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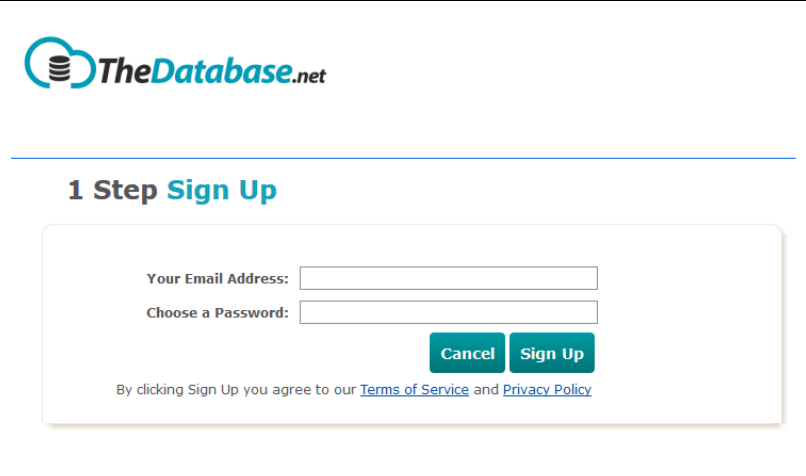
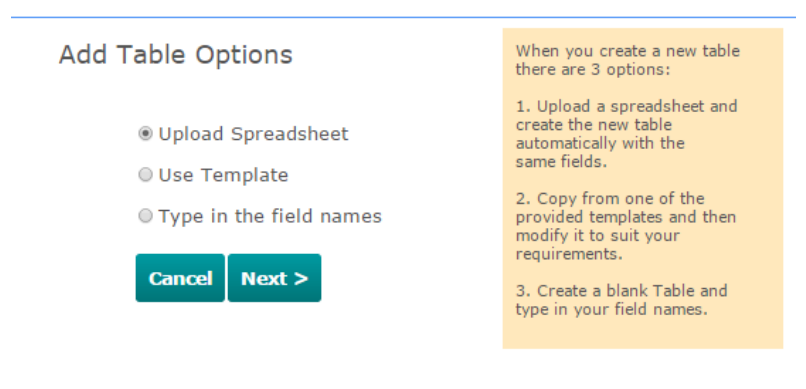
## Introduction

When a client requires a database we should customise it for them to include their:

- Name
- Logo
- Tables
- Columns
- Data

And so on .. whatever is available to us to make it more personalised.

## Creating an Account

<p>First thing to do is create an account on the dev server:</p> <p><a href="http://dev.thedatabase.net/signup.aspx">http://dev.thedatabase.net/signup.aspx</a></p> <ul style="list-style-type: none"><li>• Use the email address <a href="mailto:clientname@dbgurus.com.au">clientname@dbgurus.com.au</a></li><li>• Use the password <b>Secret123</b></li></ul>	 <p>The screenshot shows the '1 Step Sign Up' form on TheDatabase.net. It includes a logo at the top, followed by the title '1 Step Sign Up'. Below the title is a form with two input fields: 'Your Email Address:' and 'Choose a Password:'. There are 'Cancel' and 'Sign Up' buttons. A note at the bottom states: 'By clicking Sign Up you agree to our <a href="#">Terms of Service</a> and <a href="#">Privacy Policy</a>'.</p>
<p>Create the tables:</p>	 <p>The screenshot shows the 'Add Table Options' screen. It has three radio button options: 'Upload Spreadsheet' (selected), 'Use Template', and 'Type in the field names'. There are 'Cancel' and 'Next &gt;' buttons. A yellow callout box on the right contains the text: 'When you create a new table there are 3 options: 1. Upload a spreadsheet and create the new table automatically with the same fields. 2. Copy from one of the provided templates and then modify it to suit your requirements. 3. Create a blank Table and type in your field names.'</p>

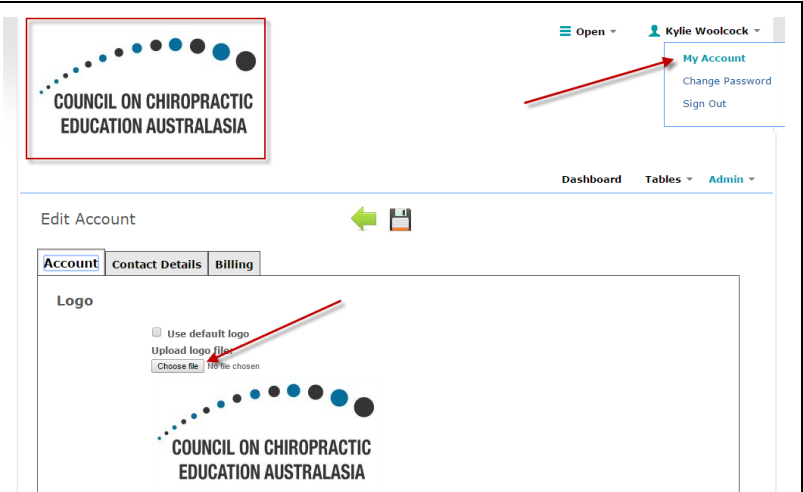
TIP: For more info on how to do this see the documents

- [TheDatabase-Help-User.pdf](#)
- [TheDatabase-Help-Admin.pdf](#)

## Setting Account Options

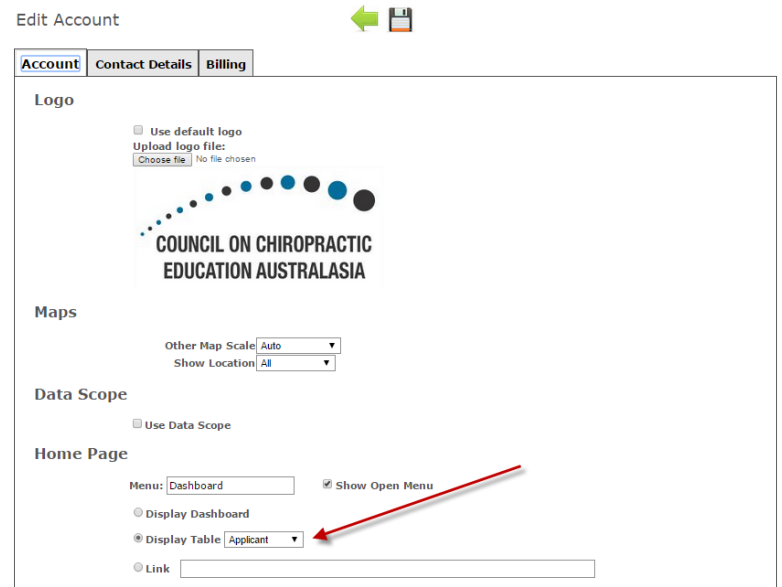
Set the logo that is shown at the top of the screen.

TIP: If the image is more than 16px high or 300px wide then resize it to within that range

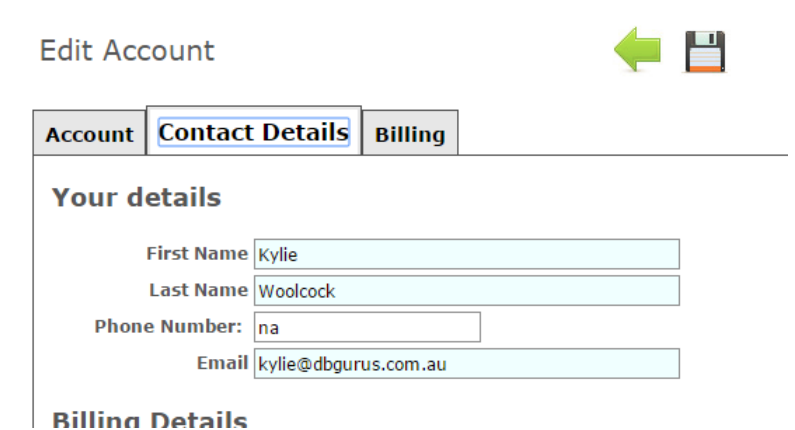


Set the Home Page to Display Table

- Choose the primary table



Set the Contact Details to the name of the client. If not sure of the name to use then ask the client manager.



## Data

A database without any data is a bit like an empty box and the client will not understand it without some sample data.

If they have not provided data then you can manually add some (at least 5 rows)

Sample data should be relevant to them as possible. Put in data that you think will look like their data. For example use Australian names, addresses and phone numbers.

I have put some sample data here:  
[www.dbgurus.com.au/files/Au50.zip](http://www.dbgurus.com.au/files/Au50.zip)

TIP: Copy the sheet and rename the fields to match.. or add new columns as required.

	A	B	C	D
1	First Name	Last Name	Company Name	Address
2	Rebecca	Didio	Brandt	171 E 24th St
3	Stevie	Hallo	Landrum Temporary Services	22222 Acoma St
4	Mariko	Stayer	Inabinet, Macre	534 Schoenborn St #51
5	Gerardo	Woodka	Morris Downing & Sherred	69206 Jackson Ave
5	Mayra	Bena	Buelt, David L	808 Glen Cove Ave
7	Idella	Scotland	Artesian Ice & Cold Storage Co	373 Lafayette St
8	Sherill	Klar	Midway Hotel	87 Sylvan Ave
9	Ena	Desjardiws	Selsor, Robert J	60562 Ky Rt 321
0	Vince	Siena	Vincent J Petti & Co	70 S 18th Pl
1	Theron	Jarding	Prentiss, Paul F	8839 Ventura Blvd
2	Amira	Chudej	Public Works Department	3684 N Wacker Dr
3	Marica	Tarbor	Prudential Lighting Corp	68828 S 32nd St #6

Tip: You can use the function

=RANDBETWEEN(100,500)

To generate random numbers.

For large bits of text look up the “Lorem Ipsum Generator” which creates text that looks like text but not offensive to anyone.

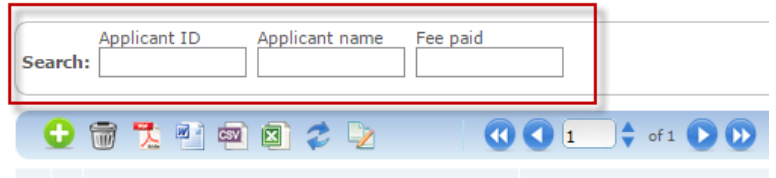
	L	M	N	O
	Applicant name	Fee Paid		
	Rebecca Didio	=RANDBETWEEN(100,500)		
	Stevie Hallo	RANDBETWEEN(bottom, top)		
	Mariko Stayer	485		
	Gerardo Woodka	451		
	Mayra Bena	231		

## Summary Pages

Generally we want to use Search fields (as opposed to filters) so this needs to be changed.

Note: we only want a max of 5 or 6 search fields on

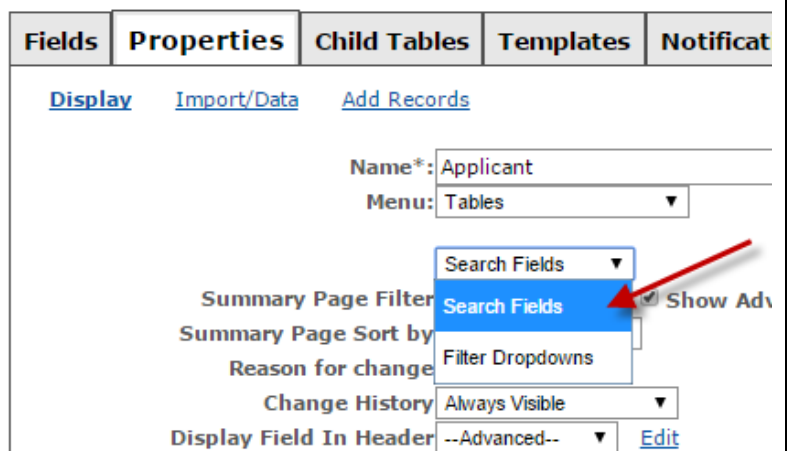
### Records - Applicant



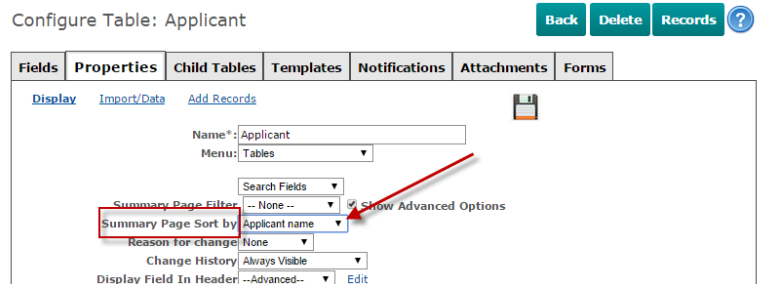
So we need to **Configure** the table and select the Properties tab.

Select "Search Fields" from the dropdown.

### Configure Table: Applicant



Set the Summary Page Sort order to something that makes sense



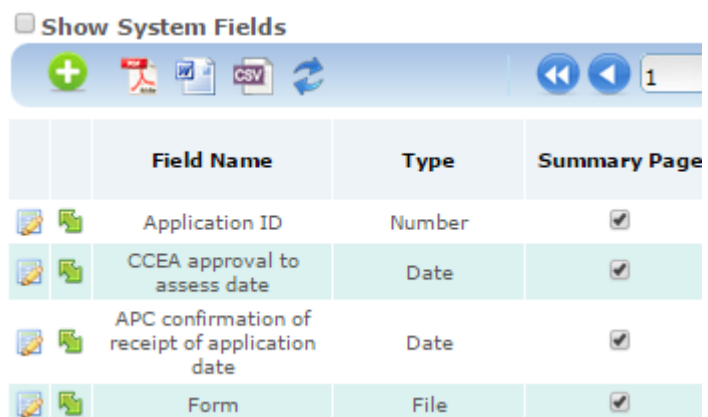
Make sure that the Field Names are sensible:

- Correct Capitalisation
  - Main words have capital letters
  - Minor words (and, of, or, the) are lower case

E.g. "CCEA approval to assess date" should be "CCEA Approval to Assess Date"

- Make sure that there are no funny spaces (no doubles)

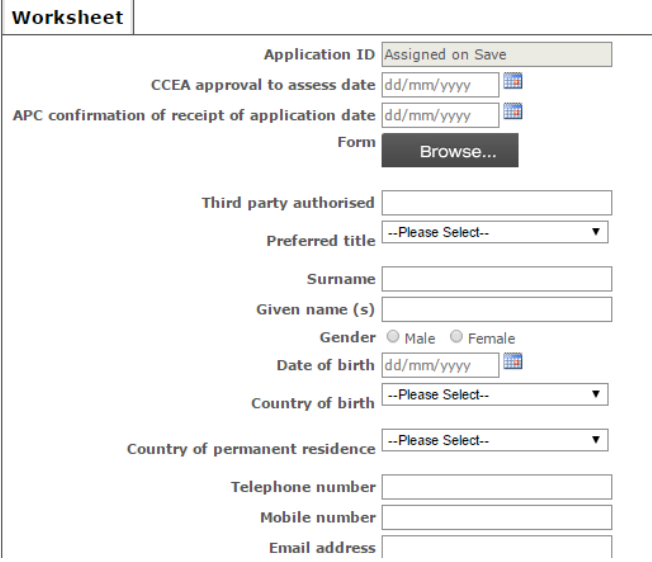
Show System Fields



	Field Name	Type	Summary Page
	Application ID	Number	<input checked="" type="checkbox"/>
	CCEA approval to assess date	Date	<input checked="" type="checkbox"/>
	APC confirmation of receipt of application date	Date	<input checked="" type="checkbox"/>
	Form	File	<input checked="" type="checkbox"/>

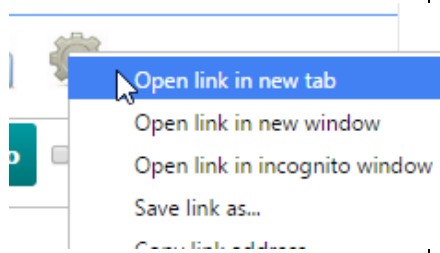
<p>E.g. "Given name (s)" should be "Given Name(s)"</p>	
<p>Make sure the fields have the right type:</p> <ul style="list-style-type: none"> <li>• Number</li> <li>• Date</li> <li>• Text</li> <li>• File</li> </ul> <p>For note fields make sure they</p>	

## Detail Pages

<p>We want the Detail Pages to look nice:</p> <ul style="list-style-type: none"> <li>• Capitalization</li> <li>• Layout</li> <li>• Field Attributes</li> </ul>	 <p>The screenshot shows a form titled 'Worksheet' with the following fields and controls:</p> <ul style="list-style-type: none"> <li>Application ID: Assigned on Save</li> <li>CCEA approval to assess date: dd/mm/yyyy</li> <li>APC confirmation of receipt of application date: dd/mm/yyyy</li> <li>Form: Browse...</li> <li>Third party authorised: [Text Input]</li> <li>Preferred title: --Please Select--</li> <li>Surname: [Text Input]</li> <li>Given name (s): [Text Input]</li> <li>Gender: Male (selected), Female</li> <li>Date of birth: dd/mm/yyyy</li> <li>Country of birth: --Please Select--</li> <li>Country of permanent residence: --Please Select--</li> <li>Telephone number: [Text Input]</li> <li>Mobile number: [Text Input]</li> <li>Email address: [Text Input]</li> </ul>
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If there are a lot of fields then ...

Tip: open the table properties page in a new tab to save going backwards and forwards



Application ID Assigned on Save

CCEA Approval to Assess Date dd/mm/yyyy

APC confirmation of receipt of application date dd/mm/yyyy

Form

Third party authorised

Preferred title --Please Select--

Surname

Given name (s)

Gender  Male  Female

Date of birth dd/mm/yyyy

Country of birth --Please Select--

Country of permanent residence --Please Select--

Telephone number

Mobile number

Email address

Postal address 1

Postal address 2

Postal address 3

Migration

Registration

Other

Preferred title --Please Select--

Family name/ Surname

Given name (s)

Relationship to applicant

Postal address 1

Postal address 2

...split them up into left and right

Field Name	Type	Summary Page	Detail Page	Mandatory	Display on the Right	Import	Export
Application ID	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CCEA Approval to	Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country of birth	DropDown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country of permanent residence	DropDown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Telephone number	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile number	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email address	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Postal address 1	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Postal address 2	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Postal address 3	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Migration	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Registration	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preferred title1	DropDown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If there are some very long field names (this is not a great example) then...

**Worksheet**

Application ID Assigned on Save

CCEA Approval to Assess Date dd/mm/yyyy

**APC confirmation of receipt of application date** dd/mm/yyyy

Form

...split it across multiple lines by putting in carriage returns here

### Edit Field

Table   See  
 Field Name\*   Visible

Summary Page  Heading   
 Alignment    
 View Name   
 Detail Page  Label    
 Display on the right

Add Contents to break up large groups and make the page layout more logical.

Field Type   Allow user to edit content

**Key Dates** **Heading 1**  
**Heading 2**  
 Heading 3  
 Heading 4  
 Heading 5  
 Heading 6  
 Preformatted  
 Normal (P)  
 Normal (DIV)

## Key Dates

Year first registered

Part 1 date

Part 2 date

Part 3 date

Part 4 date

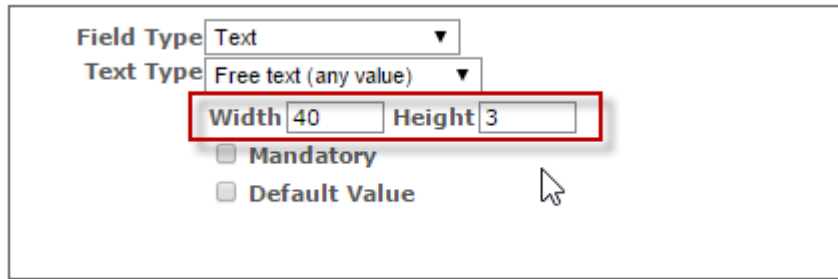
Written date

Practical date

Preferred month

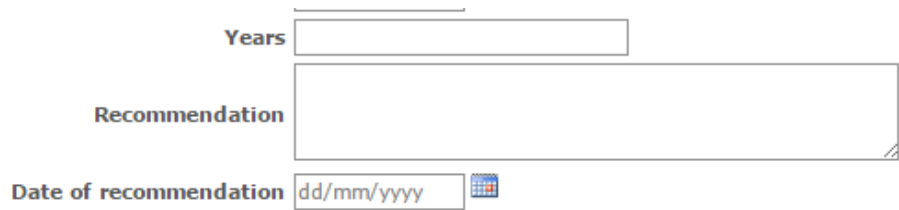


If a field sounds like it would contain more than one line of text (such as a Notes field) then make it bigger



A screenshot of a configuration dialog box. It contains two dropdown menus: 'Field Type' set to 'Text' and 'Text Type' set to 'Free text (any value)'. Below these are two input fields: 'Width' with the value '40' and 'Height' with the value '3'. These two input fields are enclosed in a red rectangular box. At the bottom, there are two unchecked checkboxes labeled 'Mandatory' and 'Default Value'. A mouse cursor is visible near the 'Default Value' checkbox.

... it is partly to look good and partly to demonstrate what we can do so try and use different types of fields too.



A screenshot of a form with three fields. The first is a text input field labeled 'Years'. The second is a larger text area labeled 'Recommendation'. The third is a date input field labeled 'Date of recommendation' with the placeholder text 'dd/mm/yyyy' and a calendar icon to its right.