TheDatabase Help - Admin

Table of Contents

My Account

The first tab is the same as the normal user. The other tabs are only visible to Admin users

Options is the 2nd tab:

Logo allows you to change the logo shown at the top of the page. Suggested size: less than 150px high and less than 400px wide

Other Map Scale allows you to set the zoom of the map on other pages such as the sample site page.

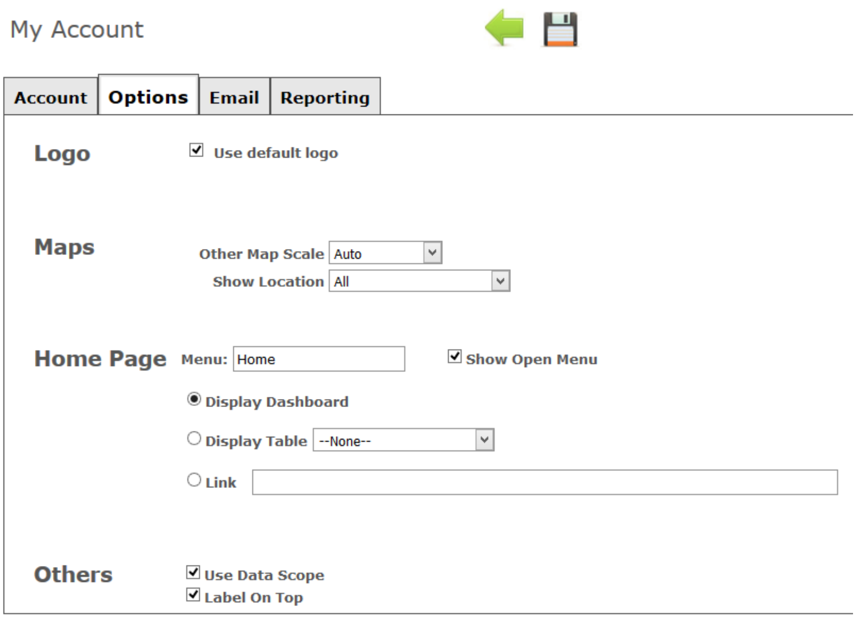
Show Location allows you to choose which samples sites are shown on the dashboard map.

Show Open Menu shows the Open menu at the top of the page.

Display Dashboard/Table allows you to either show a user configurable dashboard or your main table.

Use Data Scope see below.

Label on Top displays the label above the fields rather than next to them.

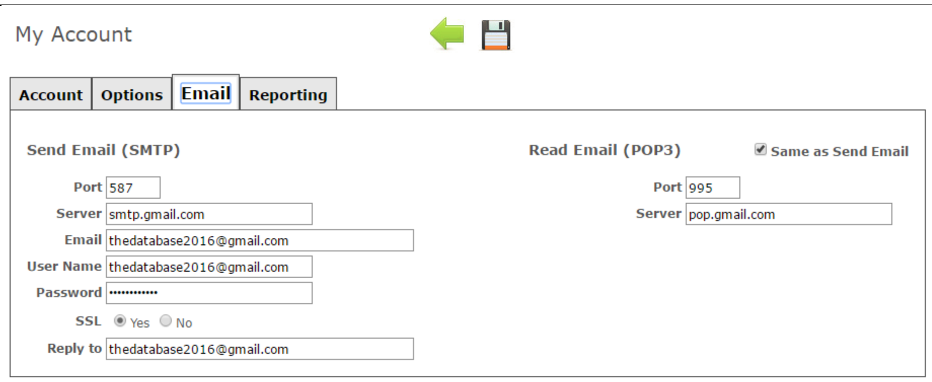


Email
Email settings for the current Account

Tip: Use Gmail with Email and Username as the email address

Ports = ***587*** *SMTP,* ***995*** *Pop*

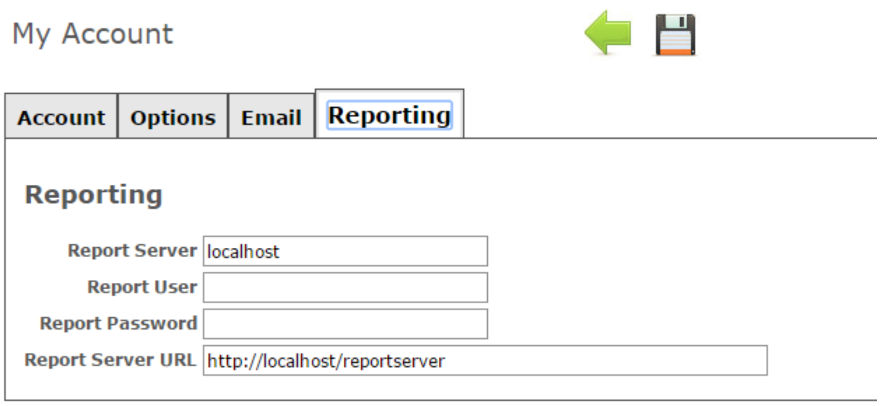
Server = ***smtp.gmail.com*** *and* ***pop.gmail.com***



Reporting

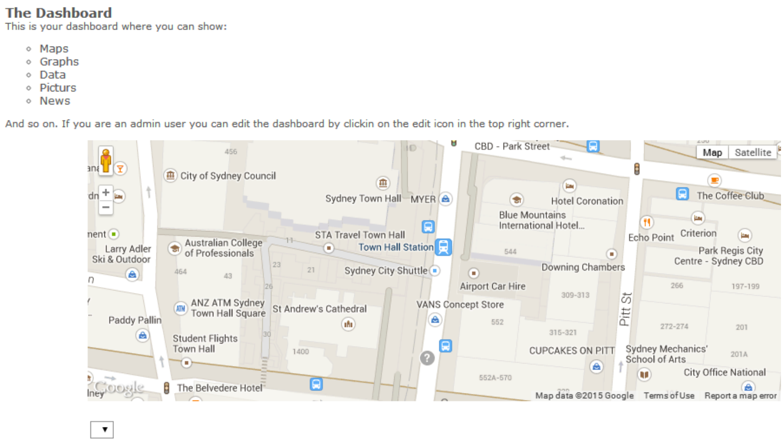
Report settings for the current Account

Tip: Can be left like this if using our server



Dashboard

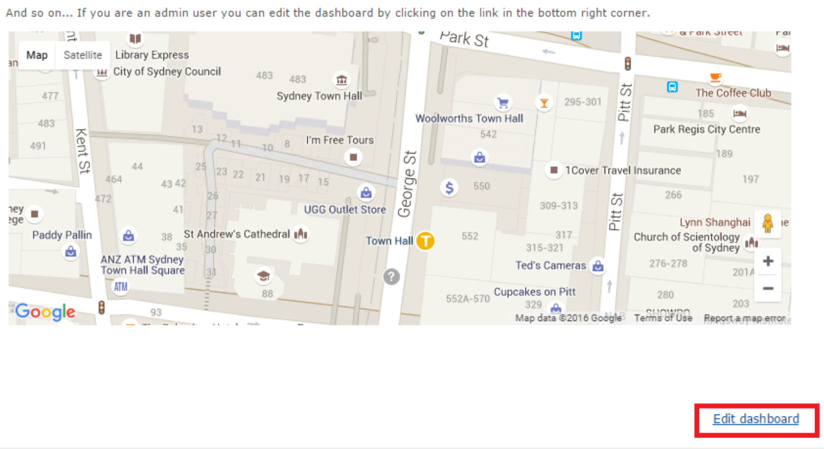
After successful registration, when you go to Dashboard, it will display map of your location and some content. Also it offers some functionalities that a user may need.

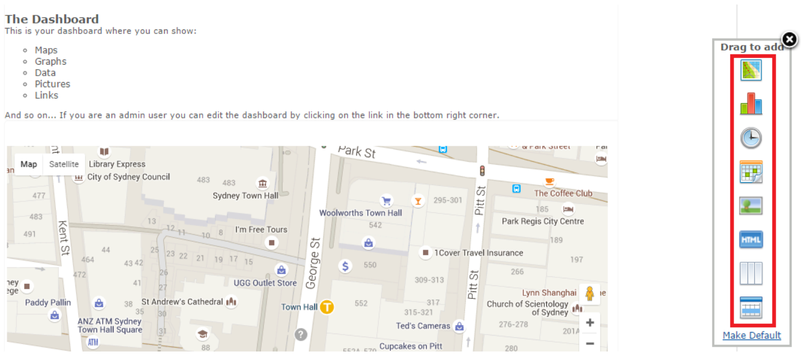
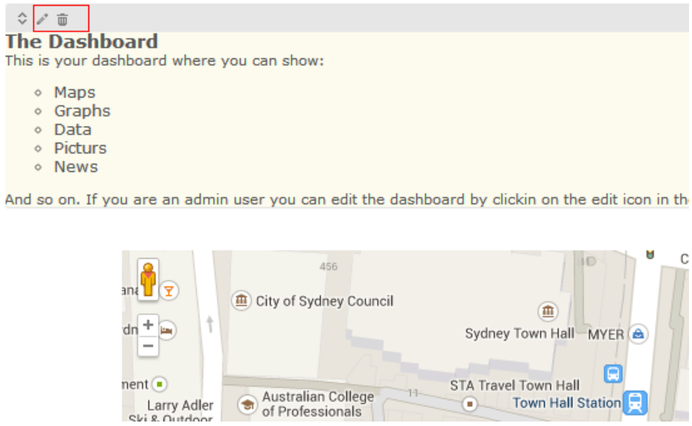
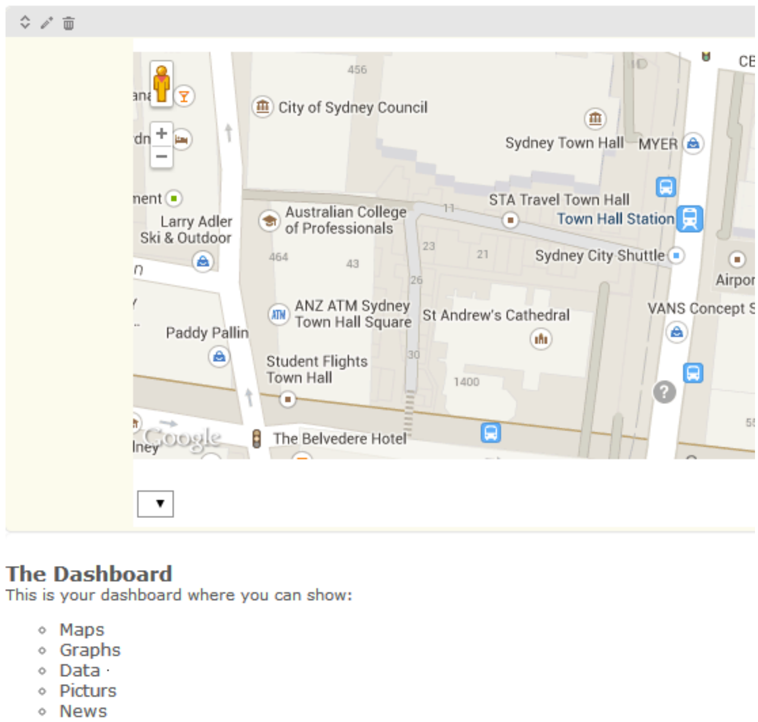


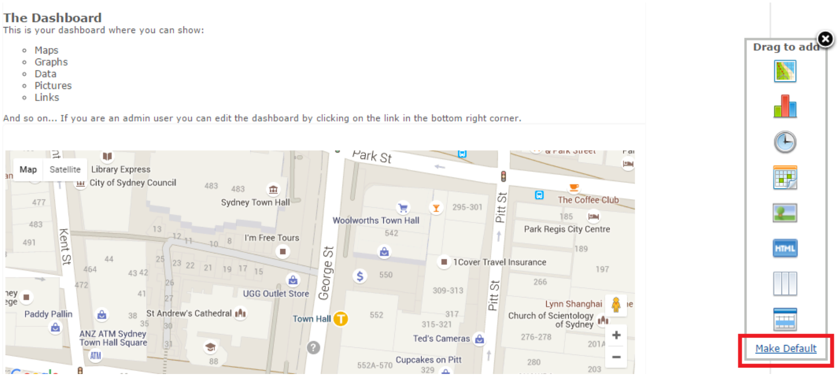
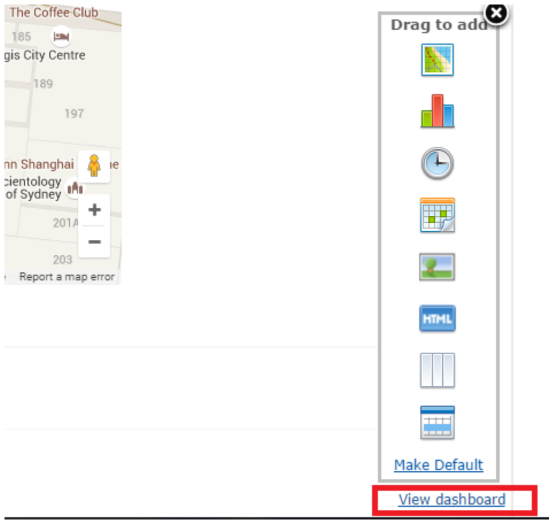
Editing the Dashboard

You can edit Dashboard and add more items as well.

To edit Dashboard, click on "Edit" link given at the bottom right corner.



Once the dashboard in edit mode Admin user can drag and drop any item from the toolbar to add it to Dashboard.	
Edit any item by mouse hover on it and then click on edit/delete. You can also simply edit any item by double clicking on it.	
You can also drag and drop items on the map to change their order.	

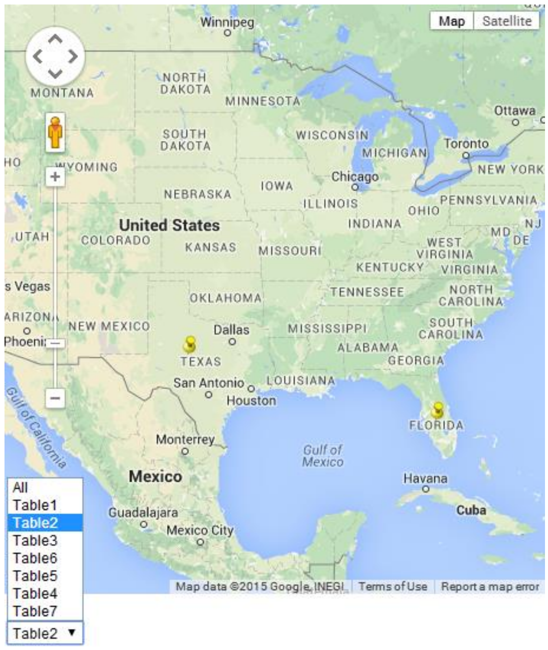
Also, you can set your dashboard as default Dashboard for all users. When you click on “Make default” link given on bottom of the toolbar, TheDatabase asks for confirmation and then makes that the default dashboard for all users.	
If you want to exit from edit mode, click on the “View dashboard” link given in bottom right corner.	

Dashboard Functions

Map

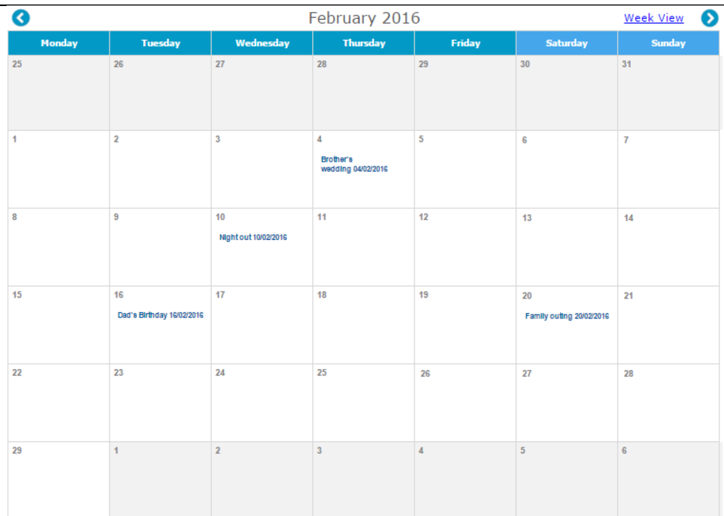
Default function of the dashboard is the map. It can be configured to show locations on a table containing Location field

Below the map, there is a dropdown displaying the list of tables having location field. When you select a particular table, It will point to location on the map for the table selected in dropdown.

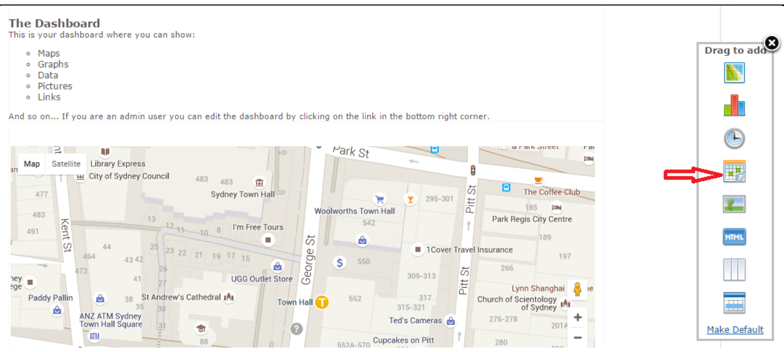


Calendar

One of the dashboard can offer is the Calendar function. This function displays the dates recorded on a particular table.



You can add calendar function on the dashboard by clicking the [Edit Dashboard](#)link and dragging the calendar Icon to the main screen

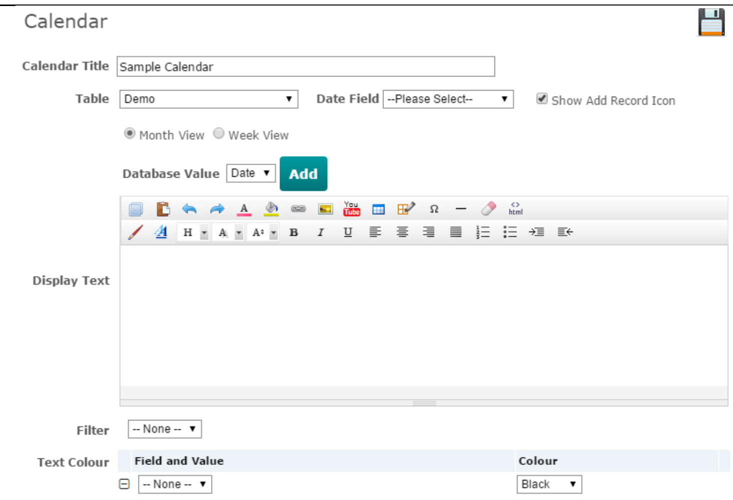


A window will pop up for the calendar configuration.

Once a table is selected it will show the other configuration as well.

When everything is configured hit save and it will now show the events on the calendar.

See image on calendar



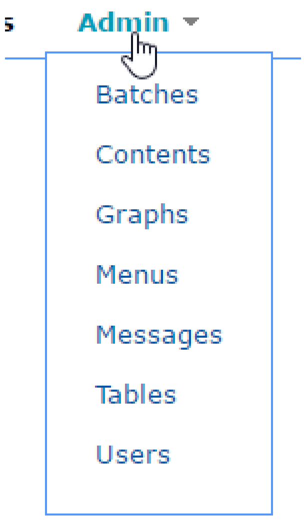
Menus

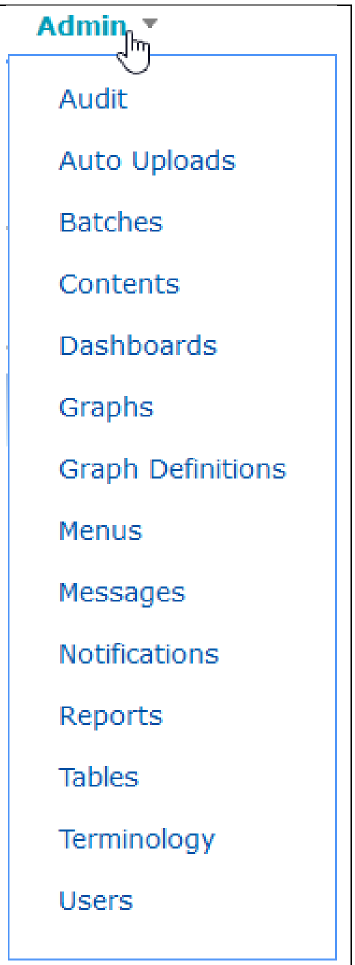
Admin Menu

The Admin menu is only available to users with the Administrator role.

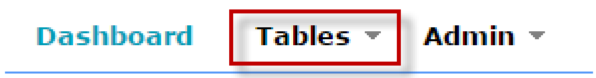
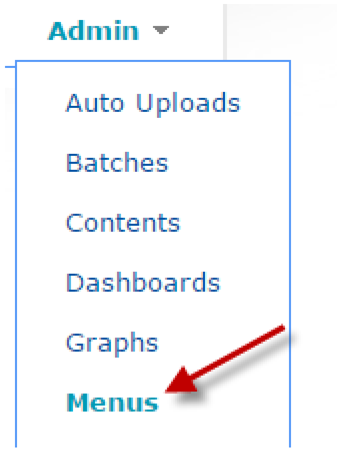
It provides access to all of the admin functions which are described in other sections.

The Account Holder has access to more items on the Admin menu. Note: Screen shot required of extended menu

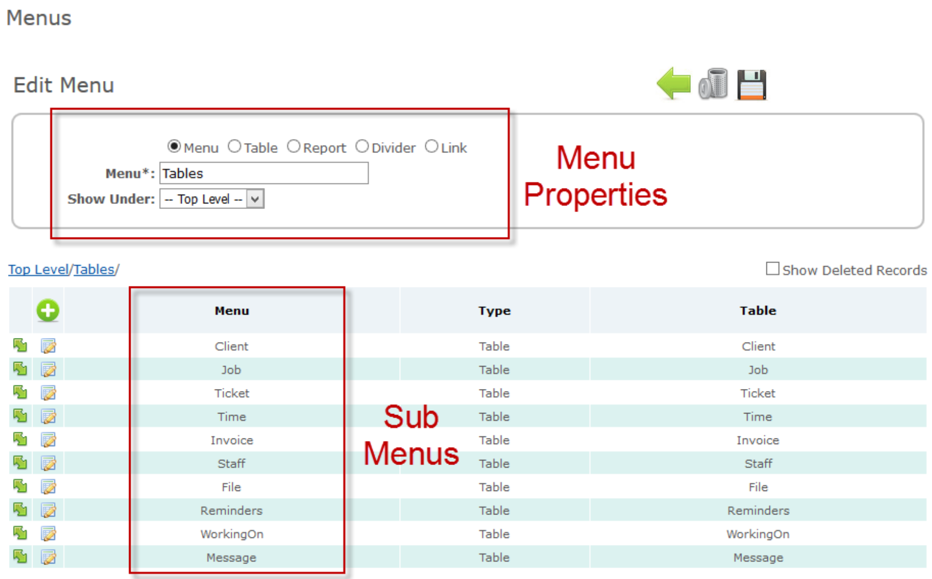




Configuring Menus

The menus are totally configurable. You can have no other menus and just use the dashboard menu to access your main table or you can have any number of menus running along the top or have multi-level menus.	
You can have any number of menu items below each menu and even have sub menus below those.	
Administrators can edit the menus by choosing **Menus** from the **Admin** menu	
At the top are some “breadcrumbs” that allow you to see where you are in the menu structure.	

In that page you can add new menus, edit existing menus, move them and delete them on.

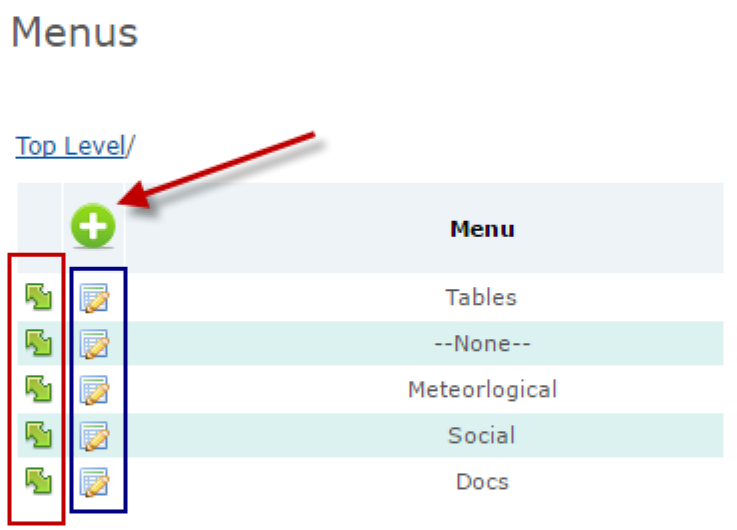


You can:

Click on the Add icon to add a new menu (red arrow).

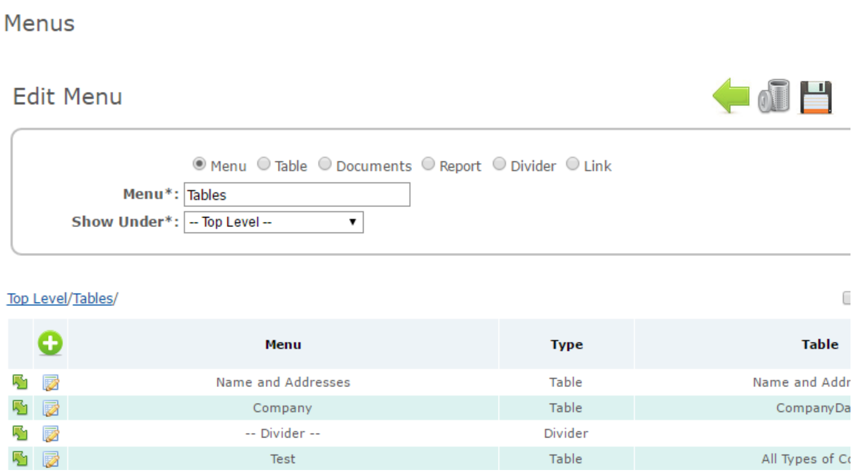
Use the handles to change the order of menus (red box).

Edit a menu item (blue box).



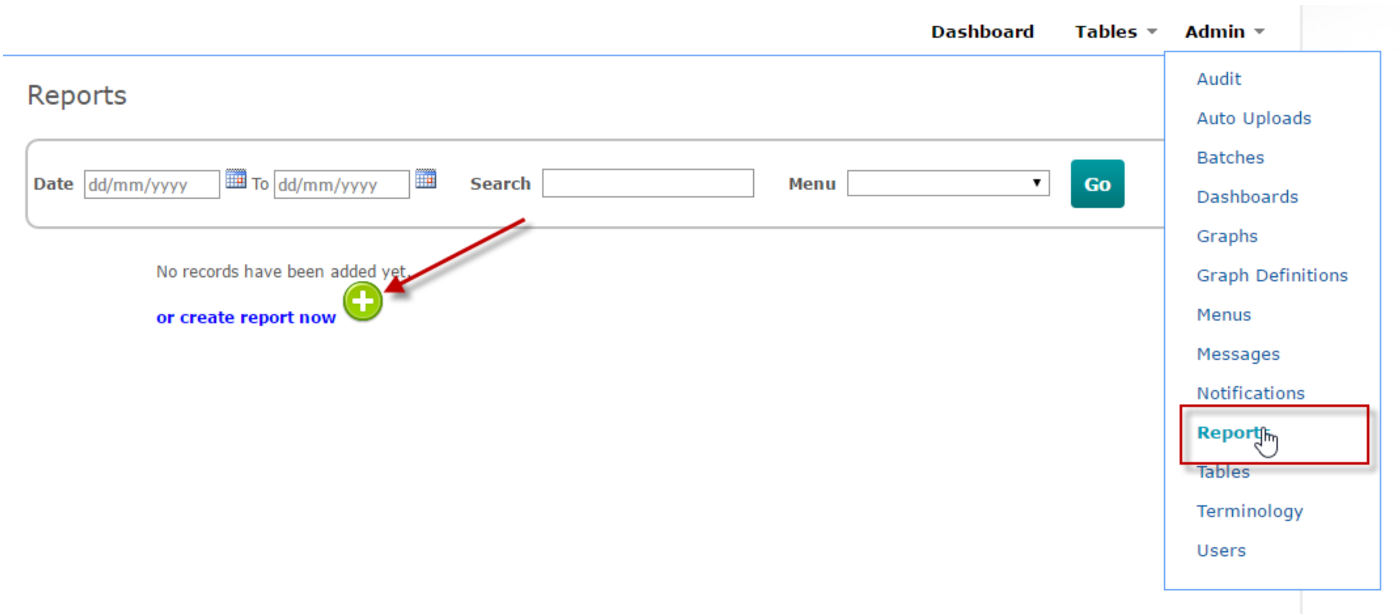
There are many different types of menu:

- Menu allows you to have sub menus to organise menu items
- Table opens a particular database table/summary page
- Documents opens the document area for a particular type of document
- Divider adds a horizontal line
- Link allows you to open other web pages – both in the database and outside



Reports

Adding a SQL Server Report



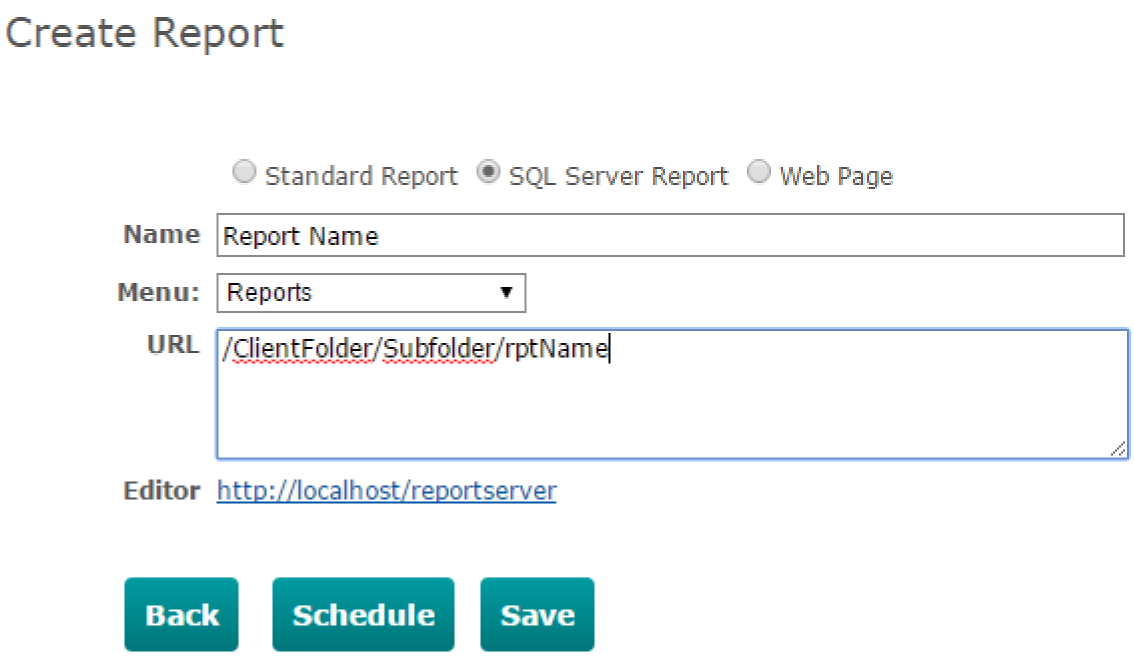
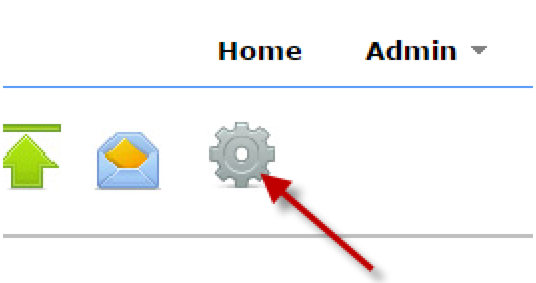
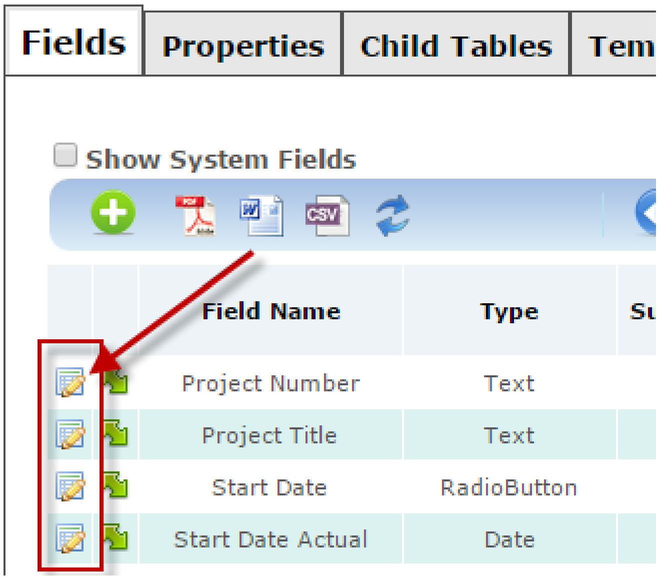
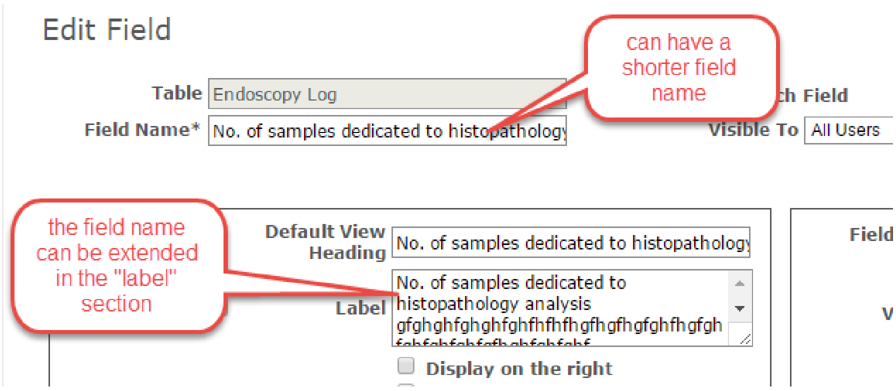
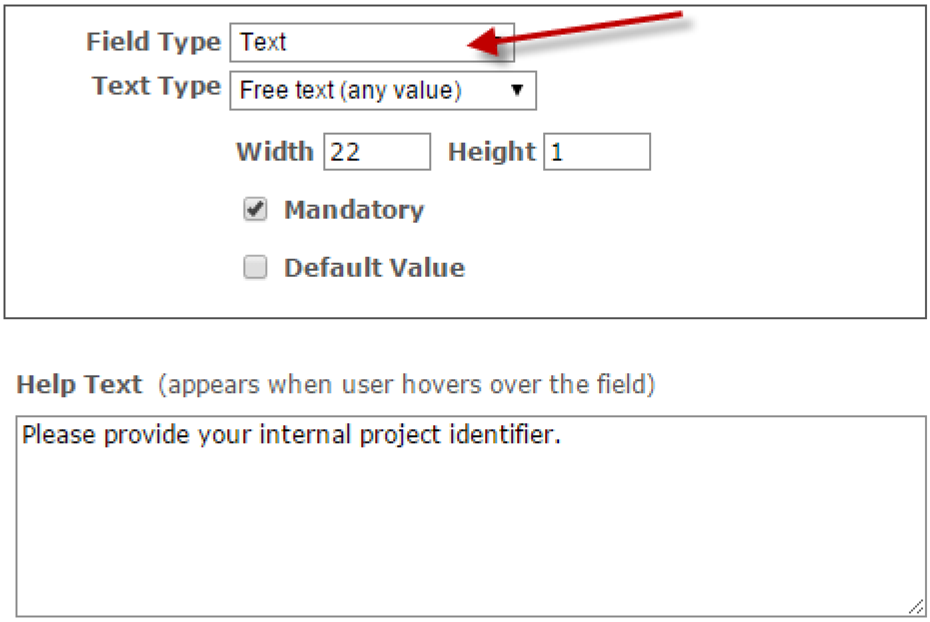


Table Configuration

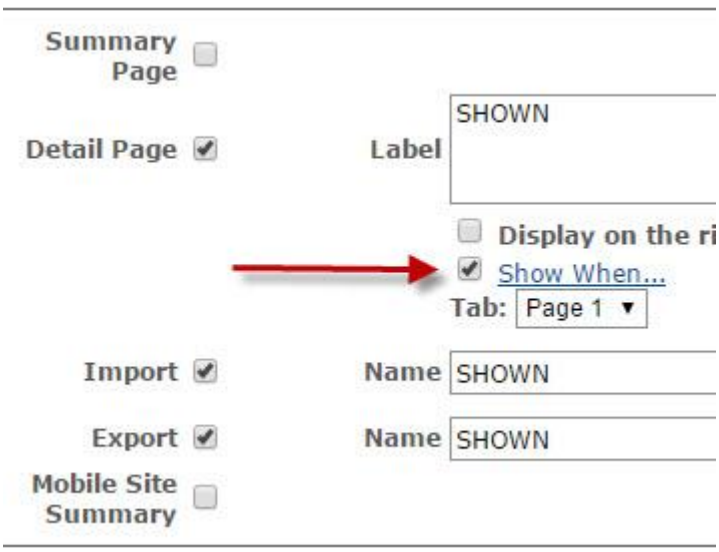
Fields

Edit Field

Go into table configuration – either from the Admin, Tables menu or using the icon on the table summary page	
Click on the Field you wish to edit	
In there you can change the name of the field (this affects all areas)	
Or you can change the name as it appears on the Summary page (the listing page), the	

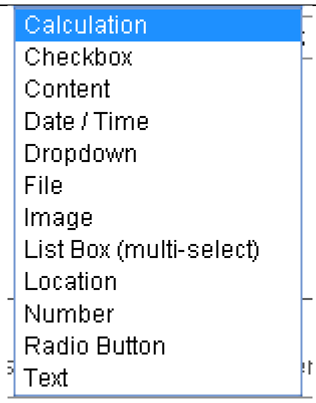
Detail page, in the Import file or the Export file. You can also hide it / not use it in any of those places by unticking the checkbox.	
You can also change the type of field and various options based on the type of field. Each Field Type has different options so have a browse through them. Below that you can change the Help Text which will appear as the user hovers over the field.	

Show When

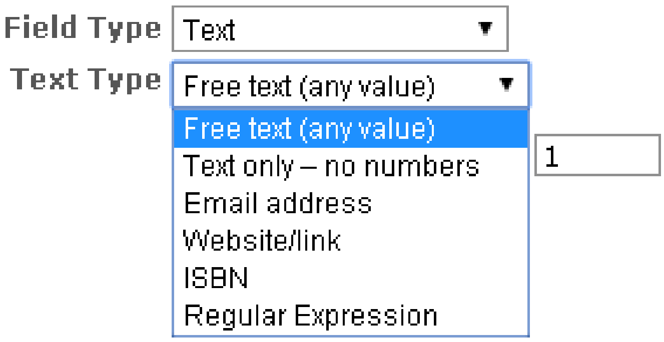
Show When option let the user manipulate a field that will be shown depending on another field result. On Edit field page of a certain field tick Show When	

This is the Show When configuration. In the first Field select a field that will be used.	
In this sample I used the Field "Show When" which is a radio button and when selected "Yes" another field will show.	
These 2 samples shows the effect of show when function. If "Yes" the SHOWN text field will show If "No" it will be hidden	

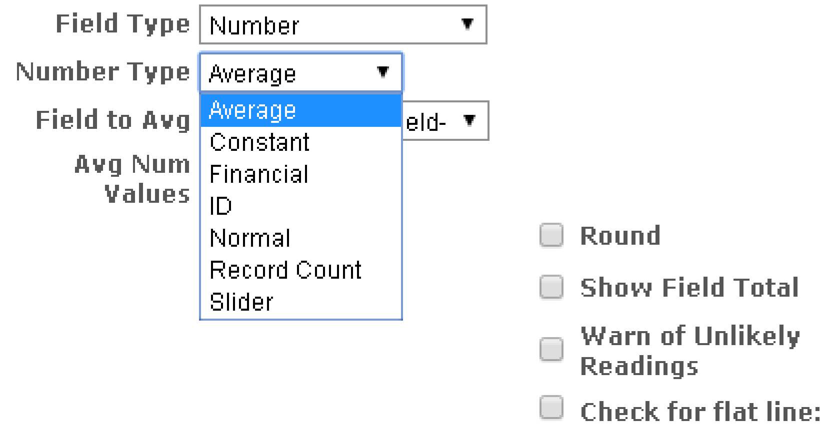
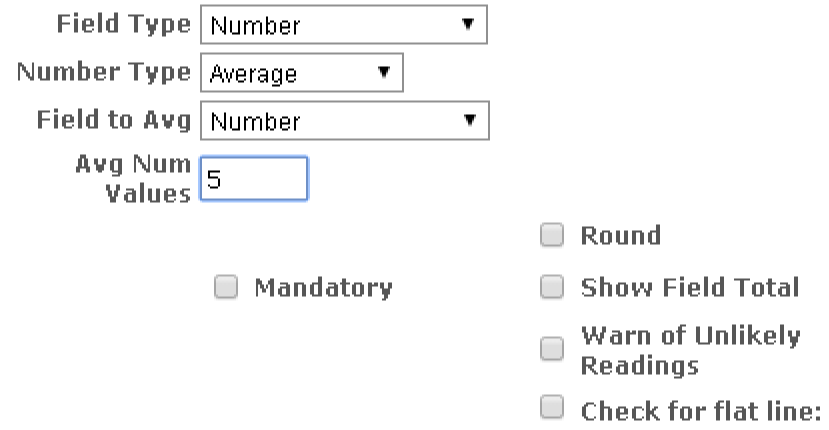
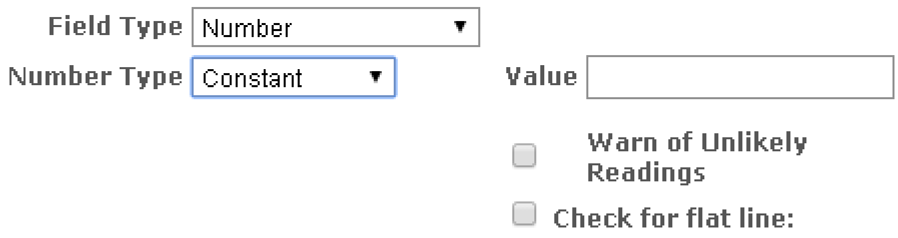
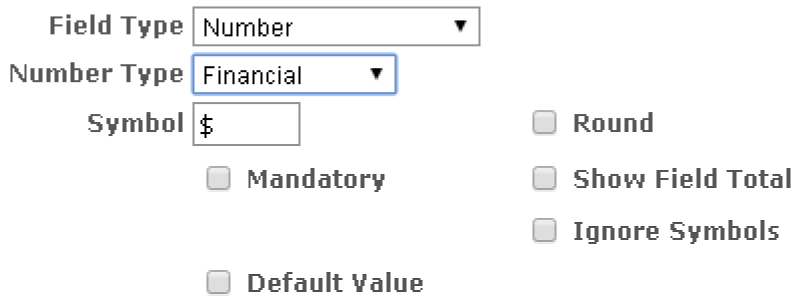
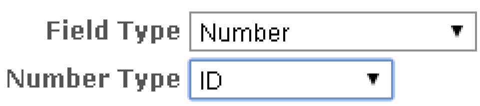
Field Types

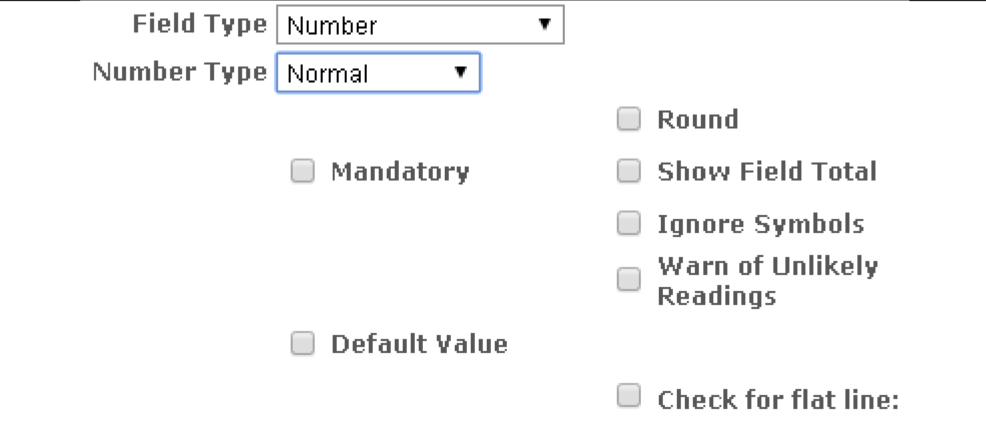
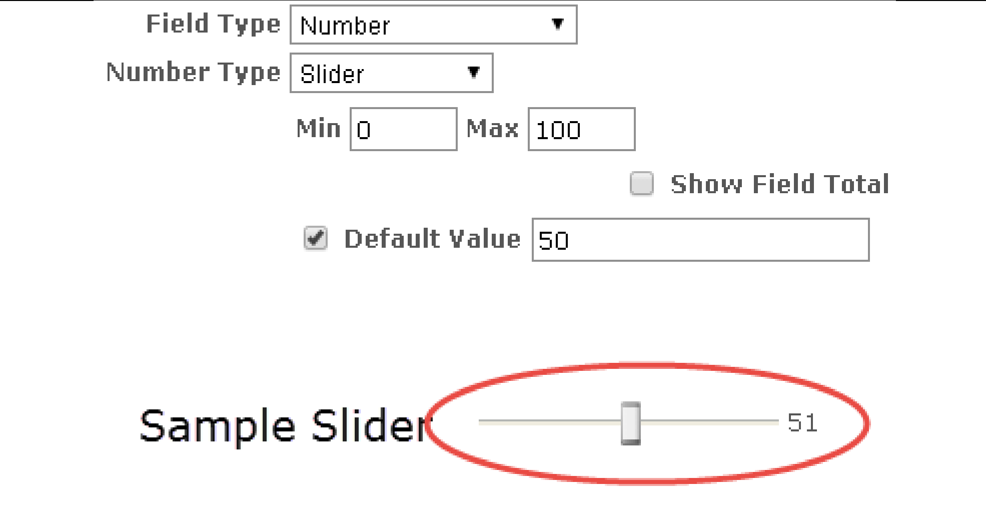
Users have several types of field that can be used that will suit the user's need of functionality.	

Text

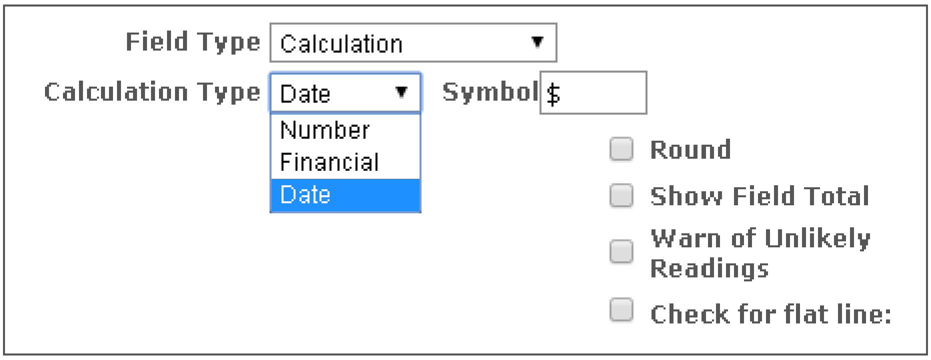
Text field is commonly used field type. It also has several type and functionality. User can also set width and height of **Text** field **Text only – no numbers** user can input text only and will not accept numbers. **Email Address** text field is restricted for email address only. **Website/link** restricted to link or website only **ISBN-** International Standard Book Number unique numeric commercial book identifier **Regular Expression-** for advance user	

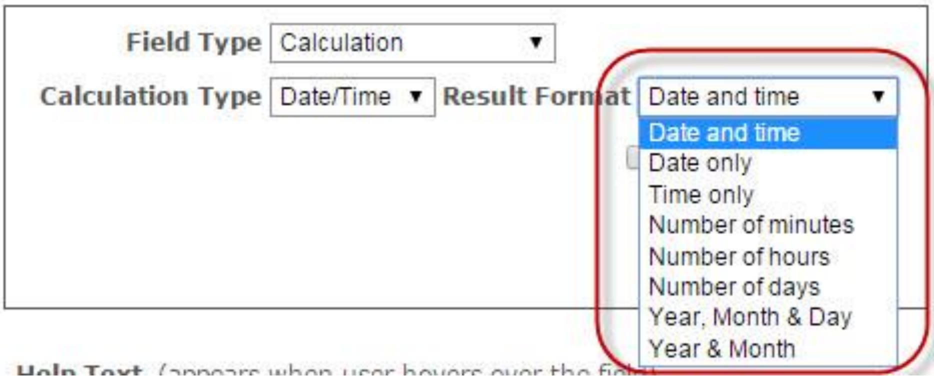
Number

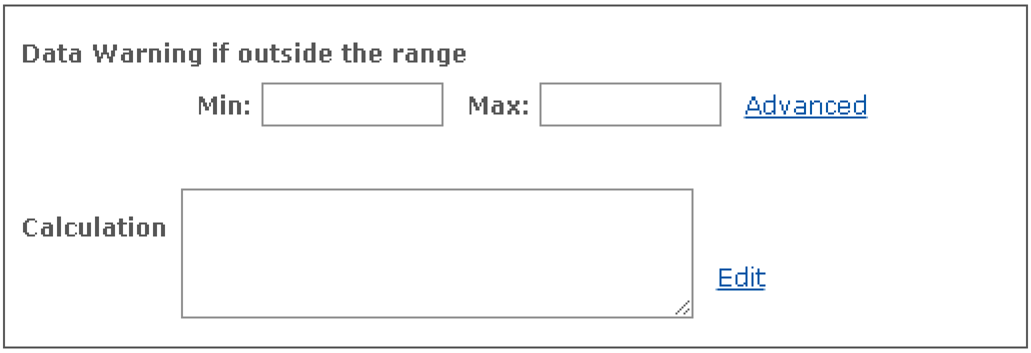
Number field type does almost anything about number in **TheDatabase**. It has several types to choose from.	
Average type gets the average of a field. In this sample, Field to Avg is set to **Number**(field in a sample form) and the Avg Num Values is set to 5 (sample value)	
Constant sets a constant value	
Financial sets a financial value in a form. User can also set a range of value to be accepted.	
ID sets a unique value on each record after each save.	

<table>
<tr>
<td>Normal type is a default type value of field type Number. Just a normal value.</td>
<td>
</td>
</tr>
<tr>
<td>Slider sets a value using a slider. User can set a min and max value as well as Default Value.</td>
<td>
</td>
</tr>
</table>

Calculations

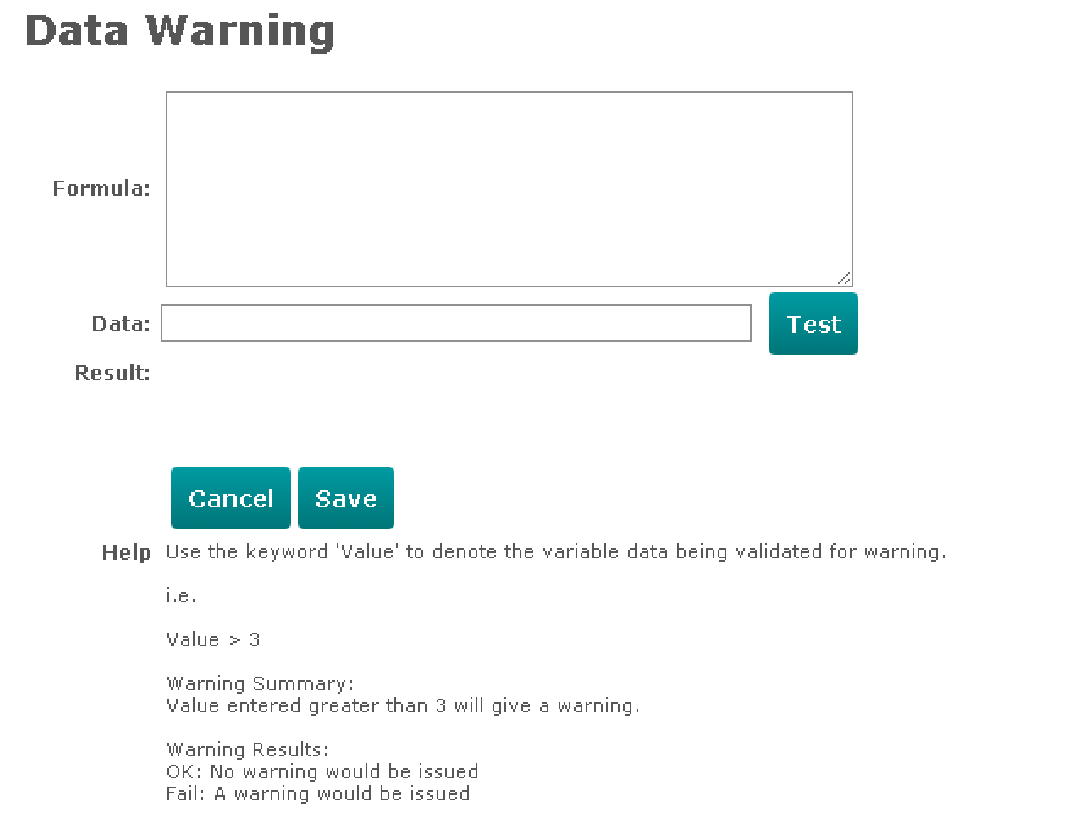
<table>
<tr>
<td>In Calculation type we can choose from 3 categories.</td>
<td>
</td>
</tr>
</table>

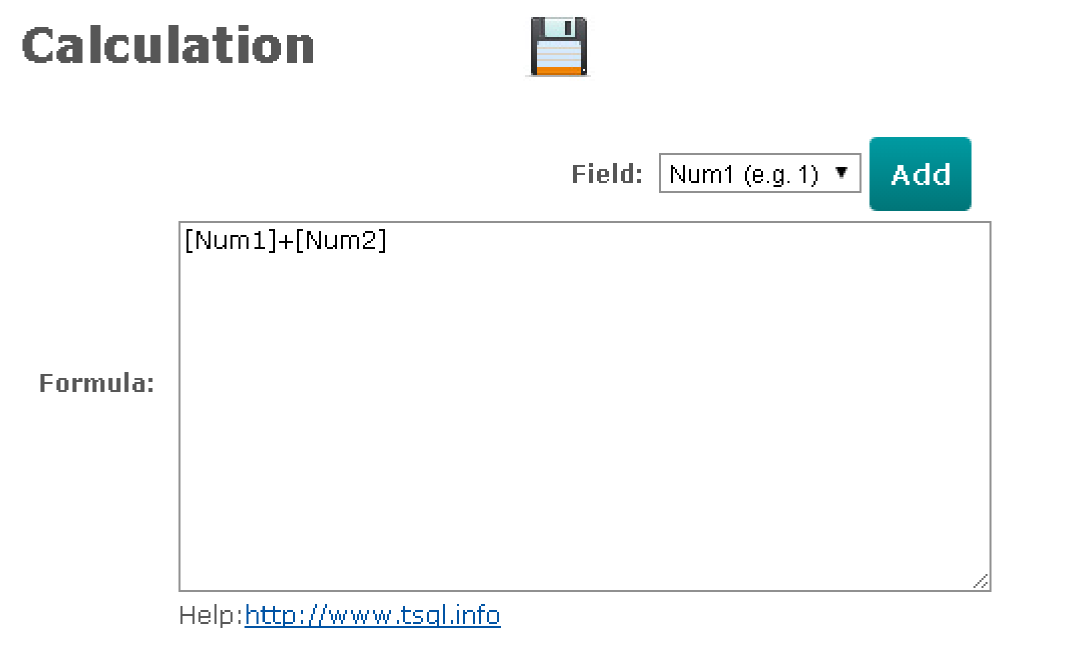
<table>
<tr>
<td>Calculation Type “Date/Time” has a sub categories user can choose depending on the user’s needs.</td>
<td>
</td>
</tr>
<tr>
<td>Calculation Type “Financial” has an option to add a symbol depending on what type of currency the user will have.</td>
<td>
</td>
</tr>
<tr>
<td>Data Warning- set a Min and Max range on our calculation

Calculation- formula will be seen here.</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>Advanced option of Data Warning.

Formula- inputs the condition.

Data- to test if the condition will work</td>
<td>
</td>
</tr>
<tr>
<td>Edit form of Calculation.

In this example I place 2 Number field types named Num1 and Num2 and put them under the procedure of adding.</td>
<td>
</td>
</tr>
</table>

Calculation Tips

<table>
<tr>
<td>

- If using Pages Show All Pages.

  This is so you can move them relative to the other fields on other pages.

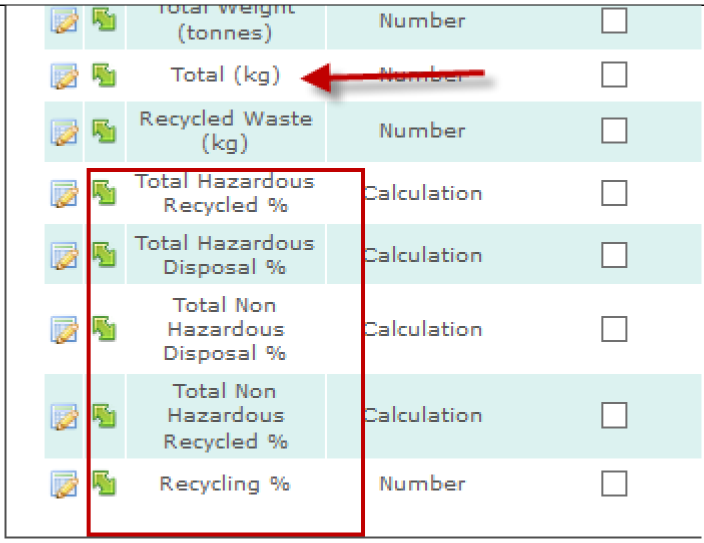
</td>
<td>

</td>
</tr>
<tr>
<td>

- Move all of the calculated fields below the fields they use in their calculations.

  Calculations are done in the order the fields appear in the page from top to bottom.

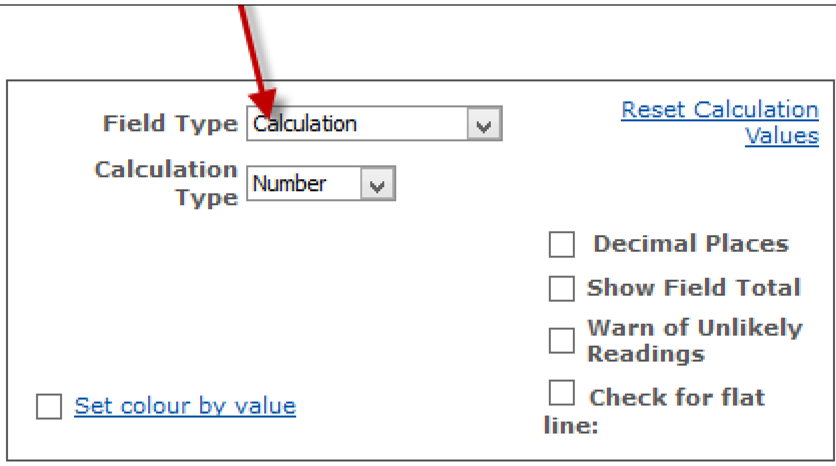
</td>
<td>



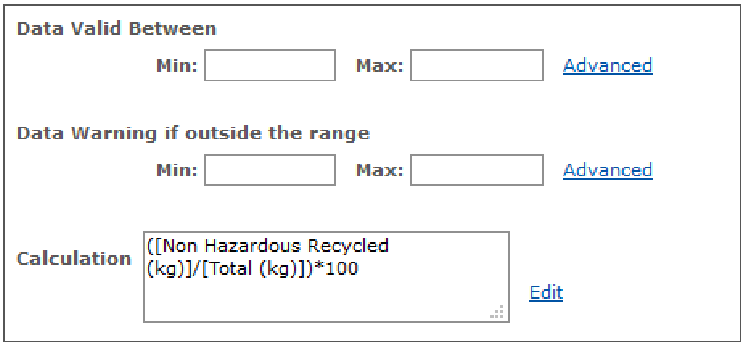
</td>
</tr>
<tr>
<td>

- Set it to Calculation, Number

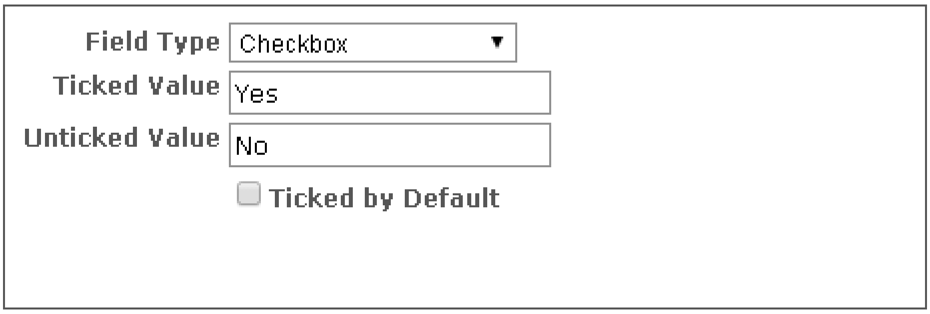
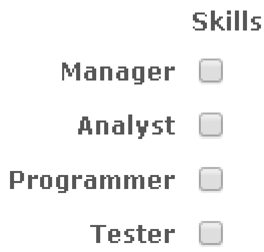
</td>
<td>



</td>
</tr>
</table>

• Set the formula like this, using brackets to ensure the calculation is done in the correct order.	

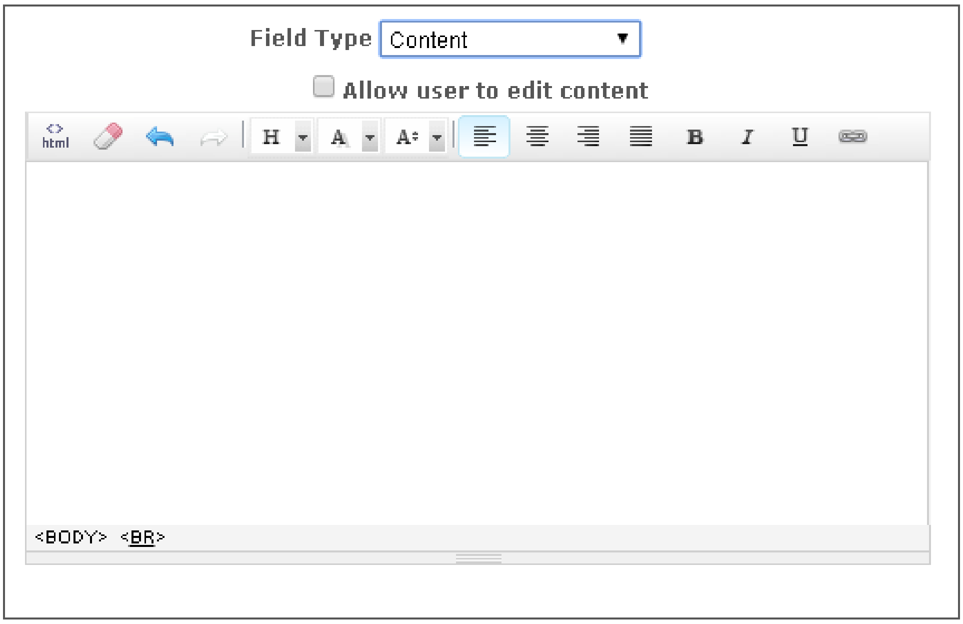
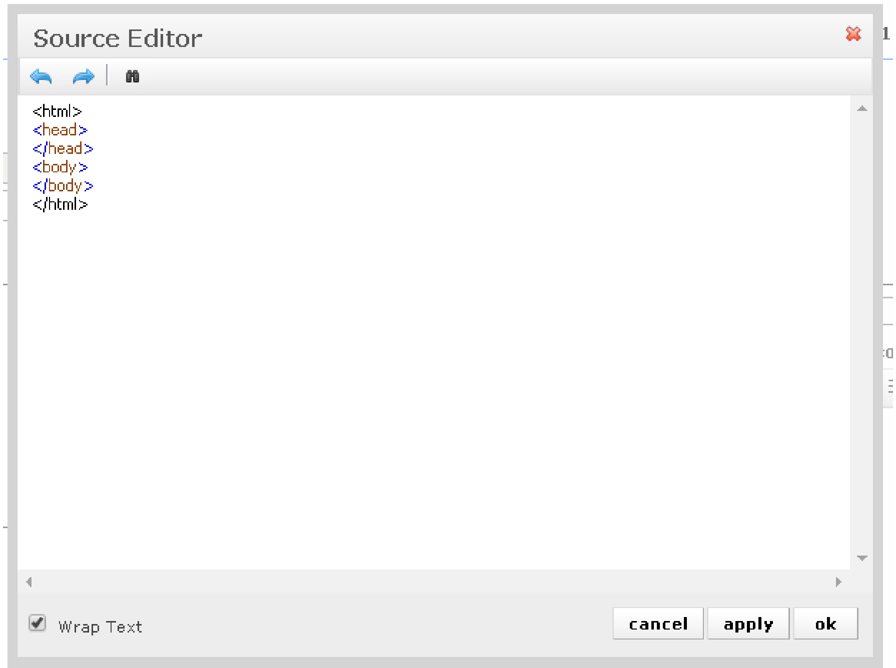
Checkbox

Can be used as a response to a question or a selection Default value is set to Yes and No. Can also set ticked by default, when the form loads it is ticked automatically.	
In this sample, We can select which skill will described most by using **Checkbox**	

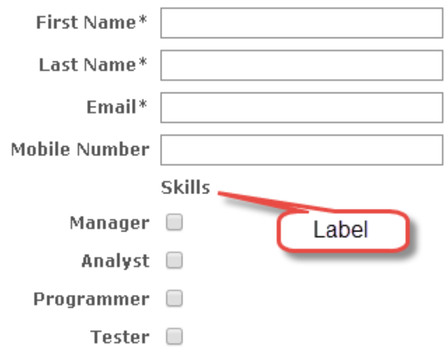
Content

<table>
<tr><td>Medium to express suggestion, opinion, etc. or can be used as a Label

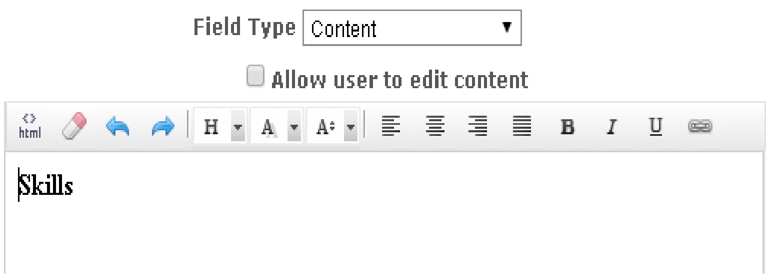
We can set Content to allow user to edit or not.

Formatting text is also possible.</td><td>
</td></tr>
<tr><td>HTML Option of Content field</td><td>
</td></tr>
</table>

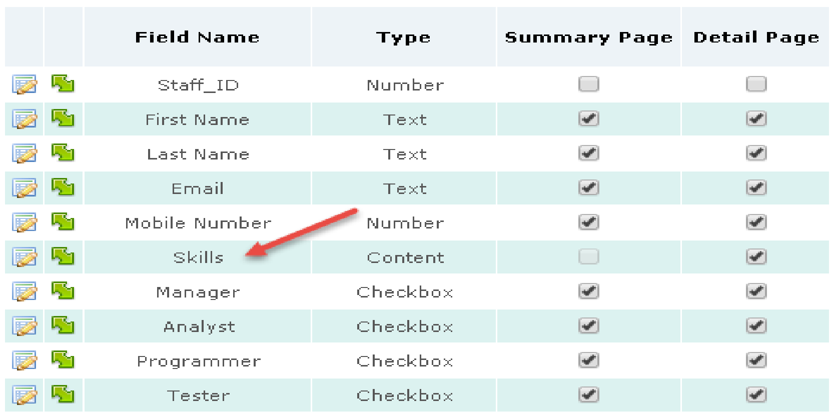
Using Content Field Type as Label



On the field type Content edit page and type the label you need or want to use.



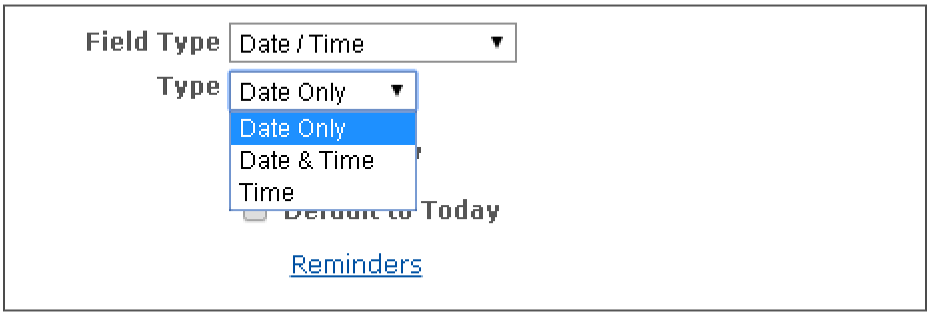
Placing the label on where it should be. The result is on the first example.



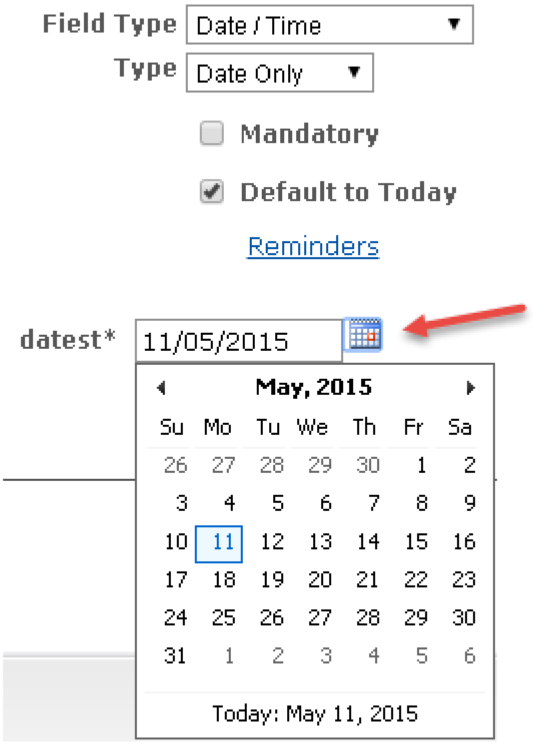
Field Name	Type	Summary Page	Detail Page
Staff_ID	Number	☐	☐
First Name	Text	☑	☑
Last Name	Text	☑	☑
Email	Text	☑	☑
Mobile Number	Number	☑	☑
Skills	Content	☐	☑
Manager	Checkbox	☑	☑
Analyst	Checkbox	☑	☑
Programmer	Checkbox	☑	☑
Tester	Checkbox	☑	☑

Date/Time

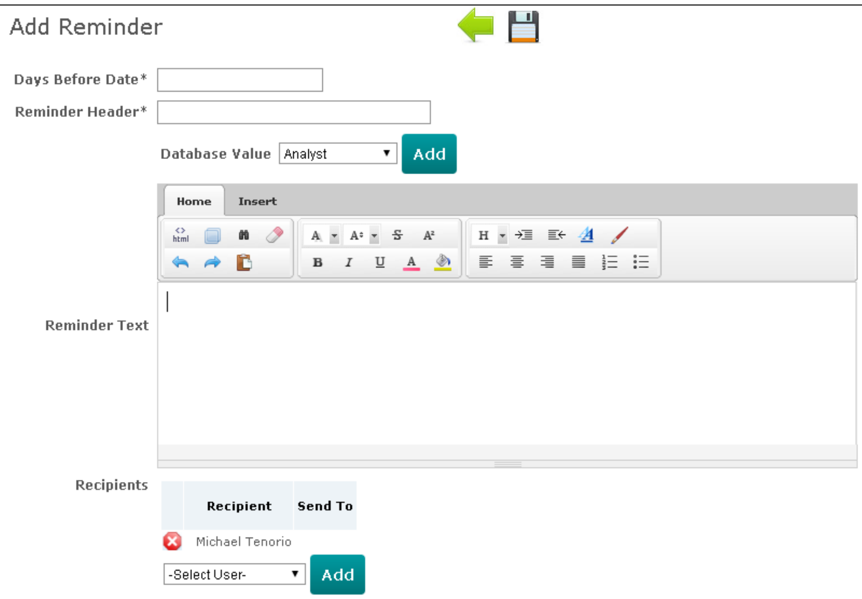
Date/Time can be set to 3 types. Date Only, Date & Time and Time.



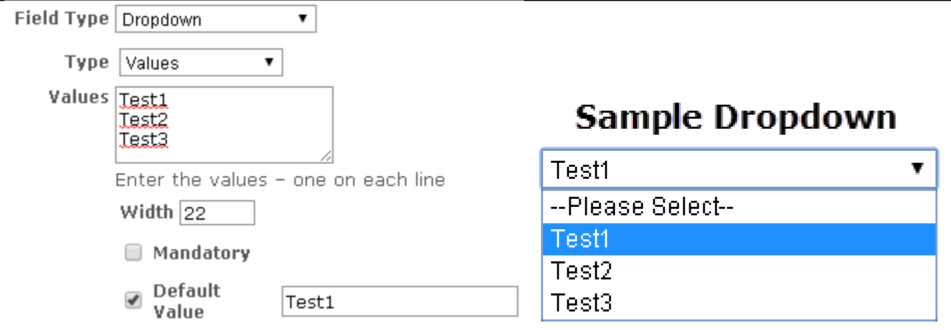
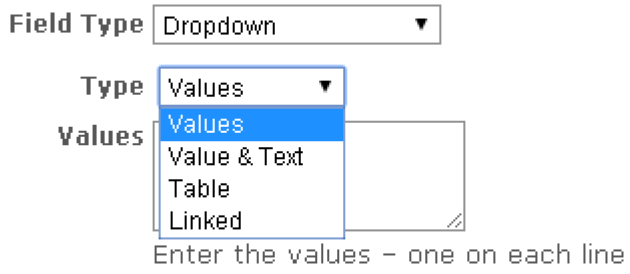
In this sample **Default to Today** is ticked it will show the date today.



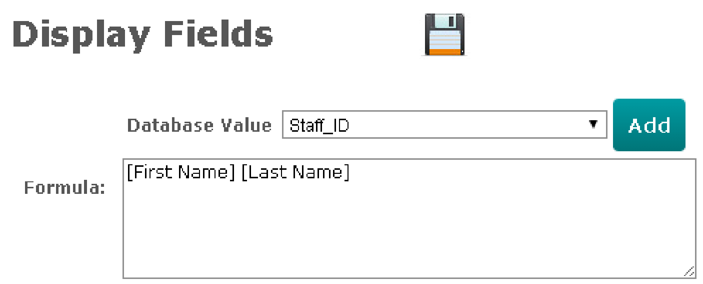
It also has an option to add reminder and send to a Recipient.



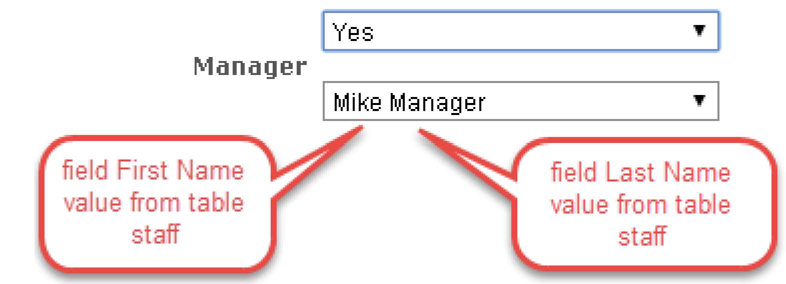
Dropdown

Group of selection that is listed on a **Dropdown.** In this sample, values are set to test1 to 3 and the default value is Test1 when the form loads	
There are four types of **Dropdown**	

In this field we can set or customized a value to be displayed.

Display Field --Advance— We can customize what will be displayed and can also combine numbers of fields to be displayed (e.g first and last name, ID and name).	
Database Value- value you want to display from the parent table then it will be displayed on **Formula.** Then hit the save icon which is in form of a floppy disk.	

In this sample I combine **first name** and **last name** from a **parent table** to be displayed in this form which is a **child table**.

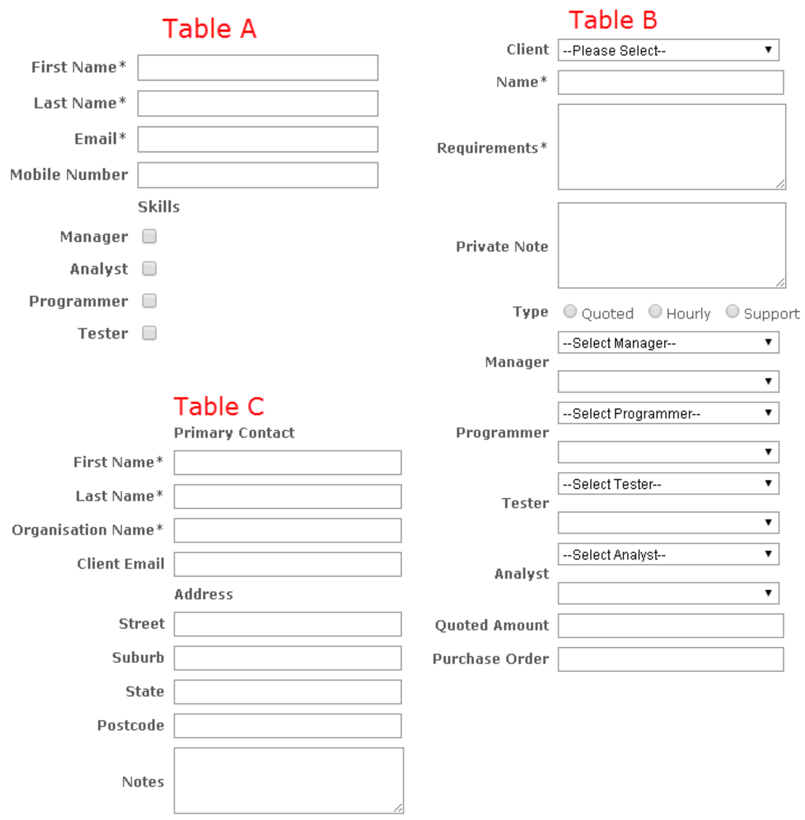


Parent Child Relationship in a database is important. This function is mainly used if you are using two or more tables.

In this sample our **Parent Table** is Table A and C and our **Child Table** is Table B. What happens here is table B is getting information from both Parent table.

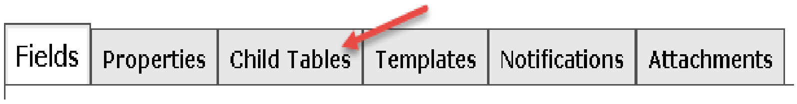
e.g

the **Client** field on **table B** is connected to **First** and **Last Name** field of **table C.** In that way, Client field will list all First and Last Name in Table C. Same with table A and B, but this time they are segregated depending on skill. (First and Last Name is Concatenated).



Configuring parent child relationship is easy. On table page of desired parent click Configure.

Then click **Child Tables**



And you click either the **plus sign** or **Add new record now**

Here is the form where we configure child table

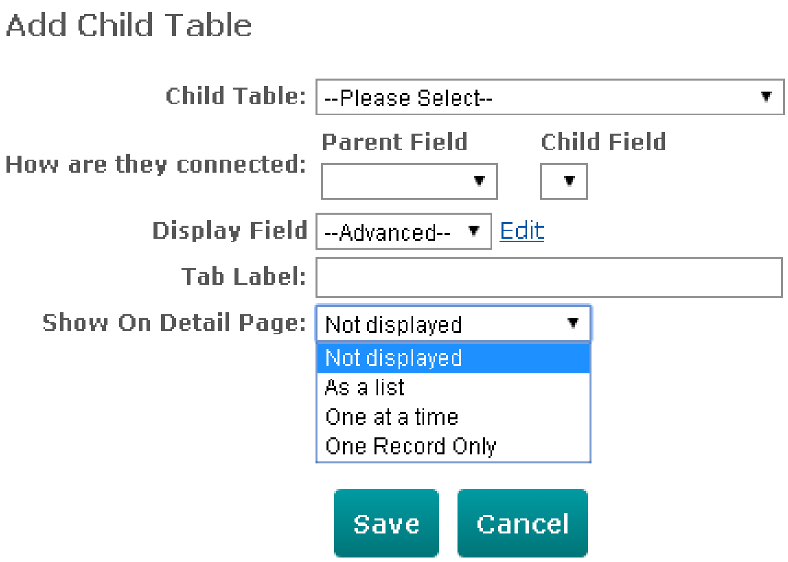
Child Table- table that will be used as a child

Parent Field-field where we will connect from a parent table.

Child Field- field where the parent field is connected.

Display Field- desired value that will be displayed from the parent table. (for –Advance—use. See Display Field section.)

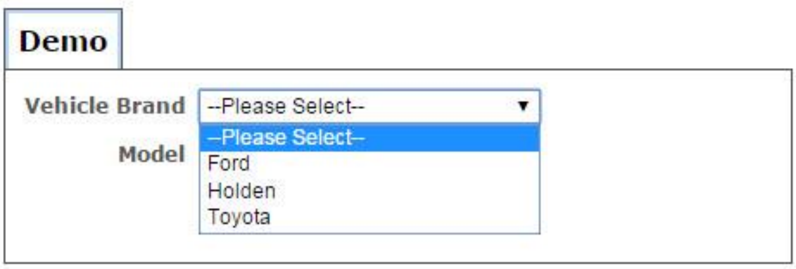
Show On Detail Page- usually it is set to **As a list.**

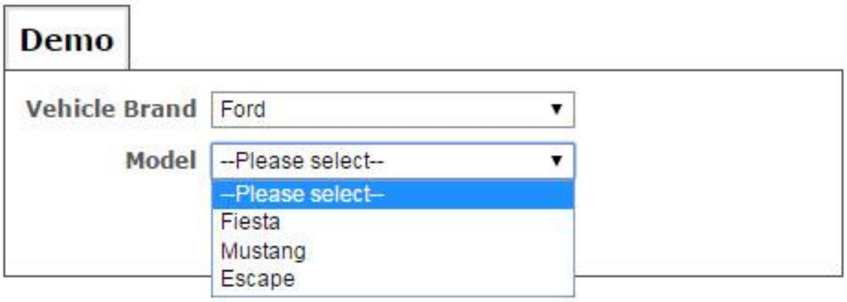
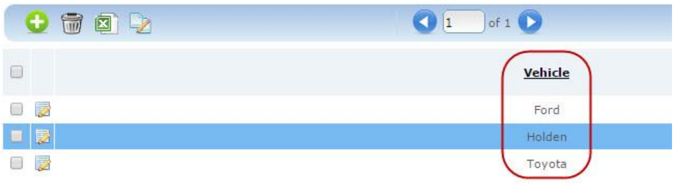
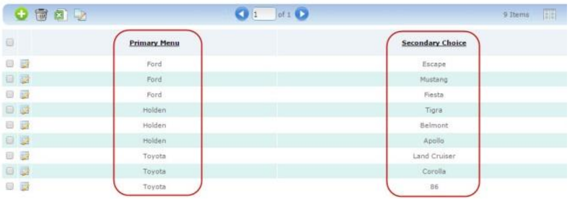


Note: Once configuration is created you cannot edit the Parent Field, Child Field, Display Field and Child Table. If you need to change those values you need to create another one and delete the previous configuration.

Dropdown field comes with a useful function for dropdown list that has sub menu. It is called **Filtered…**

In this sample Vehicle Brand field is the primary



<table>
<tr><td>menu and the Model is the sub-menu.</td><td>
</td></tr>
<tr><td rowspan="2">To configure Filtered… function. First we need to create 2 tables, one for primary menu and the other is for sub-menu.</td><td>
</td></tr>
<tr><td>
</td></tr>
<tr><td rowspan="2">On the main table create two dropdown fields.

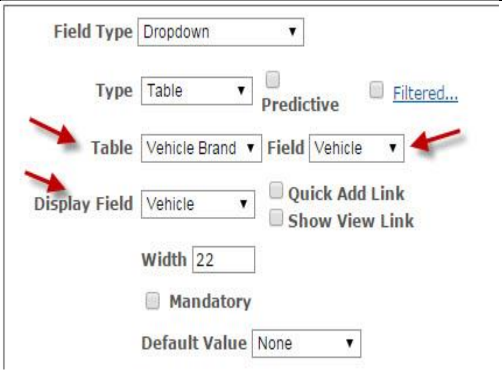
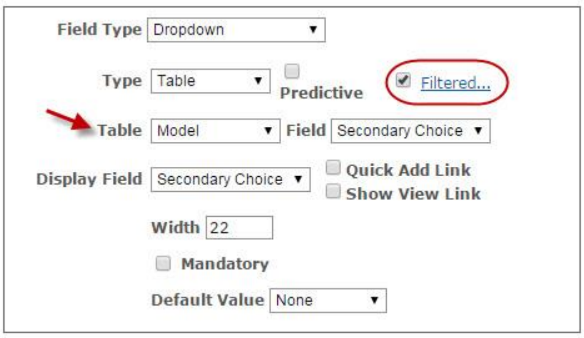
On primary menu dropdown

Type = Table

Table = (table name of primary menu)

Field and Display Field = primary menu from primary menu table

On sub-menu dropdown
Table = (sub-menu table)

Field and Display Field = sub-menu field from sub-menu table</td><td>
</td></tr>
<tr><td>
</td></tr>
</table>

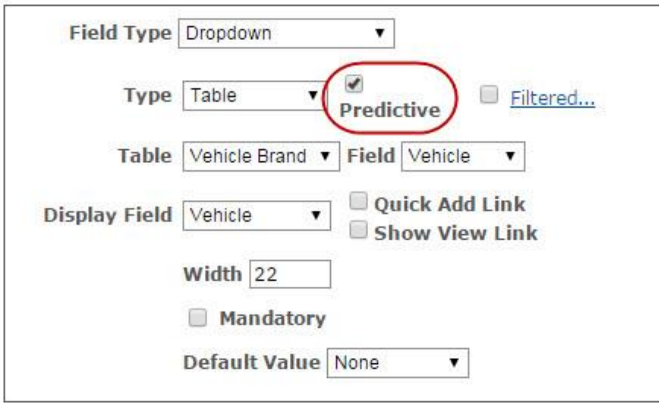
Filtered… is ticked and a window will pop-up for filtered… configuration.

Field = field of Primary menu on sub-menu table

Other Field = field where the primary menu dropdown is placed on the main table.

Dropdown field also has the option of selecting items via **Predictive**. In that way if you have a long list of selection. Just type a part of what you want to select instead of browsing the whole list.

To use it just tick the **Predictive** option on a dropdown configuration



Filter Values

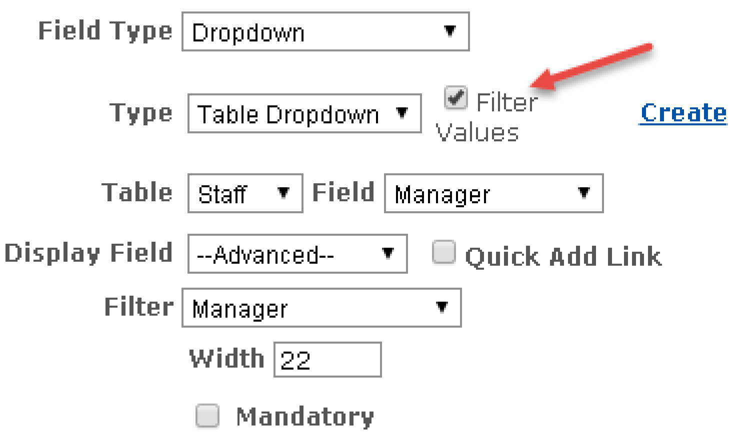
In Dropdown Field Type there is a function called **Filter Values**. What it does is filter a specific value with another dropdown menu (e.g. Yes or No) and list all the exact value on the main dropdown menu.

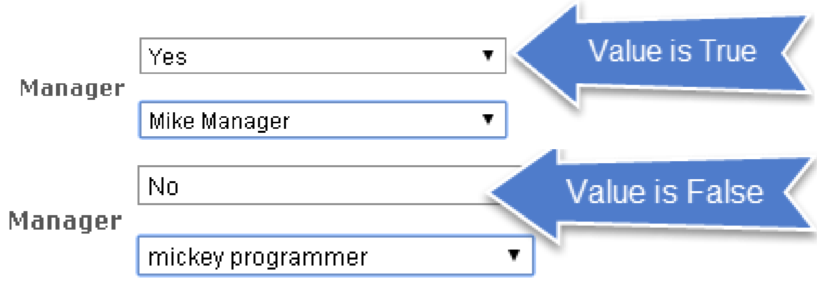
Table-parent table

Field – field of a parent table where it is connected

Filter- field of a parent table that will be filtered

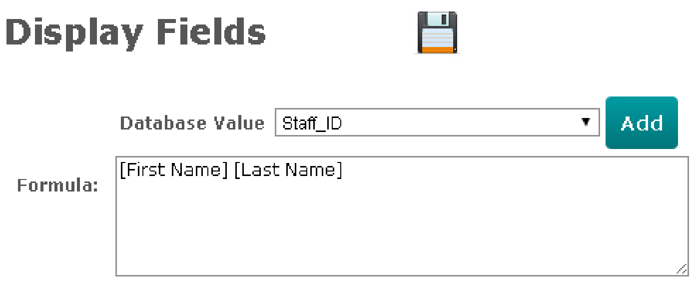
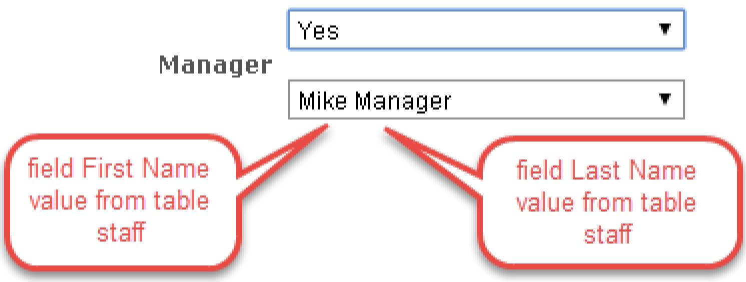
Display Field- field of a parent table which will be displayed on a list.



If the Value is **True** it will return an appropriate value, else **No**	

Display Field

In this field we can set or customized a value to be displayed.

Display Field --Advance— We can customize what will be displayed and can also combine numbers of fields to be displayed (e.g first and last name, ID and name).	
Database Value- value you want to display from the parent table then it will be displayed on **Formula.** Then hit the save icon which is in form of a floppy disk.	
In this sample I combine first name and last name from a parent table to be displayed in this form which is a child table.	

File

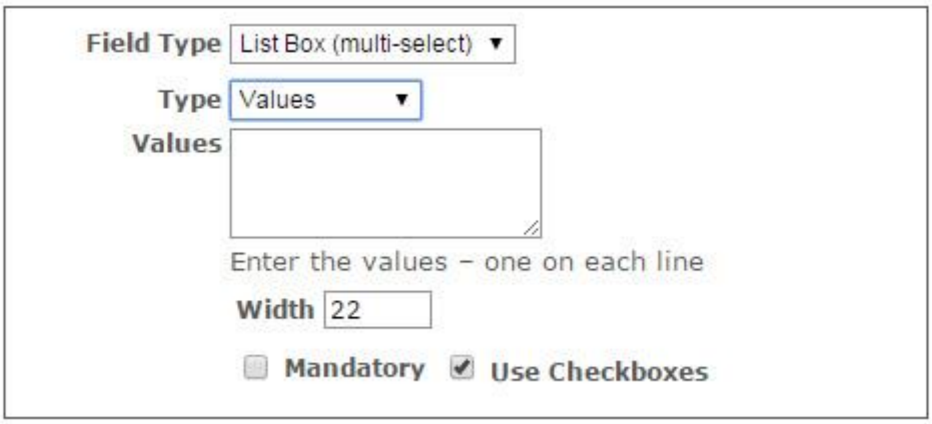
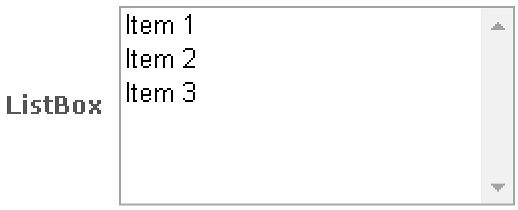
File field type allows user to upload a file and can be set to mandatory or not.	

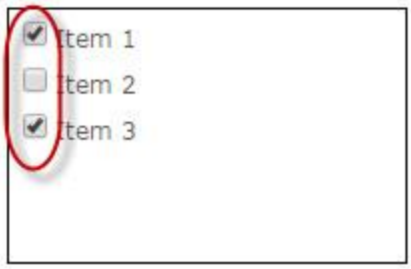
Click browse to locate the file to be uploaded	

Image

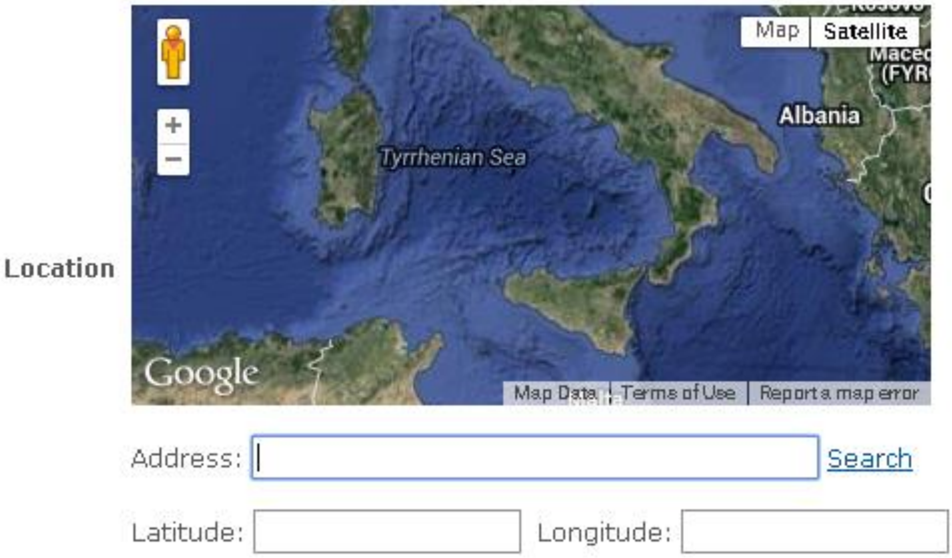
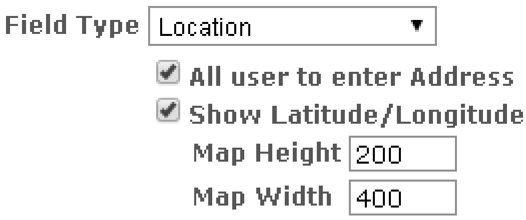
Image field type allows the user to upload image. It can be set to mandatory or not. Height of the image can be set as well.	
Click browse to locate the image to be uploaded.	

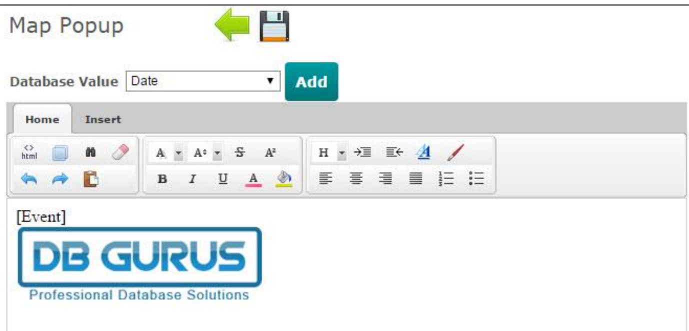
Listbox

Just like dropdown list all the values, but this time in a **Listbox**	
In this sample of **Listbox**, Values are set to Item1 to 3 and **Use checkboxes** is not used.	

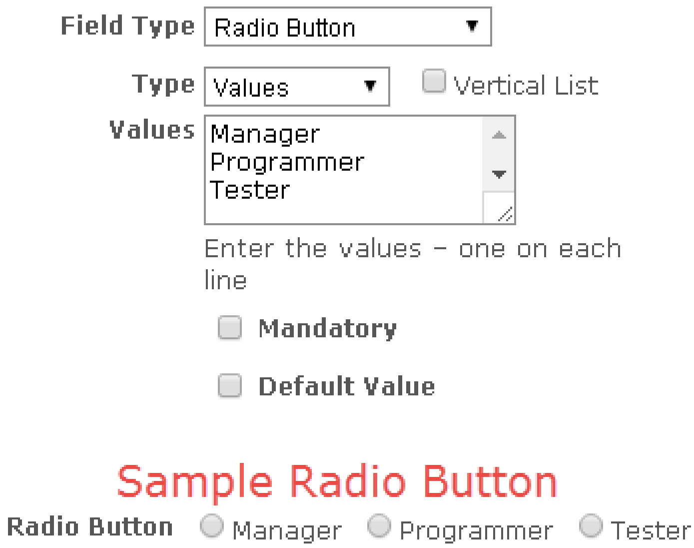
In this **Listbox** the **Use checkboxes** is being used. In this way selecting multiple option is much easier.	

Location

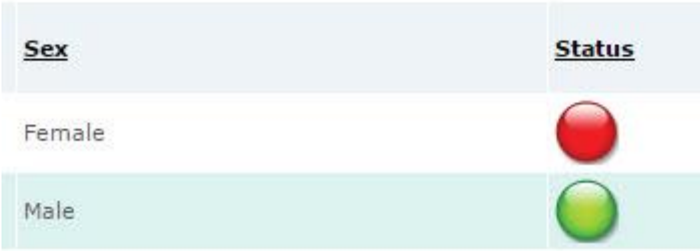
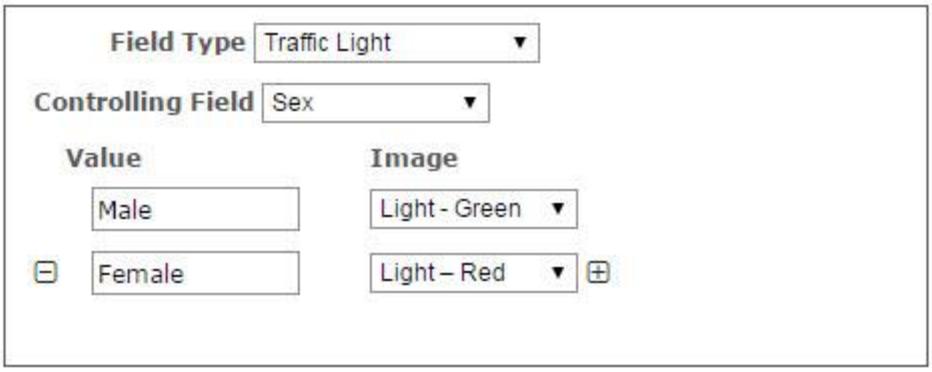
Location field type allows the user to set a location record. Setting the address it will search via Google map. Locating the address and giving the Latitude and Longitude.	
User can have an option to show or hide Latitude/Longitude. Also can set the size of the Map in a form.	
Hover Text helps the user to show the caption of a certain location when you hover on a pin in the dashboard's map. User can also use the **Map Popup** where the user can add custom Text or can insert an image when clicking on a location.	

Hover Text can be configured on **Location** field. In **Hover Text** field select which field will be shown when mouse hovering occurs on a location pin.	
Map Popup can also configured in **Location** field. Hit the **Edit Popup** link and the configuration window will show. User can insert image and add custom text.	 

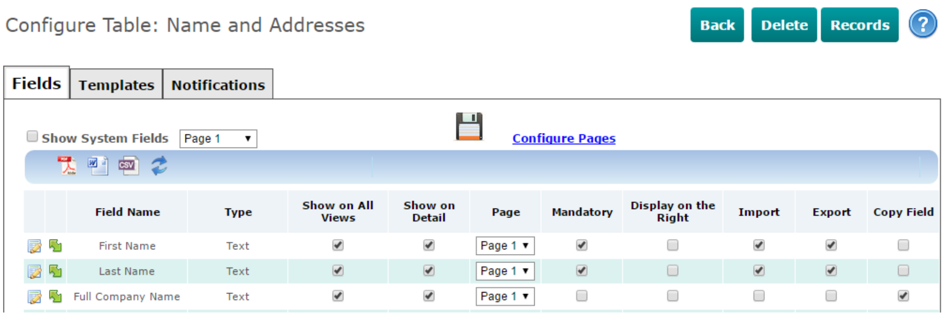
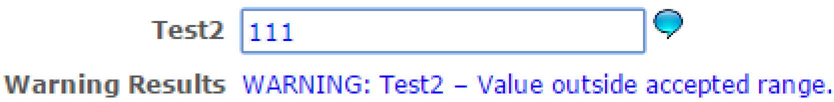
Radio Button

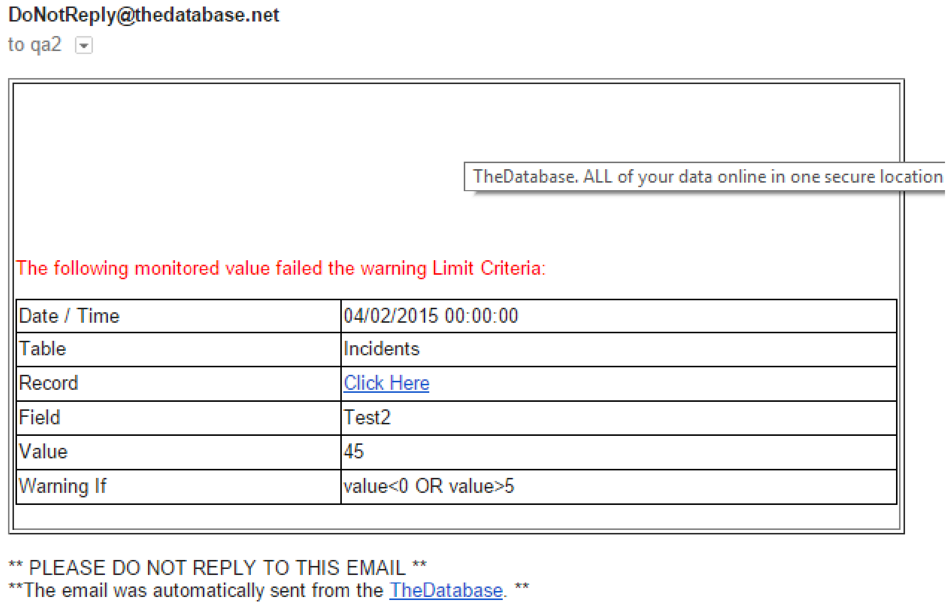
Radio Button lets the user choose from an option. In this sample, Values are set as a skill. User can also set a Default value to be ticked when the form loads.	

Traffic Light

This function can be use on many different type of scenario like having an ease on checking a record, expiration, validity, etc..	
In this sample **Traffic Light** is used to determine a record if it's Male or Female. **Controlling Field**, choose what field will the traffic light takes effect.	

Attachments

In this example we are using: • TheDatabase test server • Main table is called "Incidents" • Saving both Incoming and Outgoing emails to a table called "File Notes' 1. Create a Table to Store The Emails	
3. Test outgoing using a warning (or a reminder)	

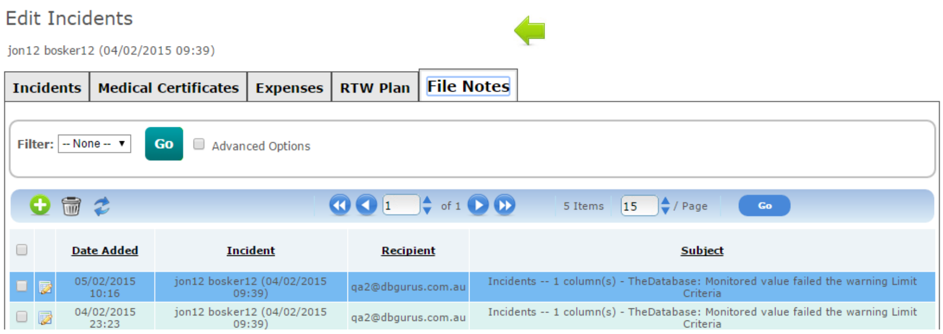

DoNotReply@thedatabase.net
to qa2

TheDatabase. ALL of your data online in one secure location

The following monitored value failed the warning Limit Criteria:

Date / Time	04/02/2015 00:00:00
Table	Incidents
Record	Click Here
Field	Test2
Value	45
Warning If	value<0 OR value>5

** PLEASE DO NOT REPLY TO THIS EMAIL **
**The email was automatically sent from the TheDatabase. **



4. Test incoming by sending an email to the incoming

Wait for 5 minutes… and refresh the page – the email should be there.


testing attachments #532624#

uploads@thedatabase.net

testing attachments #532624#

This email should be automatically attached to incident 532624 with a bit of luck

DB Gurus
Professional Database Solutions
P: 1800 901096
www.dbgurus.com.au

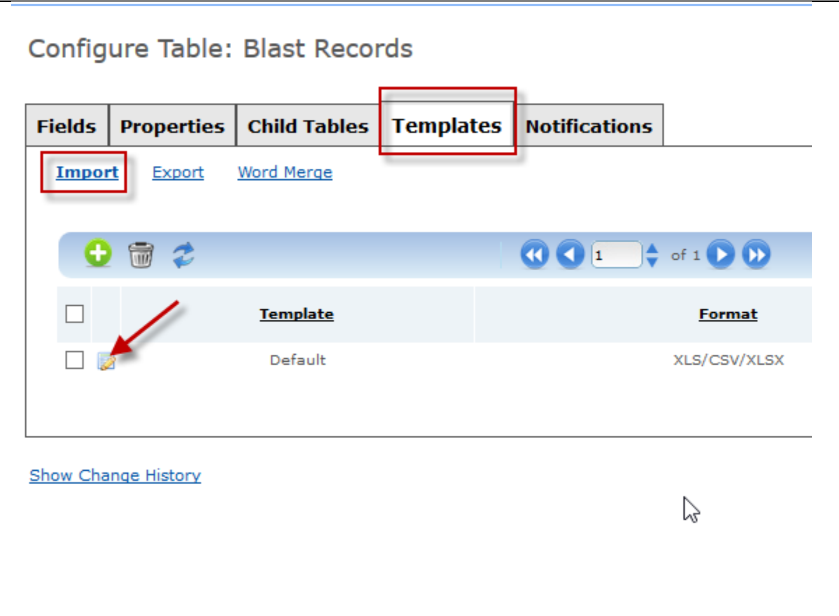
Templates

Import

- Configure the table,
- Select the Templates tab
- Select the Import page

You can add new import templates and thus have alternative formats which can be picked from the dropdown on the Upload page.

You can also end the template here by clicking in the edit icon.

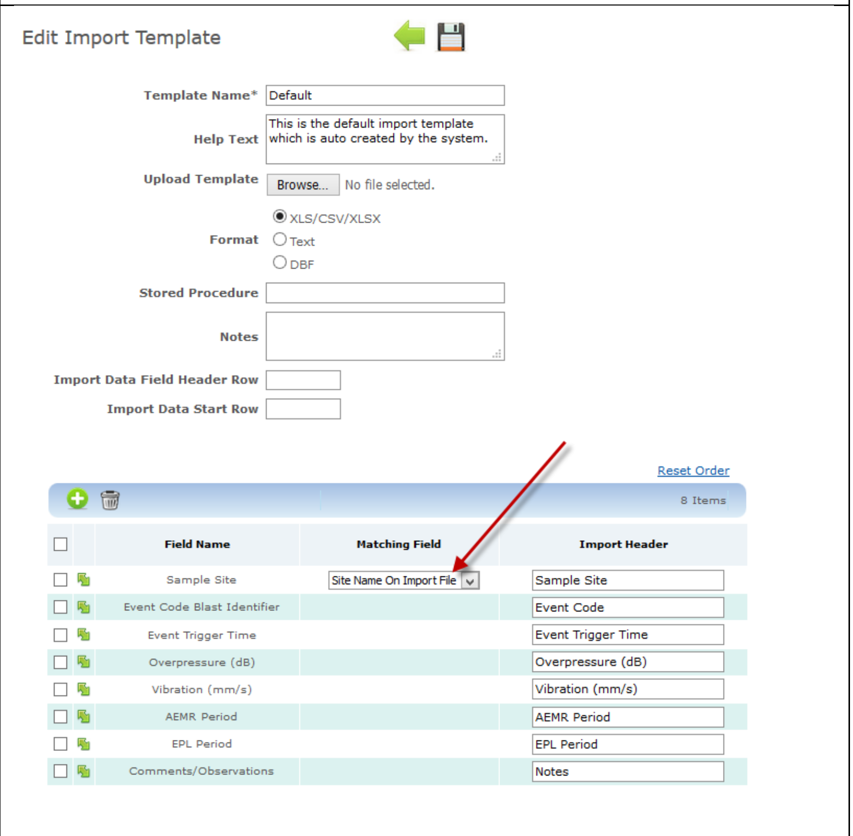


Help Text is shown on the upload page to help the user.

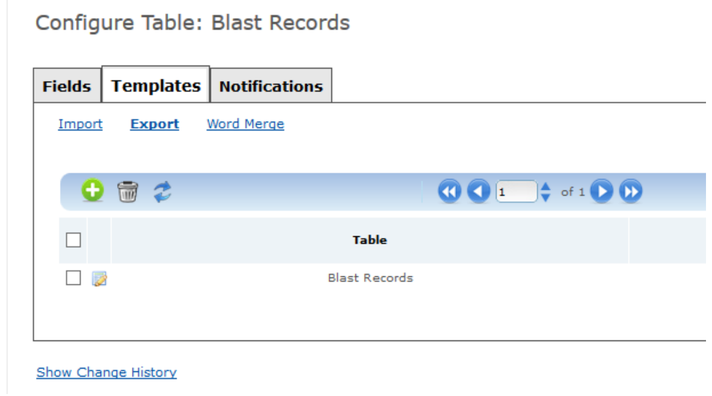
Upload Template is a custom Excel spreadsheet you can make available to the user on the upload page.

Stored Procedure is a bit of code that is run immediately after upload. A setting only DB Gurus would use.

Matching Field allows the database knows how to match the incoming data to the dropdown correctly.



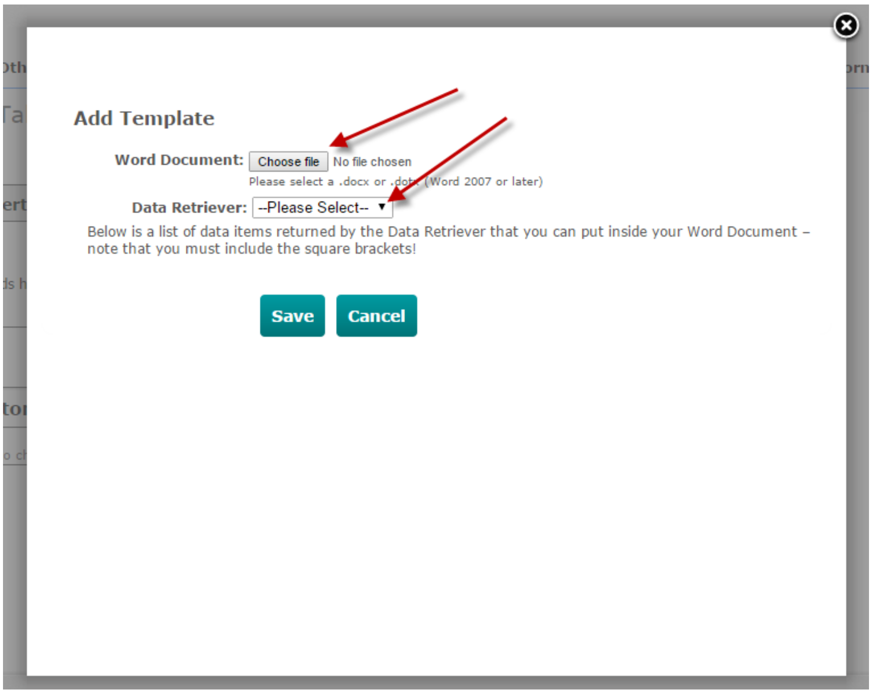
Export

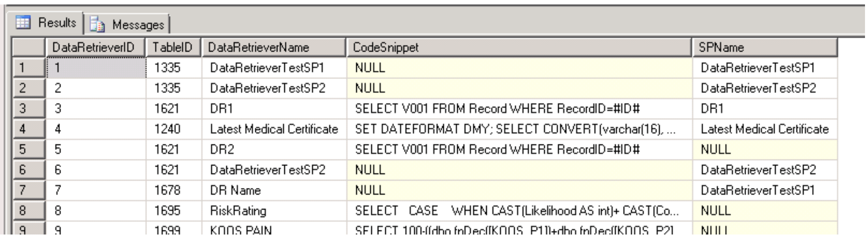
Mail Merge

Sign in as an administrator	
From the Admin menu select Tables	
Click on Config	
On the Templates tab click on Add new record now	

Select your Word document



Note that the Data Retriever must be added by DB Gurus and stored in the table [DataRetreiver]

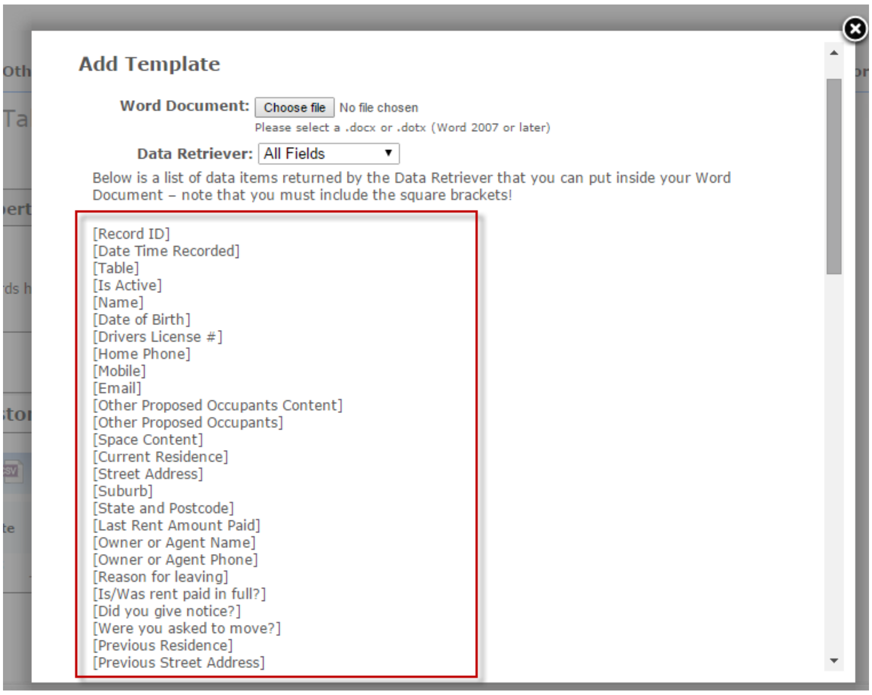


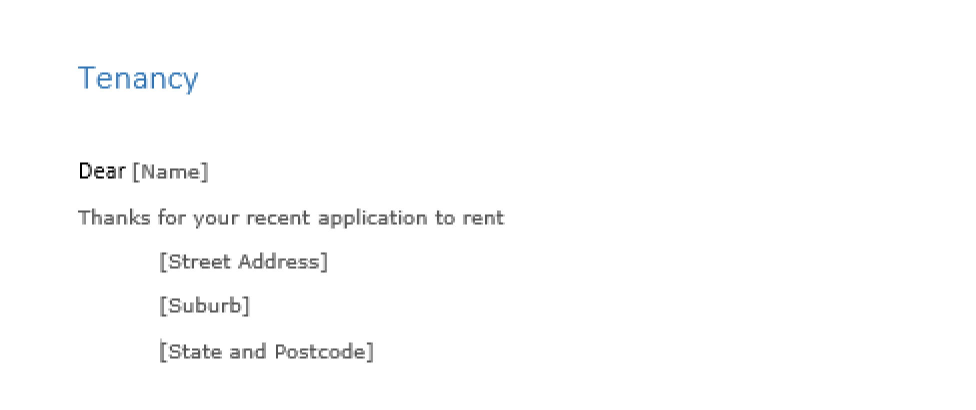
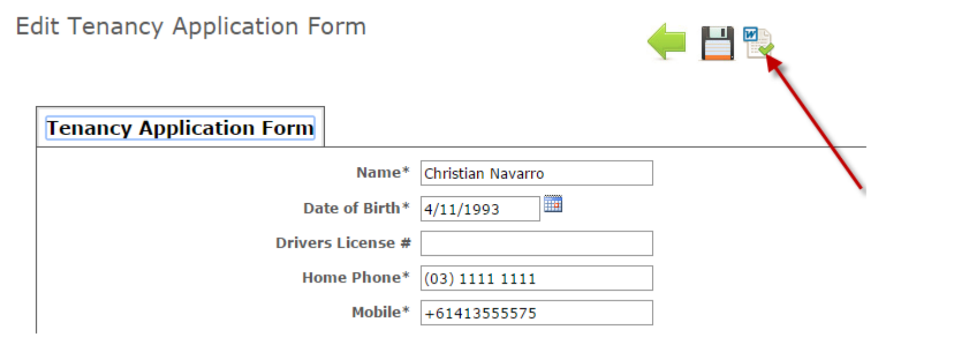
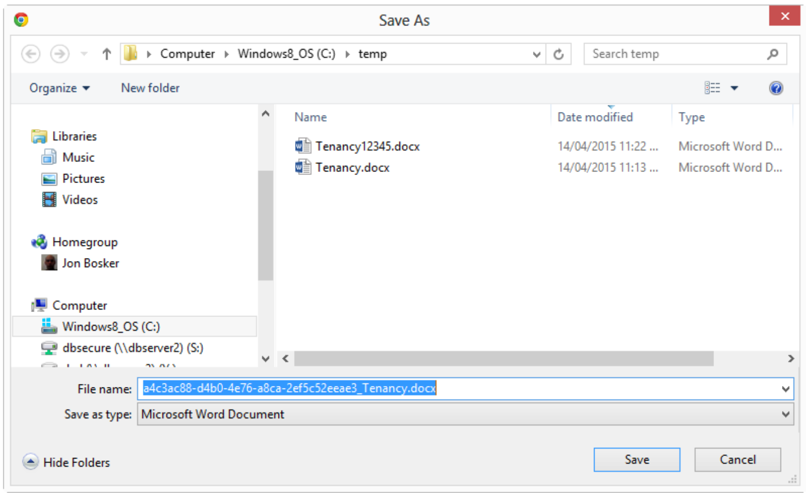
	DataRetrieverID	TableID	DataRetrieverName	CodeSnippet	SPName
1	1	1335	DataRetrieverTestSP1	NULL	DataRetrieverTestSP1
2	2	1335	DataRetrieverTestSP2	NULL	DataRetrieverTestSP2
3	3	1621	DR1	SELECT V001 FROM Record WHERE RecordID=#ID#	DR1
4	4	1240	Latest Medical Certificate	SET DATEFORMAT DMY; SELECT CONVERT(varchar(16), ...	Latest Medical Certificate
5	5	1621	DR2	SELECT V001 FROM Record WHERE RecordID=#ID#	NULL
6	6	1621	DataRetrieverTestSP2	NULL	DataRetrieverTestSP2
7	7	1678	DR Name	NULL	DataRetrieverTestSP1
8	8	1695	RiskRating	SELECT CASE WHEN CAST(Likelihood AS int)+ CAST(Co...	NULL
9	9	1699	KOOS PAIN	SELECT 100-((dbo.fnDec([KOOS_P1])+dbo.fnDec([KOOS_P2]	NULL

A sample stored procedure

```
CREATE PROCEDURE [dbo].dataRetriever_AllFields
(
	@nTableID INT=NULL, -- not used
	@nRecordID int=null
)

/*

*/
AS
BEGIN
	SET NOCOUNT ON;

	DECLARE @tDisplayColumns TABLE
	(
		ID int identity(1,1),
		ColumnID int,
		SystemName varchar(50),
		DisplayText varchar(50)
	)

--DECLARE @nTableID INT
IF @nTableID IS NULL and @nRecordID IS NOT NULL
SELECT @nTableID=TableID FROM Record WHERE
RecordID=@nRecordID
```

	`` INSERT INTO @tDisplayColumns (ColumnID, DisplayText, SystemName) SELECT ColumnID, DisplayName, SystemName FROM [Column] WHERE TableID = @nTableID AND DisplayName IS NOT NULL AND LEN(DisplayName) > 0 AND SystemName<>'EnteredBy' ORDER BY DisplayOrder DECLARE @sSQL varchar(MAX) DECLARE @counter int SET @counter = 1 SELECT @sSQL = 'SELECT * FROM (SELECT RecordInfo.* FROM (SELECT ' SET @counter = 1 WHILE EXISTS(SELECT * FROM @tDisplayColumns WHERE ID >= @counter) BEGIN SELECT @sSQL = @sSQL + 'Record.' + SystemName + ' AS [' + DisplayText + '], ' FROM @tDisplayColumns WHERE ID = @counter SET @counter = @counter + 1 END SELECT @sSQL = LEFT(@sSQL, LEN(@sSQL)-1) SELECT @sSQL = @sSQL + ' FROM [Record]' -- ADD IN THE WHERE CRITERIA SELECT @sSQL = @sSQL + ' WHERE Record.RecordID = ' + CAST(@nRecordID as varchar) SELECT @sSQL = @sSQL + ' ' SELECT @sSQL= @sSQL + ') as RecordInfo) as RecordFinalInfo ' PRINT @sSQL EXEC (@sSQL) -- PRINT @sSQL END GO ```
Which can be tested like this	`exec dataRetriever_AllFields @nRecordID=757899`
For now we need to run a command like this to link the table with the Data Retriever.	`insert into [DataRetriever] (TableID, DataRetrieverName, SPName) values (2124, 'All Fields', 'dataRetriever_AllFields')`

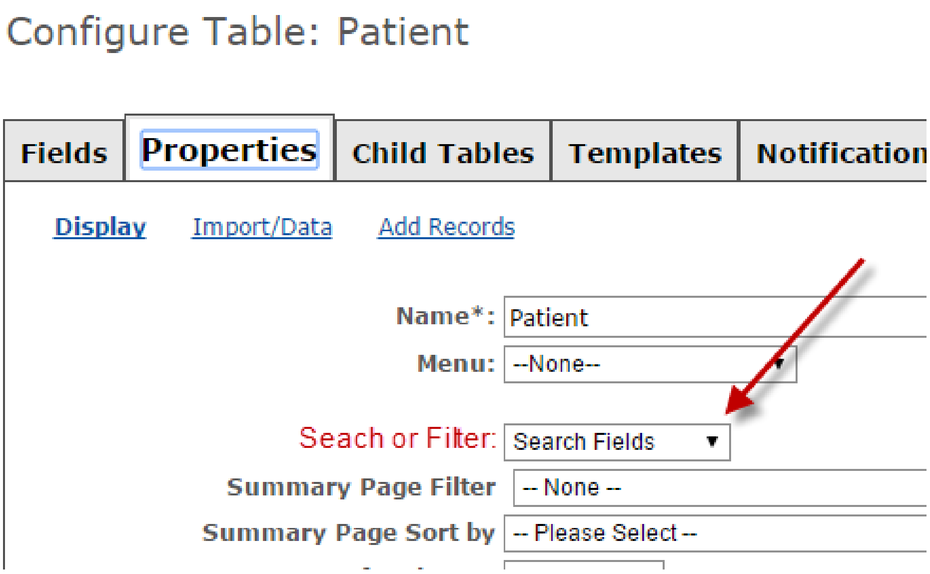
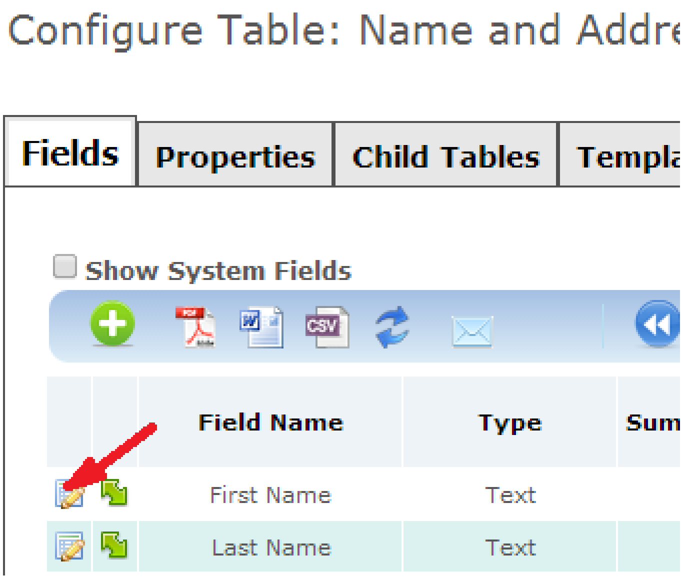
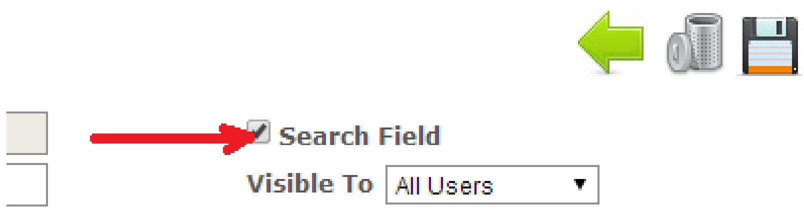
<table>
<tr><td>We should change the database so that AllFields is always available</td><td></td></tr>
<tr><td>Once the Data Retriever is selected the available fields are listed</td><td>
</td></tr>
<tr><td>This is also not great – the Save and Cancel buttons need to be moved to the top and/or we need a scrolling control for the fields</td><td>
</td></tr>
</table>

The document then just needs placeholders with the text shown above as the placeholders	
Once set up you can then click this button to create a document	
This is opens the Save As dialog It would be good if it could save it as table name plus RecordID	

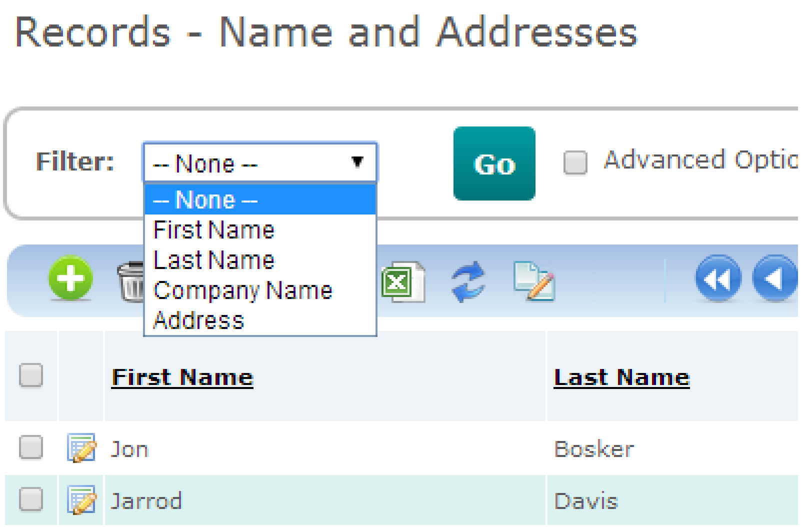
Configuring Search / Filter

<table>
<tr>
<td>Each table can be configured to either use Search or Filter depending on the requirements.

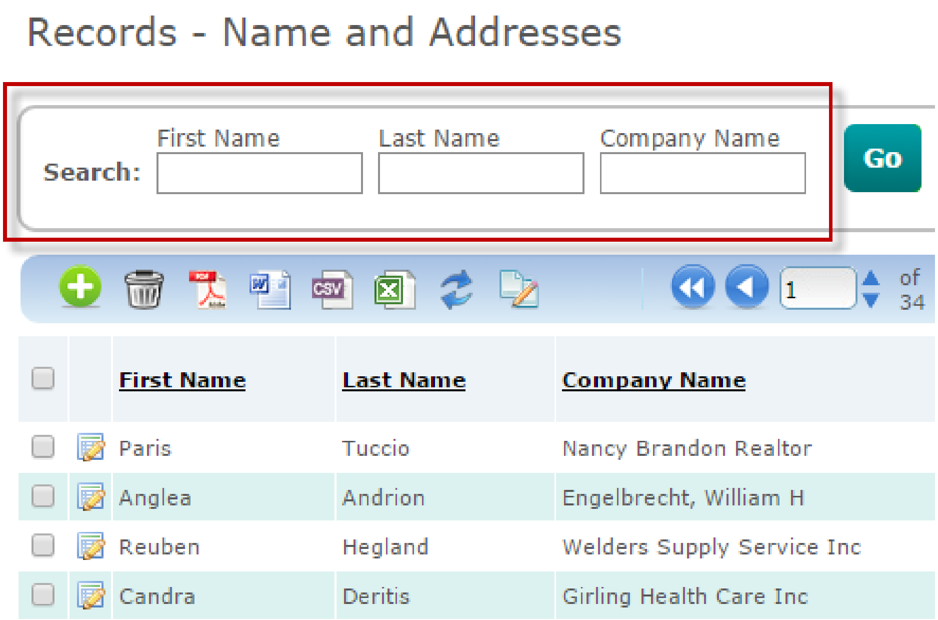
Search is the default and often considered easier for the users to understand.

Filter is more powerful.</td>
<td>
</td>
</tr>
<tr>
<td>First Configure a field to appear in the Filter drop-down</td>
<td>
</td>
</tr>
<tr>
<td>Tick the Search Field checkbox and click the Save Icon</td>
<td>
</td>
</tr>
</table>

You can now see the configured fields in the Filter drop down



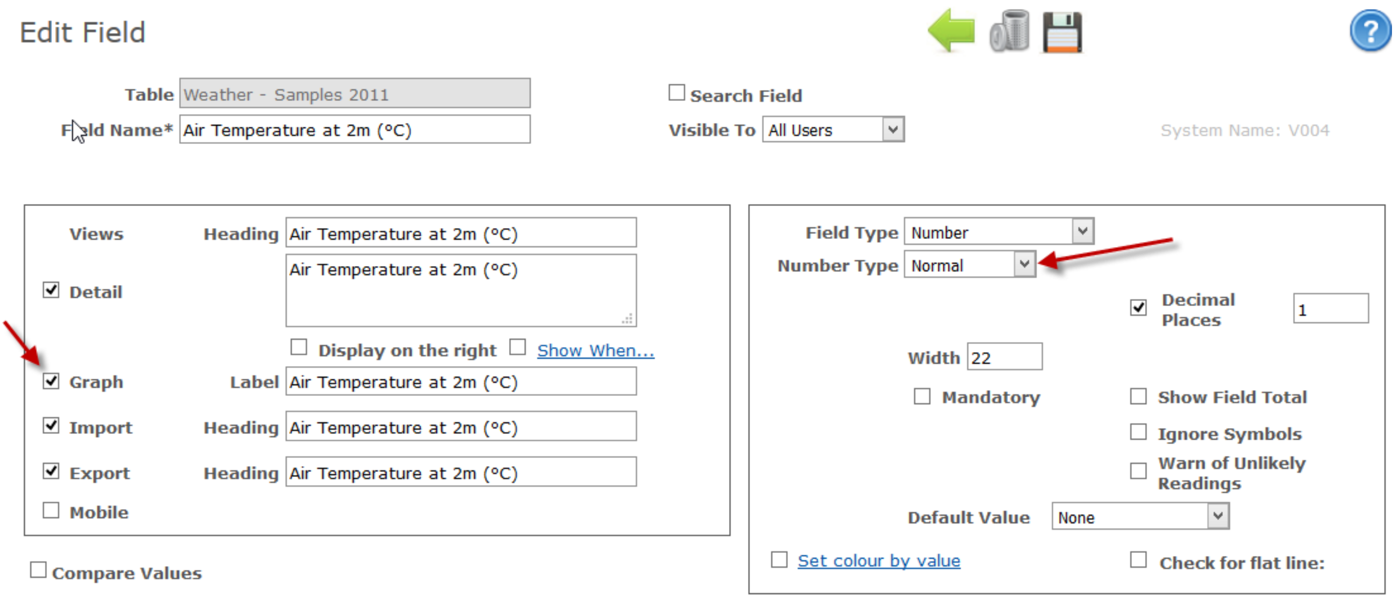
You can change the summary screen to show Search fields rather than filters and make it easier to use.



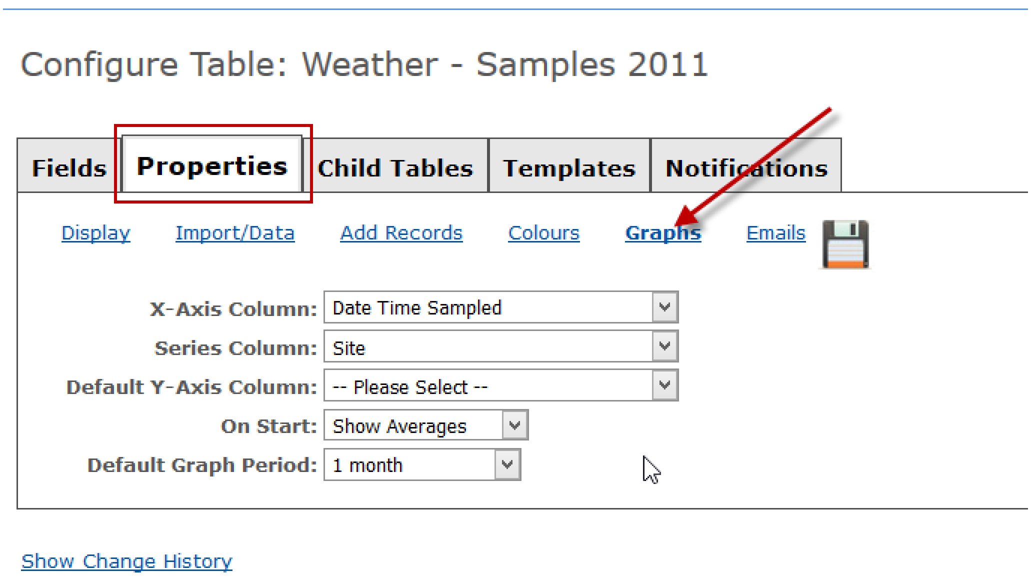
Graph Configuration

In order to produce graphs you need

- at least 1 number field (only numbers can be graphed)
- The Graph checkbox ticked on all fields to be graphed



- The Graph options set under Table Properties:

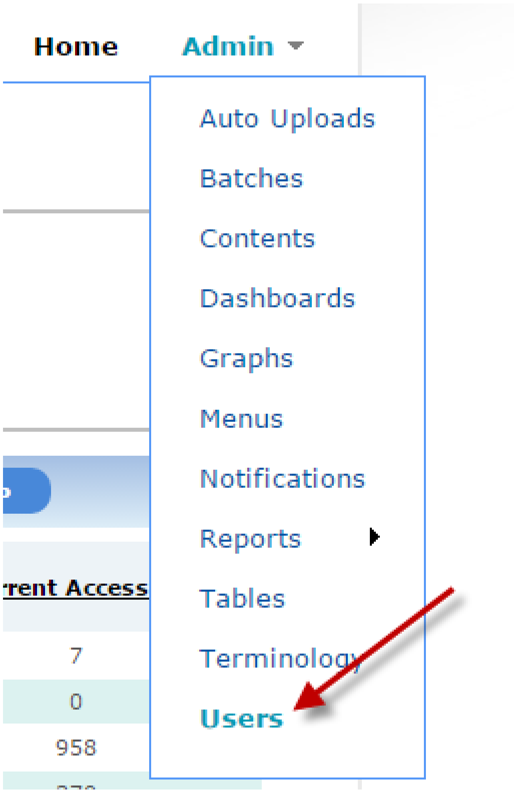
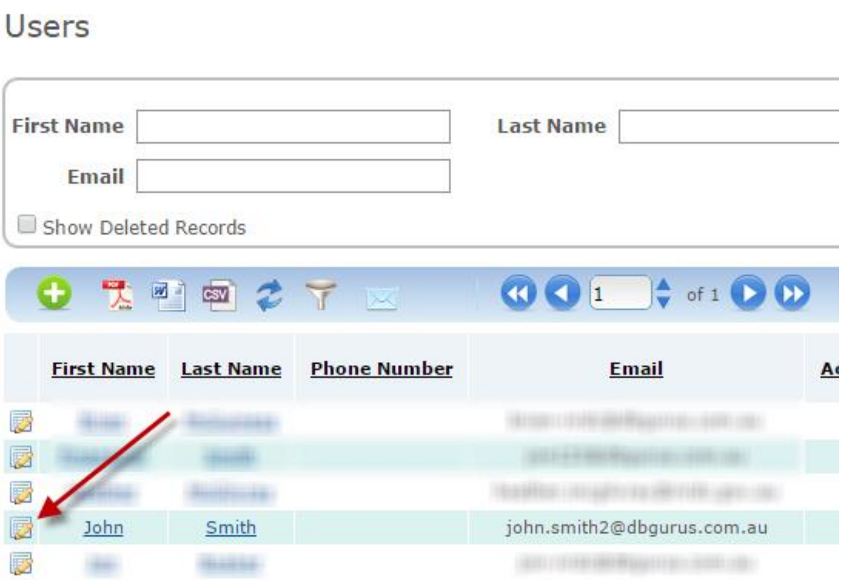


Security

Basic Security

TheDatabase allows you to control what each user can do through security “roles”.

<table>
<tr>
<td>Select Users from the Admin menu.

Note that you need to be set up as an admin user to be able to see this menu.</td>
<td>
</td>
</tr>
<tr>
<td>Edit the User</td>
<td>
</td>
</tr>
</table>

Choose the role you want that User to have.

Read Only means they can view records but not change anything.

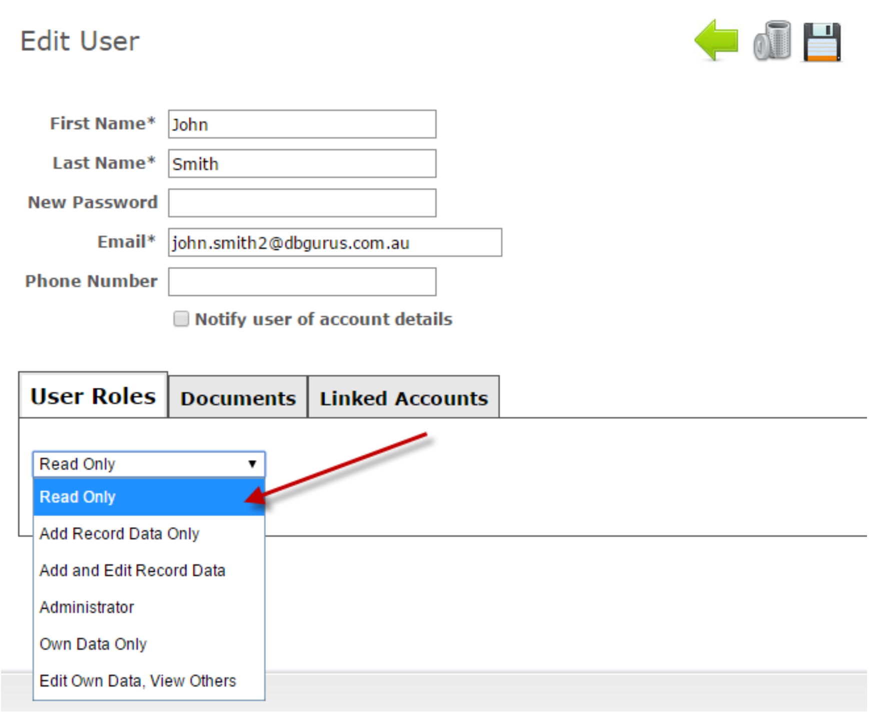
Add Record Data Only means they can add new records but not edit existing records.

Add and Edit Record Data is a full control user. They can perform virtual deletes.

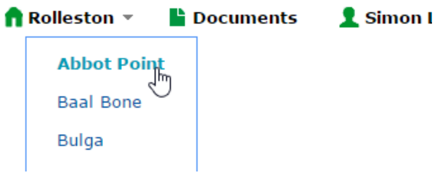
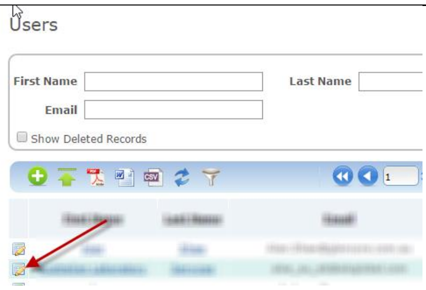
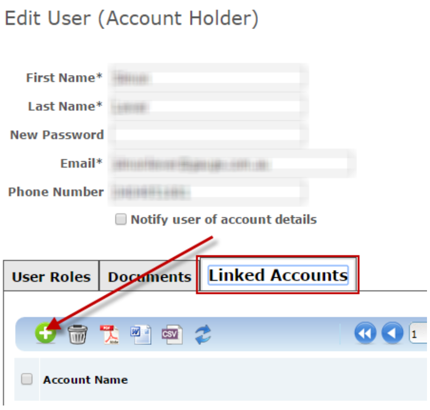
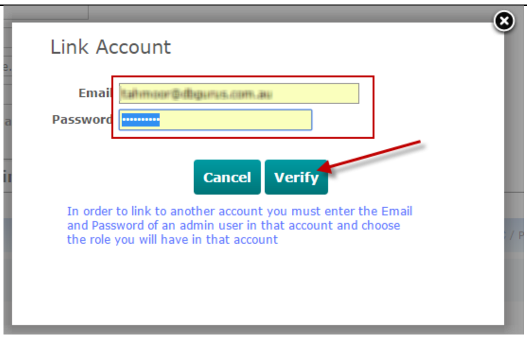
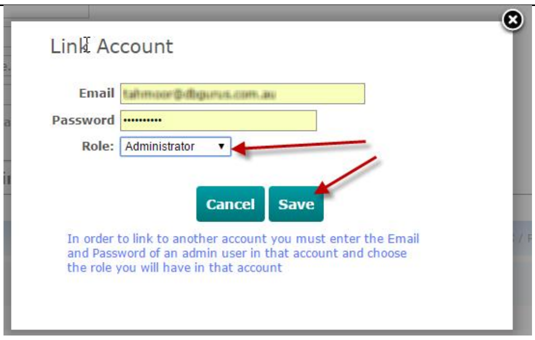
Administrator means they have full access including permanent delete. This should not be given out to many users.

Own Data Only means they can only edit records that they have entered or uploaded.

Edit Own Data, View Others allows them to edit records they have added and view other user's records.

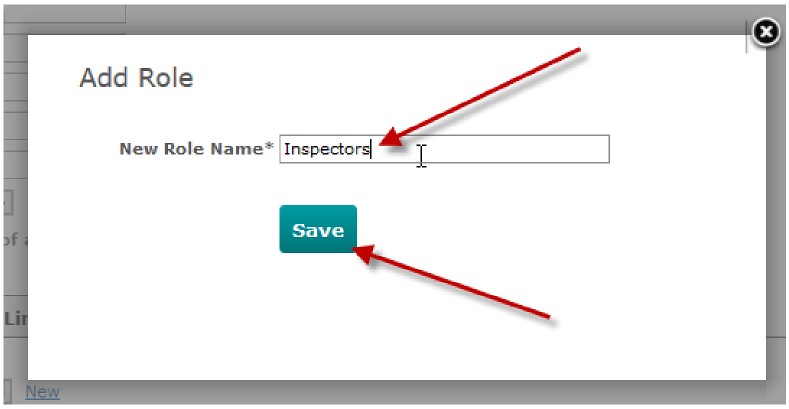
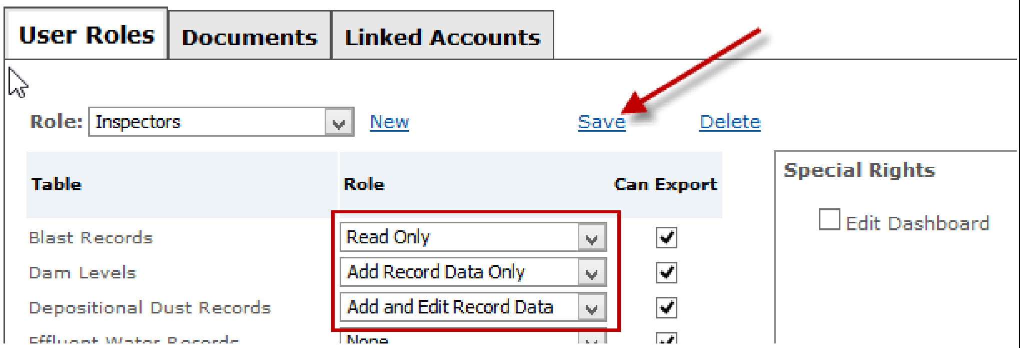


Linked Accounts

TheDatabase allows you to access multiple accounts from within the same database.	
To link to another account go to the Admin, Users page and edit the user	
Go to the Linked Accounts tab and press the **Add** button	
Enter the email and password of the account holder on the <u>target</u> account and press **Verify**	
Select the Role this user will have on the <u>target</u> account and press **Save**	

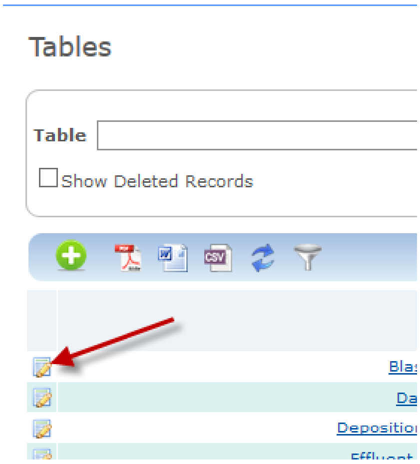
Custom Roles

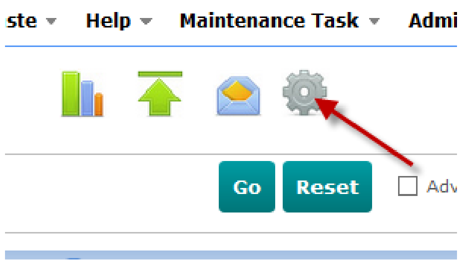
If you require more "granular" control of what a user can do then you can do that through custom roles:

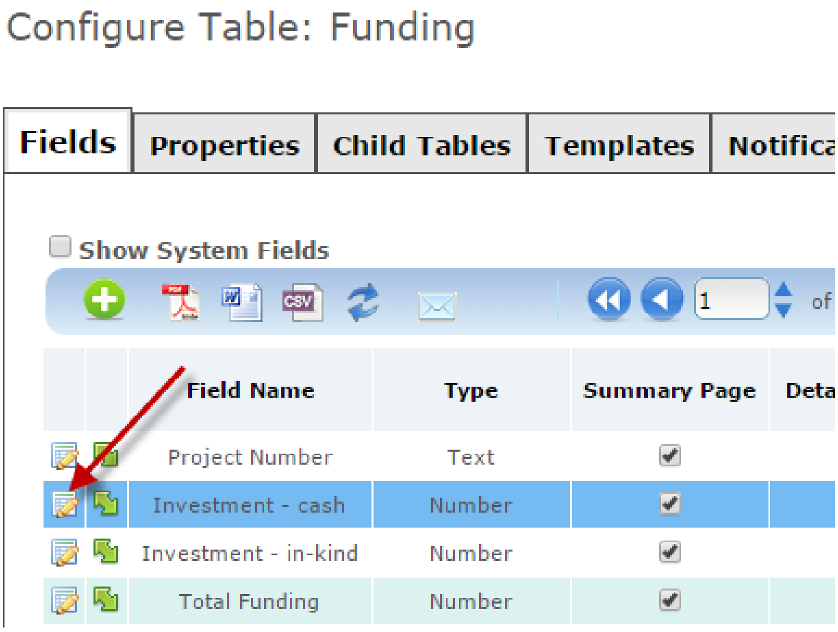
Edit a user (described above) and click on the New link	
Give the new role a name and press Save	
Choose what users with the new Role can do on each of the tables and when finished press the Save link.	

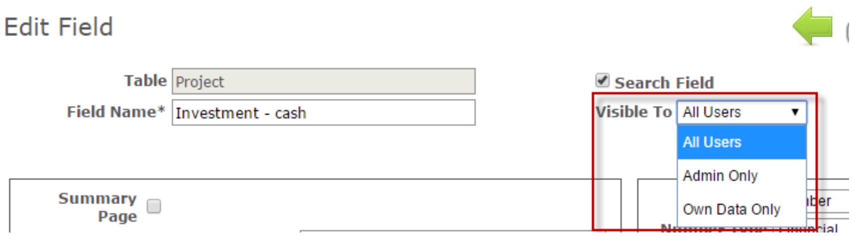
Field Level Security

Sometimes you just want certain users to see a particular field on a table or a certain set of fields. In that situation the easiest solution

<table>
<tr>
<td>
From the Admin menu choose Tables and edit that table.
Alternatively click on the config icon on the summary page
</td>
<td>


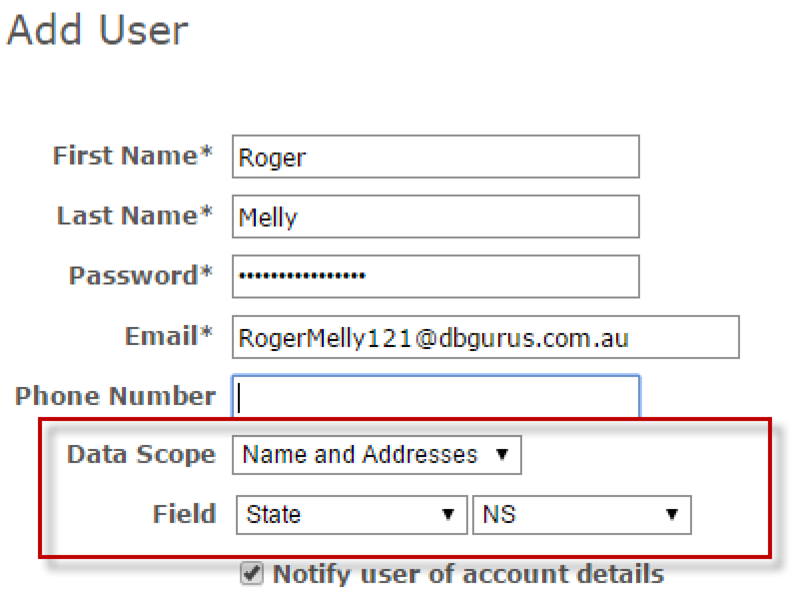


</td>
</tr>
<tr>
<td>
Edit the field you want to set
</td>
<td>


</td>
</tr>
<tr>
<td>
Set the Visible To dropdown:
All Users means that all users can see that field
Admin Only means that only system administrators can see that field.
Own Data Only means that you can see this field when it is your data but not when another user created it.
</td>
<td>


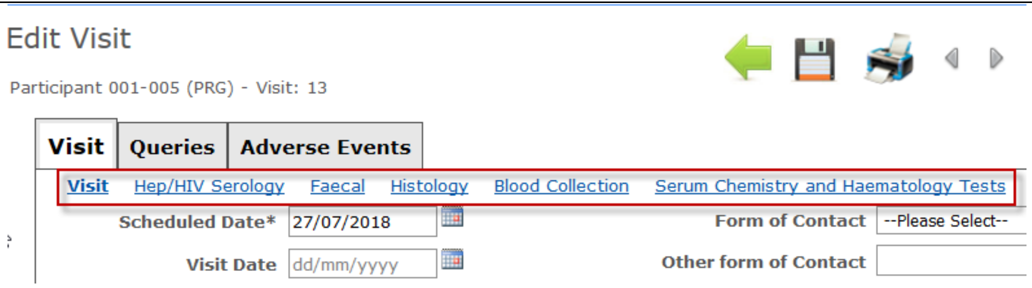
Note: We expect to add more dropdown values in the future so please let us you're your requirements.
</td>
</tr>
</table>

Data Scope

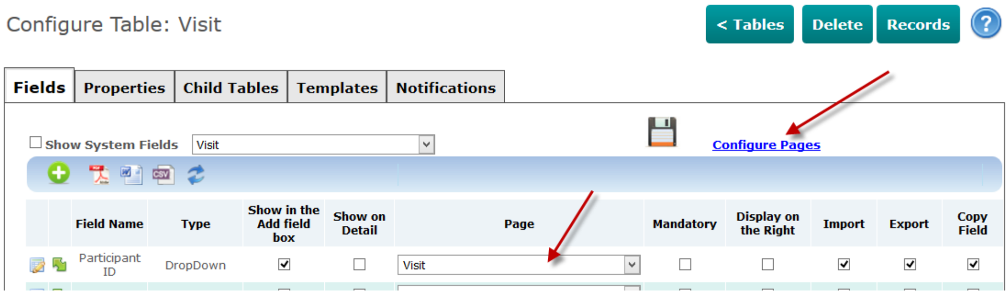
Data Scope allows you to segment your data. For example, you might have regions and upper management can see all regions but the staff in regions can only see their own data.	
When turned on you will see these Options in the User detail page. In this example Roger will only be able to see Name and Addresses in the state of NS. ***Note: Data Scope works on child tables too! If you have records relating to Name and Addresses then Roger will only be able to see those records that are children to records in the state of NS and so on…***	

Dividing Fields Using Pages

If you have a lot of fields on one table you can arrange them by “Pages” – showing just one set of fields at a time.



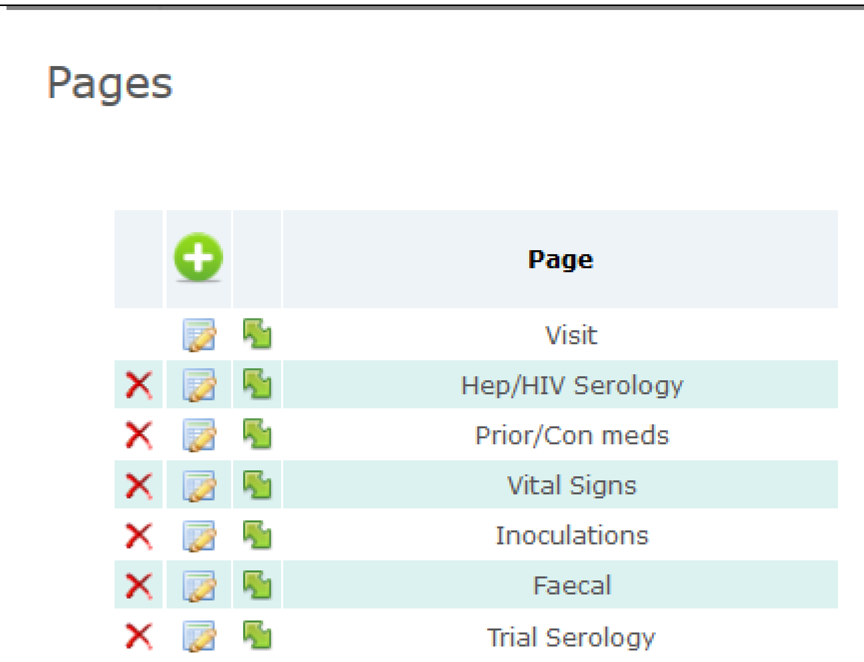
To do this click on the Configure Pages link in the Configure Table page



Here you can:

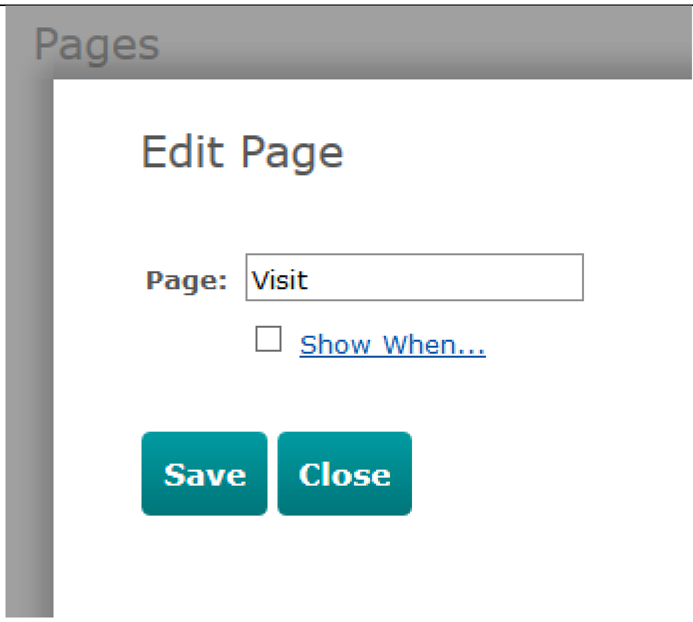
- Add
- Edit
- Delete
- Reorder

the pages.



You can change the label a the top of the page specify conditions when the pages are shown.

See Show When for fields as it works the same way.



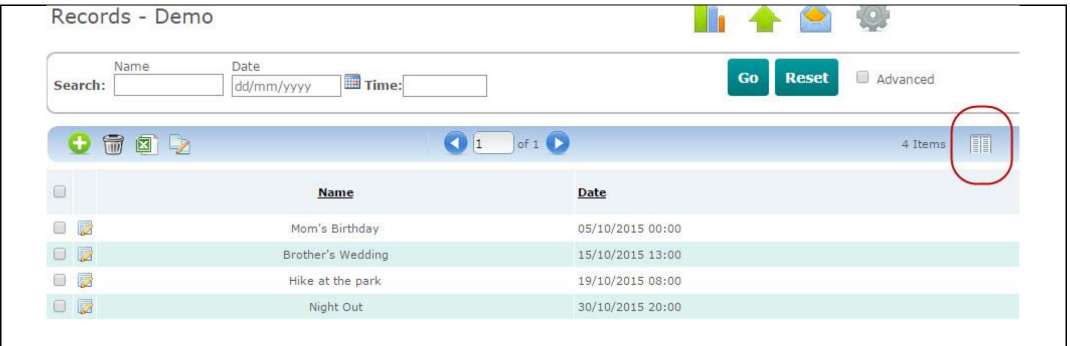
View Designer

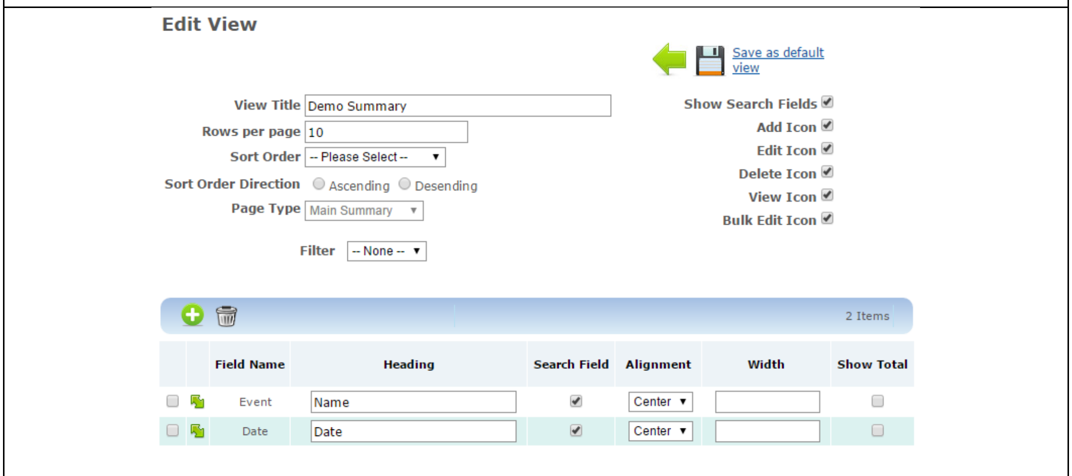
User can edit what and how the records can be viewed on the summary page by using the **View Designer.** To use it, click the **View Designer** icon.

A window will pop up for the configuration.

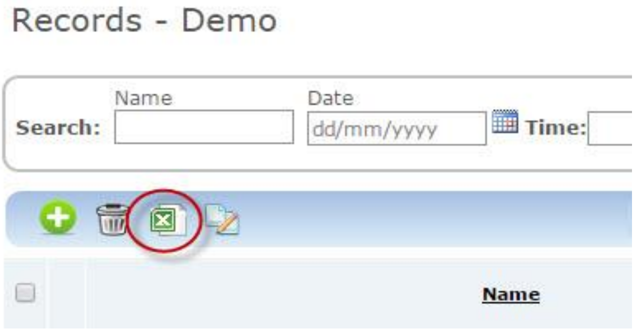
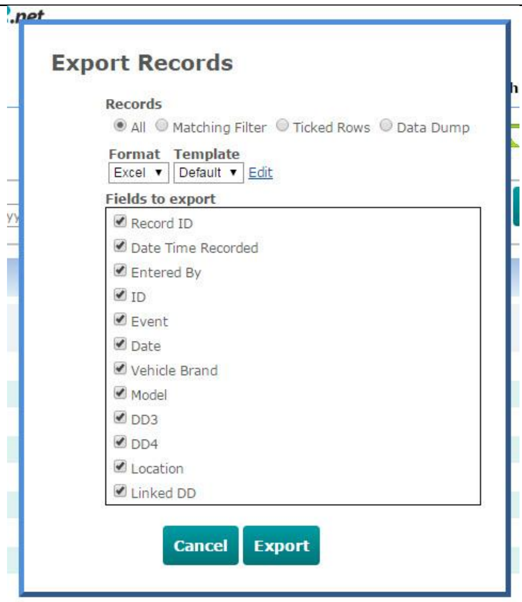
It can hide or show several functions like Add, Edit, Delete, View, etc..

Also can manipulate how many records per page, what fields to be shown, reorder the fields, etc.





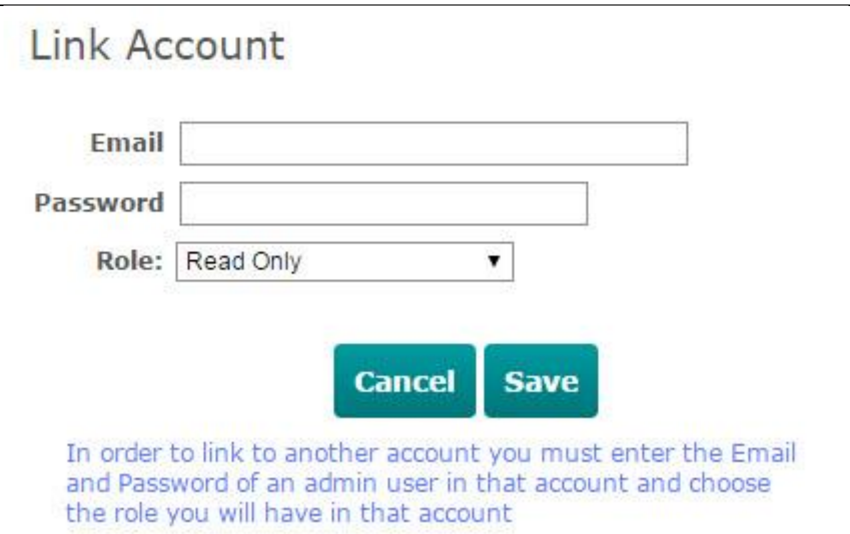
Export Template

Export Template is a function for exporting records. User can manipulate what to export, format to be used and edit the header of records. To use the **Export Template,** click the excel icon on the summary page of the table and a pop up window will show.	
Field to Export , choose which column will be exported. **Format,** format to be used in exporting file like Excel, CSV, Word and PDF. **Template** can be edited to change the header of each column and re-order them as well.	

Linked Accounts

User has the ability to link the current account to another account in **TheDatabase.net** by using the **Link to another Account.** To use it just click the **Link to another Account** and it will direct the user on another page	

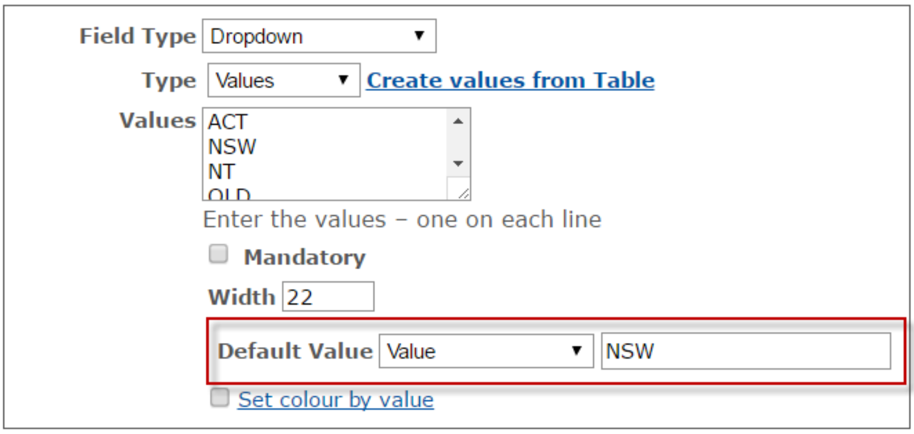
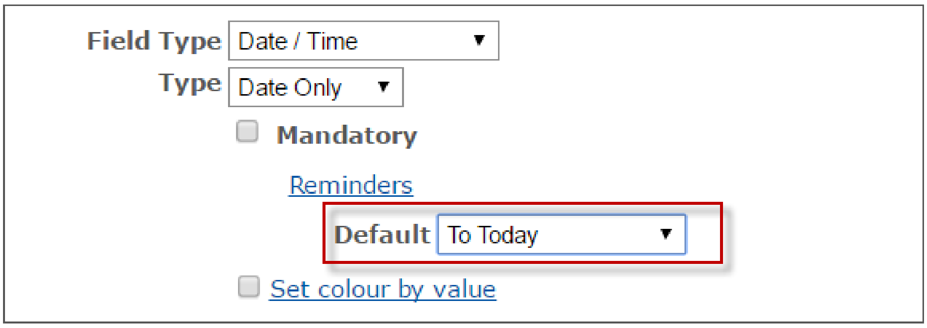
Linking to another account will require admin credentials on other account and the role they will have on current account. Role can be Read Only, Add Record Data Only, Add and Edit Record Data and Administrator as well



Default Value

Fields can default a value from another table or any desired value by using the **Default Value** on field configuration.

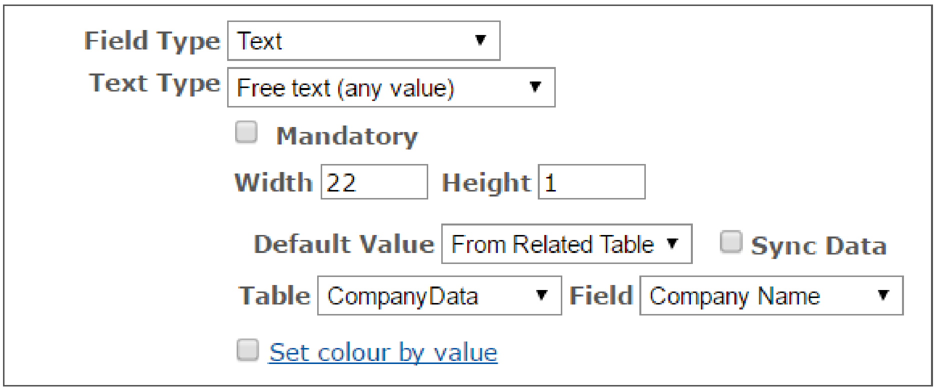
Fixed Value

<table>
<tr>
<td>If the Default Value set to Value, user can enter desired default value on a certain field once the detail page is executed.</td>
<td>
</td>
</tr>
<tr>
<td>Dates can be set to default to today's date</td>
<td>
</td>
</tr>
</table>

From Related Table

<table>
<tr>
<td>A related table can be:

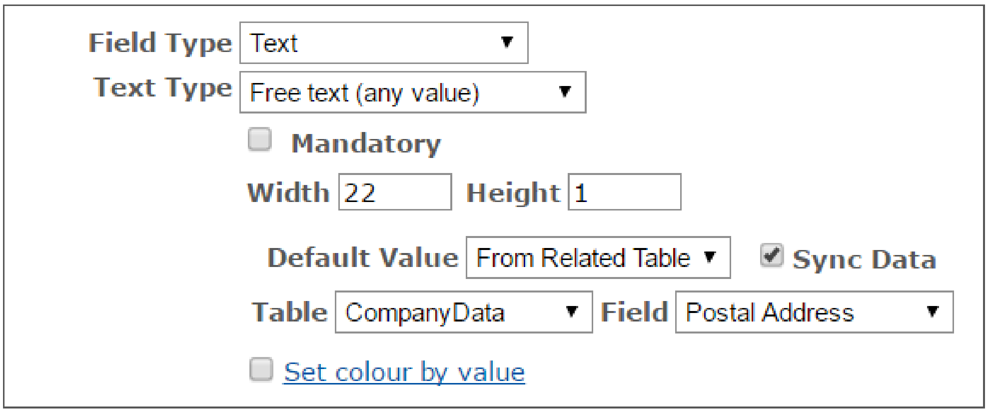
A parent table
A sibling table?
A grandparent table?

Simply choose the Table and Field to get the value from.</td>
<td>
</td>
</tr>
</table>

From Related Table with Sync Data

When Sync Data is ticked the related table is updated when the data in the related table is updated.

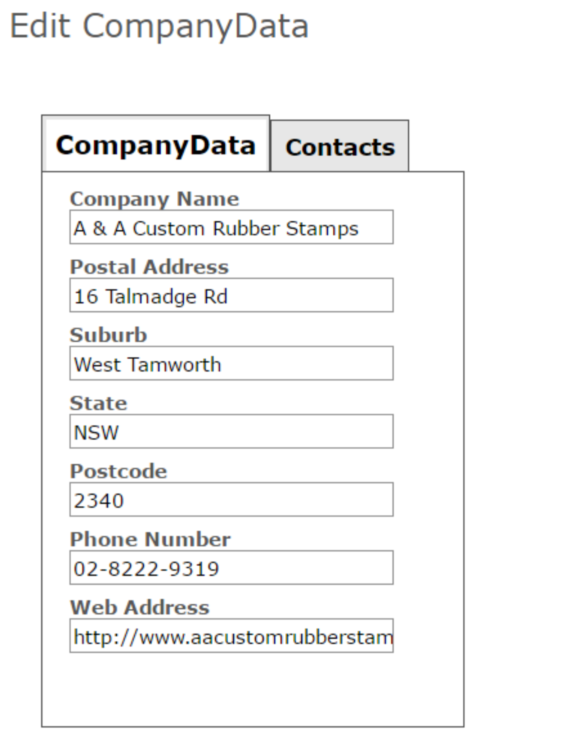
When not ticked the data is only copied across when the record is created.

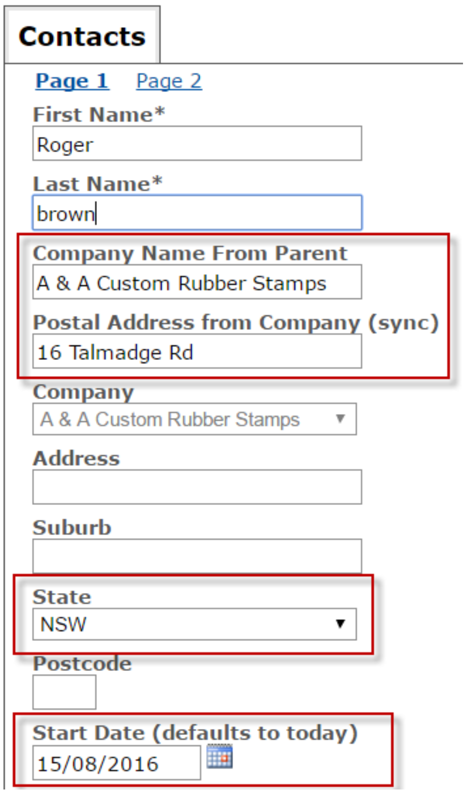


Example

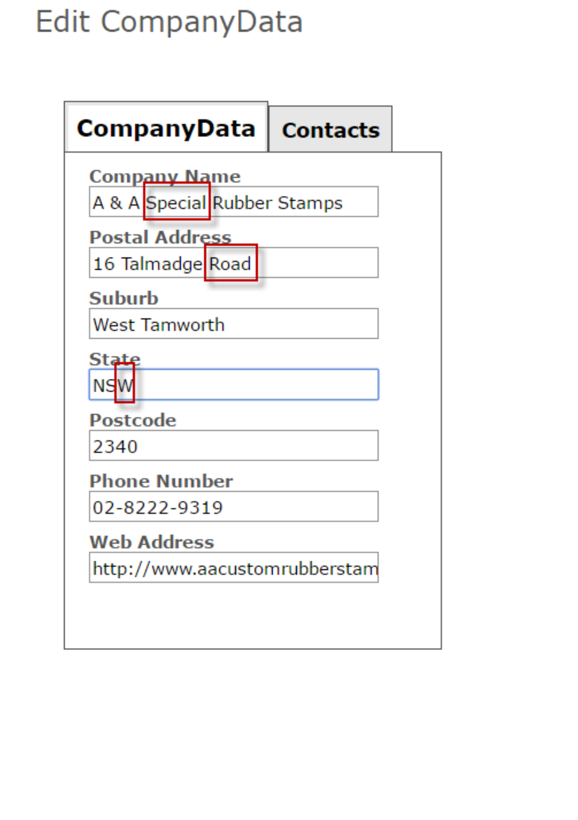
In this example we have a Company table with Contacts below it.

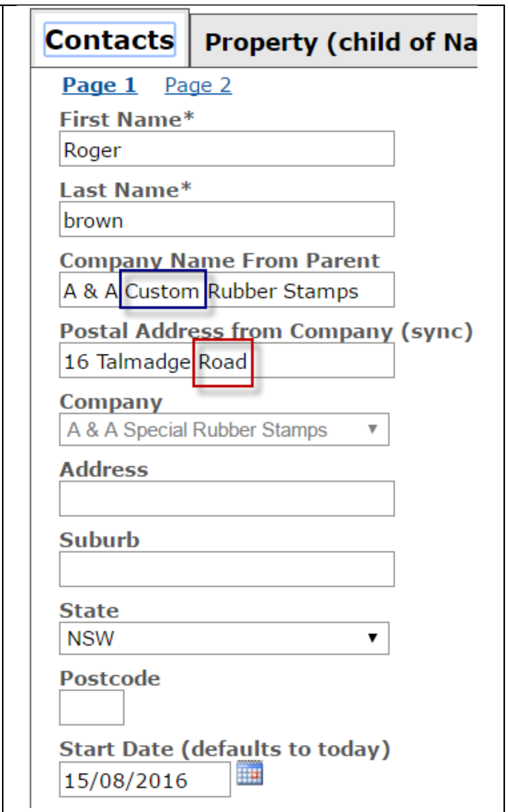
Adding data as per the config above the highlighted fields are filled automatically.





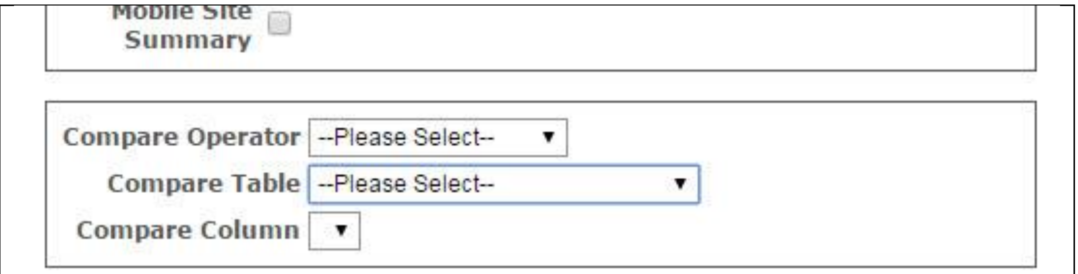
Changing the data on the company record only updates the Postal Addres because that is the one that was set to "Sync"





Comparison with Related Table

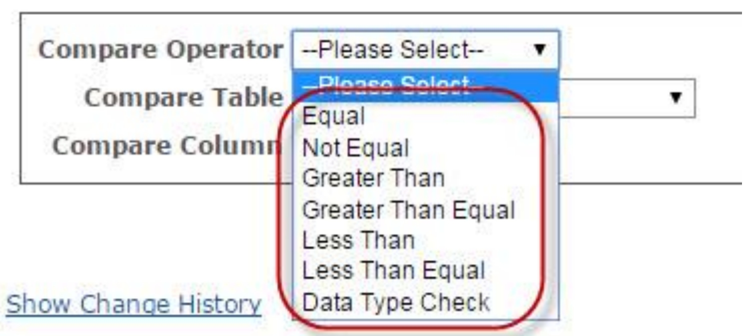
This function let the user to compare value on different table.



Compare Operator has several options to choose.

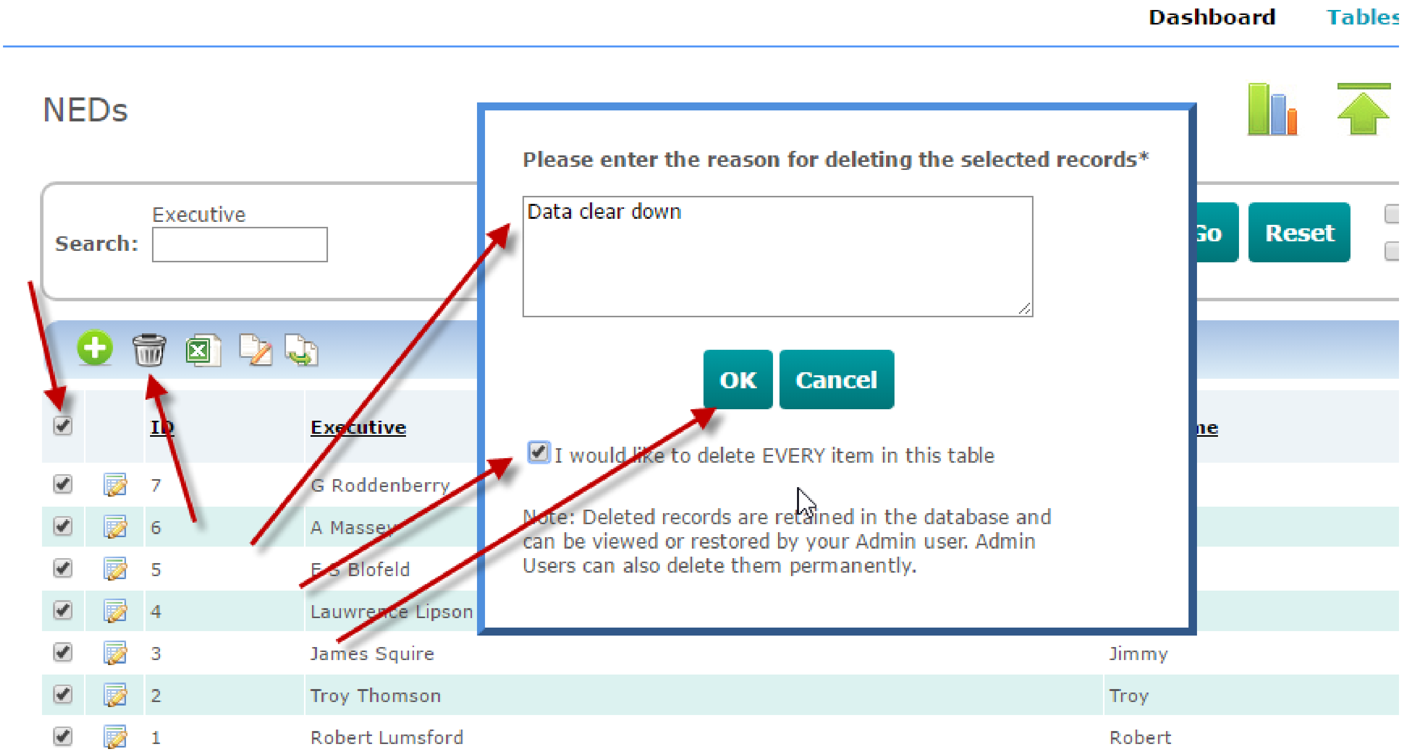
Compare Table is where the user choose, what table to use

Compare Column, this is the field where the user compare the value.



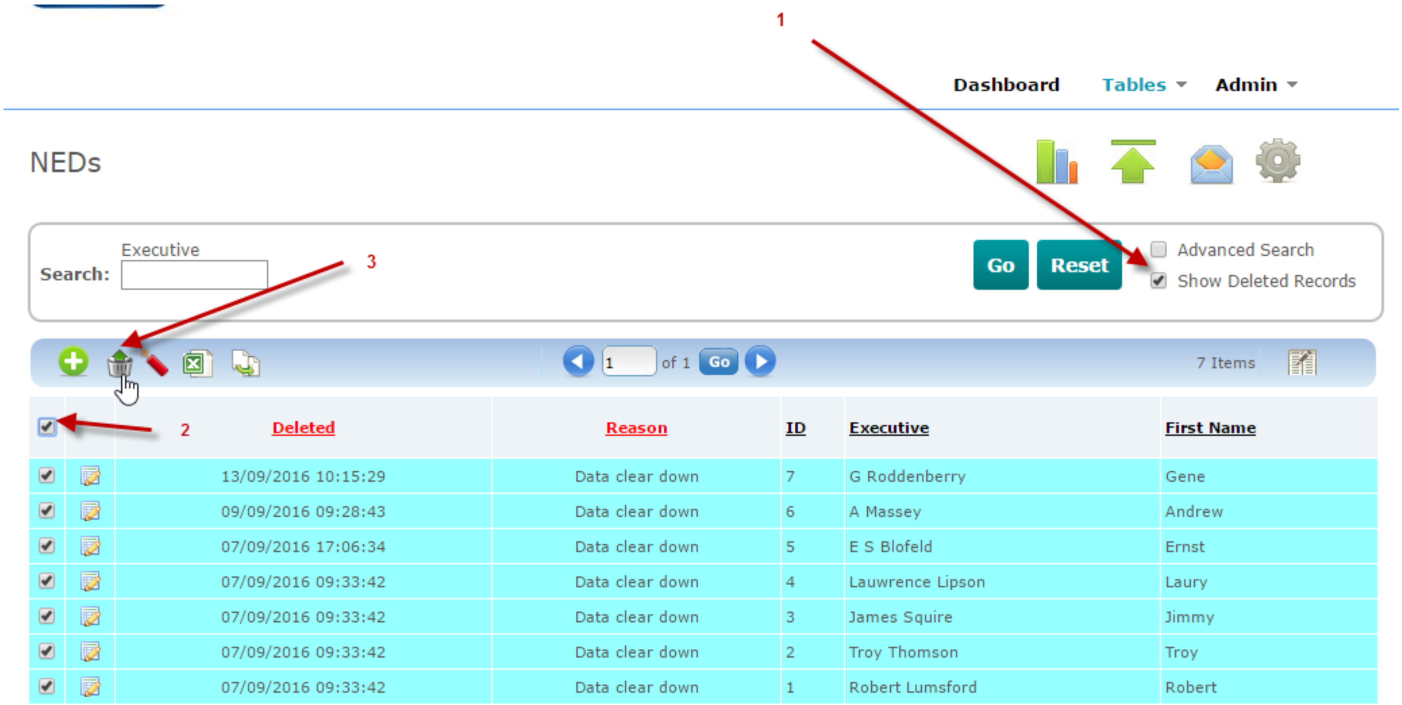
How To / Tips

Delete all records



1. Tick the select all checkbox
2. Click the delete icon
3. Enter a reason for deleting the records
4. Tick the checkbox to delete EVERY item in the table
5. Press OK

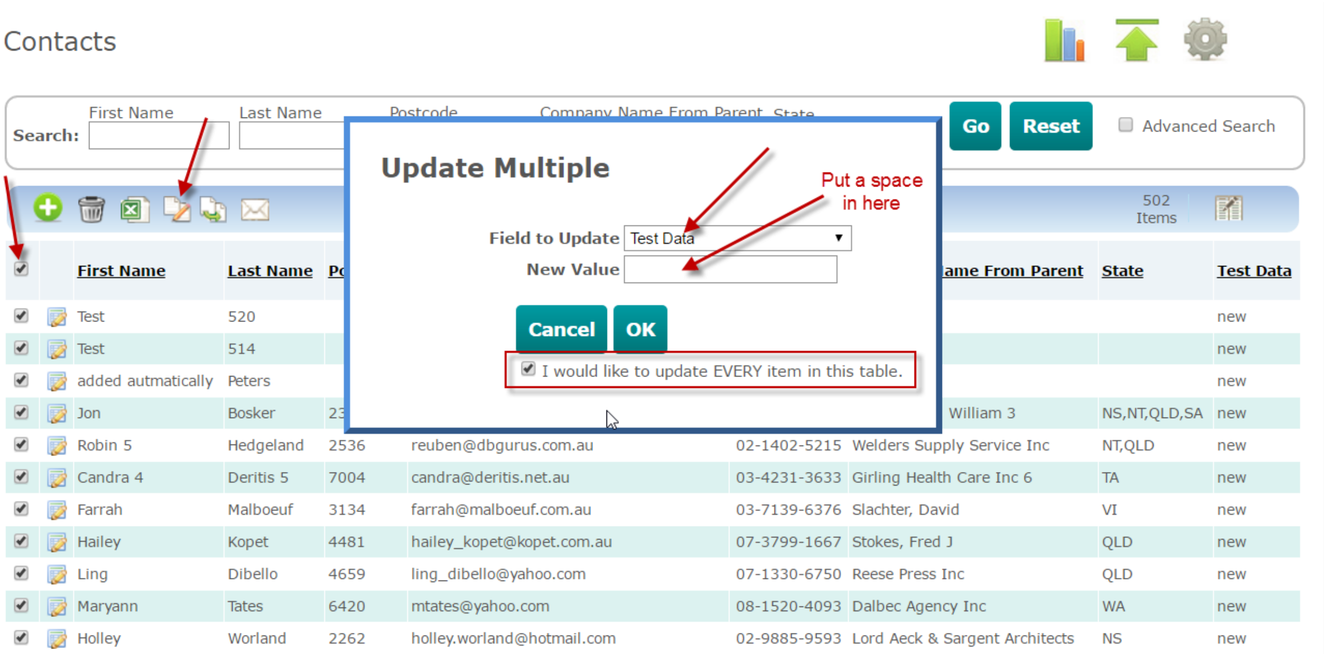
Restore All Deleted Data



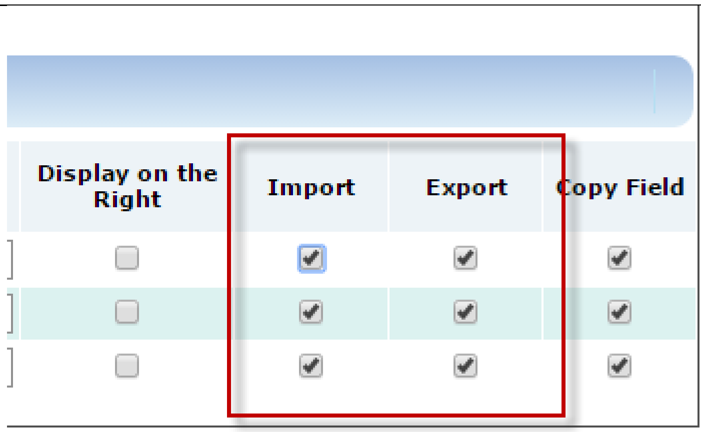
1. Click on Show Deleted Records
2. Tick the select all checkbox
3. Click on the Restore icon

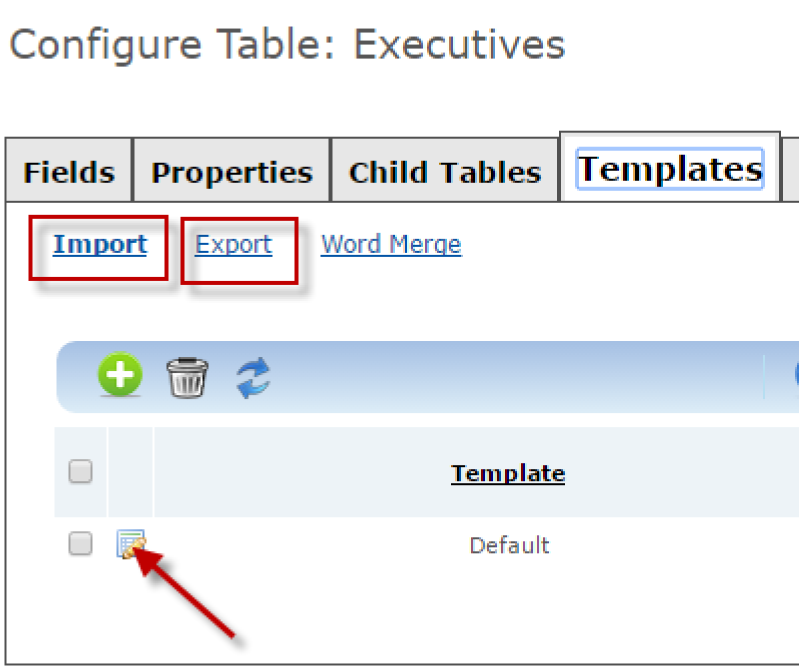
Clear data from a field – all rows

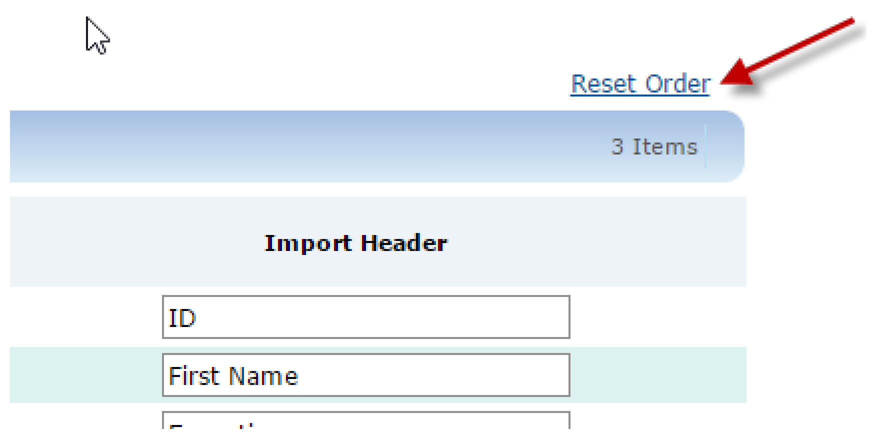
1. Make sure the field is visible on the view
2. Select all rows
3. Click on the Update Multiple icon
4. Select the field to update
5. Enter a space in the New Value
6. Tick the checbox to update all
7. Cross fingers
8. Please OK

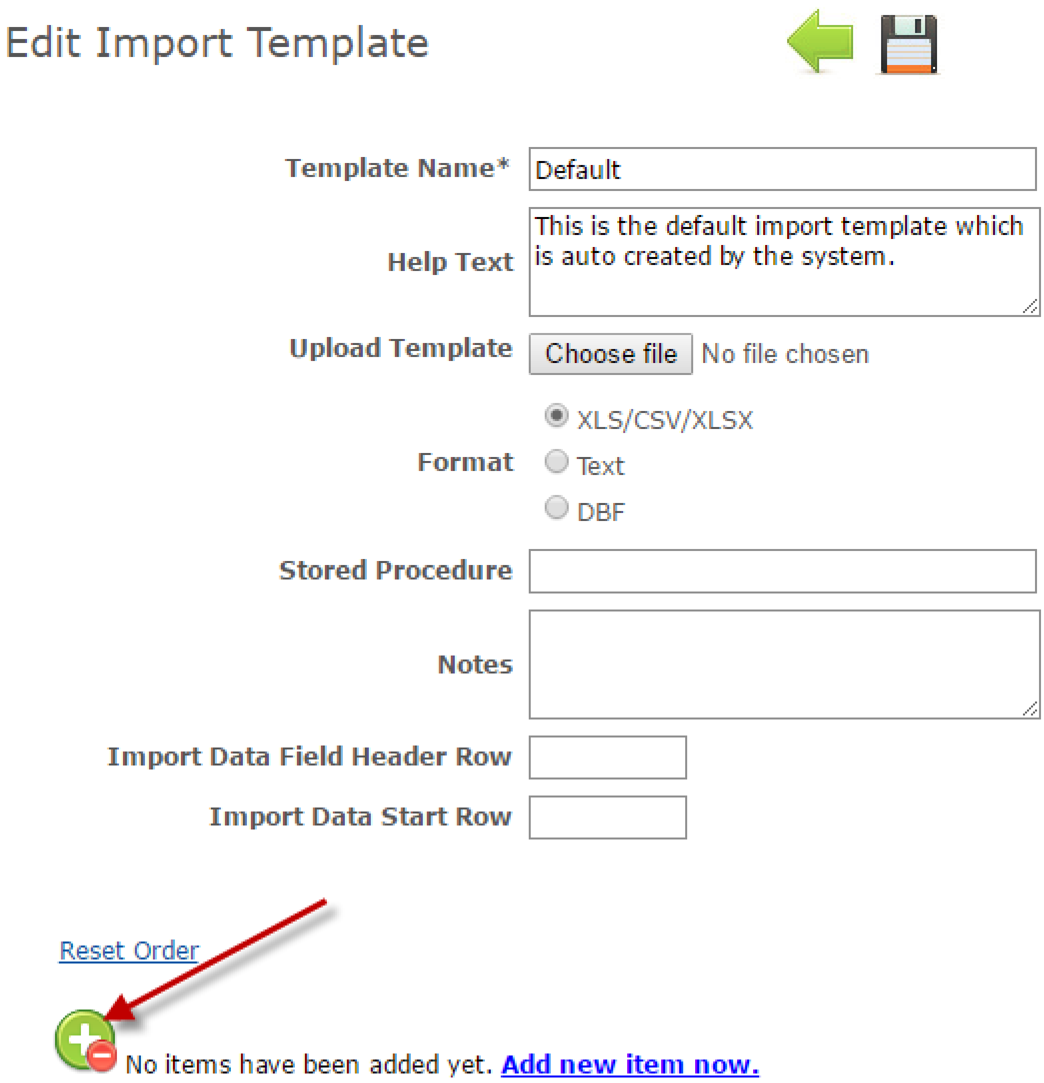


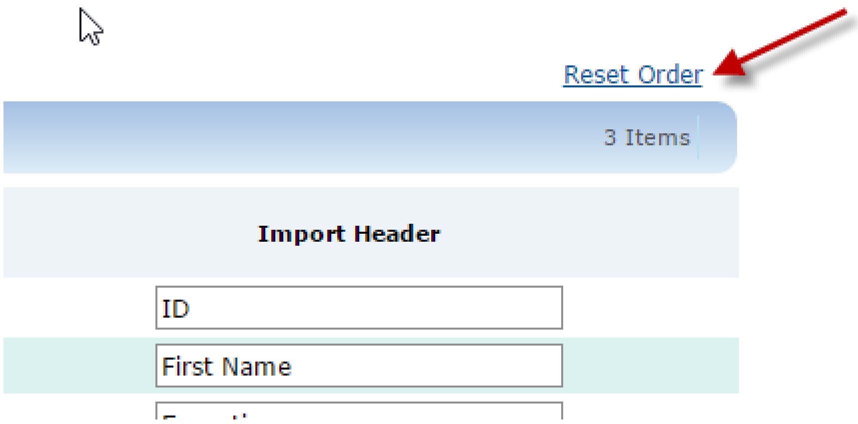
Add All Fields To A Template

<table>
<tr>
<td>Make sure these checkboxes are ticked on the table properties page</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>Edit the template</td>
<td>
</td>
</tr>
<tr>
<td>Click the Add Item</td>
<td>
</td>
</tr>
</table>

Click on the Reset Order link to get the fields in the same order as on the Detail page.	




Reset Order
3 Items
Import Header
ID
First Name