the menu system under the folder Management Tools. Lets move it to the top to be the first selection.



Once in position we can highlight the new folder and then click new page to create the page for sales.

- Panel Name: Sales Customer Sample Request
 - URL\Page Name: admin/sample_request_sales
 - Since this page should reside within the CIS system and require a login like all other pages in CIS, the URL should be admin/*page name (no Spaces)*
- Properties: Is Active and Show in Menu
- Login is required
- Permission: in this case it is to be used by the sales only. Therefore, the folder could be given access to the user type administrator and sales. No other user type would see this folder or even know it exists.
- Resource: Web Page
- Template: Admin Template
- Enter page title, description and any key words for the search engine in CIS.
- Insert the User Control – “rssales”. Note, you could insert a table here and add a message to your sales personnel or guidelines that will appear on the page before the input/edit forms appear. Below is an example:
- Click Save.

Edit Page Properties

* **Panel Name:** ?

* **URL\Page Name:** ?

Extra Properties: Is Default Is Folder Is Active
 Show in Menu Is Https

Login Required: Is Login Required Login Not Required Hide After Login

Permission To:

<input type="checkbox"/> All	<input type="checkbox"/> HR Consultant	<input type="checkbox"/> Subcontractor
<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Manager	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Company Administrator	<input type="checkbox"/> Operations	<input type="checkbox"/> Supplier
<input type="checkbox"/> Customer	<input type="checkbox"/> Receiving Inspector	<input type="checkbox"/> User
<input type="checkbox"/> HR Assistant	<input checked="" type="checkbox"/> Sales Person	

Resource Type: ?

Select Template: ?

Page Title:

Descriptions: ?

Keywords: ?

Robots: ?

Select Module:

HTML Editor **Free Text Area**

[[Control:WebUserControl:rssales]]

The page will look as follows:

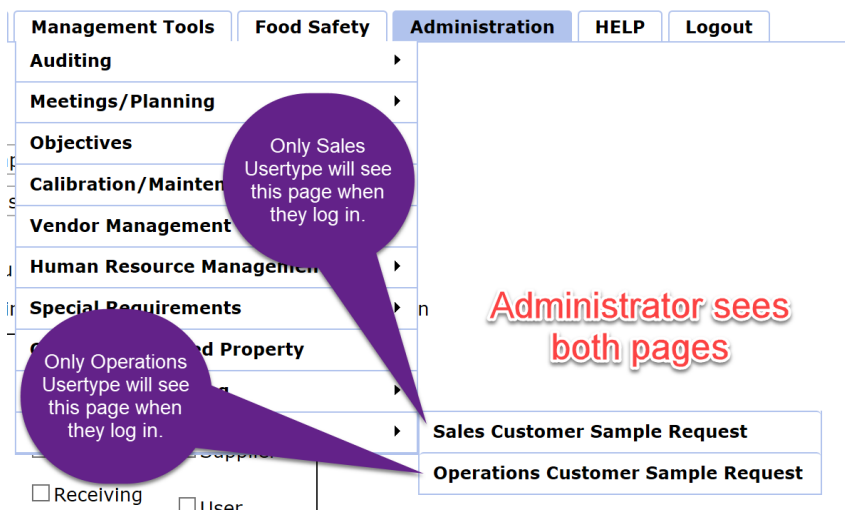
The sample details page will only be seen and can be used by sales user types. Therefore, we must add a page for operations. In this case we repeat the above steps and select operations to have access and the user control for operations (highlight request samples and new page).

Important Note on Pages:

- As mentioned earlier on, when new pages are created in the menu system they cannot be seen immediately. This is because of browser caching. CIS will not update the menu system until the browser is hard refreshed by closing all open windows of the browser. If CIS were to update the menu system every 300 seconds or so, it would slow down the navigation and page displays. Remember to shut down the browser.
- If after shutting down, you still cannot see the pages, first review the permissions on the page and in the user module.
- Review the pages to ensure login and show in menu is selected.
- Ensure User Control is inserted.

Different pages for different user types work as follows:

When Administrator signs in he/she can see both sample request pages:



Menu when Operations

Management Tools	Food Safety	HELP	Logout
Special Requirements	▶		
Customer Sample Request	▶ Operations Customer Sample Request		

Menu when Sales Logs In

Management Tools	Food Safety	HELP	Logout
Special Requirements	▶		
Customer Sample Request	▶ Sales Customer Sample Request		

Each page has its unique user control and therefore can have a different input, edit, and grid set-up.

Filters and Search Bars

The grid and list views are set-up in the User Control. However, we can also add search or filters to our page so that the data is displayed as we need to see it. In order to do this, click Administration/Site management/User Controls and select the user control. In this case “rssales”.

Click List/Grid View Property and then click Filter.

Here you can select the fields that should be selectable in the filter. Dates CANNOT be selected since they are not a number or letter.

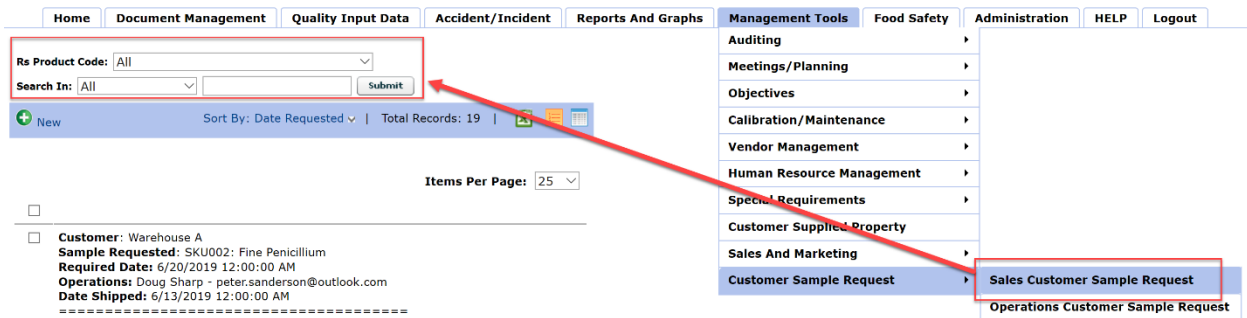
In this example we selected customer and product code.

Once selected click render Filter template then click update.

The screenshot shows the configuration interface for the 'rssales' user control. At the top, 'Select User Control:' is set to 'rssales'. Below this, there are tabs for 'Common Property', 'List/Grid View Property', 'Add/Edit/Form View Property', and 'Hide/Show Fields'. The 'List/Grid View Property' tab is active. Underneath, there's a 'Grid Column List' section with a 'Custom Template' dropdown. Below that is a grid with four columns: 'Customer Info', 'Product Info', 'Operations', and 'Comments'. Each column has a 'Custom' dropdown and an 'Apply Select Command' link. Below the grid, there are tabs for 'Advance Property', 'Filter', 'Suffix', and 'ListView'. The 'Filter' tab is active. Under 'Custom Filter Function:', there are checkboxes for various fields: 'Updated By (2305)', 'Updated Date (2306)', 'Created By (2307)', 'Created Date (2308)', 'Date Requested (2311)', 'Date Sample Required (2312)', 'Product Code (2313)', and 'Customer Name (2314)'. The 'Product Code (2313)' and 'Customer Name (2314)' checkboxes are checked. Below the 'Filter In' section is a 'Render Filter Template' button. Under 'Filter Template:', there is a rich text editor with the following content: 'Rs Product Code: [[filter_223_rs_Product_Code:2366]]' and 'Search In: [[search_in_223:2367]] [[search_for_223:2368]] [[search_submit_223:2369]]'. At the bottom of the interface is an 'Update' button.

It is best to immediately check the page to ensure that the filter did not create any errors. Note below how fields that are foreign will have their own select box while fields that have entered data appear in the Search In box.

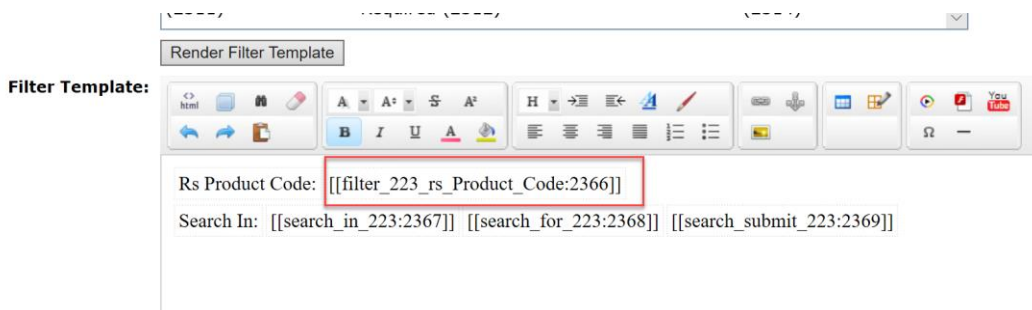
If there is an error, go back to the filter and in HTML view delete all of it and try again.



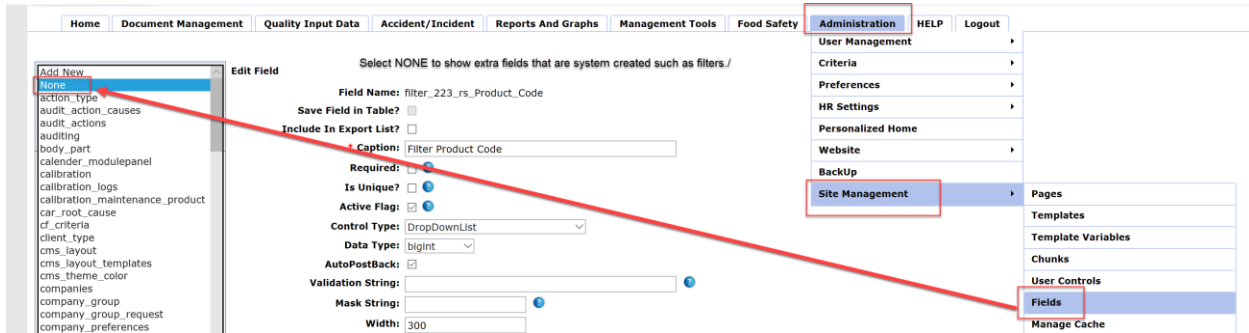
Possible Errors in Filters:

When a filter is created, the system will create a new field specific for that filter and table. Sometimes because of the field datatype and the foreign field data type the filter field created may be incorrect and this could be a cause of a yellow screen error page when you go to display the records just after adding a filter. Before calling for help, examine the new filter field and special attention to the datatypes to ensure they are consistent and make sense (bigint, int, varchar, nvarchar etc...).

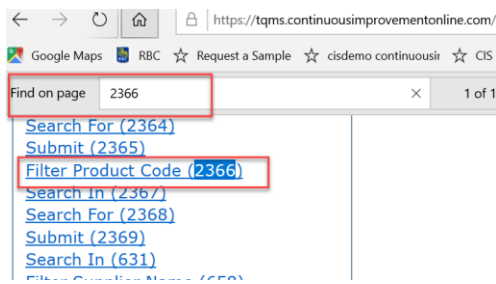
First copy the field name and numbers that are displayed in the filter template that was created when you rendered the filter. Here we will be looking for `[[filter_223_rs_Product_Code:2366]]`.



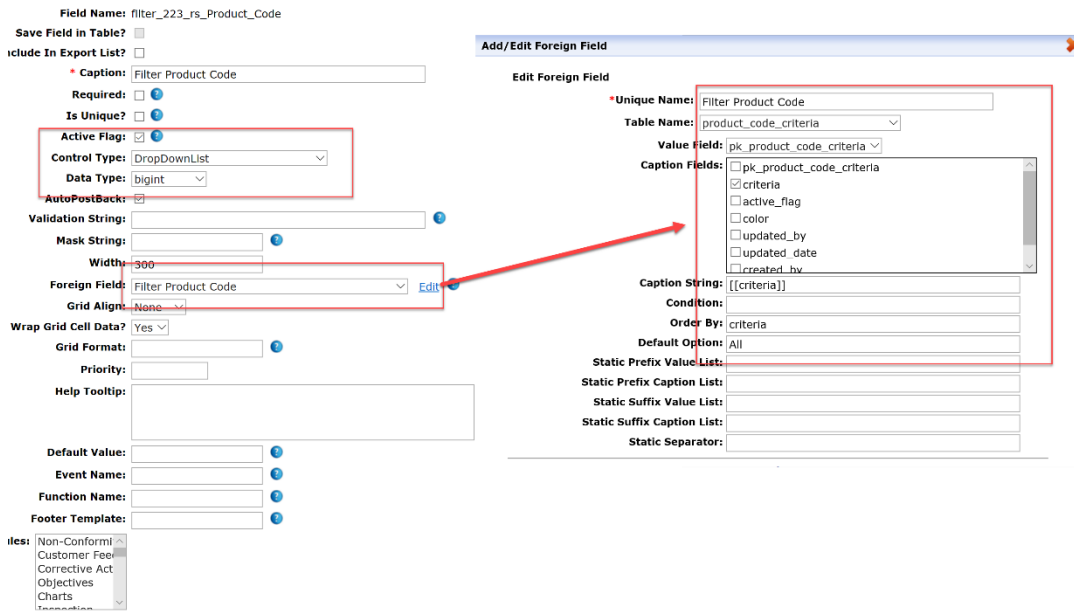
To find these fields and examine them you go to “Fields” under administration, site management and select NONE when selecting the table. This is where all system created fields are stored.



Then use the Find feature on your browser to find number 2366 on the page which is part of the filter name.



Click on that filter and you may have to scroll up quite a bit to see the setting. Check all data type settings.



Additional errors occur when trying to add a filter to a field that cannot be filtered properly without additional coding put in by our programmers. The following are some examples of field types you cannot filter. These fields will cause an error and cannot be used in the supplied filter tool so **DO NOT SELECT THESE TYPES OF FIELD DATA.**

1. Multi-Select Fields such as checkbox list, DivCheckBoxList, RadioButtonList or any field whereby more than one selection is possible.
2. No Date fields can be used.

Our programmers are required to add script for multi-select fields and date fields to be selectable in a query or filter. Please contact your consultant for details.

A Video Look at the Progress

At this point we have created a database table for samples and have created a portal and two pages, one for sales and one for operations. A complete video explanation of this process is under HELP/ADMINISTRATION in your CIS System.

Administration Help

[Welcome to CIS Software](#)

[Importing Users](#)

[Setting Up Criteria](#)

[Setting Up HR and Training](#)

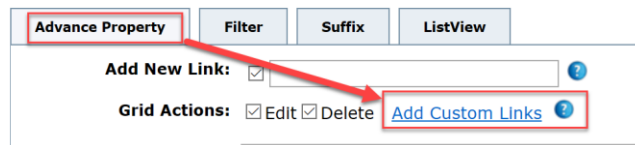
Programming (Seminar Unlocking the Secrets of CIS)

Description	Link	Topics Discussed
PDF File Seminar Book	Click	Book for Seminar may be printed
PDF File Seminar Slide Show	Click	Slide Show for Seminar
Unlocking the Secrets Part 1	Click	Essential Definitions and Walkthrough
Unlocking the Secrets Part 2	Click	Essential Definitions and Walkthrough
Unlocking the Secrets Part 3	Click	Reviewing the Steps to Create a Database
Unlocking the Secrets Part 4	Click	Planning a new Database
Unlocking the Secrets Part 5	Click	Creating a Database to be used as a Foreign Field
Unlocking the Secrets Part 6	Click	Creating a Database to be used as a Foreign Field
Unlocking the Secrets Part 7	Click	Creating a Database to be used as a Foreign Field
Unlocking the Secrets Part 8	Click	Reviewing Database Field Settings and Database Fields
Unlocking the Secrets Part 9	Click	Database Fields
Unlocking the Secrets Part 10	Click	Database Fields including foreign fields
Unlocking the Secrets Part 11	Click	User Control including Grid & List View and Pages (Menu)
Unlocking the Secrets Part 12	Click	User Control including Grid & List View and Pages (Menu)
Unlocking the Secrets Part 13	Click	User Control including Grid & List View and Pages (Menu)
Unlocking the Secrets Part 14	Click	User Control including Grid & List View
Unlocking the Secrets Part 15	Click	Customization of add and edit forms including inserting documents to pop-up in a new tab

How to Archive

We can create the archive select box to archive records so that they appear grey. However, if you wish to have the archive records not show in the grid at all with a “Show Archive” button like in the NCR module it requires some script in the back ground by the programmers (<http://www.cis2014.com/cis-2014-add-ons/add-archive-functionality>). To create the archive button, we proceed as follows.

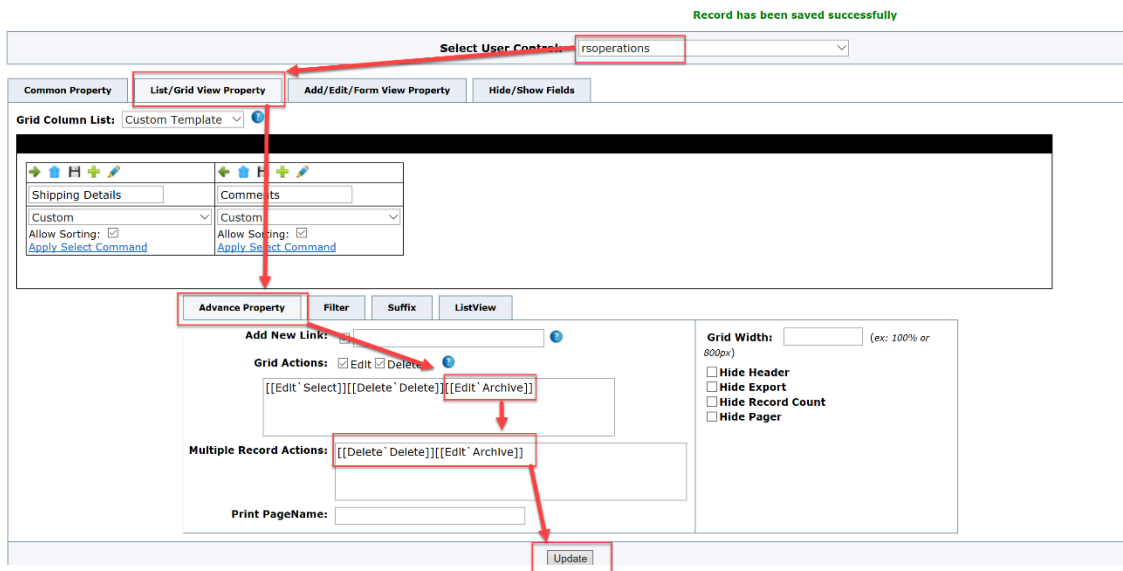
In this example, we will have it so only the operations can archive the record after they have shipped it. Go to the rsoperation’s user control and under List/Grid View Property select Add Custom Links:



CIS will insert the edit and delete links and now we must insert the archive link.

Add the following or copy and paste from the NCR user table: `[[Edit`Archive]]`

Additionally, we would want to add the delete and archive functions to the Multiple Record Action so that when someone selects multiple records these commands would be available. If you do not add these to the multiple record actions, then the commands would only be available when one record is selected.



In this example only operations can archive a record however the sales will see the archived records in grey.

Operations View:

Notice how the archive is available when records are selected.

The screenshot shows a software interface with a top navigation bar containing buttons for '+ New', 'Edit', 'Delete', and 'Archive'. The 'Archive' button is highlighted with a red box, and a red arrow points from it to the 'Archive' checkbox of the second record in a list. The list includes records with details like Customer, Contact, Sample, Address, City, State, and Zip. A purple callout bubble labeled 'ARCHIVED RECORD' points to the first record in the list.

Items Per Page: 25

<input type="checkbox"/>	Customer: Warehouse A Contact: John Doe Sample: SKU002: Fine Penicillium Address: 111345 City: 1 State: 1 Zip: 1 =====
<input checked="" type="checkbox"/>	Customer: Delta Contact: John Doe Sample: Sample Product 1 Address: Loucks Dr City: Russell State: 10 Zip: K4R1B7 =====
<input type="checkbox"/>	Customer: Debra Contact: Debra

Portals for Simplifying Data Input (*especially using a cell phone*)

Often, we have a situation where we may want to simplify and control the access to our CIS system. Portals are a very quick and useful tool that allow us to easily design an input form using Microsoft Word, create a User control Portal and Portal page for simple data input. Remember that a portal does not require the user to be logged in, so it is quick and easy. A portal can only create a new record. Below is an example of a portal for entering a nonconformity. The users on the floor simply have a link to the portal and whenever they need to enter an NCR, they just click the link.

The information is presented in a simple manner and can be easily accessed on a computer, tablet, or phone. Only the required information is displayed and most of it is selectable, so no typing is required.

Sample on a computer of the portal:

https://cisdemo.continuousimprovementonline.com/ncr_portal




Add Record

* Indicates required field

TQMS Online Problem Reporting Form

Select the Type of Issue:

Enter the Date: 

Reported By:

Enter Customer:

Select Criteria:

Select Location:

Select Process:

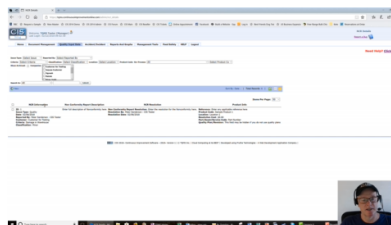
Select Product:

Describe the Problem:

[Save](#) [Cancel](#)

Need Help?

[Watch Video](#)



Sample on a Google Phone of a Portal:

INPUT SCREEN ON PORTAL

11:50 91%

improvementonline.com/n

Select Issue

02/18/2020

Select Recommended By

Select Criteria

Select Location

Select Process/Department

Select Product Code

INPUT WHEN SELECTING A FIELD

11:52 91%

improvementonline.com/n

Select Issue

02/18/2020

Select Recommended By

Select Issue

Environmental

Food Safety

Other

Performance

Quality

Regulatory

Security

Given the above example and using the tools you have learned in this manual, you may create multiple portals for a variety of data inputs.

Some examples of portals that could simplify certain data inputs:

- Customer Complaint (feedback)
- New Employee Application (into HR)
- Incoming Inspection
- Work Order
- Your own custom designed database systems

Getting the Programmers involved

A congratulations is in order at this point. We have a working system short of some features that will help make it better.

The following can be added by our programmers for you:

- Two e-mails sent when Portal is saved, one to customer and one to sales
- Two different e-mails sent when sales approve sample
 - One to operations to give order to package and ship
 - One to Customer advising them that samples are approved, and tracking will be sent to them shortly
- One e-mail sent when operations saves the record to send customer tracking information
- Archive button to be set-up

Multiple Upload Fields

In addition to the above, keep in mind that the programmers can add many unique features to better serve your CIS system. For example, you can create a table and have it as a field in another table.

The sample below is entered by adding as many entries for the locations as necessary in an input/edit form.

Site Name	Quantity Shifts	Registered?	Street Address	Total Employees	Hours	Scope	Action
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

One table was created with the fields:

Site Name
Quantity Shifts
Registered
Street Address
Total Employees
Hours
Scope

Then another table, user control and page was created. Then the programmers were contacted to add the above table to the input form as shown below. The input form was created without the site table and the programmers added it in using scripting. We call this a multiple upload field and it can be ordered at: <http://www.cis2014.com/cis-2014-add-ons/0ayra80q93ujebk4sokqma2j2tdkj1>

* Quotation Date:

* Site Structure:

Site Name	Quantity Shifts	Registered?	Street Address	Total Employees	Hours	Scope	Action
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

* Management Representative:

* Phone Number:

* E-Mail:

Applicable Standard:

- AS9100
- AS9120
- ISO 9001
- XISO9001

Statutory Regulatory Requirements:

- ANSIASNT ILI PQ 2010
- API Standard 1163
- ITAR
- NACE SP0102-2010

Other Ideas

Feel free to contact us with additional requests. CIS can:

- Interface with other software
- Have unique and new reports added to the reports and graphs
- Have new report forms added to modules and pages
- Have formula added to a field. This requires code from behind the field.
- Interlink tables and databases
- Almost anything else that your imagination can dream up!