DataBase Oasis

User's Guide

Professional Edition

Basic Edition

MKF Solutions, Inc.

www.databaseoasis.com

TABLE OF CONTENTS

CHAPTER 1
FIRST, SOME BASICS

What is Database Oasis?

Database Oasis is a central storage place for information. This can be anything that you need to keep track of, such as personal information, financial information, family records, business records, etc.

The nice thing about Database Oasis is that everything is stored in one central place. Rather than having multiple applications that are all geared to different types of information, Database Oasis gives you a blank page where you can define the information you want to store, and then keeps all of the pages you've created together so you can easily view different types of information side-by-side.

This is all accomplished without requiring you to have any technical knowledge of databases. Our goal is to provide many of the same advantages that IT professionals have with their ability to design custom databases to people who have not had any technical training.

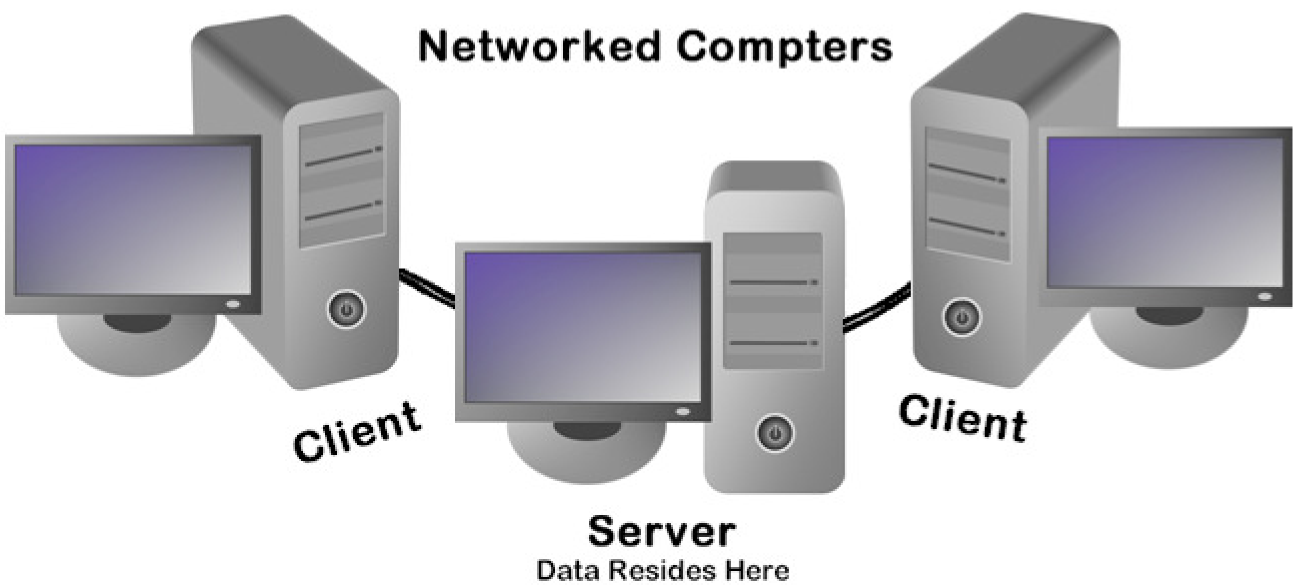
Professional Edition vs. Basic Edition

Database Oasis comes in either a Professional Edition, or a Basic Edition. Database Oasis Professional Edition has all of the features of the Basic Edition, plus additional functionality that is geared toward business users. In addition to features such as relational databases, a report designer, and enhanced security, one notable difference is that the Basic Edition is a single user database. Professional Edition includes a network server that allows multiple users to access the same database from different workstations.

Understanding Multi-User Environments

If you want to have more than one person sharing information in Database Oasis, you need to have the data stored in a central location on your network that everyone can access. For example, you may have three computers that are able to talk to each other over a network.

Database Oasis needs to be installed on all three computers, but the data only needs to be installed on one of them. The other two computers will be told to use the data on that first computer. The computer where the data is installed is called the server. The other computers are called clients.



Prior to installing Database Oasis, you decide which computer will be your server and which will be the clients. When selecting the server, keep in mind that it needs to be accessible over the network to all of the client computers, and it should be a computer that is left on most of the time as the clients will not be able to access the data when the server is turned off.

The first time you log into a client, you will tell it where the data resides. After that point, there are very few differences between using Database Oasis on the server versus client installations.

Database Basics

Even though you don't need any experience or knowledge of databases to use Database Oasis, understanding some simple terms will help when reading this documentation and the help files.

Databases are just collections of related data. That data is stored in records. For example, if you're creating an address book, each person's name and address information would be a separate record.

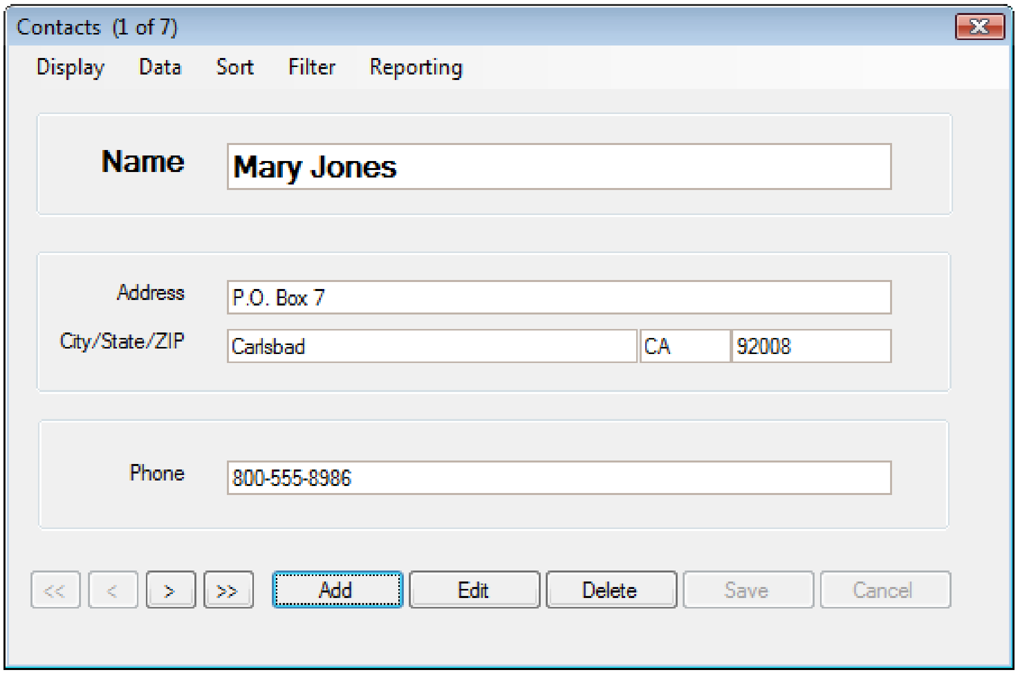
Note
This is an extremely simplified explanation of databases.

Each piece of data in the record is stored in a field. Using the address book example, you might have one field to contain each person's name, and another field to contain their phone numbers. There are different types of fields available in Database Oasis:

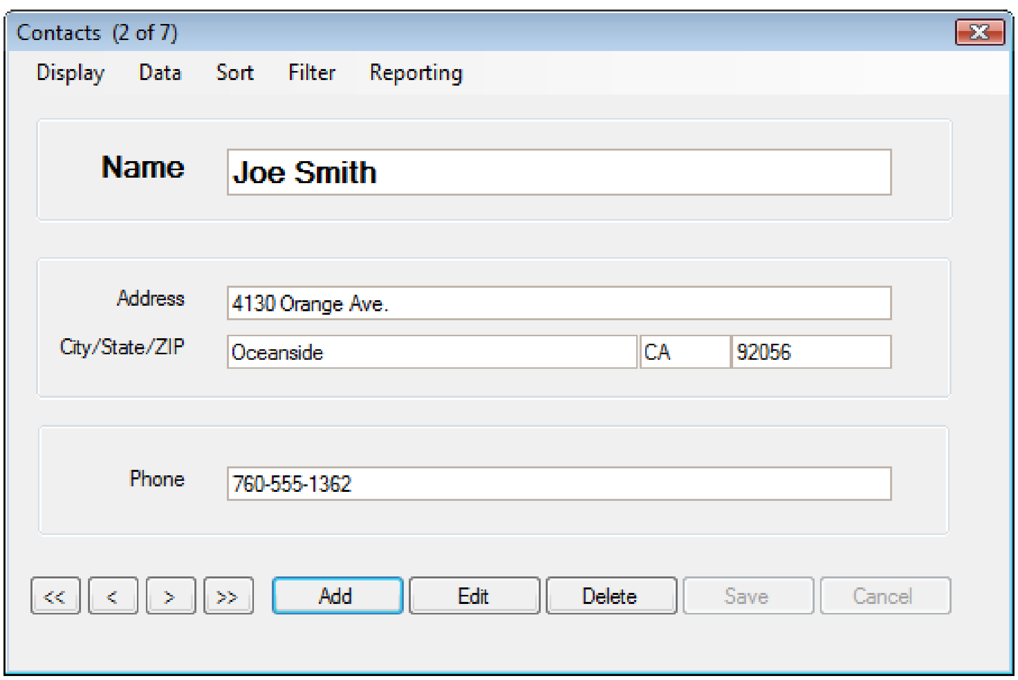
- **Text Fields** This is the most common type of field. It can contain characters, numbers, and symbols such as @ # { }.
- **Numeric Fields** These are similar to text fields, except that they are limited to only containing numbers.
- **Auto Incrementing** This is a numeric field that automatically increases by one for each new record.
- **Notes Fields** This is very similar to a text field, except that you can enter multiple lines of data. Where you would use a text field to store someone's name, you might use a notes field to keep a record of every time you talk to the person.
- **Date Fields** This field type is used to store dates. A small calendar icon appears next to the field, allowing you to manually type in the date or select it from a popup calendar.
- **Check Boxes** This field is displayed as a box: ☑ and allows you to indicate a Yes or No answer to a question. A mark in the box means Yes. If the box is unmarked, it means No.
- **List Fields** This lets you pre-configure a list of data entry options. When entering data in the field, you select from the list and the item is automatically filled into the field.
- **Picture Fields** This is a placeholder for a graphic file. For example, if you're storing information about your employees, you might put a picture of each person in his or her record.
- **Calculated Fields** This is an advanced type of field. It lets you perform a calculation in a field instead of just displaying static data. For example, you might want to calculate sales tax on the value in a numeric field.

Displaying Data

There are two common ways that data can be displayed. The most common is in a single record display. These displays are sometimes called forms, screens, or windows. In Database Oasis, we simply call them data displays:

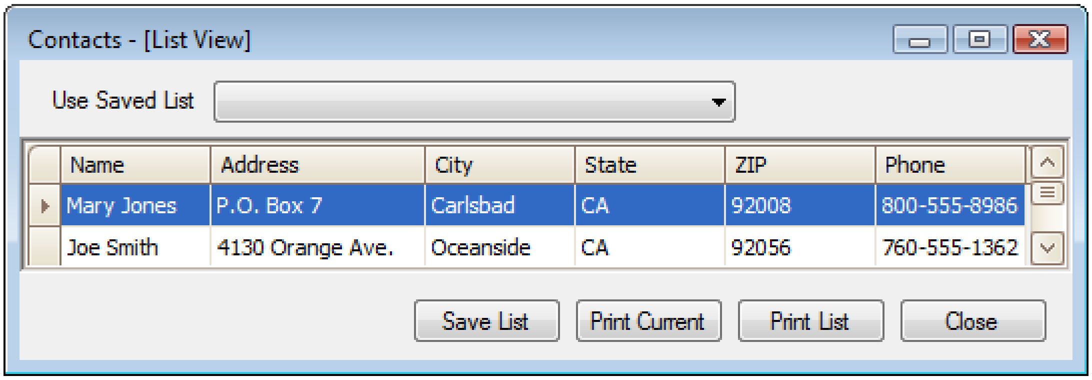


In the above example, all of the information you are looking at belongs to Mary Jones. If you click the right arrow button, you will scroll to the next record:



In this example, Joe Smith's information is now displayed.

The second way to view data is in a list view. This is a tabular view that shows each field as a column and each record as a row. For example:



In the above example, the first row is a column heading row which describes the fields. The second row contains all of Mary Jones' information. The third row contains all of Joe Smith's information. This view allows you to see multiple records side-by-side.

Relational Databases

PRO Relational databases is an advanced feature that is only available in Database Oasis Professional Edition.

Relational Databases are simply databases that contain tables that are linked together, or related, by a common value. They are used when multiple records share common information. The common data is stored in what is known as a "Parent" record and shared across one or more related "Child" records.

This type of display is commonly used to track things like contacts at a company, purchases by a customer, visits by a patient, etc.

In Database Oasis, the relationship is made by opening a display in the designer and adding a "child display" to it. This automatically ties that child display to its parent display.

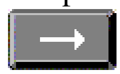
Note

In technical terms, Database Oasis uses what is known as a one-to-many relational database (i.e., one parent to many children).

Documentation Basics

This file provides the documentation in a printable format. The same information is also available in the help files. You will probably find it easier to use the help file if you want to go directly to a specific topic for help on a particular area of the application.

Throughout the documentation, if you need to press a key on your keyboard, the instructions will reference it by the name that appears on the key. For example, if you should press the escape key, you will be instructed to press Esc. If a key has a picture on it instead of a word, the key will be described.

For example, the key that looks like this:  will be referred to as the right arrow key. Sometimes you will need to hold down two or more keys at the same time. In this case the key names will appear separated by a plus sign. Shift+End indicates that you should simultaneously hold down the Shift and End keys.

If the documentation instructs you to click on something with your mouse, you should use the left mouse button unless specifically instructed to click with the right mouse button.

If the documentation is referring to something on the screen by name, the item's name will appear in a blue font. For example, a reference to the Work with Designer menu indicates that you should see the words "Work with Designer" on your screen.

The documentation will generally provide a brief description of a feature, followed by step-by-step instructions on how to access and use the feature. Instructions will appear in this format:

Instruction Heading

1. Step one of the instructions.
2. Step two.
3. Etc.

Supplemental notes, warnings, and hints will appear in this format:

Note
 Note Text.

The map pin icon:  indicates a general note. This is supplemental information you may find useful.

The light bulb icon:  indicates a hint. This is a tip or trick that you might try.

The lightning bolt icon:  indicates a warning. You should pay particular attention to this information.

This documentation covers both Database Oasis Professional Edition and Database Oasis Basic Edition. If a feature being discussed is only relevant to Professional Edition, you will see the following notation:

PRO This feature is only applicable to Database Oasis Professional Edition.

Windows® Basics

If you're not at all familiar with using software in the Windows operating system, you may find this section useful. It covers some basics such as using a mouse, the parts of a form, and some other Windows standards that may be referred to in the documentation. If you understand these basics, feel free to skip to the next chapter.

Using Windows® Applications

The Windows operating system opens each software application in a separate pane, or window. Generally, the window will contain a title bar and a menu bar above the main application work area.

Title bar

The title bar is the band at the top of a window or form that shows its name. It has buttons that let you minimize a window, control whether a window fills the full screen or can be sized (which toggles between the restore and maximize buttons), and close a window.

When a window is maximized, it will be locked in its default maximum size. In Database Oasis, this means it will fill your monitor. You will not be able to move or change the size of the screen. If a window is maximized, you will see the restore button, as in the above illustration.

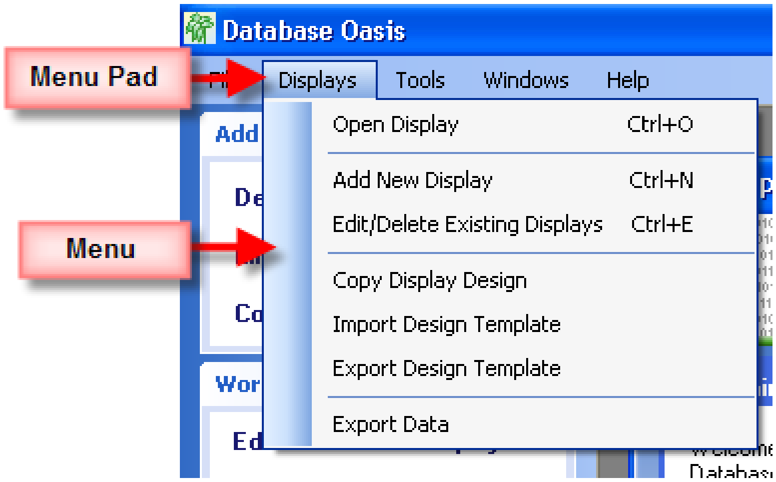
Clicking the restore button will unlock the window and enable you to move and size it. To move the window, click on the title bar and drag the window. If the window is in this state, the restore button will be replaced with the maximize button: . Clicking maximize will return the window to the locked, full screen position.

In addition to the main application title bar, every form that you open will have its own title bar.

Note
These buttons may not be present on all forms.

Menu

A menu is a list of options from which you may select. The menu bar is the area directly below the title bar. Each word on the menu bar is a menu pad. When you select a menu pad, a menu opens:



The main application window has a menu, as do some forms within the application. For example, when you have a display open, you'll find a second menu that provides options specific to the data in that display.

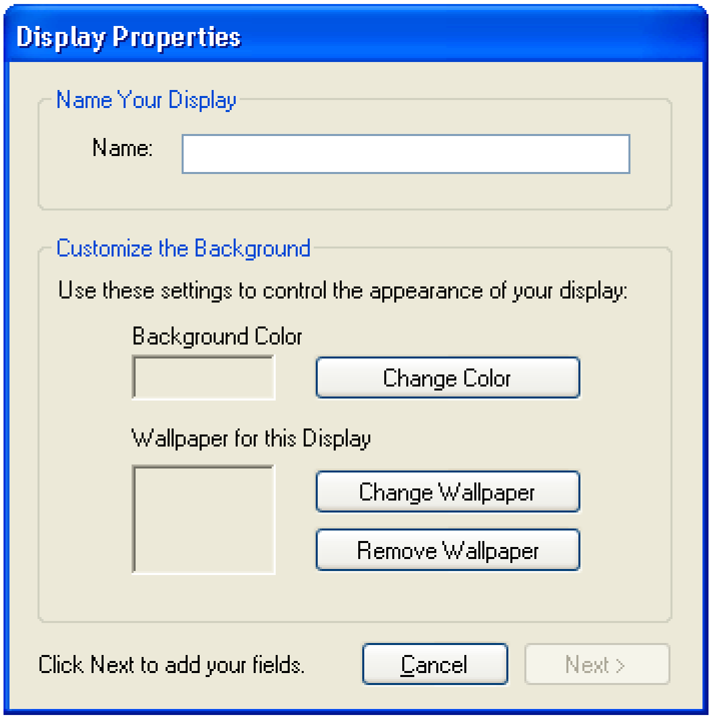
Menus can also sometimes change in response to what you're currently doing. For example, the Child Displays menu only appears on a display that has a child level.

Form

Forms are the screens where data is viewed and work is performed. Whenever you need to interact with the program, you will be presented with a form.

The forms that you create in the display designer are referred to in the documentation and program as data displays or just displays. These displays allow you to view and modify your data. Since you design these, how they look is completely up to you. Any displays shown in the documentation are just examples of a possible display design and may or may not match any of your displays.

Other forms let you make selections before performing some action. For example, when you add a new data display, there's a Display Properties screen that lets you select a name, background color, and a background wallpaper for the display:



This type of screen will be referred to as screens or forms in the documentation.

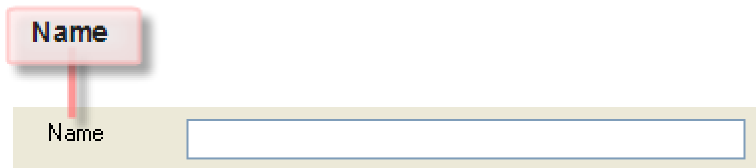
Most of the time when a form is open, other features of the application will be unavailable. You must close the current form in order to open another. There are some exceptions to this. For example, you can have more than one data display open at the same time. In this case, only one will be considered the active form. This is the form that gets affected when you type or otherwise interact with it. The active form will be in front of any other open forms. If you want to make a form the active form, simply click on it.

As you work in a form, only one object at a time will be the currently active object. That object is said to have focus. The object with focus will be highlighted in some way, depending on the type of object. The highlight may be simply a cursor blinking in a field, or a highlight around a button.

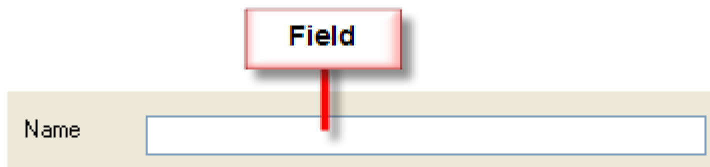
Some options on a form may be unavailable. This will occur if the option is not applicable at the current time. For example, the OK button in most forms will be unavailable until you have filled in the required data. In this case, the option will be dimmed with the text grayed out:

Following is a list of the objects you will encounter in forms:

Field Names
Field names tell you what to expect when you select an item or what information is contained in a field:



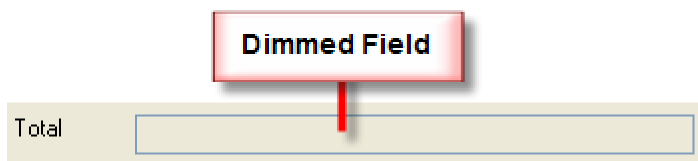
Fields
A field contains a single piece of data from a record:



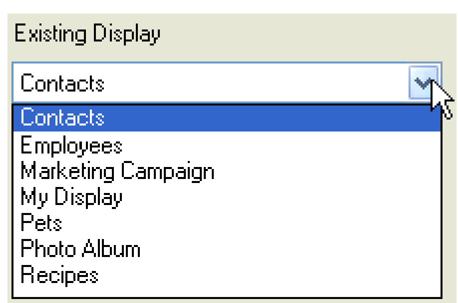
When a field has focus, it will contain a blinking cursor.

To enter or edit text in the field, start typing. Text will appear at the cursor point.

If you cannot edit a field, the background will appear grayed out:



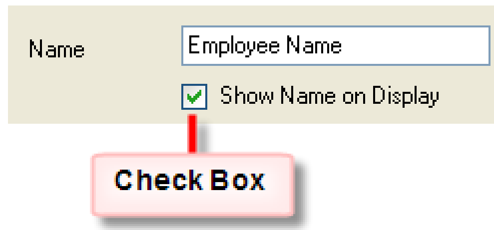
Drop-down lists
Drop-down lists are fields where the possible valid entries for the field have already been established. You enter data into the field by selecting from the list:



Drop-down lists appear highlighted when they have focus.

Check boxes

Check boxes provide a True or False indication. If it is marked, the statement in the name is true. If it is not marked, the statement is false:



The above example appears when adding a new field to a display. If the check box is marked (as in the picture), you are telling the program that it should show Employee Name on the display next to the field. If it is not marked, you are telling the program not to display the field name.

When a check box has focus, it will appear with a dotted line around the prompt:

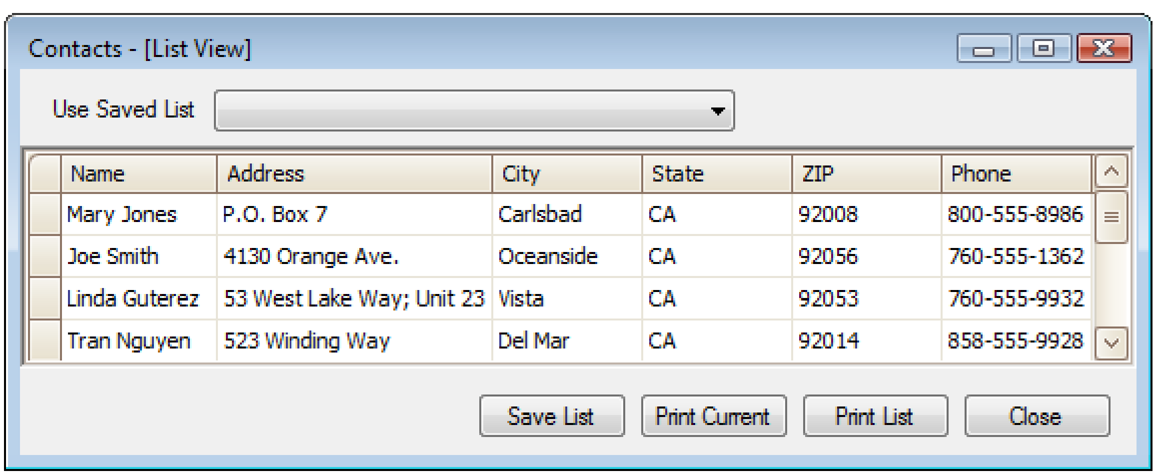
Date Fields

Date fields are used to contain dates. The field will only accept a valid date and formatting characters automatically appear in the field:

When a date field has focus, it will appear highlighted.

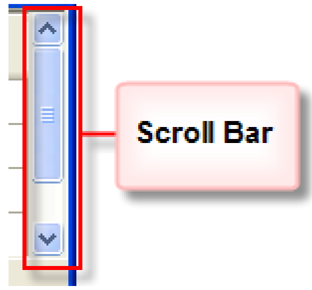
List Views

A list view lets you view several records at the same time by displaying multiple fields from each record across rows:



Each row is a record. Each column is a field in the record.

You can view more records by scrolling the list with the scrollbar:



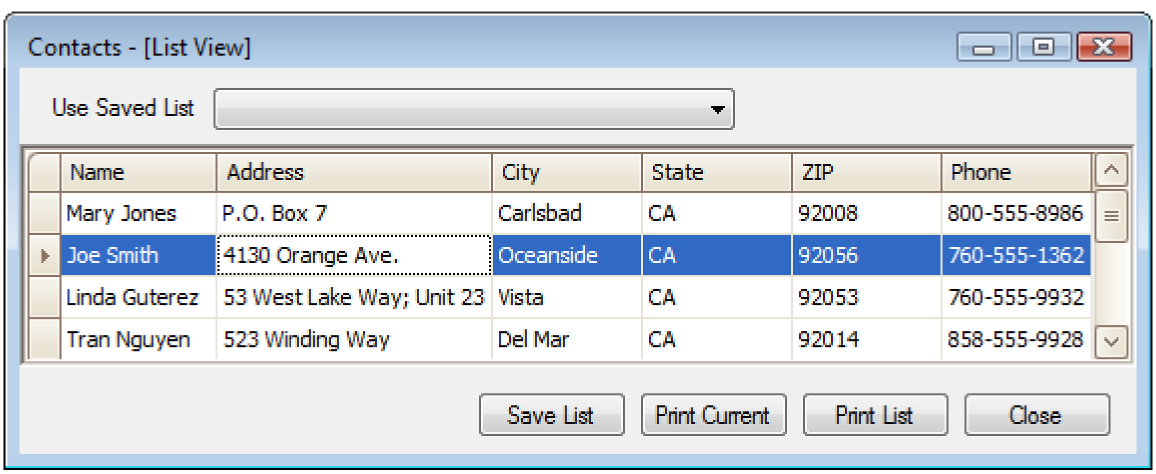
By clicking on the arrows at the top and bottom of the bar, you can move the list up or down by one record.

The button in the middle of the bar is called a scroll box:

You can click on it and slide it up or down to move directly to a particular spot on the list. For example, if you know the record you're looking for is toward the end of the list, you can move the scroll box near the bottom of the bar, then scroll up or down as necessary until you locate the record. You can also scroll the list using the up and down arrow keys on your keyboard to move one record at a time, or the PgUp and PgDn keys to move a page at a time.

If there is a horizontal scrollbar along the bottom of the list, there are more fields available than you can currently see. Use the scrollbar to view additional information on each record.

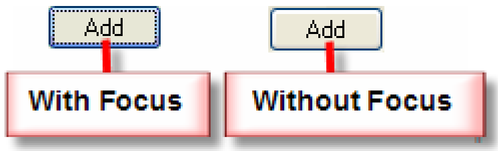
A record in the list is selected when it is highlighted in blue and has an arrow pointing to it in the first column:



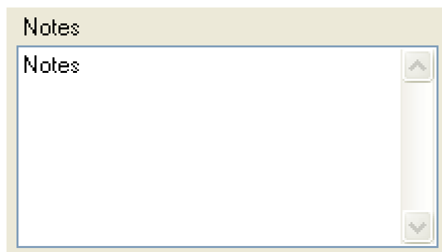
In the above example, Joe Smith's record is selected. The field that currently has focus will not appear highlighted unless the text in the field has been selected. In that case, just the text will appear highlighted.

Buttons
Buttons are used to perform an action. They include text and/or a graphic that indicates what action is associated with the button:

Activate a button by clicking on it with the mouse, or pressing Enter if the button has focus. If a button has focus, it will have a dotted blue border around the edges:



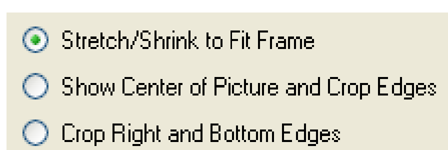
Notes fields
Most fields have a set number of characters that can be entered in them. Notes fields can contain unlimited amounts of text:



If there is more text than can be displayed in the field, the scrollbar will become active. (See the *List View* item, earlier in this section, for a discussion of scrollbars.)

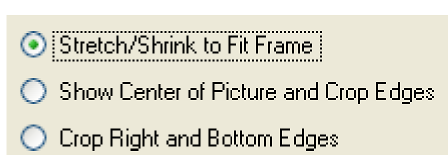
When a notes field is active, a blinking cursor will appear in the field. Start typing at the cursor point to enter and edit text in the field.

Radio buttons
Radio buttons are used to select between a set of options. The radio button is a circle, followed by text indicating the option:



Only one option in the set may be selected at a time. The selected radio button is filled in with a green mark. In the example above, the Stretch/Shrink to Fit Frame option is selected.

When an option has focus it will be surrounded by a dotted line:



In the example above, Stretch/Shrink to Fit Frame has focus. Use the up and down arrow keys to move the focus between the radio buttons.

Using a Mouse

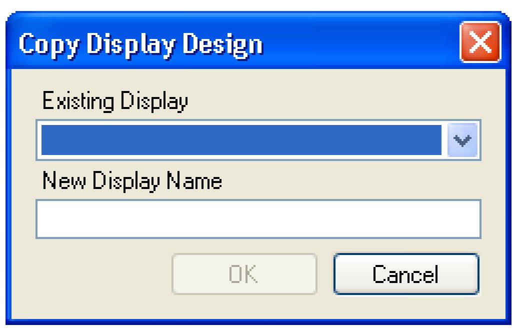
A mouse is typically a device with a small ball in the bottom that pushes against sensors inside the mouse when you move it. These sensors are used to move the mouse pointer:  on your screen. This pointer is used to interact with the software. There are some variations on this design, such as touch pads, trackballs, and laser mice that use light instead of a ball, but the basic functionality of moving the pointer remains the same.

On the top of the mouse are two buttons, a left and a right mouse button. The left-hand button is more commonly used. Whenever you are told to click or double-click with the mouse, you should use the button on the left. If you are supposed to use the button on the right, you will be told to right-click. Some mice come with a third button or a wheel between the left and right mouse buttons. Refer to the documentation that came with your mouse for information on how this button is used. For the purposes of this documentation, we will only use the buttons on the far left and far right.

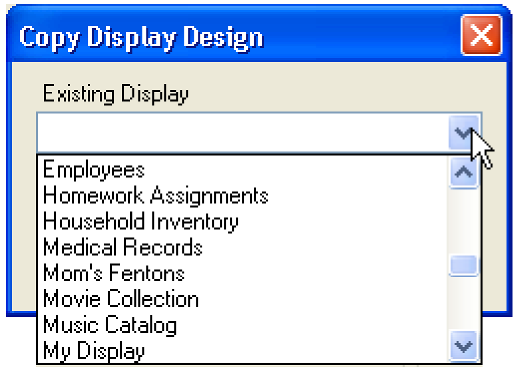
> **Note**
>
> It is possible to configure the mouse in Windows to be more comfortable for left-handed people. In this case, the button functions are switched and the right button is more commonly used. If your mouse has been configured this way, use the button on the right when you are told to click or double-click, and the button on the left if you are told to right-click.

The mouse is used to click buttons, open menus, enter a field so you can start typing, and select items in a list. To use the mouse, position the pointer over the item and click.

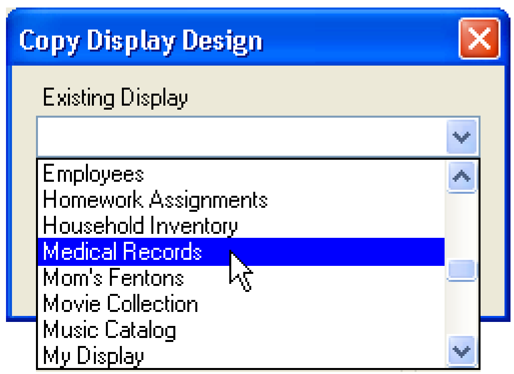
Let's look at an example screen:



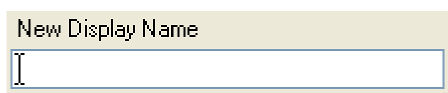
You may be instructed to click the arrow next to the Existing Display field. Place your cursor over the arrow and click once with the left mouse button:



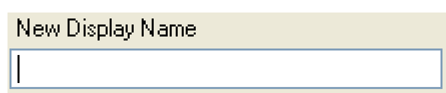
From there you can select an item in the list by moving the mouse over your choice and clicking once with the left mouse button:



If you are instructed to type something in a field, you can click in the field to bring focus to it. Position your mouse over the field. When your mouse is over a text edit region, it will change from a standard pointer to a text select bar:



Click once with the left mouse button to put the focus in the field so you can start typing:



If you are instructed to select a button, you should place your mouse pointer over the button and click once with the left mouse button:

If you are instructed double click on an object, position your mouse over your selection and quickly press twice on the left mouse button.

Note

If you double click and nothing happens, it may be that you are not clicking fast enough or that you are moving the mouse slightly between clicks. It is possible to control how fast you have to click in your mouse configuration. Practice clicking faster, or refer to the documentation that came with your mouse for help with adjusting the double-click speed

The mouse can also be used to highlight text. For example, if you wanted to highlight a selection of text in a field, you would position your mouse at one end of the text you wish to select, and move it to the opposite end of the text you wish to select while holding down your left mouse button. A blue highlight will appear on the text as you drag:

Double clicking on a word will also highlight the entire word.

Once you have a selection of text highlighted, you can press CTRL+C on your keyboard to copy it to your Windows clipboard. If you press CTRL+V on your keyboard, the copied text will be pasted at your current cursor location. This can be very useful if you need to enter the same data multiple times, or you wish to move data from one place to another.

Another use for the mouse is drag and drop. Items that can be moved from one location to another are moved using this method. To drag and drop and item, first click on it with your mouse. Continue to hold down the right mouse button while you drag to the desired position. When you release the mouse button, the item will be dropped in the new location.

Using the Keyboard

Many options that can be accessed using a mouse can also be accessed using the keyboard. Move focus through a screen by pressing the Tab key. Once the desired object has focus, press Enter to select it.

Note

For a complete discussion on identifying which object has focus, refer to the *Form* section earlier in this chapter.

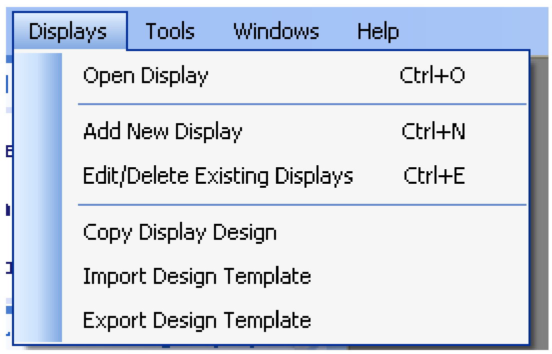
If you tab past the desired option, you can use Shift+Tab to tab back to the previous object.

You will not be able to tab to a disabled object. If you find you cannot tab to an item that is not disabled, it is probably part of a set. For example, if there are radio buttons on a form, when you tab to them only the first one will be selected. Pressing Tab again will move you to a different object. When this occurs, tab to the first item, then use either the left and right arrow keys (if the objects are aligned horizontally) or the up and down arrow keys (if the objects are aligned vertically) to move through the individual items in the set.

The up and down arrow keys can also be used to scroll through the items in a drop-down list. Place focus in the list, then press the arrow key. Each item in the list will appear in the field in order. You can move quickly through the items in a drop-down list by typing the first character of the desired item. The list will jump to the first item that begins with that letter. You can then use the up and down arrow keys to scroll the list.

If you would like to open a drop-down list, enter the field and press Alt+ the down arrow key. The entire list will appear. Use the up and down arrow keys to scroll the options on the list.

If an object has a hot key, you can activate the object directly rather than tabbing to it and pressing Enter. A hot key is the underlined key on the name of an option. For example, the menus in Database Oasis all have hot key access:



Hot keys are activated by holding down the Alt key on the keyboard at the same time you press the underlined letter. In the above example, I is the hot key for Import Design Template. To activate this menu option, you would press Alt+I on your keyboard.

On the above example, you will also see that you can press Ctrl+O to open a display, Ctrl+N to add a new display, and Ctrl+E to edit an existing display. These control key combinations are also keyboard shortcuts. The difference between these option and a hot key is that you don't need to have the menu open in order to use the control keys. The hot key allows you to activate an option you can currently see on the screen. The control key shortcuts provide quick access to the most common features from anywhere in the software.

Note
When some screens are open, you must finish working with that screen before you can start another task. In this case, the control key shortcuts will not work until you close the screen.

Entering Data

Most data is entered by simply typing in a field. If you make a mistake, press the Backspace key on your keyboard to remove one character to the left. The Delete key on your keyboard will remove one character to the right. To remove more than one character at a time, highlight it with your mouse and press delete, or simply type over it.

Using Windows® Forms

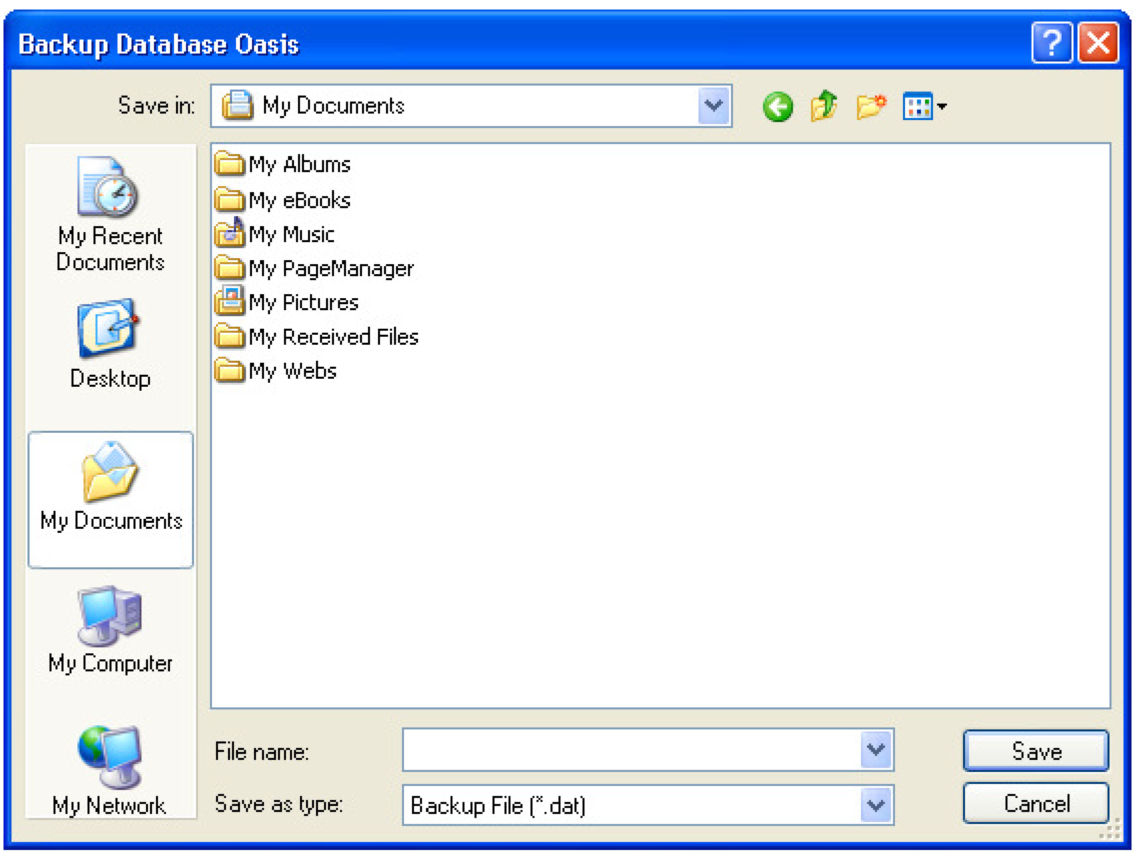
Database Oasis makes use of a number of standard Windows form, such as the Color Picker, the Font Selection screen, and the Open dialog box. If you use other Windows applications, chances are you will have already encountered these forms. If you are not familiar with these screens, use the following instructions when working with them.

Windows Open/Save Dialog

The Windows Open/Save dialog is used to either locate a file on your computer (Open), or to select a location to store a file on your computer (Save). The overall functionality of the screen is the same for both activities, but the options on the screen will change slightly depending on which task you are performing

USING THE WINDOWS OPEN/SAVE DIALOG

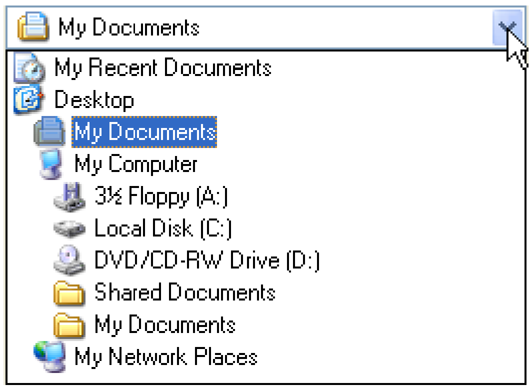
1 When the Windows Open/Save dialog first comes up, it will look something like this:



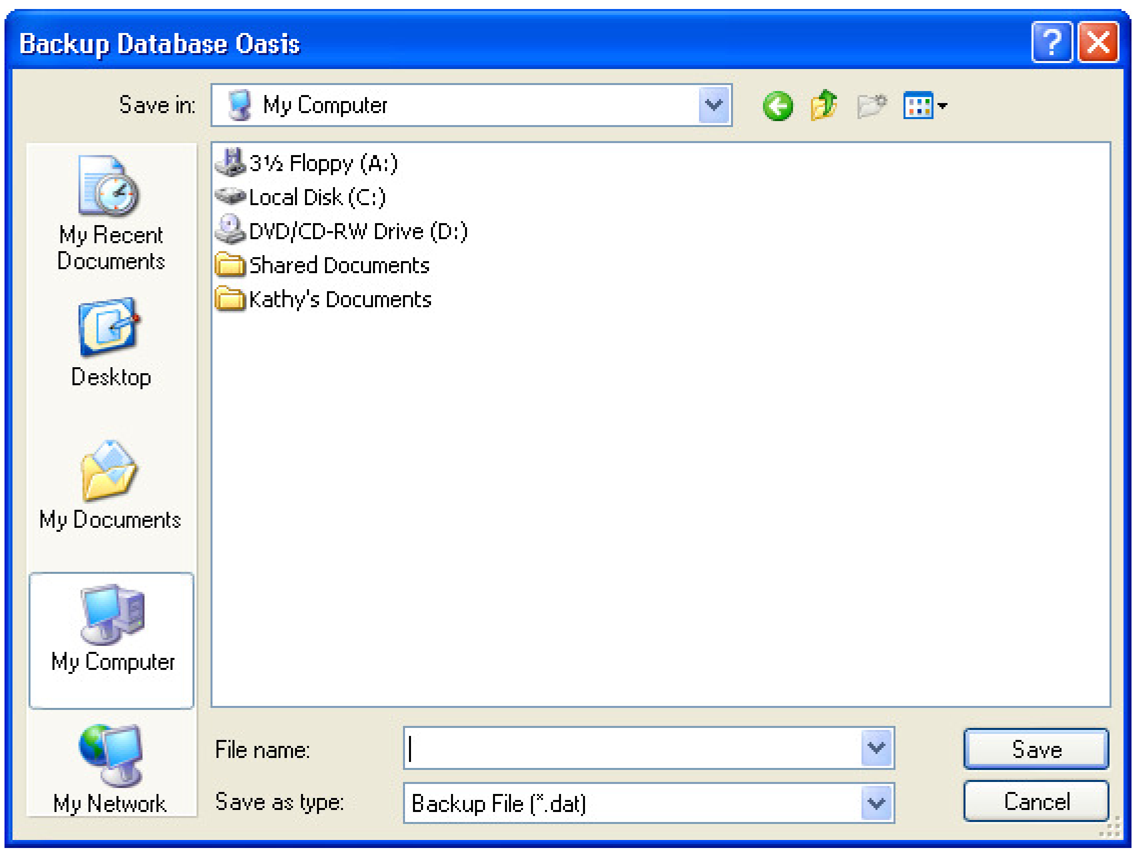
What is actually displayed will vary based on how you accessed this screen.

2 If you are writing a file, such as a backup or an export, to an external location, the list at the top will say Save in: as it does in the above illustration. If you are locating a file that you will bring into Database Oasis, such as a graphic file, the list at the top will say Look in. In either case, this list is used to navigate through the data on your computer.

When you open the list, it will look something like this:



Alternatively, you can click the My Computer button in the left hand navigation pane to populate the window with this list, minus any network locations:



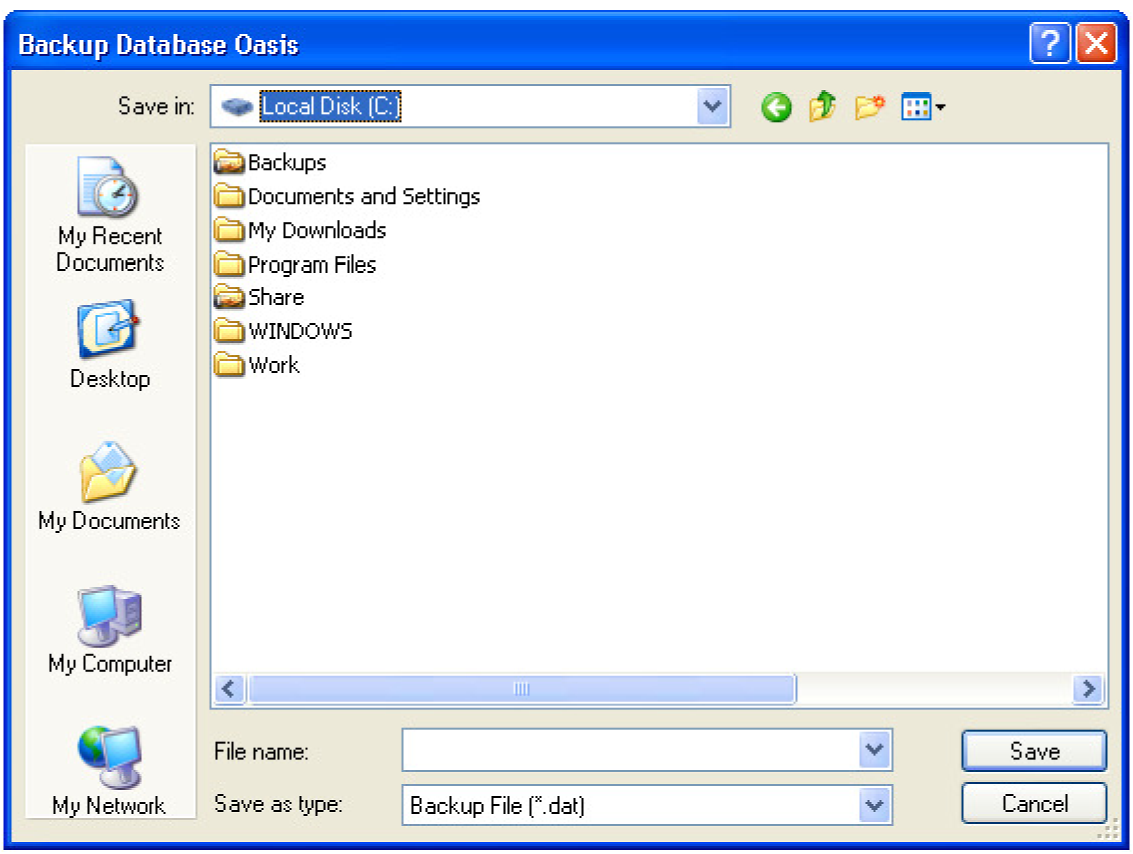
3 By default, the main hard drive on your computer is identified as [C:]. Everything that is stored on your computer will be under that drive. You may also have one or more external drives. For example, if your computer can read and write to floppy disks, you will have a floppy drive, usually [A:]. If your computer can read and/or write to CDs, you will have a CD drive, usually [D:]. If you plug in an external data device, such as a memory stick, your computer will automatically assign it the next available drive letter during the time it is connected. This will also appear on this list.

Note

Even though floppy drives and CD drives are built into your computer, they are still considered external devices.

4 Click on the drive that contains the folder you are trying to read from or write to. Unless you are trying to access an external device or are working on a network, this will be the Local Disk [C:] option.

5 The box below the drop down list displays everything in the selected location. If you have selected your local disk, this will show any files and folders that are stored directly in c:\.:



6 Double click on the desired folder name. The contents of that folder will open. Most folders contain subfolders. These are used to help organize your files. Double clicking on a folder in this box will show all of the subfolders under it. Continue double clicking on folders until you have drilled down to the desired location.

For example, you may keep all of your work in a c:\work folder. Under that, you may have separate folders to contain information related to different types of work you perform, such as all financial information in one folder, and all customer related information in another. Using this example, if you were navigating to a graphic of a pie chart called chart.bmp in your financial folder, your path would be c:\work\financial\chart.bmp. Once you've selected the Local Disk [C:] option, the \work folder would appear in the box. Once you double click on the \work folder the box would populate with your \customer and \financial folders. Double clicking on \financial will open that folder. The chart.bmp file would now be displayed in the box.

7 If you make an error, you can use the button on the toolbar to go up one folder level. Alternatively, you can open the Save in/Look in list again to go directly to any folder in your current path or start completely over.

Hint
Windows has designed the My Document folder to be a central repository for most of your files. If you store items in the My Documents folder, or a subfolder under My Documents, such as My Pictures, you can use the My Documents button in the left-hand navigation pane to quickly access this folder.

8 Once you have navigated to the desired folder, do one of two things:

- If you are saving a file, type a name for the file in the File name: field then click the Save button. If a file with that name already exists in the selected location, you will be asked if you would like to overwrite it. Click Yes to overwrite or No to return to the screen to select a different name or location.

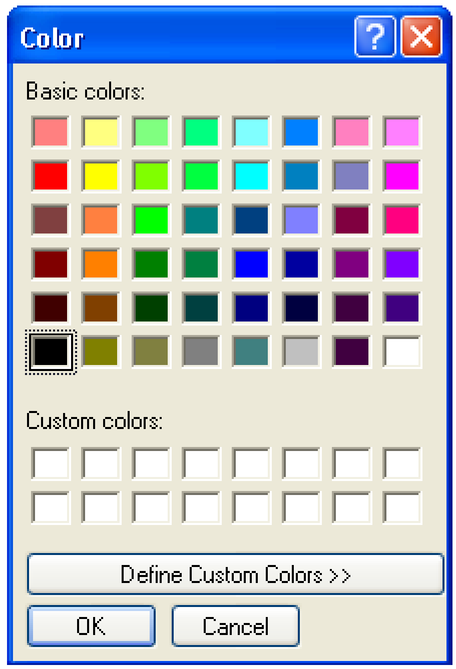
- If you are locating an existing file, click on the file in the window. It will appear in the File name: field. The Save button shown in the earlier illustration will appear as an Open button instead. Click Open to select the file.

Windows Color Picker

In several places throughout the display designer, you are given the option to change the color of an item using the Windows Color picker. Following these instructions when working with this form.

USING THE WINDOWS COLOR PICKER

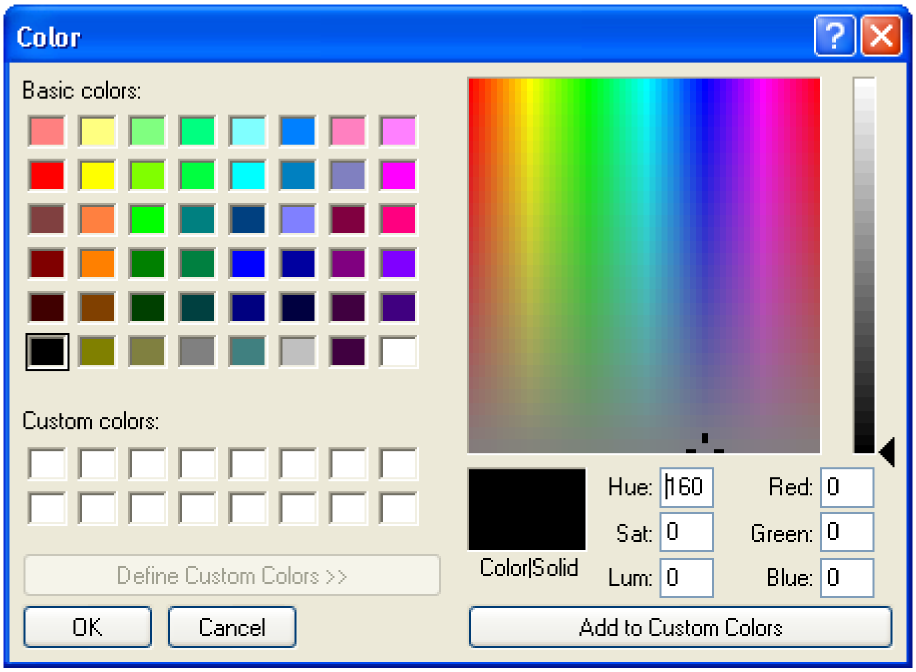
1 When the Windows Color picker first opens, it will look like this:



The Basic Colors section provides 48 of the most common colors.

2 To select a color, simply click on the box showing the desired color. A dotted line will appear around the color, indicating it is selected. In the above illustration, the color black in the lower-left corner is selected.

3 To select a color that is not among the basics, click Define Custom Colors. The screen will expand to include the custom color options:



4 The rainbow hued box at the top-right is a color matrix. When you expand the screen, it will default to the color selected in the Basic Colors section. You can fine tune the basic color by selecting nearby color options from the matrix, or by using the vertical band next to the color matrix to control the intensity of the color.

The Color/Solid box will display the currently selected color. If you click on any of the basic colors, or click on the color matrix, this box will update to reflect the change.

The Hue, Sat, and Lum fields provide the numeric values of the hue, saturation (the strength of the color in the specified hue), and luminosity (lightness or darkness of the color) of the currently selected color.

The Red, Green, and Blue fields provide the numeric value of a color based on the amount of red, green, and blue found in the color. When trying to match colors, knowing the red/green/blue values is the easiest way of ensuring an exact match.

5 Use the color matrix to define a color that you like. If you are not certain of a color, you can click the Add to Custom Colors button to add the color to the Custom Colors section. This will save that particular color so you may return to it later, if desired.

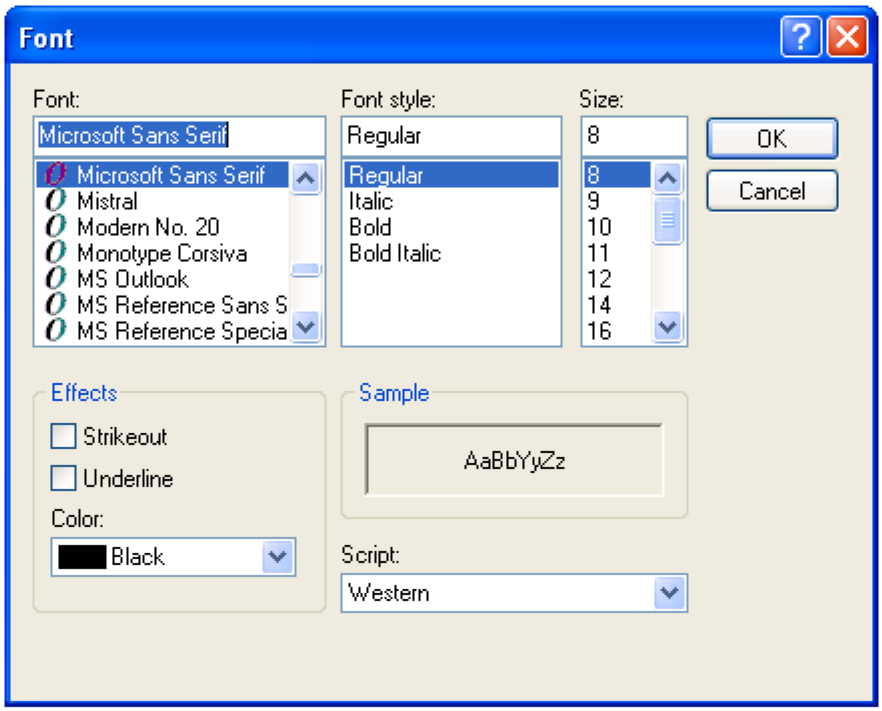
6 When you are satisfied with your color selection, click OK. Whatever color is currently showing in the Color/Solid box will be selected.

Windows Font Selector

In several places throughout the display designer, you are given the option to change the font of an item using the Windows Font selector. Following these instructions when working with this form.

USING THE WINDOWS FONT SELECTOR

1 When the Windows Font selector first opens, it will look like this:



2 The Font list will display all of the fonts that you currently have installed on your computer. Use the scroll bar to locate the font you would like to use and click on it in the list.

3 The Font Style section allows you to apply style changes to the font. You can make it *italic*, **bold**, or ***bold italic*** by clicking on the desired item in the list.

4 The Size list allows you to control how large the characters appear in your chosen font. A smaller number means a smaller text size. For example, a 9 point font is smaller than a 14 point font.

5 The Effects section allows you to apply additional effects to your font. Strikeout will place a line through the text like ~~this~~. Underline will place a line under the text like this.

6 Click the arrow next to the Font list to select a color for the text.

7 Many fonts have different scripts to accommodate different languages. If your text will be in English, leave the Western setting selected in the Scripts drop down list. If your data will be in a different language, select the appropriate script from the list.

8 The Sample text will display how all of your settings will look together. When you are satisfied with your font selection, click OK.

Technical Support

Database Oasis offers complimentary technical support to registered users via e-mail at Support@DatabaseOasis.com.

If you are not a registered user and have a pre-sales support question, you may contact us at Sales@DatabaseOasis.com.

CHAPTER 2
INSTALLATION

System Requirements

Before installing Database Oasis, you should verify that your computer meets the recommended system requirements.

Operating System
Database Oasis is compatible with Windows operating systems including Windows XP and later. You must have the latest service packs available from Microsoft® installed on your computer.

RAM
You will need a minimum of 256MB of RAM to operate Database Oasis. It is recommended that you have 512MB of RAM.

Screen Resolution
Your screen resolution must be set to at least 800x600. Setting your resolution to 1024x768 or greater is recommended.

Hard Drive Space
The Database Oasis application will initially require 30 MB to install. You will need additional hard drive space as you use the software and add data. You are able to store up to 4TB (Terabytes) of data in Database Oasis.

Installation

There are three different types of Database Oasis installations:

- Basic Edition is a single-user product that is installed and used on one computer.
- Professional Edition is a multi-user product. The database is installed on one computer on the network, then accessed by other computers over the network. This primary installation is called the server.
- Professional Edition clients are installed on each machine that needs to use Database Oasis. They are exactly like the server, except that the database isn't installed locally. Instead, they access the database located on the server.

If you will be using Database Oasis - Basic Edition, you will simply need to install the software on the computer you will be using to work with your data.

If you will be using Database Oasis - Professional Edition, you will need to select where you want to install the server.

Selecting where to Install the Professional Server

PRO This feature is only applicable to Database Oasis Professional Edition.

If you will be using Database Oasis - Professional Edition, chances are you will need to access the software from more than one computer. In this case, you need to decide which computer will host the data. When choosing where to install the data server, keep the following points in mind:

- The computer where the data resides will need to be accessible on your network to all of the computers that will be using Database Oasis.
- The computer where the data resides will need to be turned on and logged into Windows when other people want to use the software.

Once you've decided where to install the server, you can perform the client installation on any other computers that will need to access Database Oasis.

Hint
If you do not want the data on the same computer as Database Oasis, you can move it to another location after installation.

Installing Prerequisites

Database Oasis requires version 4 of the Microsoft .NET Framework from Microsoft© Technologies and version 3.1 or later of the Windows Installer. These applications are typically included with the Windows operating system, but older Windows installations may have earlier versions of these applications.

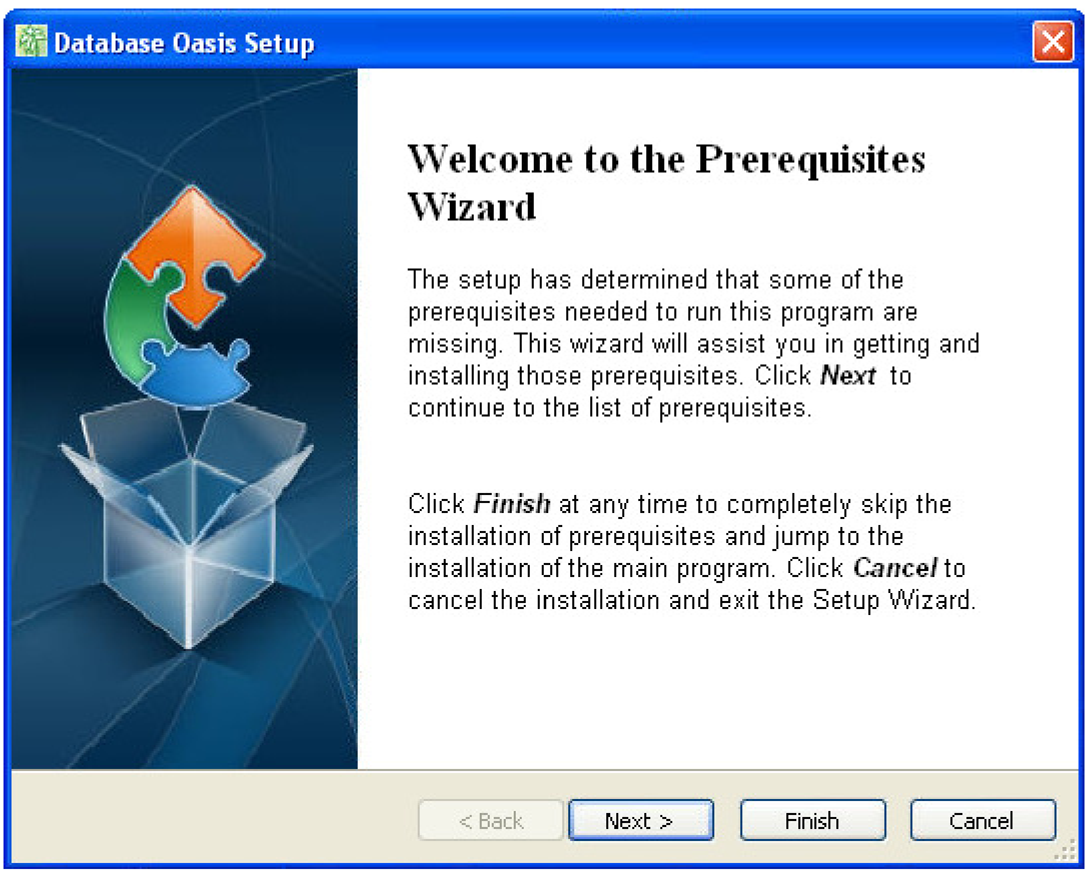
The Database Oasis installer checks your system for these prerequisites on launch. If the required versions are not installed, the Prerequisites Wizard will launch to walk you through the installation.

INSTALLING PREREQUISITES

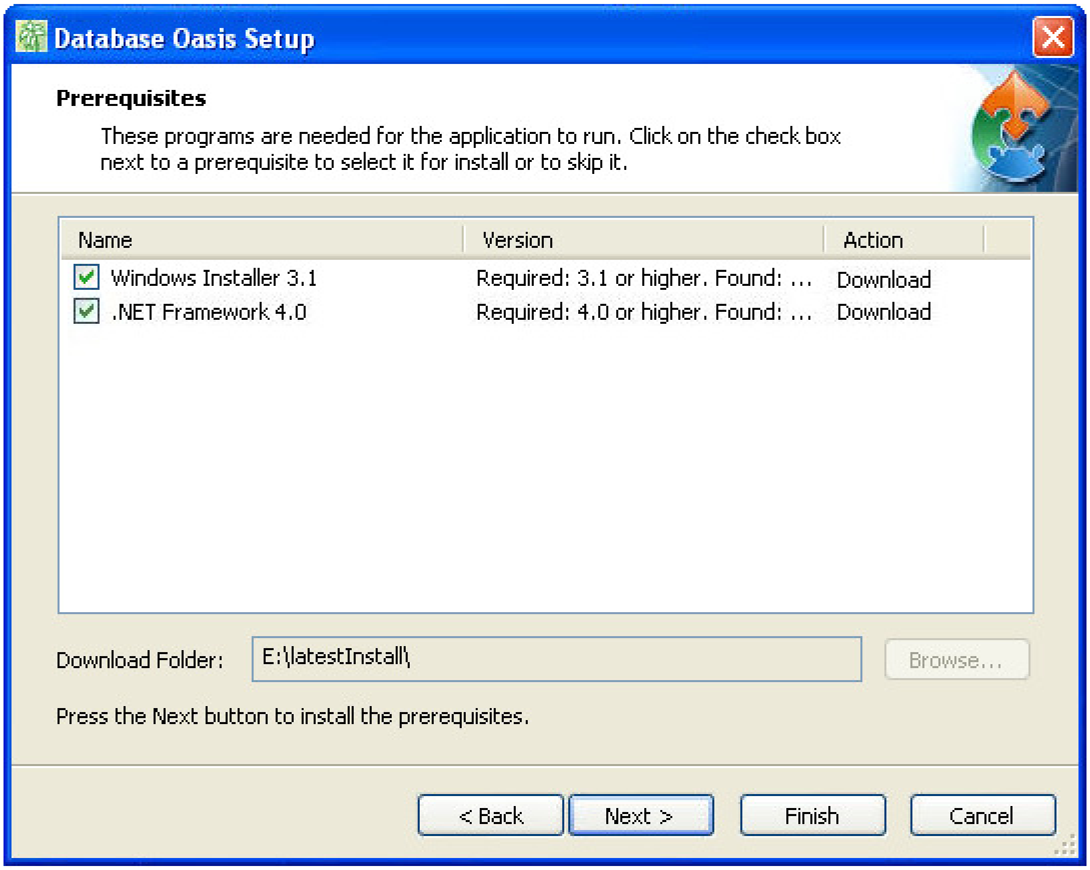
1. If you have not already done so, download the Database Oasis installation using the download link on the www.databaseoasis.com website.

2. Launch the DBOasisSetup.exe file that you downloaded.

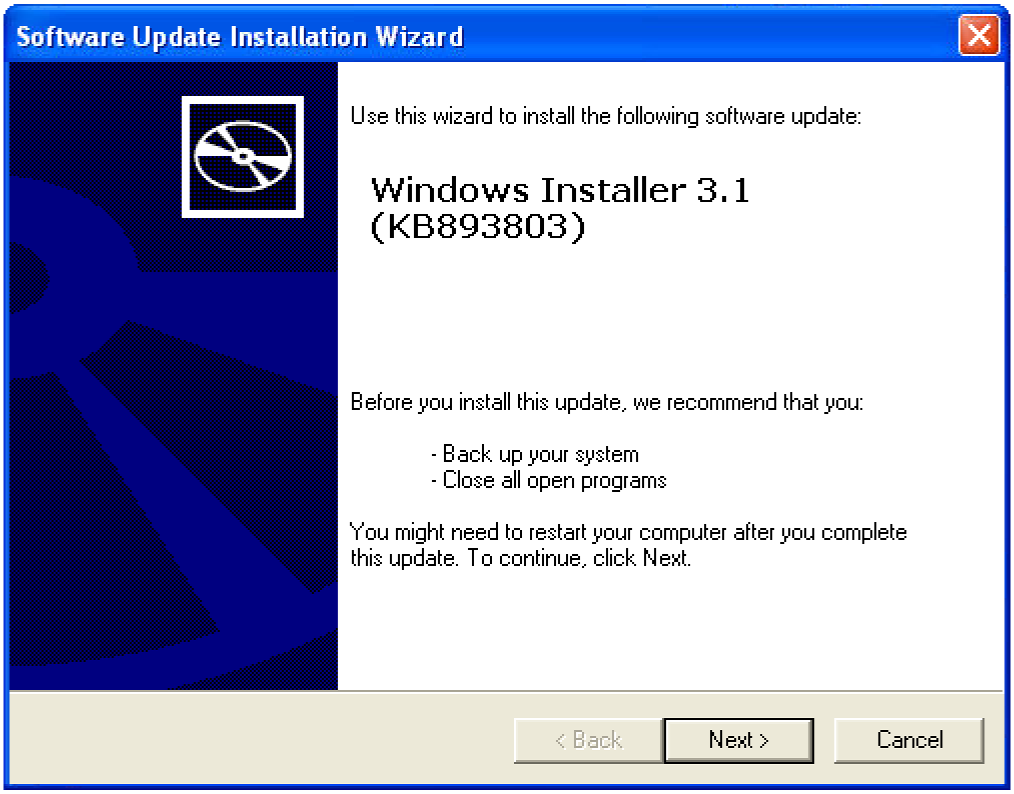
3. If Microsoft .NET Framework 4 and Windows 3.1 are not already installed on your computer, the Prerequisites Wizard will appear:



4 Click Next to access a list of the missing prerequisites.



5 Click Next to begin installation of the prerequisites. If the .NET Framework is the only missing prerequisite, skip to step 9. If you do not have Windows Installer version 3.1 or later installed, the Software Update Installation Wizard for the installer will launch:



Note

As part of the Windows Installer you will be required to reboot your computer. Make sure all other applications are closed before proceeding.

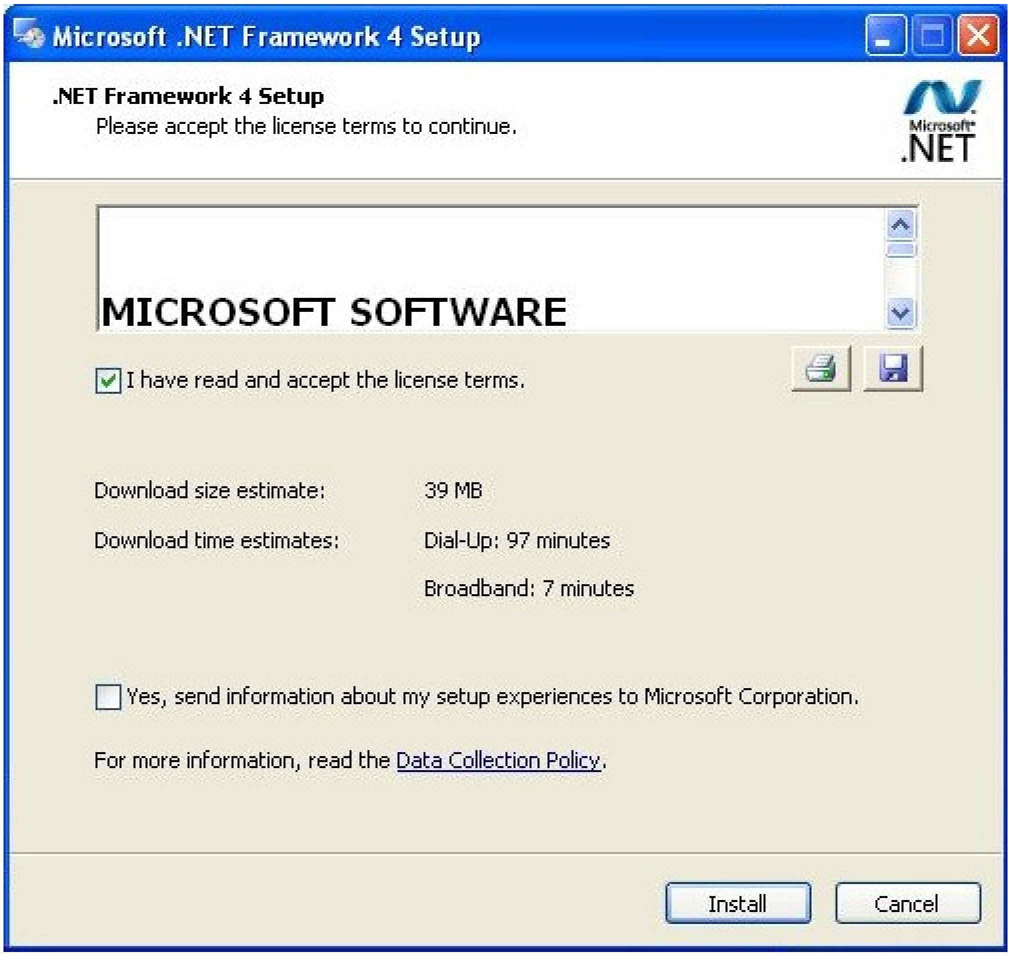
6 Click Next to begin the installation. The Software Update Installation Wizard will ask you to accept the end user license agreement, then launch the installation process. When it is complete, you will be promoted to restart your computer.

7 Click Finish to complete the installation and reboot.

8 When Windows reboots, launch the DBOasisSetup.exe file again to continue with the installation. The Prerequisite Wizard will launch to allow you to install the .NET Framework.

9 Click Next in the Prerequisites Wizard to launch the .NET Framework 4 Setup.

10 You will be asked to accept the license agreement prior to download and installation:



11 Read and accept the license agreement and click Install. The installation process will commence. When it is finished, you will receive a Setup complete screen.

12 Click Exit to launch the Database Oasis installation process.

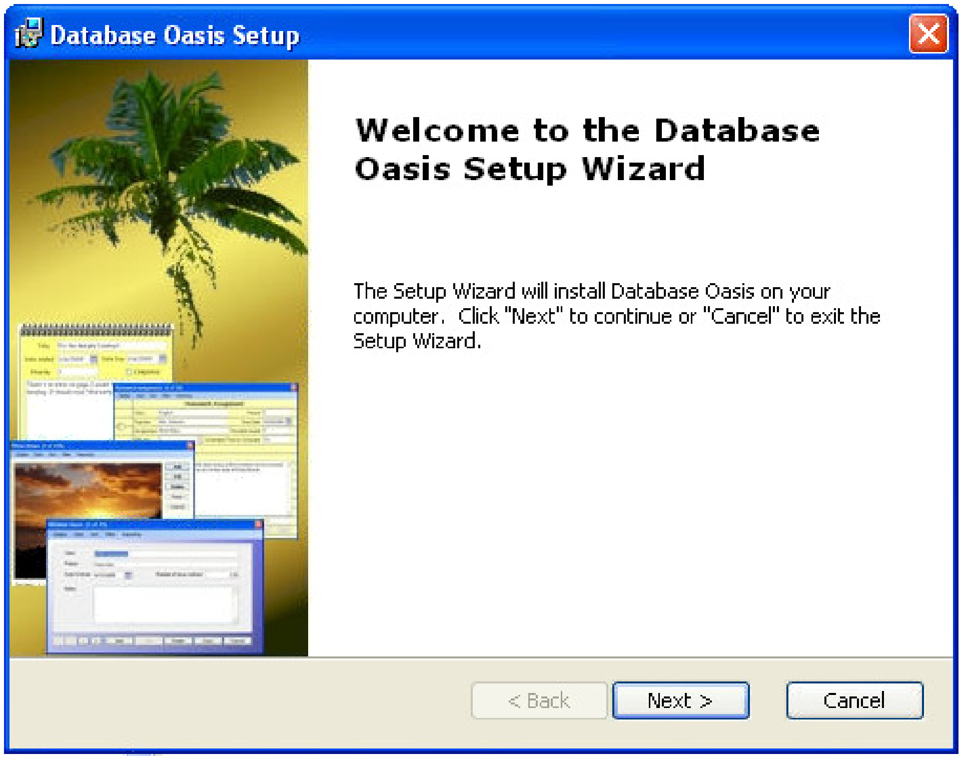
Installing Basic Edition and Professional Edition Server

The process to install Basic Edition and Professional Edition Server are identical. The edition is controlled based on the registration code that is entered after purchasing the software.

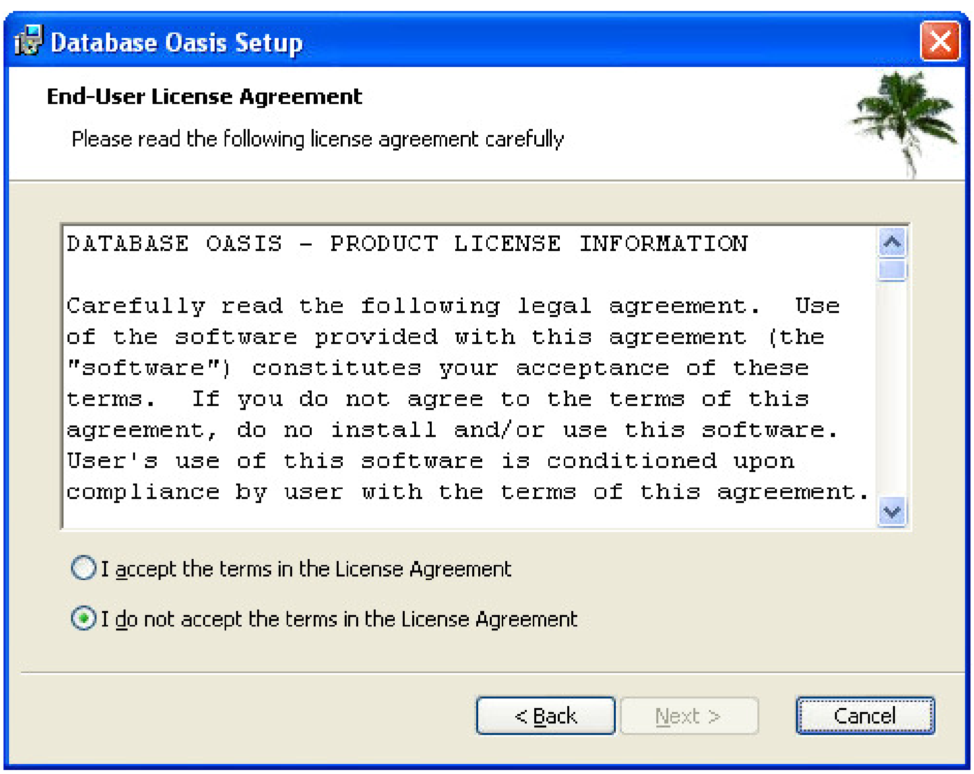
INSTALLING BASIC EDITION AND PROFESSIONAL SERVER

1 If you have not already done so, download the Database Oasis installation using the download link on the www.databaseoasis.com website.

2 Launch the DBOasisSetup.exe file that you downloaded. The setup files will be extracted and the following screen will appear:



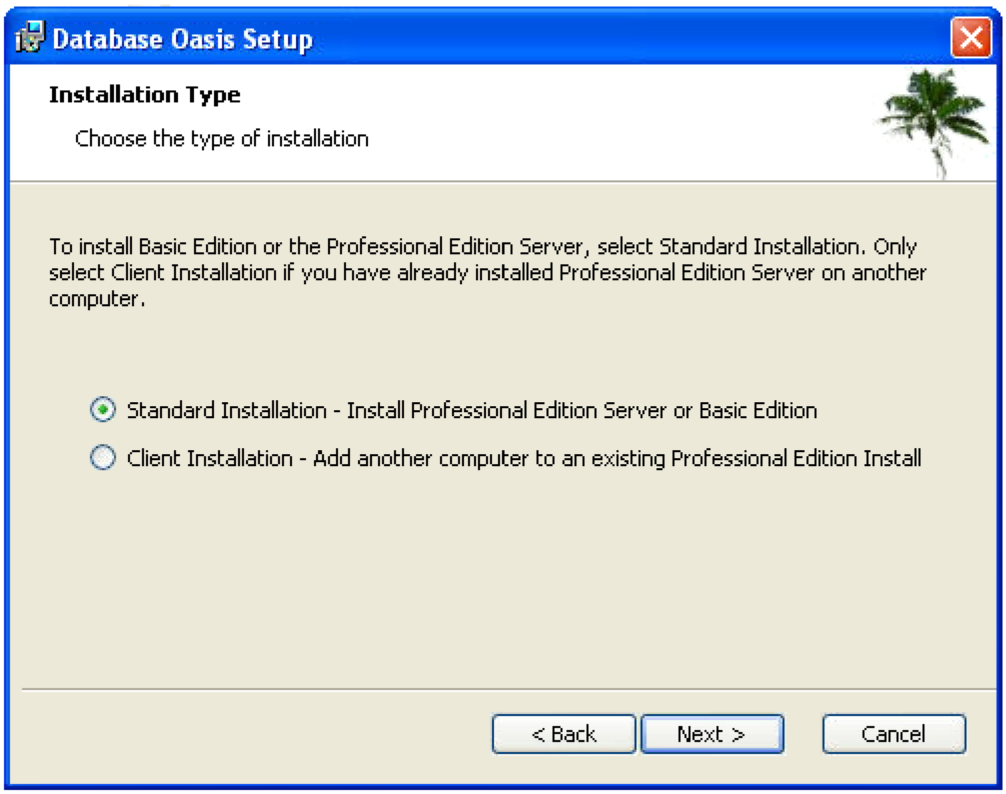
3 Click Next > to continue. The license agreement screen will open:



Note

If a Program Maintenance screen appears instead of the License Agreement screen, you already have this version of the software installed.

4 Please read the license information carefully. If you do not accept the terms of this agreement, click Cancel to abort the installation. If you do accept the terms of the agreement, select the I Agree radio button and click Next > to continue. The Installation Type screen will appear:

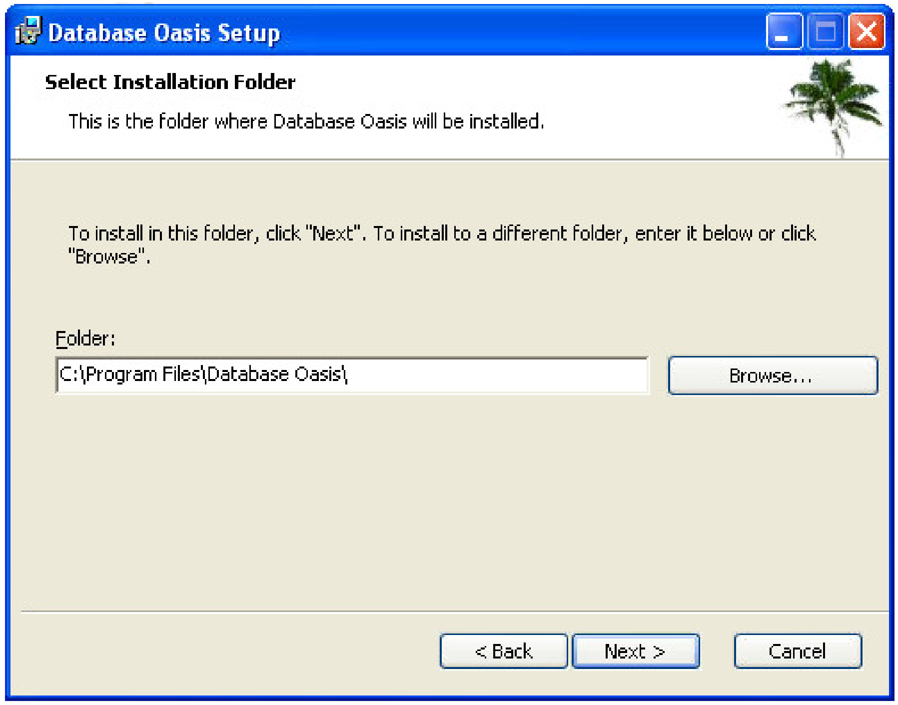


5 To install Basic Edition or Professional Edition Server, leave the Standard installation radio button selected.

Note

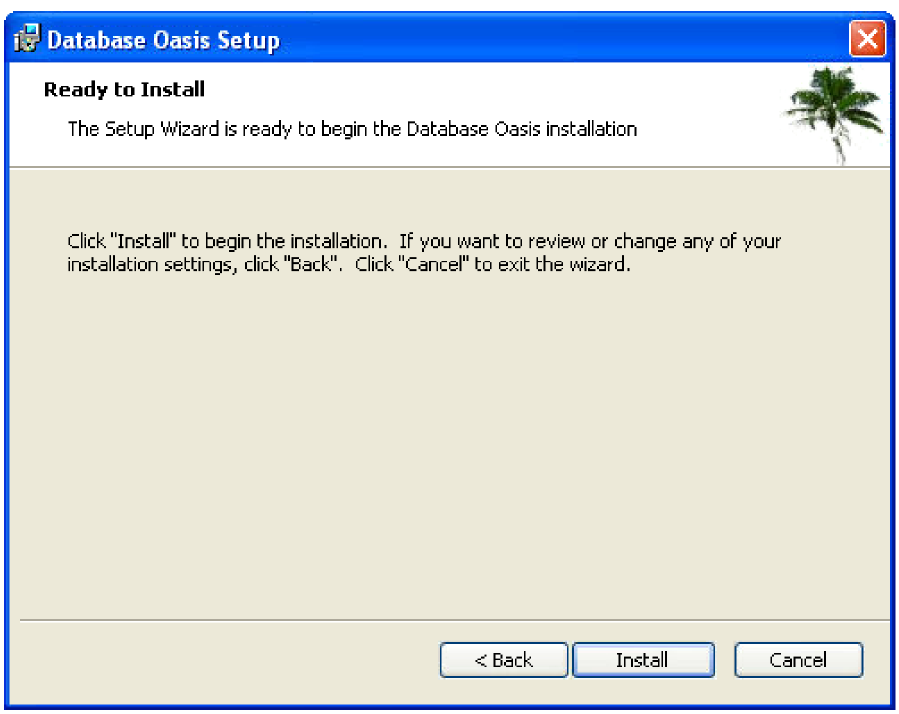
If you have already installed a Professional Edition Server on another computer on your network and would like to install a client, refer to the *Installing Professional Edition Clients* section, below.

6 The Select Installation Folder page will open:

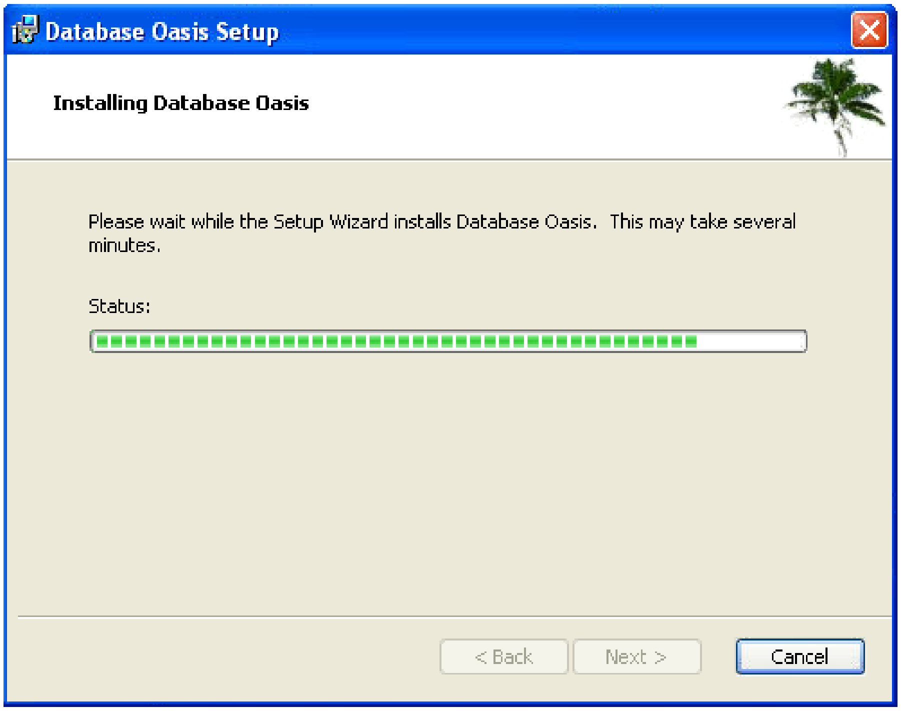


7 This allows you to specify a location for your installation of Database Oasis. It is recommended that you install to the default location in the \Program Files folder. If you wish to install to a different location, click the Browse… button and select the target folder.

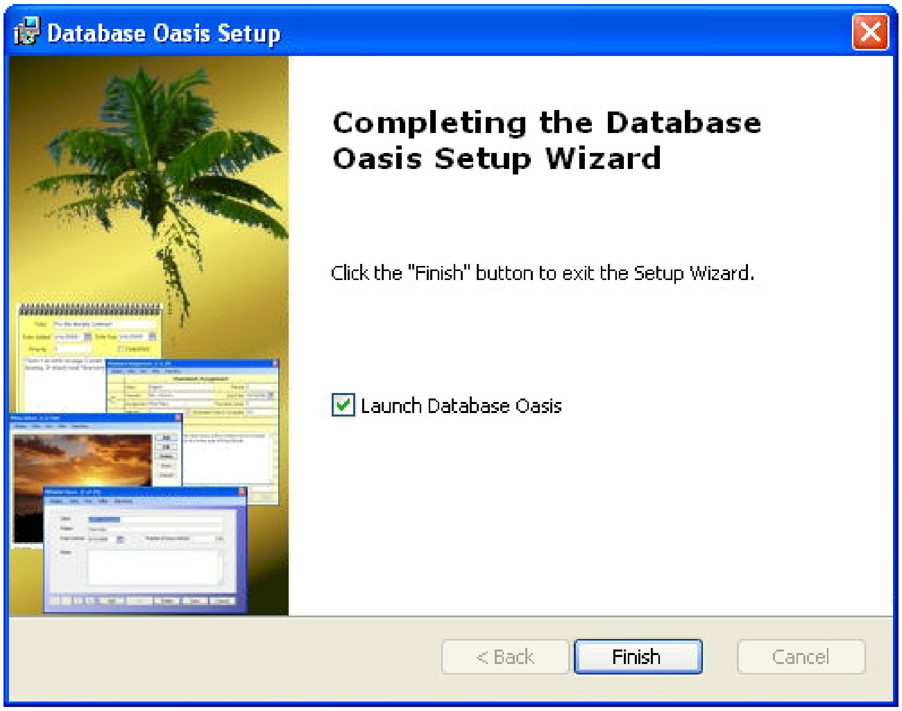
8 Click Next > to continue. The Ready to Install screen will open:



9 Click Install to begin installing Database Oasis. A progress screen will appear as the software is installed:



10 Once the installation process is complete, the following screen will appear:



11 If you would like to launch Database Oasis, now, leave the Launch Database Oasis check box marked and click Finish to exit the wizard. (See *Launching the Application* in *Chapter 3, Getting Started* for instructions on opening the software.)

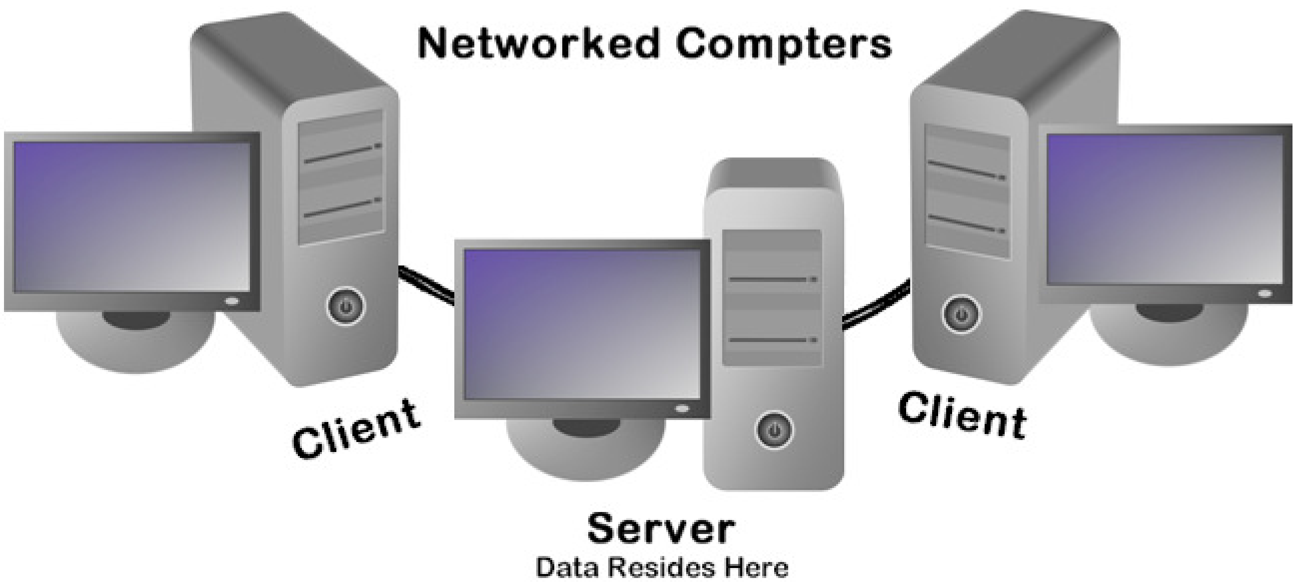
Installing Professional Edition Clients

PRO This feature is only applicable to Database Oasis Professional Edition.

Database Oasis Professional Edition lets users on the same network work together using the same database.

If you want to have more than one person sharing information in Database Oasis, you need to have the data stored in a central location on your network that everyone can access. For example, you may have three computers that are able to talk to each other over a network.

Database Oasis needs to be installed on all three computers, but the data only needs to be installed on one of them. The other two computers will be told to use the data on that first computer. The computer where the data is installed is called the server. The other computers are called clients.



You should run the server installation first to install the data. During the client installation, you will need to select the path to the data that was previously installed on the server computer.

Configuration for Professional Client Access

In a network environment, in order for the clients to access the data over the network, you will need to set up a network share to the data file.

Creating a Network Share

Note

There may be slight differences in the procedure for sharing data, depending on your operating system and security settings. These steps provide an overview of common configuration options, but do not cover all possible variables.

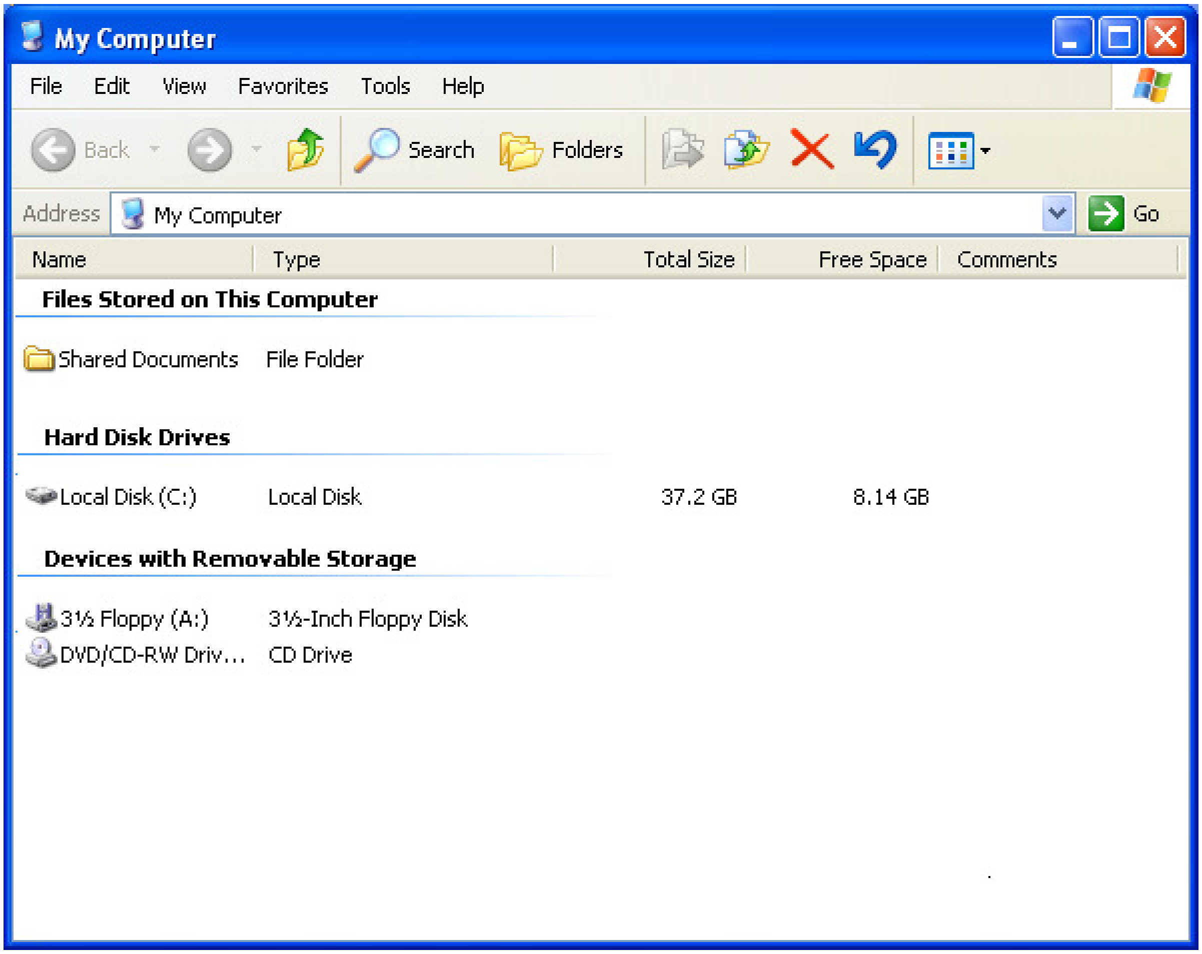
For comprehensive help with configuring a share in Windows XP, refer to the article http://support.microsoft.com/kb/304040.

For help in Windows Vista, refer to the article http://www.microsoft.com/technet/network/evaluate/vista_fp.mspx.

For help in Windows 7, refer to the article http://windows.microsoft.com/en-us/windows7/Share-files-with-someone.

1 On the computer where Professional Edition is installed, double click on the My Computer icon on your desktop:

2 The My Computer screen will open:

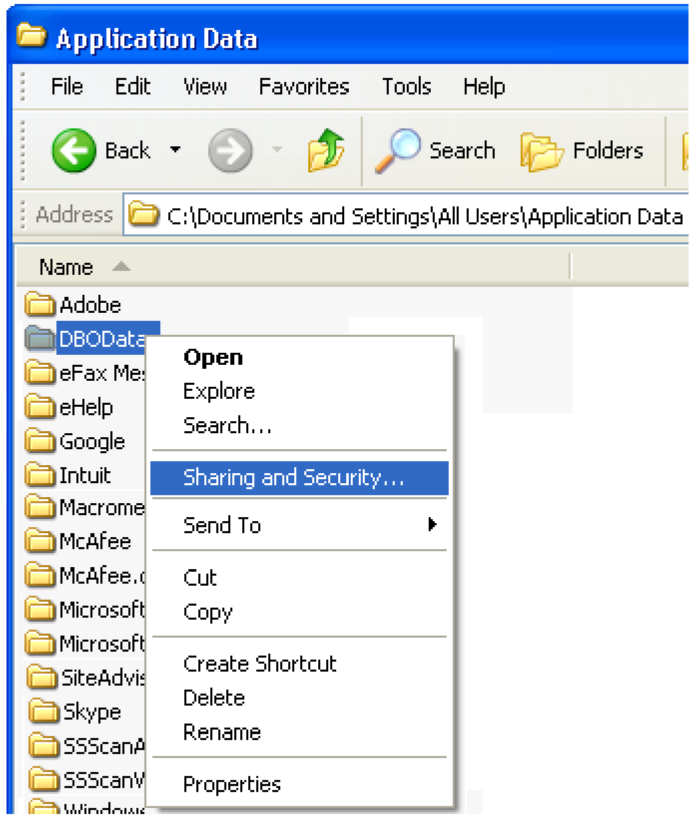


3 Navigate to the Database Oasis data path. For operating systems prior to Windows Vista, the data is located in the path C:\Documents and Settings\All Users\Application Data\DBOData. In Windows Vista and Windows 7, the data is located in the path C:\ProgramData\DBOData\.

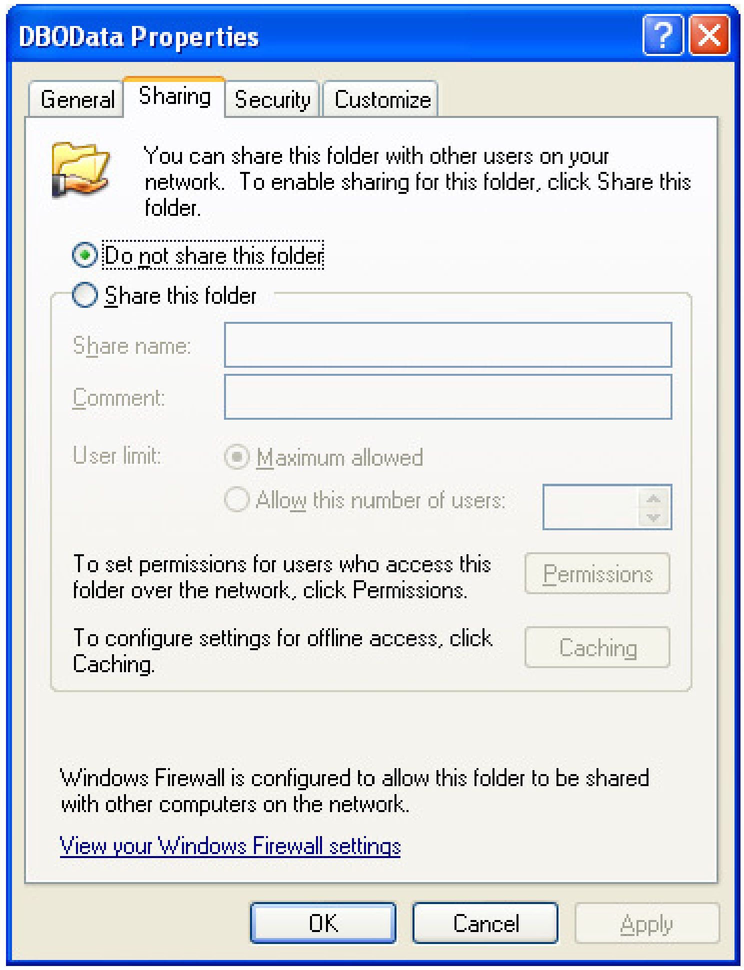
Note

If you do not see the \DBOData folder, it is usually because it is hidden in Windows. To unhide the folder, right click on your Windows Start button and select Explore from the menu to open Windows File Explorer. Select Folder Options from the Tools menu, then select the View tab. Make sure that the Show hidden files and folders option is selected.

4 Right click on the \DBOData folder and select Sharing and Security or Share (depending on your version of Windows) from the right-click menu:



5 The Sharing tab of the Properties screen for the \DBOData folder will open:



Note

Depending on your version of Windows, you may need to press the Advanced Sharing button on the Properties screen to access the sharing options.

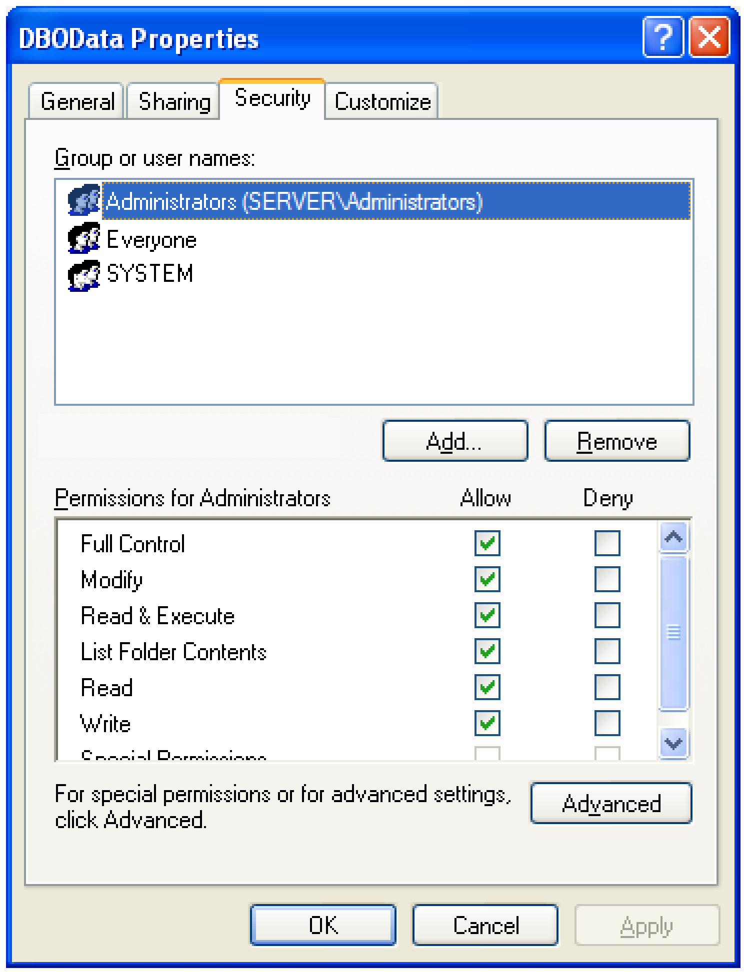
Note

If you have never created a network share, this screen will have a link to a wizard where you can set up file sharing. Follow the on-screen instructions in the wizard, if desired.

6 Select the Share this folder check box or radio button (depending on your version of Windows). This option will make the \DBOData folder accessible to clients on the network.

WARNING!
If an outside user is able to access your network, any shared folders will be available. Make sure that you have security on your network to prevent outside access, especially if you are using a wireless network.

7 Select the Security tab:



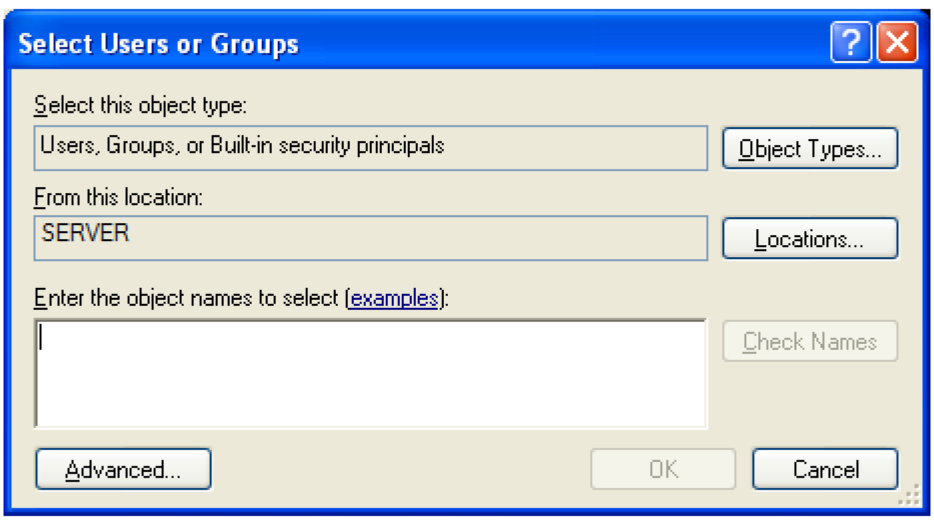
Note
Depending on your version of Windows, you may need to click Edit to open a separate Permissions screen to change these settings.

8 Verify that there is a group named Everyone in the Group or user names list. If there is, skip to step 12.

WARNING!

Selecting the Everyone group gives anyone who is able to access your network access to the folder. Configuring the Everyone group is the easiest way to ensure clients will be able to access the software when there is not a security scheme in place. If you have group security in place, it is recommended that you select groups and/or users that reflect your security configuration rather than using Everyone.

9 If there is no Everyone group, click Add. The Select Users or Groups screen will open:



10 In the Enter the object names to select box, type *Everyone.*

11 Click OK to save the group and return to the Security tab.

12 Highlight the Everyone group in the Group or User Names list and select the Full Control check box in the Permissions for Administrators box.

13 Click OK to save the changes and close the Properties screen.

Testing the Folder Share

Once you've configured your share, it is recommended that you test it outside of Database Oasis by trying to access that folder in Windows Explorer from the client computer.

To Test the Permissions:

1. On the client computer, right click on the Windows Taskbar's Start button and select Explore from the menu.

2. In the Folders list, select Network or My Network Places (depending on your version of Windows).

3. Navigate to your Database Oasis server computer and make sure you can see the Database Oasis data folder in the list.

> **Note**
>
> To navigate to the computer in Windows XP, select Entire Network, then Microsoft Windows Network under the My Network Places link.

4. Click on the Database Oasis data folder and make sure you can open it.

5. With the folder selected, right click in the files section on the right and select New, Text Document from the menu and verify it allows you to create a text file in the folder. (You may delete the text file if desired.)

If you are unable to access the folder and create a new file in the folder, clients will not be able to access the Database Oasis data. In this case, check the following:

- On the Database Oasis server computer, verify in Windows that the Guest account is turned on. (Refer to Microsoft Windows help for instructions on turning on the Guest account in your version of Windows.)
- Verify that the folder share has been correctly configured using the above instructions.

> **Note**
>
> If you are able to access an existing folder share that is working, compare its settings with the new share to determine the differences.

- Depending on the version of Windows and internal security settings, Windows may not allow you to grant full access to the default data path. In this case, you may need to move the \DBOData folder directly under the C:\ drive.

Client Installation

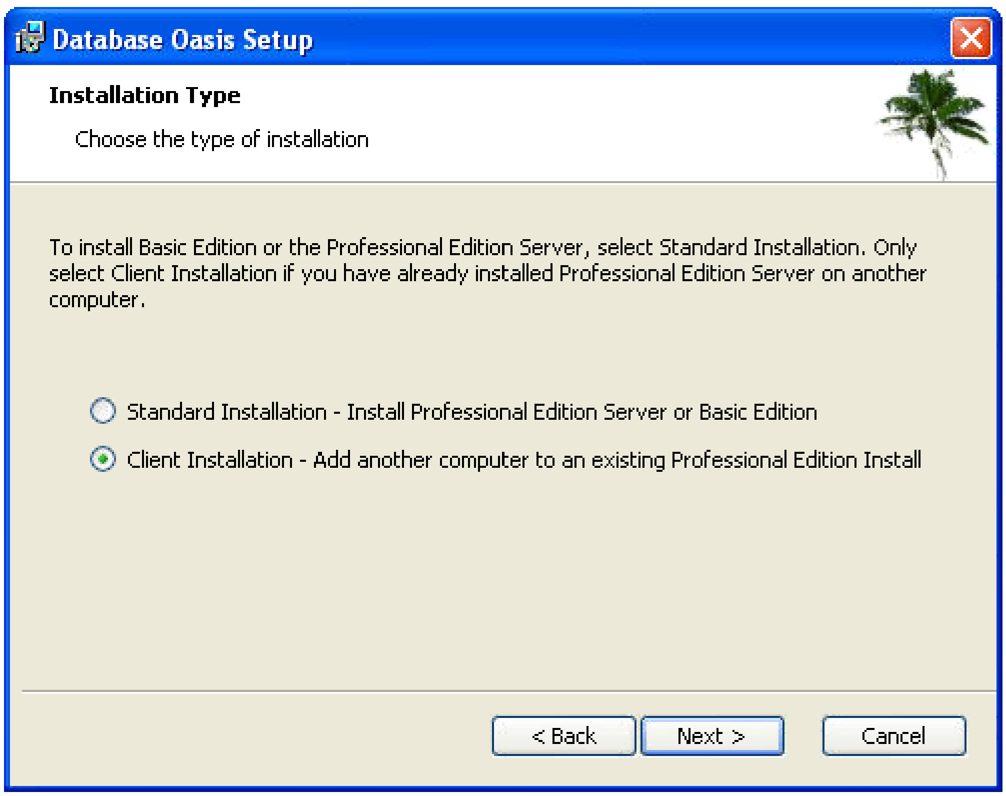
Once you are able to access the data on the server from the other computers on your network, you are ready to install the client.

RUNNING THE PROFESSIONAL CLIENT INSTALL

1 If you have not already done so, download the Database Oasis installation using the download link on the www.databaseoasis.com website.

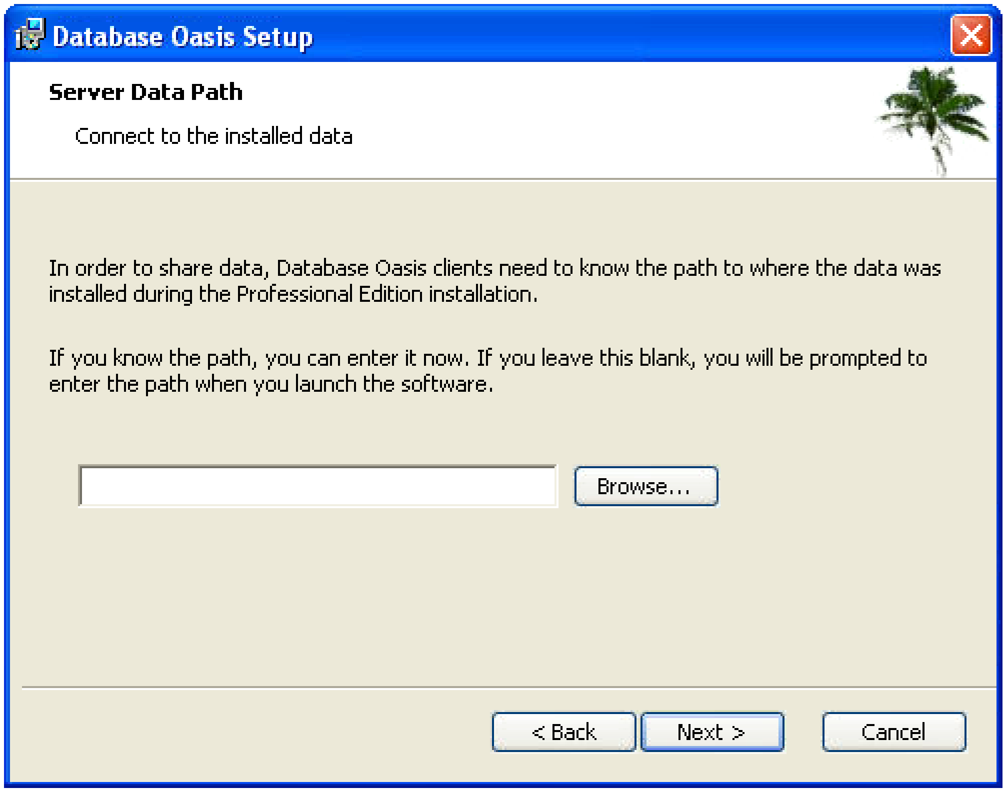
2 Launch the DBOasisSetup.exe file that you downloaded.

3 Follow the installation steps using the guidelines under *Running the Basic Edition and Professional Server Install*, above. After you accept the license agreement, the Installation Type screen will appear:



4 To install a Professional Edition client, select the Client Installation radio button and click Next.

5 The Server Data Path screen will appear:



6 Click the Browse button and navigate to the network share containing the Database Oasis data file on your Database Oasis server computer.

7 Click Next to proceed with the installation following steps 6 through 11 under *Running the Basic Edition and Professional Server Install*. The client software will install and connect to the data specified in step 6 above.

Installing an Upgrade

Prior to upgrading, please review the following:

- Before running an upgrade, make sure to back up your existing installation using the Backup option on the Tools menu.
- If you are upgrading Database Oasis - Professional Edition:
    - Make sure all clients are logged off before proceeding.
    - Make sure all clients are upgraded prior to trying to connect to the server. You will not be able to log on from a client that has not been upgraded.

Note

If you upgrade a client before upgrading the server, the database will be automatically upgraded when you first log on from the client. At that point, you will not be able to log on from the server until it has also been upgraded.

- If you are upgrading from a version of Database Oasis prior to version 3.0
    - The version 2.x to version 3.x upgrade requires an upgrade license key. Once you upgrade, your installation will become unregistered until you enter an upgrade key.

WARNING!

Be sure to have a backup of your current installation before proceeding. When you install version 3.x, changes are made to the database that make it incompatible with version 2.x. The only way to revert to version 2.x once you've upgraded is to uninstall version 3.x, reinstall version 2.x and restore your pre-upgrade backup.

- There is no direct upgrade path to version 3.x from any version prior to version 2.8. If you have a prior version, you must first upgrade to version , then to version 3.x. For version 2 download files and upgrade instructions, please visit http://databaseoasis.com/downloadsv2.aspx.

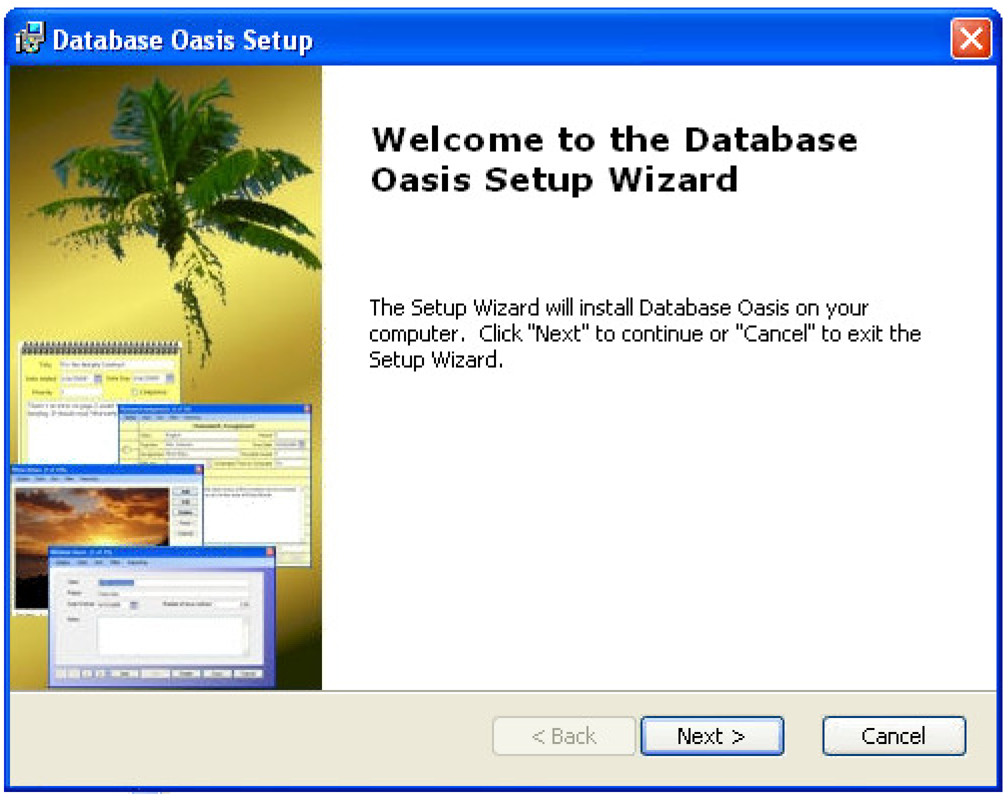
Running the Upgrade

If you have an older version of Database Oasis and would like to upgrade to a newer version, simply run the install as you would for a new installation. Database Oasis will detect your existing installation and perform the upgrade.

UPGRADING DATABASE OASIS

1. If you have not already done so, download the Database Oasis installation using the download link on the www.databaseoasis.com website.

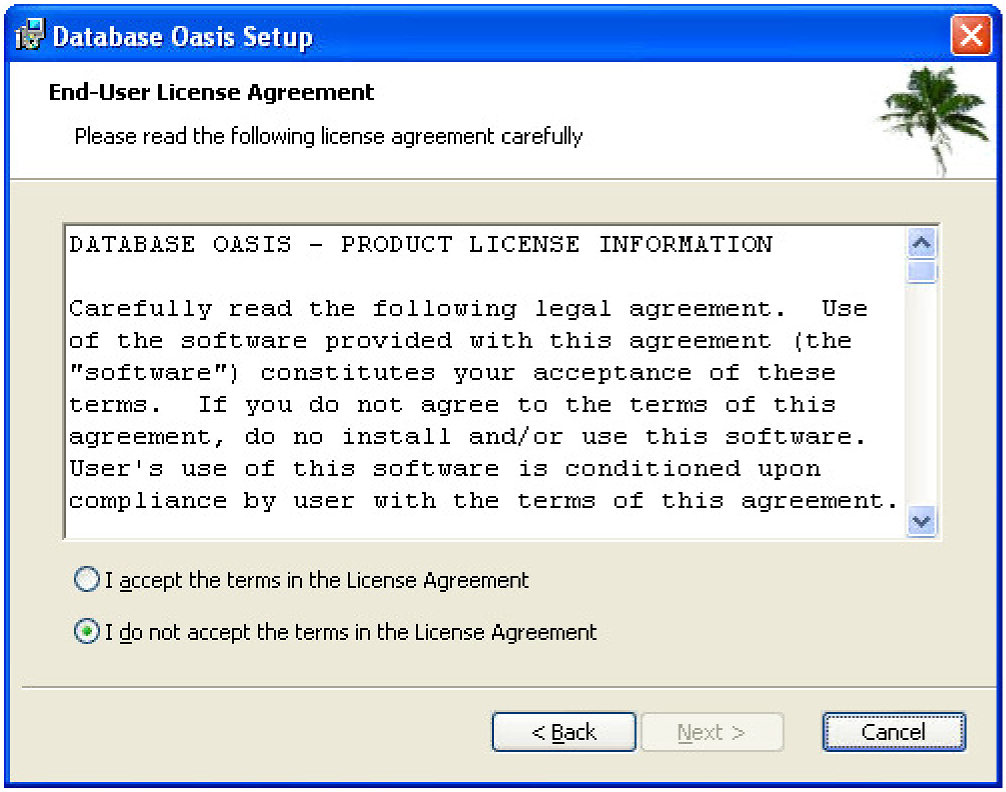
2. Launch the DBOasisSetup.exe file that you downloaded. The setup files will be extracted and the following screen will appear:



Note

If the Prerequisite screen appears before the Welcome screen, refer to *Installing Prerequisites*, earlier in this chapter.

3 Click Next > to continue. The license agreement screen will open:

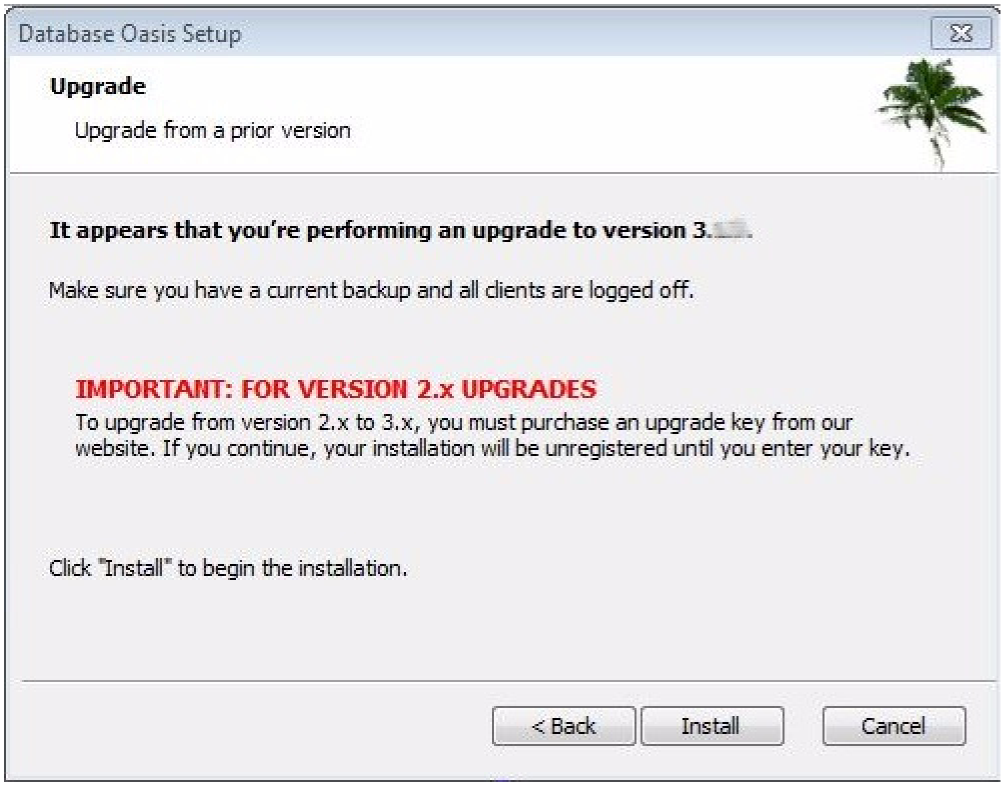


Note

If a Program Maintenance screen appears instead of the License Agreement screen, you already have this version of the software installed.

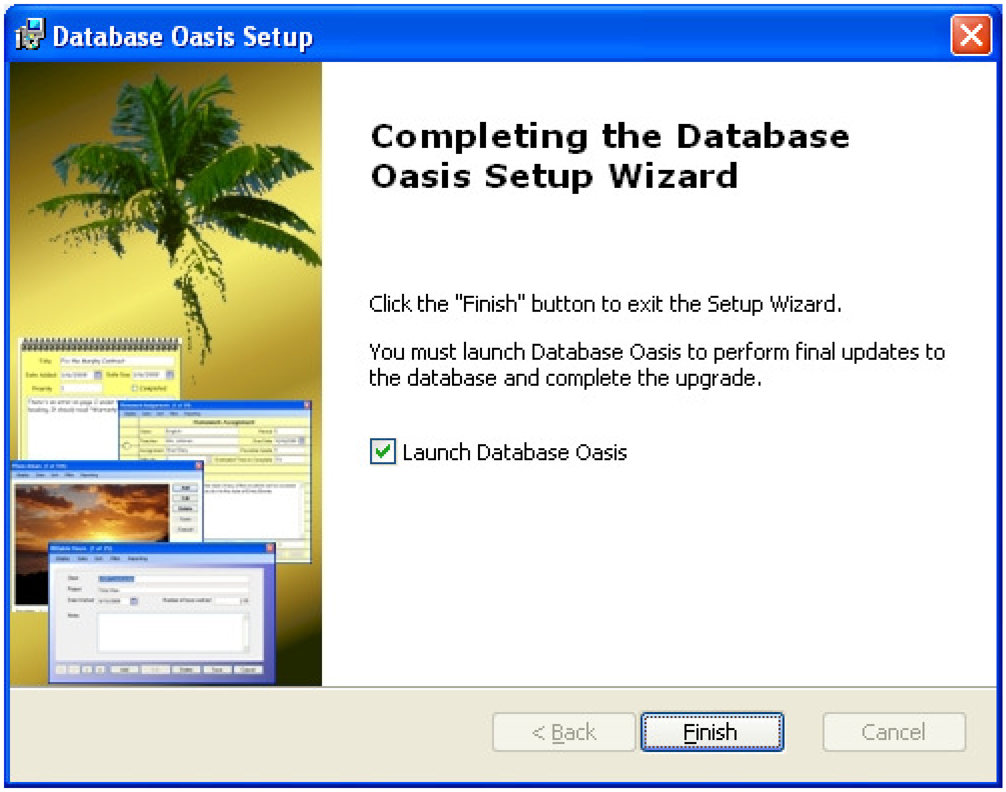
4 Please read the license information carefully. If you do not accept the terms of this agreement, click Cancel to abort the installation. If you do accept the terms of the agreement, select the I Agree radio button and click Next > to continue.

5 If you are upgrading within the same major version number (for example, from version 3.0 to version 3.1), the upgrade will proceed. If you are upgrading from version 2.97 or earlier to version 3.x, you will see the following screen:



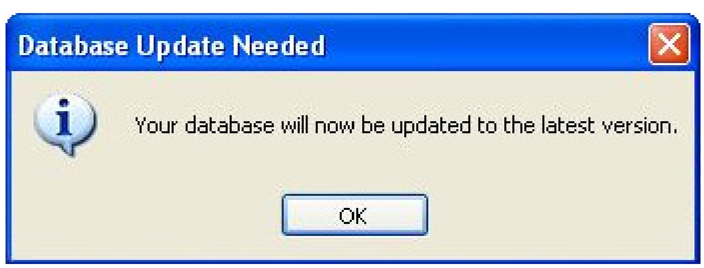
6 The upgrade from version 2.x to version 3.x requires a license key. If you do not already have an upgrade key, make sure you read this page carefully and understand that your installation will become unregistered. If that is acceptable, click Install to start the upgrade.

7 Once the installation process is complete, the following screen will appear:

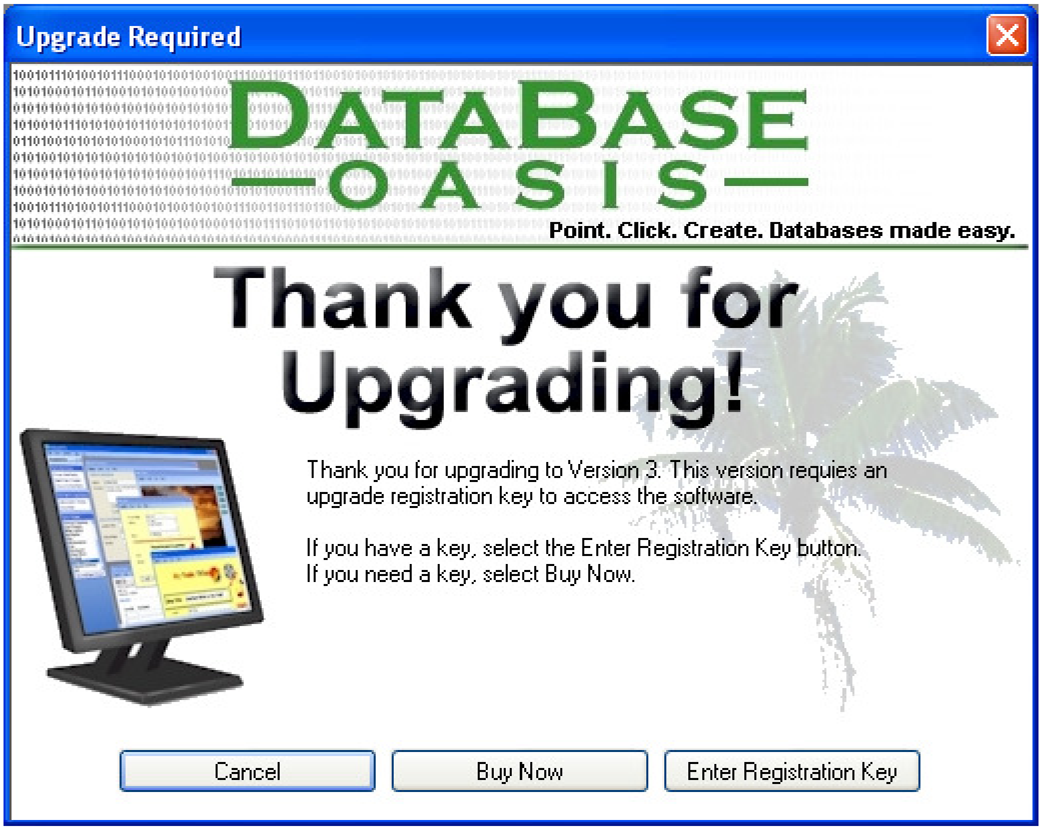


8 If you are upgrading a Basic Edition or Professional Edition server, the database update will be completed when you launch Database Oasis. If you would like to launch Database Oasis, now, leave the Launch Database Oasis check box marked and click Finish to exit the wizard.

9 If you have upgraded a Professional Edition client, the software will launch. If you have upgraded a Basic Edition or Professional Edition server, when Database Oasis launches, it will detect that it must upgrade the data and the following message will appear:



10 Click OK to update your database. Once the data upgrade has completed, the following message will appear:



11 Select Enter Registration Key and enter the registration information you were sent when you purchased your Version 3.x upgrade key. If you have not yet purchased the upgrade key, select Buy Now to be directed to a purchase page, or Cancel to exit Database Oasis.

Installing Professional Edition Clients

PRO This feature is only applicable to Database Oasis Professional Edition.

If you are using Database Oasis Professional Edition, you should install the software on any client machines that will need to access Database Oasis.

RUNNING THE PROFESSIONAL CLIENT INSTALL

1 If you have not already done so, download the Database Oasis client installation from http://www.databaseoasis.com/dboasisclientinstall.exe.

2 Launch the DBOasisClientInstall.exe file that you downloaded. The installation files will be extracted and the Setup wizard will launch to guide you through the installation.

3 Follow the installation steps using the guidelines under *Running the Basic Edition and Professional Server Install*, above.

4 Click Close to exit the wizard. (See *Clients & Users in Professional Edition* for help with client configuration.)

Registering Your Software

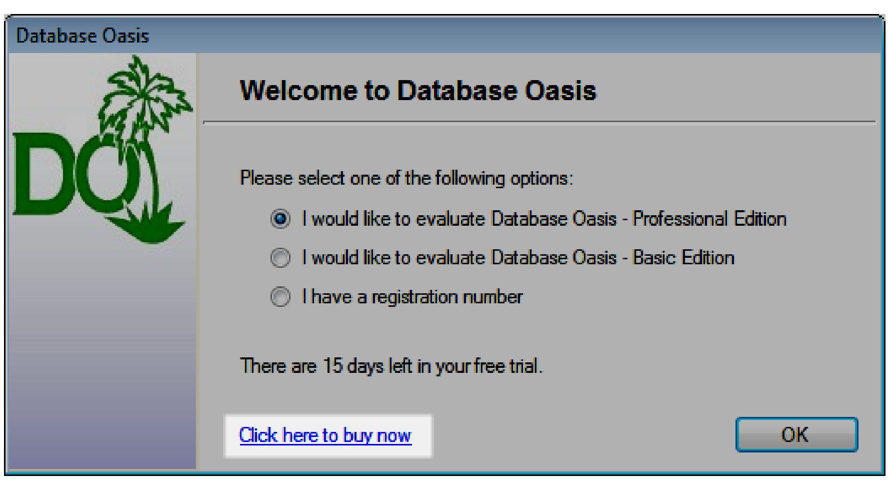
In order to allow you to evaluate the Database Oasis software prior to making a purchase decision, the software is initially installed unregistered. The unregistered version is a 15 day trial. In order to use the software beyond the 15 days, you must purchase and register it.

> **Note**
>
> Professional Editions are registered at the Server (the machine where the data is installed). You do not need to register a Professional Edition client.

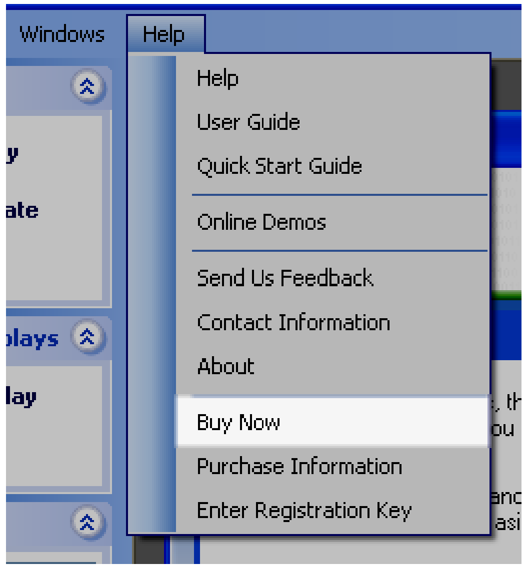
Purchasing Database Oasis

1 Select Buy Now from one of the following places:

- Select the Click here to buy now link on the Database Oasis screen that opens when you first launch the software.



- Select the Buy Now menu option on the Help menu:



- Click the Buy Now button on the Purchase Information screen that comes up when you exit the software:

- Go to www.DatabaseOasis.com and select any of the Buy Now links.

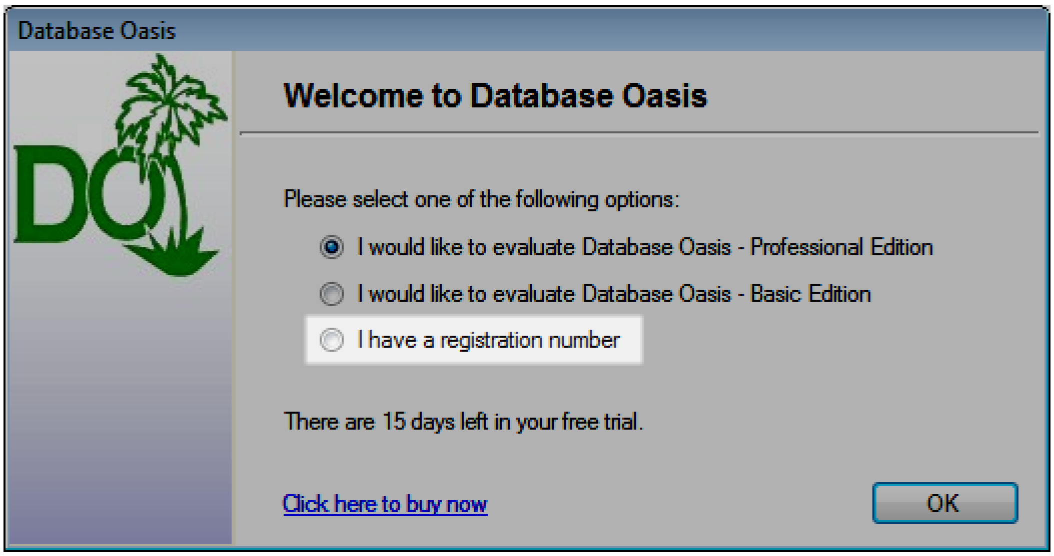
2 A secure shopping cart will open where you can enter your payment information.

Once you have purchased the software, you will be sent an e-mail that contains a registered user name and a registration key. This information will be used to register the software.

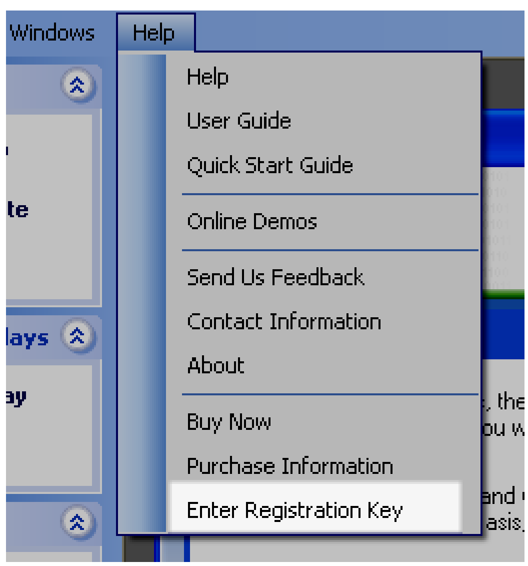
Registering the Software

1 Register the software using one of the following methods:

- From the Database Oasis screen that comes up when you launch the software, select the I have a registration number radio button and click OK.



- From the Help menu, select Enter Registration Key.



- From the Purchase Information screen that comes up when you exit the software, select Enter Key:

2 The Enter Registration Key screen will open:

3 When you purchased the product, you provided the name under which it should be registered. This name was used to generate the registration key. The key and the name must match for the registration information to be accepted. The registration name can be found in the e-mail you received that contained your purchase confirmation and the registration key. Either copy and paste the registration name from that e-mail, or

type it in the Registration Name field exactly as it appears in the e-mail. This entry is case sensitive (upper and lower case letters must match).

4 As soon as you have entered a Registration Name, the Registration Key field will become available. This is the key that was provided when you purchased the software. It is divided into four separate sections. Enter the code for each section in the boxes.

5 The OK button will become available once you have entered the complete registration information. Click this button to register the software.

6 If you are currently in a trial of the edition you are registering, you can continue to work with the software. If you are in a trial of the other edition, or you have not yet selected an edition, Database Oasis will close to allow the proper edition to launch. Reopen the software to continue.

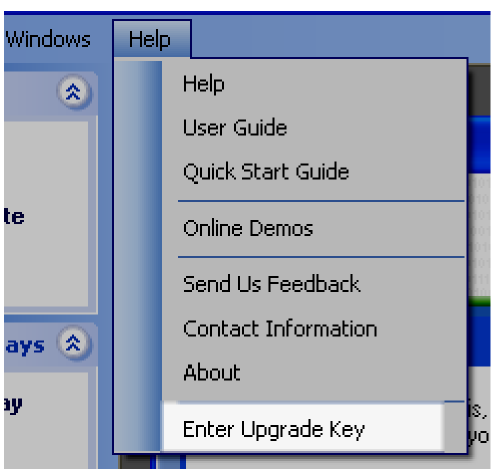
Upgrading From Basic Edition to Professional Edition

Database Oasis - Basic Edition is designed to provide a very easy-to-use, database solution that is accessible to users of all technical levels. Database Oasis - Professional Edition is designed for users who need more advanced functionality. The products use the same installed file, but some of the advanced features have been hidden from Basic Edition users. To upgrade to Professional Edition, you only need to enter a registration code that unlocks the advanced features.

Upgrading to Professional Edition

1 Open Database Oasis - Basic Edition.

2 From the Help menu, select Enter Upgrade Key.



3 The Enter Registration Key screen will open.

4 The registration name can be found in the e-mail you received that contained your upgrade confirmation and the registration key. Either copy and paste the registration

name from that e-mail, or type it in the Registration Name field exactly as it appears in the e-mail. This entry is case sensitive (upper and lower case letters must match).

5 As soon as you have entered a Registration Name, the Registration Key field will become available. This is the key that was provided when you purchased the upgrade. It is divided into four separate sections. Enter the code for each section in the boxes.

6 The OK button will become available once you have entered the complete registration information. Click this button to register the upgrade.

7 A message will appear informing you that Database Oasis must close. Click OK to exit the software. When you launch it again, it will be a Professional Edition.

Uninstalling the Software

If you wish to uninstall Database Oasis, you may do so from the Windows Control Panel.

Note

The uninstall will only remove Database Oasis. If you wish to remove the Microsoft .Net Framework, you must select to uninstall that option individually in the Control Panel. Because the framework will potentially be used by other Windows applications, it is not recommended that you uninstall it.

UNINSTALLING DATABASE OASIS

1 Click on the Start button on the taskbar in Windows to open the Start menu.

2 Select Control Panel from the Settings menu. The Control Panel will open.

3 Double click on the Add or Remove Programs icon. A list will open containing all of your installed programs.

4 Locate Database Oasis on the list and click the Remove button.

5 You will be asked to confirm your decision to remove the software. Click Remove to remove Database Oasis from your computer.

6 By default, the database is not uninstalled with the software to prevent accidental data loss. To remove the database, locate and delete the data folder. If you are using Windows Vista, the data is located in the path c:\ProgramData\DBOData.\ For all other operating systems, the data is located in the path C:\Documents and Settings\All Users\Application Data\DBOData.

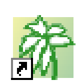
CHAPTER 3
GETTING STARTED

Launching the Application

When the software was installed, an icon was added to both your desktop and your program menu, providing two different ways to launch the software.

LAUNCHING THE SOFTWARE FROM THE DESKTOP

1 On the Windows desktop, locate the Database Oasis icon:



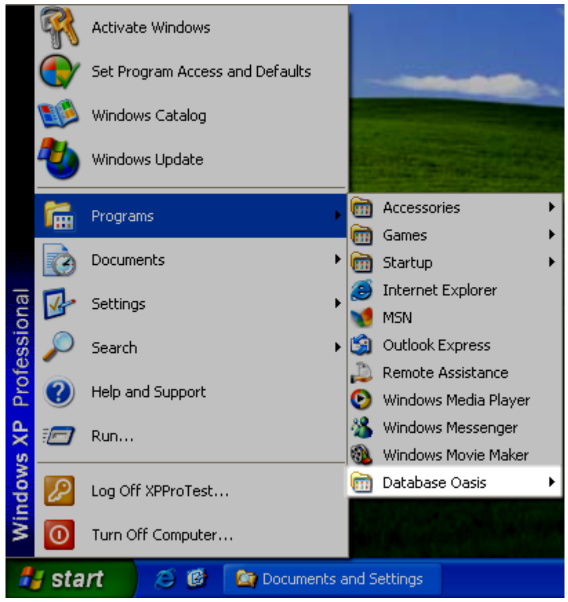
2 Double click the icon. The application will launch.

LAUNCHING THE SOFTWARE FROM THE PROGRAM MENU

1 Click the Start button on your Windows Taskbar. The Start menu will open.

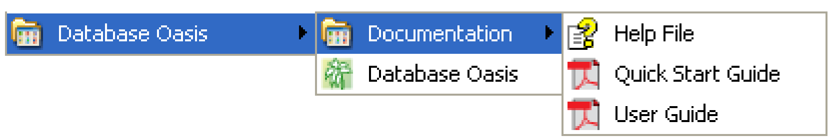
2 Locate the Programs or All Programs option on the menu (depending on your version of Windows).

3 Locate the Database Oasis folder on the menu:



4 Click on the Database Oasis folder to open a sub-menu:

5 This menu provides a shortcut to launch the software. It also contains a Documentation submenu which provides access to the software's documentation:



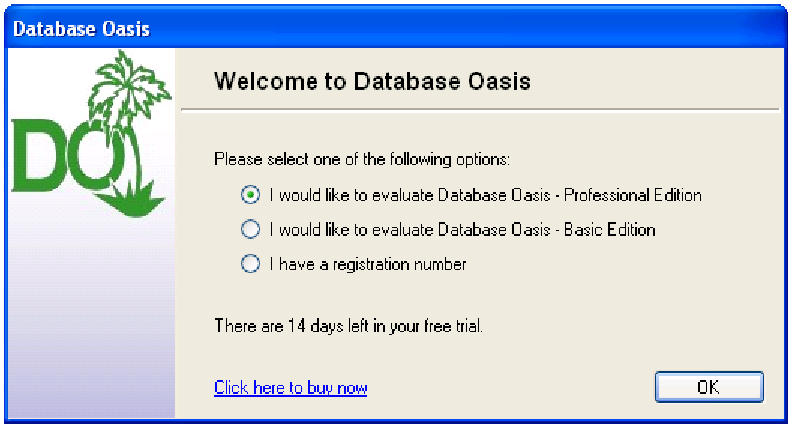
- Help File – This is the main program help file that is accessible from within the software. This provides all of the information on how to use your software.
- Quick Start Guide – This provides a brief overview of the software. This is a resource if you would like a little help getting started. You must have the Adobe® Reader to open the .pdf file.
- User Guide – This provides the same information as the help file, but in a printable .pdf file format. You must have the Adobe® Reader to open the file.

6 Click on the Database Oasis menu item:

7 The software will launch.

Evaluating the Software

The first time you launch the software, a Database Oasis screen will appear:



If you are evaluating the software, this screen provides the ability to evaluate either Professional Edition or Basic Edition. This will come up every time you open Database Oasis until you register, allowing you to toggle back and forth between the two editions while making your decision.

Launching the Software using the Database Oasis Screen

1 Launch Database Oasis.

2 If you do not have a registration key and would like to evaluate the software, select either Basic Edition – single-user version focused on ease-of-use or Professional Edition – multi-user version with advanced functionality. If you select to evaluate Professional Edition, the software will open with Professional Edition features enabled. If you evaluate Basic Edition, Professional Edition features will not be visible.

> **Note**
>
> If you would like to obtain a registration key, click the Buy Now button. If you have already purchased Database Oasis and would like to enter your registration information, select the Enter Key button. The Enter Registration Key screen will open. Follow the instructions under *Registering Your Software* in *Chapter 2* for instructions.

3 Click OK. The software will open with the features for the selected edition enabled.

Logging In

PRO This feature is only applicable to Database Oasis Professional Edition.

If you are using Database Oasis Professional Edition, you will be asked to log into the software when you launch. The first time you open the software, you will need to create a new user. The first user that is created will automatically be assigned administrative rights, meaning this user account will have full access to the software. You will not be able to delete the first user or remove administrative rights.

Logging in and Adding the First User

1 Launch Database Oasis using the instructions under *Launching the Application*, above.

2 The Add a User screen will appear:

3 In the User Name field, enter a unique name for the user. This name will be used to log into the software and to identify the user in the software.

4 In the Password field, enter the password the user will use to log into Database Oasis. The password is case sensitive, meaning that if you use capital letters in the password, the same capitalization must be used when logging in. If you do not wish to use a password, leave this field blank.

WARNING!

Make careful note of the password. If a user forgets his password, he will not be able to log into Database Oasis.

5 Retype the password entered in the Password field in the Confirm Password field. The two entries must match.

Note

The first user will be created with administrative rights. Users with administrative rights are able to run backups, restore from backup, and add, edit, and delete users.

6 Click OK to add the user and open Database Oasis.

After you have created the first user, a standard login screen will appear when you launch the software.

Logging In as an Existing User

1 Launch Database Oasis using the instructions under *Launching the Application*, above. The Database Oasis Login screen will appear:

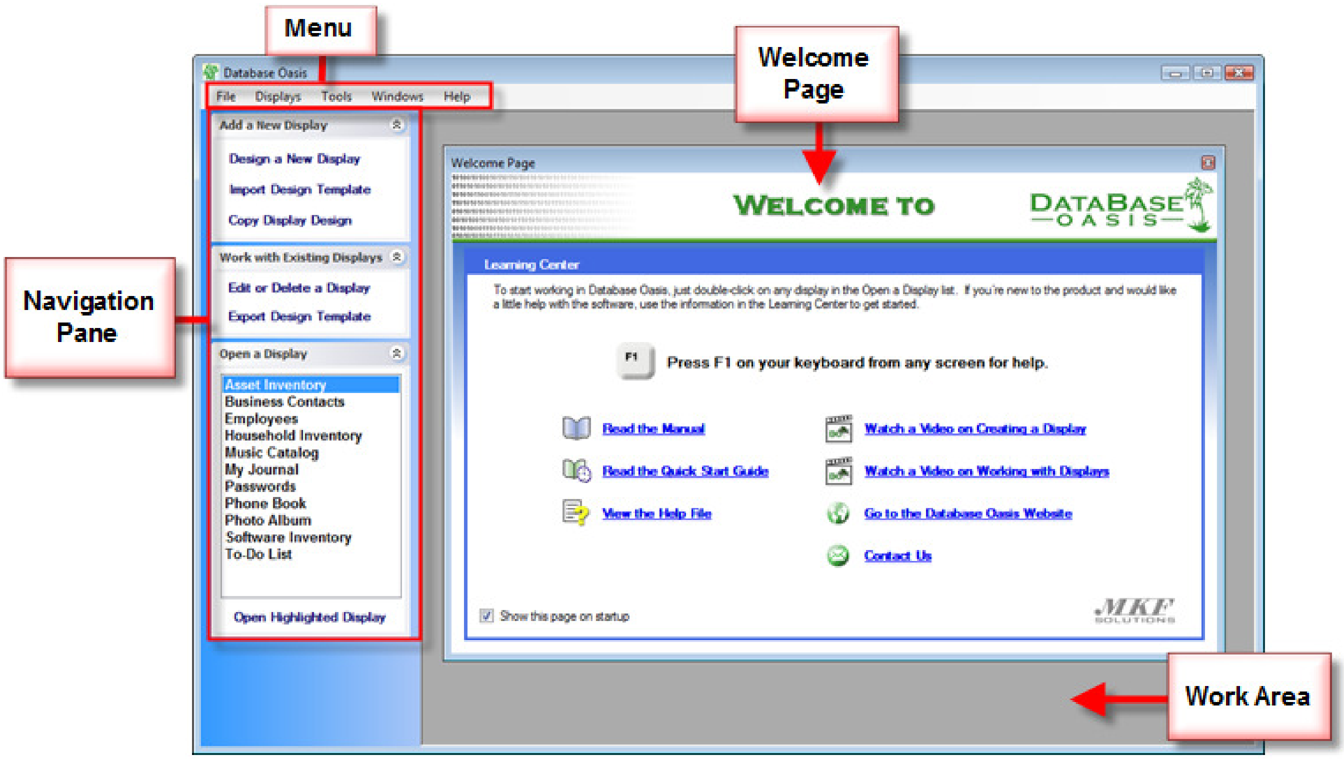
2 Enter your user name in the User Name field.

3 Enter the password associated with the user name in the Password field. The password is case-sensitive, meaning that if any capital letters were used when the password was created, they must be entered exactly as added.

4 Click Login to log into the software as the selected user.

Exploring the Screen

The main Database Oasis screen consists of a menu, a navigation pane, a work area, and the Welcome page.



Welcome Page

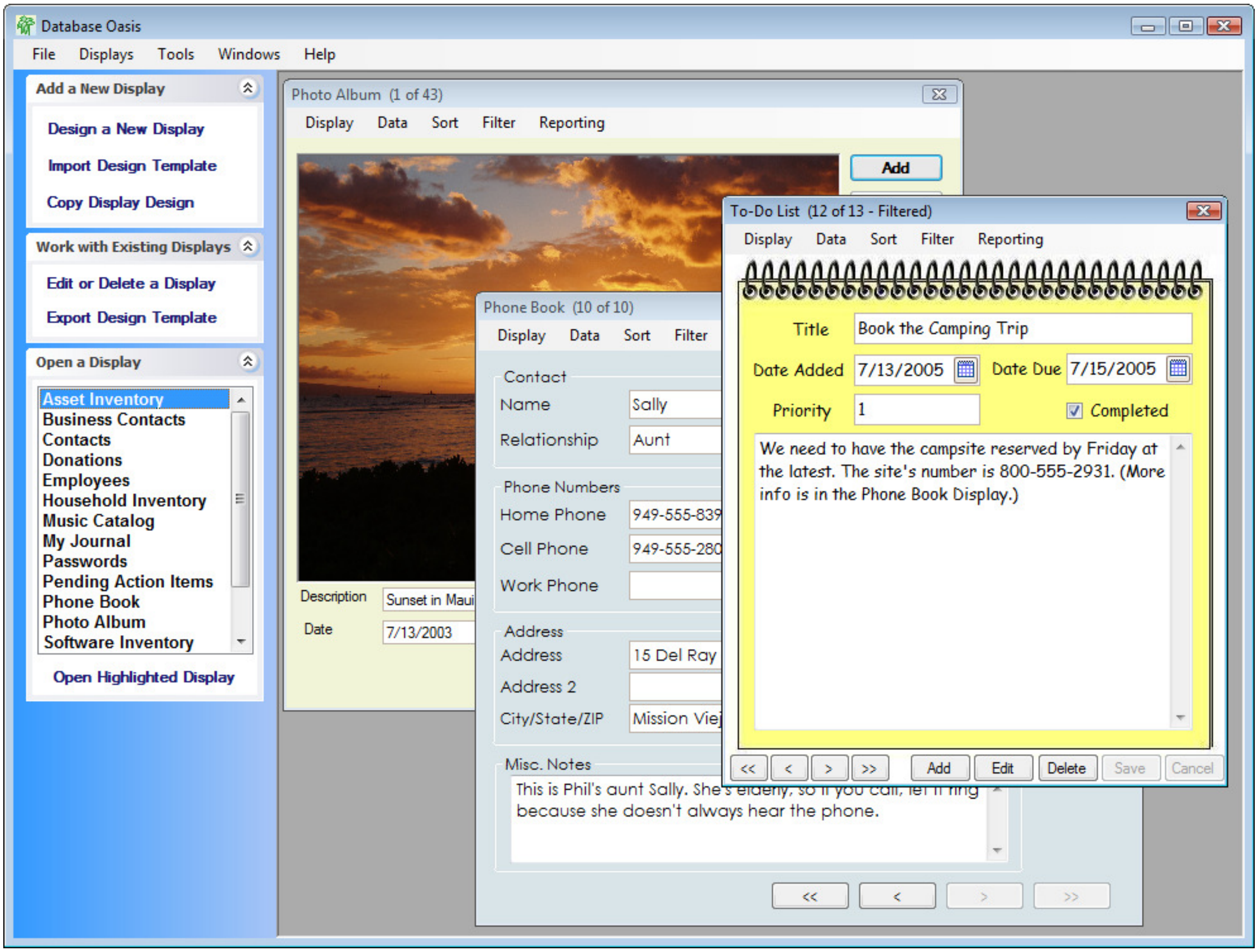
When you first open Database Oasis, you will see the Welcome To Database Oasis page. This page provides brief instructions on using the product and links to additional help options.

This screen can be closed by clicking the red X on the title bar:

As you're familiarizing yourself with the software, it may be a good idea to leave this page open for quick access to help. Once you're comfortable with using the product, unmark the Show this page on startup check box. The next time you come into Database Oasis, this screen will not appear. If you should need to access this screen again, you can open it by selecting Show Welcome Page on the File menu.

Work Area

The main work that you will be doing in Database Oasis is interacting with your displays. Displays open in this main work area. Within that area, you can open multiple displays and move them around to arrange them:



For a full discussion on how to open displays and arrange them in the work area, refer to *Chapter 7, Working with Records in Data Displays*.

Navigation Pane

The Navigation Pane provides quick access to the most commonly used features in Database Oasis. Each of the three sections in the Navigation Pane can be collapsed or expanded.

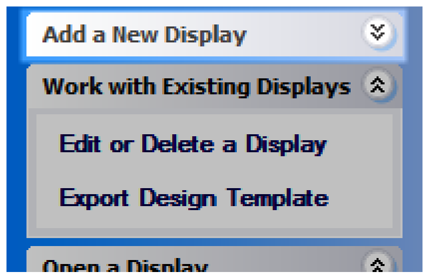
Note

Depending on your security rights, not all sections may be visible.

Collapsing a Section of the Navigation Pane

1 Click on the double arrow at the top of the section:

2 The section will collapse to a header and the double arrow will point down:

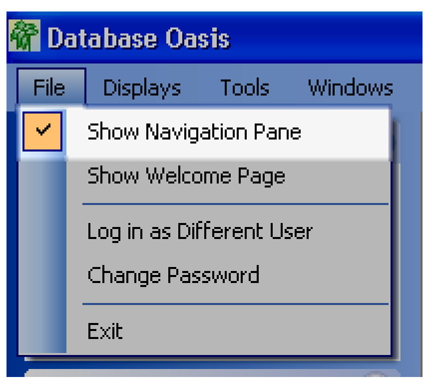


3 Click on the double arrow a second time to expand the section.

The Navigation pane appears by default when you first open the software. You may close and reopen this pane to adjust the amount of room available in the main work area.

Closing the Navigation Pane

1 From the File menu, select Show Navigation Pane:



2 The check mark will disappear from the menu and the Navigation pane will close.

Note

If you close the Navigation Pane, it will not automatically appear the next time you open the software. You must reopen the Navigation Pane using the steps below.

Reopening the Navigation Pane

1 From the File menu, select Show Navigation Pane.

2 The check mark will appear on the menu and the Navigation pane will reappear.

Following is a brief description of the options available on the Navigation Pane. Full documentation on each of these features can be found later in this documentation.

Add a New Display

Database Oasis comes with a selection of displays already built in to get you started. When you are ready to fully utilize the software, you will want to create your own displays. This section provides links to the three ways that you can add new displays.

Design a New Display – This will let you start a brand new display from a blank page.

Import Design Template – A design template is a file that contains a description of an empty display with no data. This option will allow you to locate a template file on your computer and add a new display from that template. Your installation of Database Oasis comes with a selection of templates that can be imported into your software. Templates are also available from the www.databaseoasis.com website, or may be shared between Database Oasis users.

Copy Display Design – This option will allow you to make a copy of the design of any of your displays. You can then edit the copy without affecting the original display.

Work with Existing Displays

The Work with Existing Displays box on the Navigation Pane allows you to access some of the functionality that is available around your existing displays.

Note
Most of the options that are available for working with the data in your displays are accessible from the menu inside the displays.

Edit or Delete a Display – This option allows you to open a display in the display designer where you can add or remove objects, or make other changes.

Export Design Template – This option allows you to create a template file from one of your displays. This template file can then be imported into another installation of Database Oasis.

Open a Display

This list will show all of the displays you currently have installed. To open any of the displays in the list, simply double click on it or highlight it and click the Open Highlighted Display button.

Menu Bar

Much of the functionality in Database Oasis is specific to a particular display. For this reason, each display will have its own menu. The options selected from that menu will only impact that display. Any functionality that does not require that you open a specific display is accessible from the main menu bar.

File

This menu provides options that impact main Database Oasis screen.

Show Navigation Pane – This will toggle whether the Navigation Pane appears.

Show Welcome Page – If you have closed the Welcome To Database Oasis page that appears when you first launch the software, this option will reopen it.

PRO Log in as Different User – If you are using Professional Edition, this will allow you to change the user who is currently logged in without exiting the software.

PRO Change Password – If you are using Professional Edition, this will allow users who do not have administrative access to user maintenance to change their own passwords.

PRO Set Host – This menu option will only appear if you are currently logged into a client installation of Professional Edition. When you first log onto a client, you select the Windows machine where the server installation of Database Oasis is installed. This option allows clients to select a different server.

Exit – This option closes the software.

Displays

This menu provides access to functionality around creating and working with displays.

Open Display – This option will let you select and open any of the displays you have in your software. This provides the same functionality as the Open a Display section on the Navigation Pane.

Add New Display – This will let you start a brand new display from a blank page. This provides the same functionality as the Design a New Display option on the Navigation Pane.

Edit/Delete Existing Displays – This option allows you to open a display in the display designer where you can add or remove objects, or make other changes. This provides the same functionality as the Edit or Delete a Display option on the Navigation Pane.

Copy Display Design – This option will allow you to make a copy of the design of any of your displays, without the data. You can then edit the copy without affecting the original display. This provides the same functionality as the Copy Display Design option on the Navigation Pane.

Import Design Template – A template is a file that contains description of an empty display with no data. This option will allow you to locate a template file on your computer and add a new display from that template. This provides the same functionality as the Import Design Template option on the Navigation Pane.

Export Design Template – This option allows you to create a template file from one of your displays. This template file can then be imported into another installation of Database Oasis.

Export Data – This option allows you to copy the data from a display out to an external file where you can work with it in another application, such as a spreadsheet or word processor. This provides the same functionality as the Export Data option on the Navigation Pane.

Note
This option is only available in registered installations of the software.

Tools

The Tools menu provides access to system maintenance tools.

Note
The Tools menu will only appear in Professional Edition if the user who is currently logged in has administrative rights.

Backup – This option allows you to make a safety copy of your installation of Database Oasis. It is recommended that you perform frequent backups, especially of critical information. (See *Backing up Your Data*, in *Chapter 9, System Maintenance*, for instructions.)

Restore – This option allows you to bring back a backed up copy of your installation. (See *Restoring from Backup*, in *Chapter 9, System Maintenance*, for instructions.)

PRO Users – This option opens the following sub-menu:

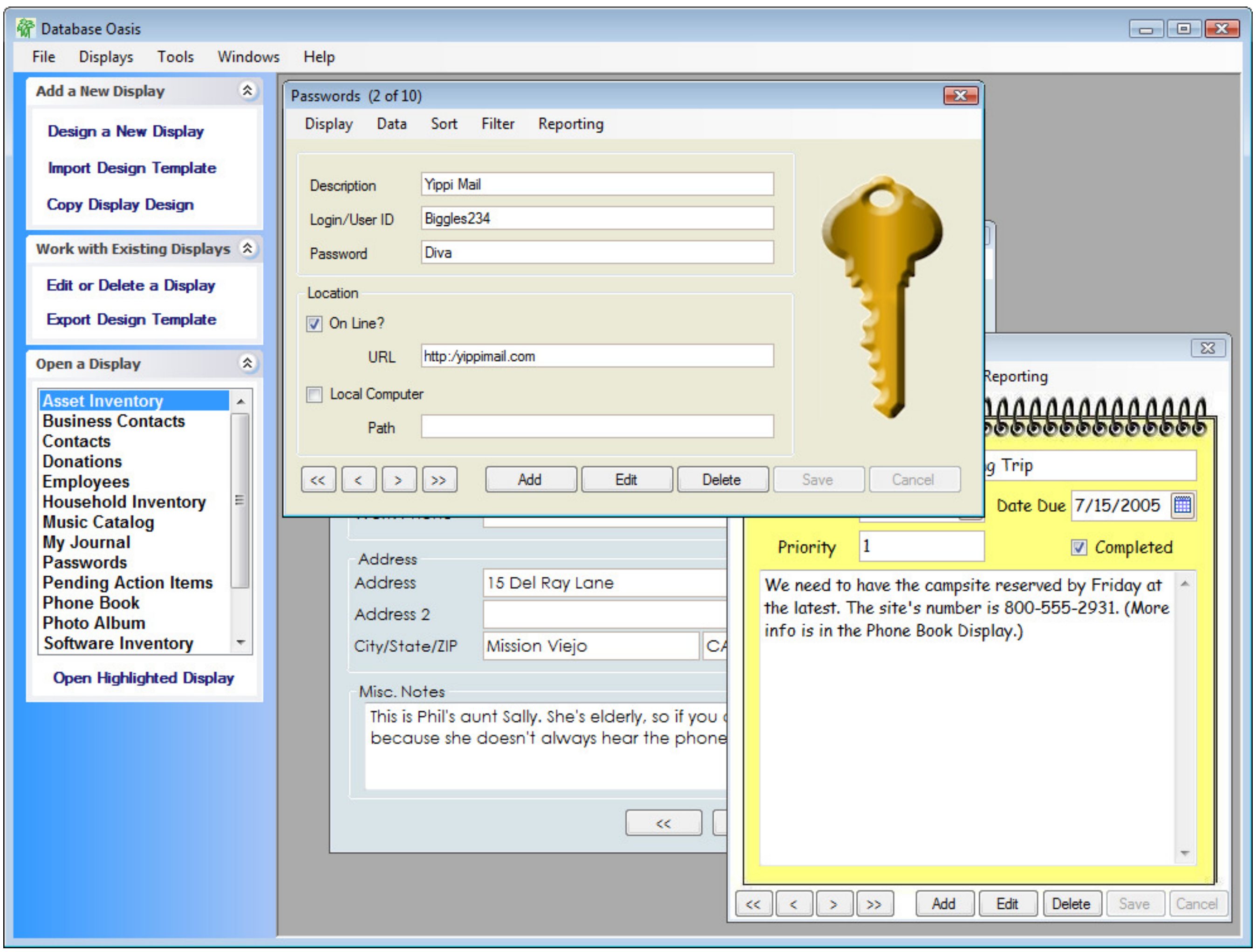
PRO Manage Users – This option opens the Manage Users screen where you can add, edit, and delete the list of users who have access to Database Oasis.

PRO Enter Key for Additional Users – The number of users that can be added to Database Oasis Professional Edition is based on the number of user licenses that have been registered. This option opens the Enter Registration Key screen where you can register additional user licenses.

Windows

The Windows menu allows you to organize the main work area when you have multiple displays open at the same time.

For example, you may have three different displays open simultaneously:



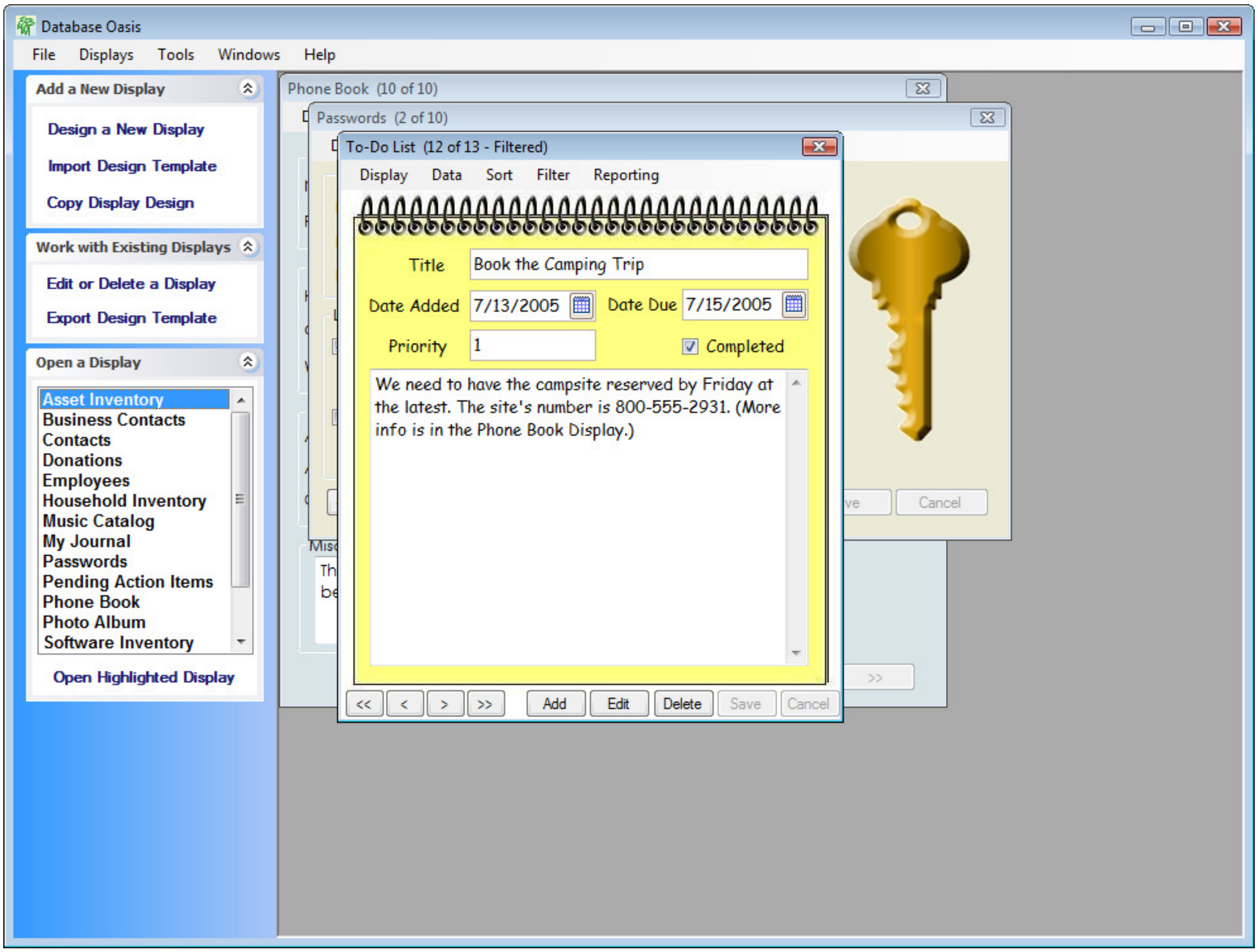
The open displays will be layered based on the order in which they have been accessed. The currently active display will be in front. The display that has not been accessed for the longest amount of time will be in back. In this example, the Contacts display is the currently active display.

The Recipes display was active just prior to Contacts, so it appears just behind it. The Music Catalog display appears at the back.

Cascade

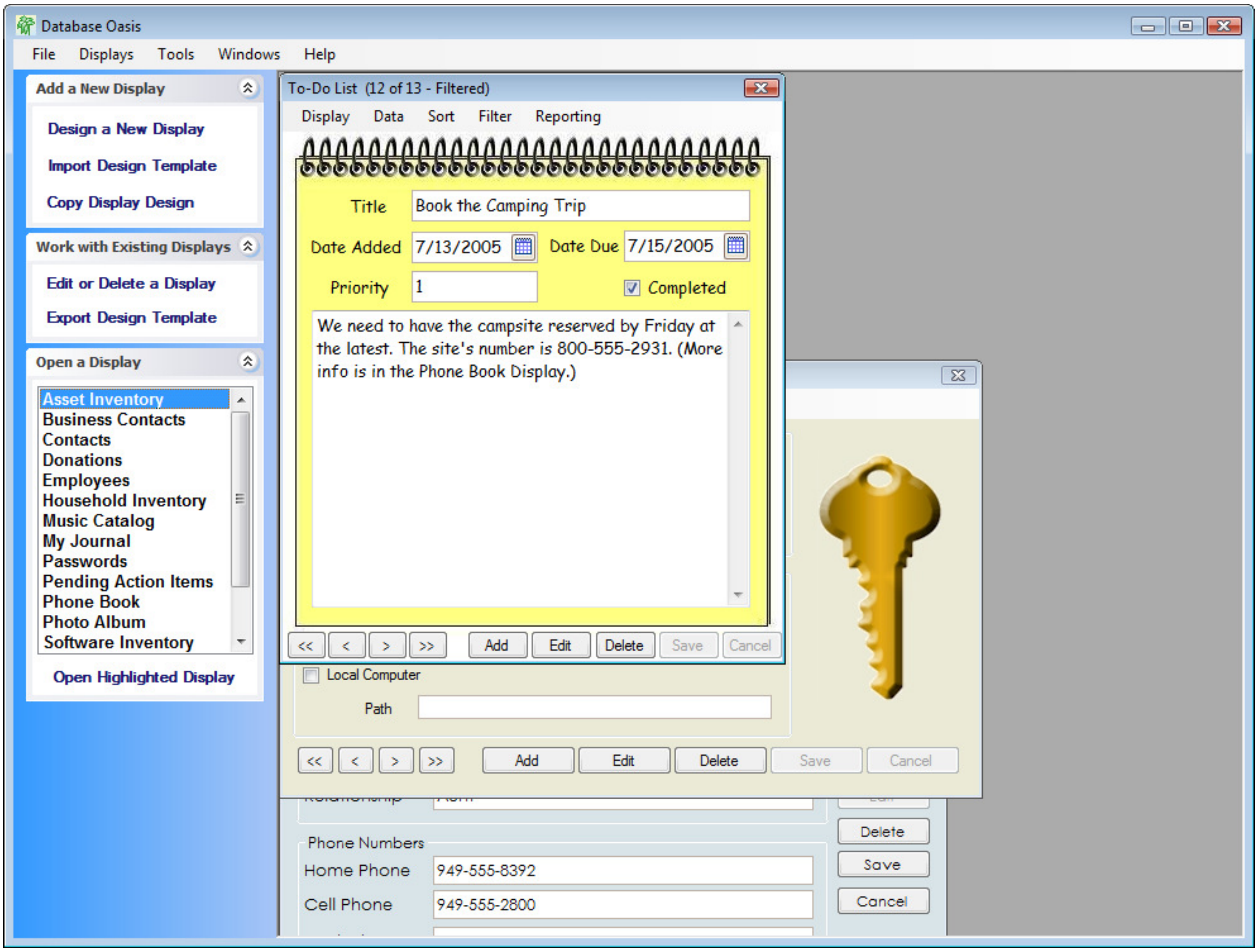
This option will stack all open displays, one on top of another, with the display that currently has focus on top. The display that was active most recently before the current display will be next, and so on. The displays will be arranged so that their title bars are accessible, so you can click on a title bar to bring a different display to the front.

Using the above example, if you select to Cascade, your screen will look like this:



Tile Horizontal

This option will arrange the displays so that they appear in horizontal rows. The currently active display will be in the top row in the upper left hand corner of the work area. The next display will appear below it, and so on:

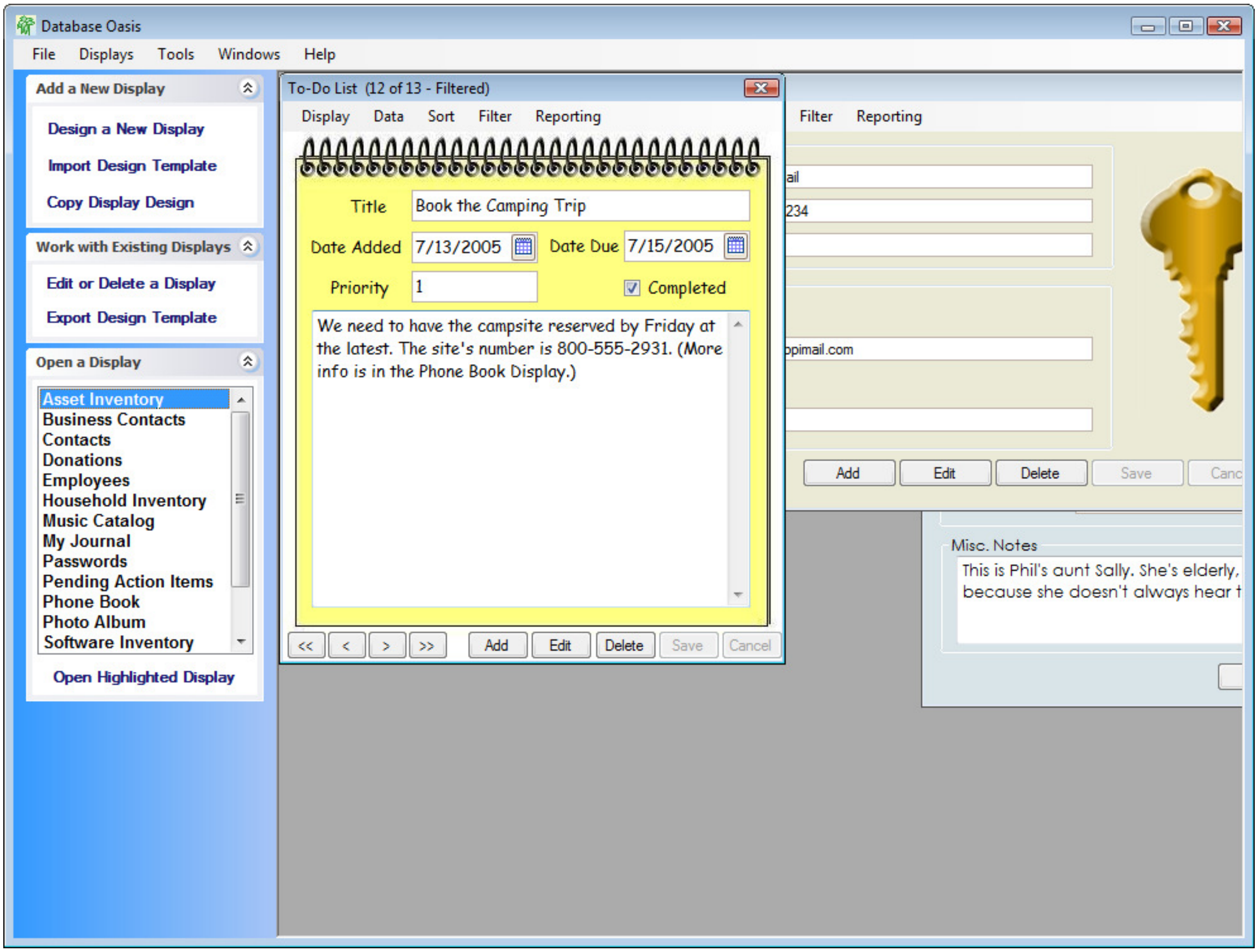


Note

When the work area is filled, it will start a second set of rows next to the first. The displays may overlap, hiding some displays from view. This option works best when there are fewer displays open.

Tile Vertical

This option is similar to Tile Horizontal, except that it tiles the displays so that they are arranged in vertical columns. The active display will appear in the upper left hand corner of the work area. It will occupy the first vertical column. The next screen will be placed to the right of it, and occupy the second vertical column, and so on:

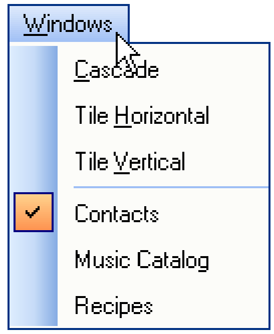


Note

When the work area is filled, it will start a second set of vertical columns below the first. The displays may overlap, hiding some displays from view. This option works best when there are fewer displays open.

[Displays]

At the bottom of the menu will be a list of any displays and list views you currently have open:



The currently active display will have a check mark next to it. Clicking on a display on the menu will bring it to the front, making it active.

Help

This menu provides access to information about your software and documentation resources.

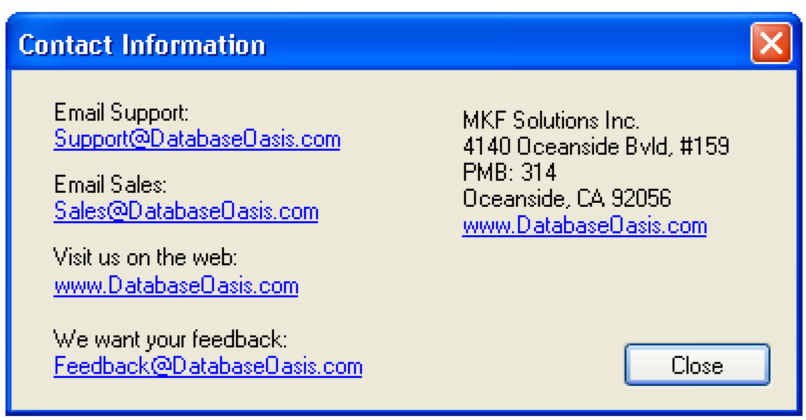
Help – This opens the main program help files that provide full documentation on using your software.

User Guide – This opens the user manuals in a .pdf file that can be printed. This file contains the same information as the help files in a printable format.

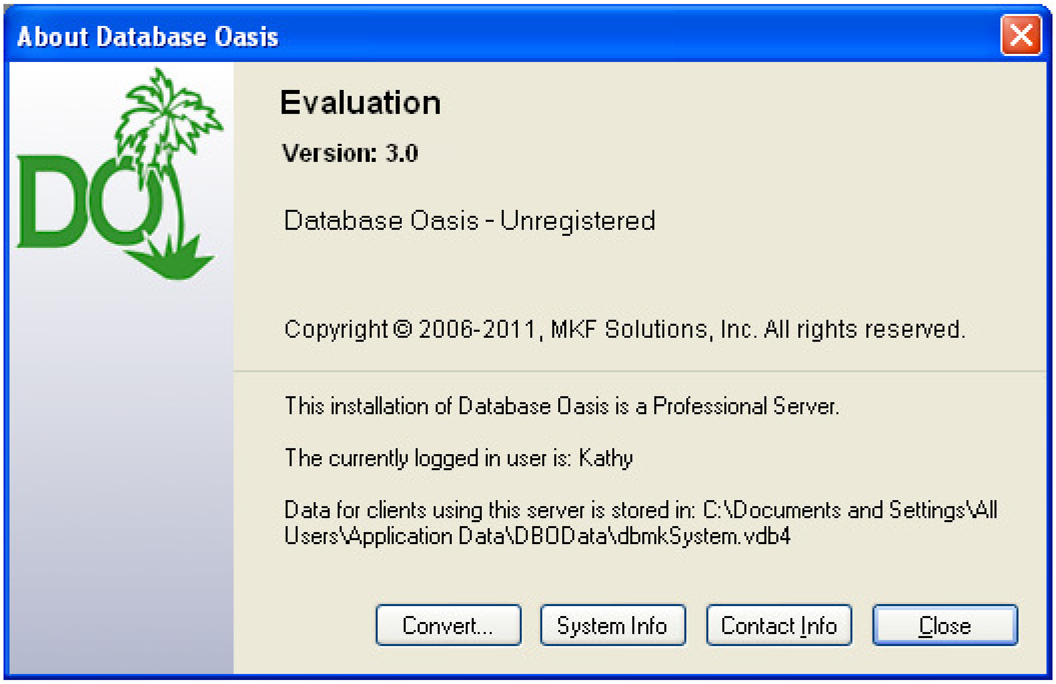
Quick Start Guide – This opens a printable .pdf file that provides a brief overview of using the software.

Online Demos – This provides a link to the databaseoasis.com website where you can run demos that illustrate how to create displays and work with your data.

Contact Information – This option opens the Contact Information screen, which provides contact information for MKF Solutions, as well as links to support and sales:



About Screen – This opens the About screen which provides information on your software:



This screen shows whether the installation is a Professional Edition or a Basic Edition, and provides the version number. If it is a Professional Edition, it also shows the number of registered users, the currently logged in user, and whether it is a client or the server. It also provides buttons to quickly access System Information related to your computer configuration, and Contact Information for technical support, sales questions, and other inquiries. In Professional Edition, there is also a Convert option that toggles the installation between a server and client.

Note

It is strongly recommended that you contact Support@DatabaseOasis.com before using the Convert option.

CHAPTER 4
CLIENTS & USERS IN PROFESSIONAL EDITION

PRO This entire chapter is only applicable to Database Oasis Professional Edition.

Multi-User Network Access

Database Oasis - Professional Edition allows more than one user to share data on a network. The data is located on one central computer (the Server), and everyone else who wants to share that data (the Clients) accesses it over the network. In order for this to work, you need to:

- Set up users in Database Oasis. When people want to use the software, they must know a valid user name and password in order to log on. This keeps unauthorized people from accessing the data remotely.
- Launch Database Oasis on each Client machine and tell it the path to where the data is stored.

Setting up Users

Note

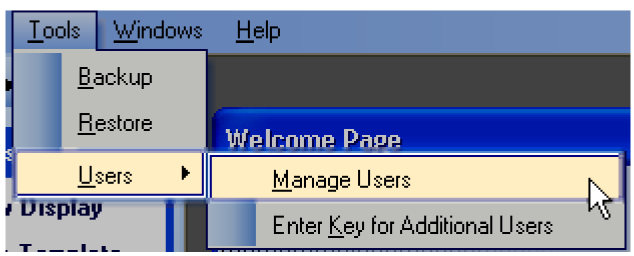
Access to manage users is subject to security. The login that you used to access Database Oasis must be an Administrative account.

When you launch the software for the first time, you are prompted to add the first user. If any additional users will be accessing Database Oasis, you must create user accounts for each of them.

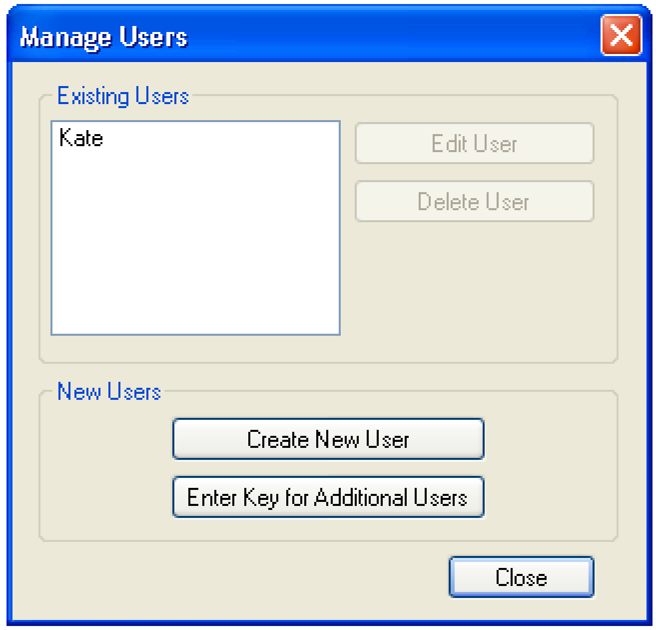
ADDING USERS

1 Log into Database Oasis as an Administrative user. (The first user that was added is automatically an administrator.)

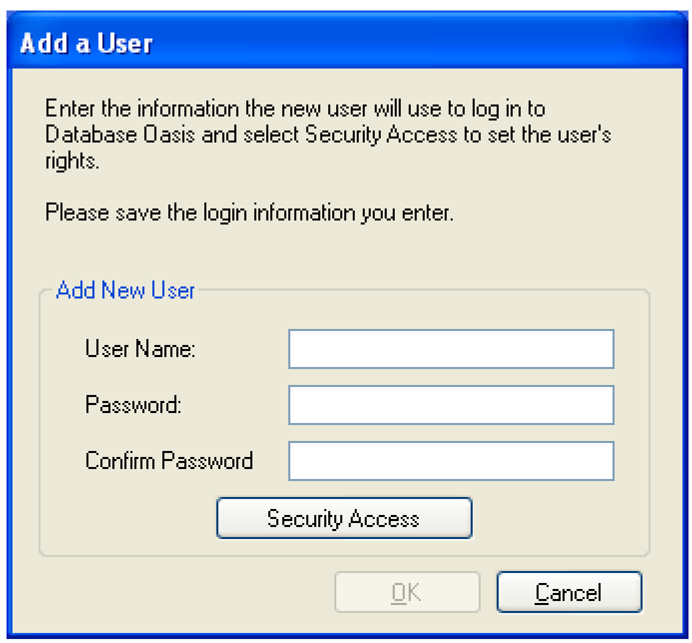
2 From the Tools menu, select Users, then select Manage Users:



3 The Manage Users screen will open:



4 Select Create New User. The Add a User screen will open:



5 Enter a unique name for the user in the User Name field. This name will be used to log into the software and to identify the user in the software.

6 Enter the password the user will use to log into Database Oasis in the Password field. The password is case sensitive, meaning that if you use capital letters in the password, the same capitalization must be used when logging in. If you do not wish to use a password, leave this field blank.

> **Note**
>
> Make careful note of the password. If a user forgets his password, he will not be able to log into Database Oasis.

7 Retype the password that was entered in the Password field in the Confirm Password field. The two entries must match.

8 By default, new users have full rights to existing displays and the ability to add new displays, but they do not have rights to add and edit users or create or restore backups. If you would like to modify the user's security rights, click the Security Access button. See the *Security* section, later in this chapter for details on modifying the user's security access.

9 Click OK to add the user. You will be returned to the Manage Users screen and your new user will appear in the Existing Users list.

Registering Additional User Licenses

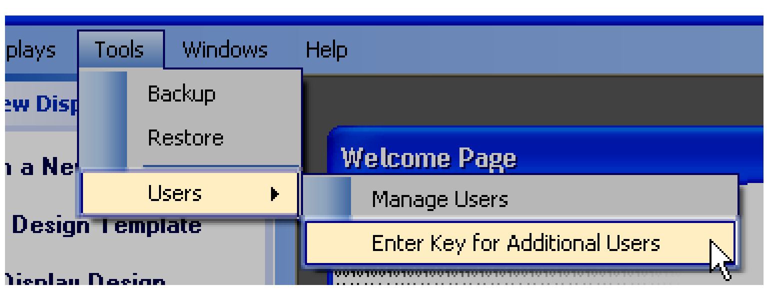
Database Oasis – Professional Edition comes with three user licenses. This means that you can add up to three users in Manage Users. If you need to add more than three users, you can purchase additional user licenses from www.databaseoasis.com.

When you purchase additional licenses, you will be sent a registration name and key via e-mail. You must enter the key to register the users before you can set up additional user accounts.

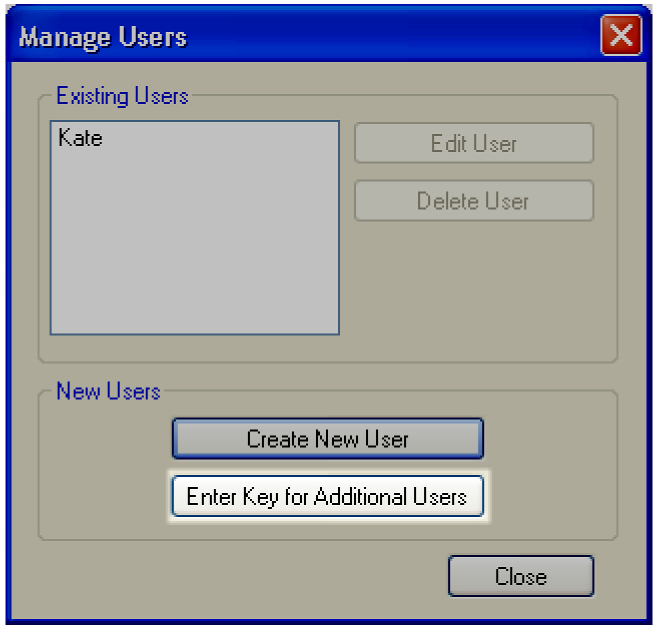
ENTERING AN ADDITIONAL USER LICENSE KEY

1 Enter the key using one of the following methods:

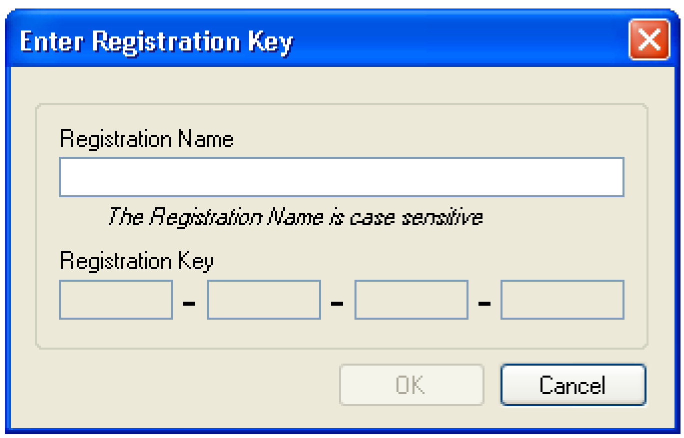
- Select Enter Key for Additional Users from the Users menu:



- Select Enter Key for Additional Users from the Manage Users screen:



2 The Enter Registration Key screen will open:



3 The registration name can be found in the e-mail you received that contained your purchase confirmation and the registration key. Either copy and paste the registration name from that e-mail, or type it in the Registration Name field exactly as it appears in the e-mail. This entry is case sensitive (upper and lower case letters must match).

4 As soon as you have entered a Registration Name, the Registration Key field will become available. This is the key that was provided when you purchased the users. It is divided into four separate sections. Enter the code for each section in the boxes.

5 The OK button will become available once you have entered the complete registration information. Click this button to register the additional users.

6 A message will appear confirming the registration. You may now add additional users.

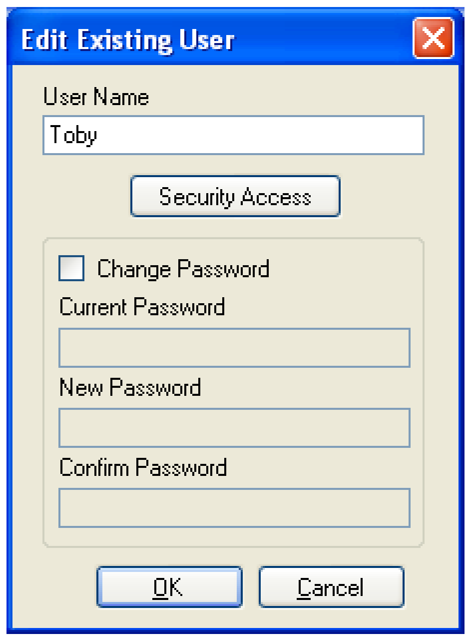
Editing Users

Once a user has been added, administrators can modify the user's settings from the Manage Users screen.

EDITING A USER:

1 Open the Manage Users screen as described under *Add a User*, above.

2 Highlight the user you would like to edit in the Existing Users list and click Edit User. The Edit Existing User screen will open:



3 If you would like to change the user's name, enter the new name in the User Name field. This name is used to log into Database Oasis and to identify the user in the software.

4 By default, new users have full rights to existing displays and the ability to add new displays, but they do not have rights to add and edit users or create or restore backups. If you would like to modify the user's security rights, click the Security Access button. See the *Security* section, later in this chapter for details on modifying the user's security access.

5 If you would like to change the user's password, mark the Change Password check box. The password fields will enable.

6 Enter the user's current password in the Current Password field for verification.

7 Enter the new password the user will use to log into Database Oasis in the New Password field. The password is case sensitive, meaning that if you use capital letters in the password, the same capitalization must be used when logging in. If you do not wish to use a password, leave this field blank.

Note

Make careful note of the password. If a user forgets his password, he will not be able to log into Database Oasis.

8 Retype the password that was entered in the New Password field in the Confirm Password field. The two entries must match.

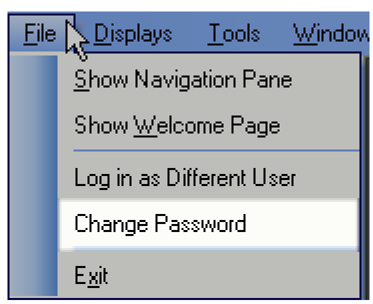
9 Click OK to save the changes to the user.

Changing Your Own Password

Even if you do not have administrative access to manage users, you can still change your own password.

CHANGING YOUR PASSWORD

1 From the File menu, select Change Password:



2 The Change Password for User screen will open:

3 Enter your current password in the Current Password field for verification.

4 Enter the new password you would like to use to log into Database Oasis in the New Password field. The password is case sensitive, meaning that if you use capital letters in the password, the same capitalization must be used when logging in. If you do not wish to use a password, leave this field blank.

Note

Make careful note of the password. If you forget your password, you will not be able to log into Database Oasis.

5 In the Confirm Password field, retype the password that you entered in the New Password field. The two entries must match.

6 Click OK to set the password. The next time you log into Database Oasis, you will need to enter this new password.

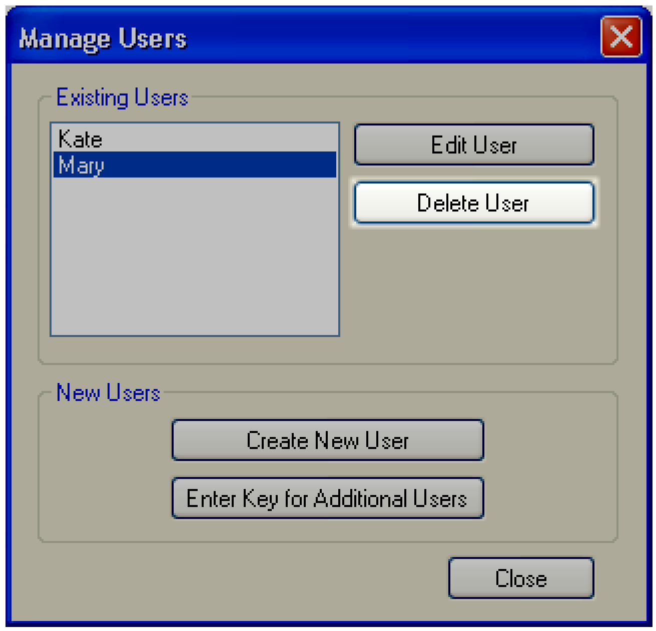
Deleting Users

If a user no longer needs to access Database Oasis, you can delete him or her from the Existing Users list in Manage Users. Once a user has been deleted, that user account will no longer have access to the software.

DELETING A USER

1 Open the Manage Users screen as described under *Add a User*.

2 Highlight the user you would like to delete in the Existing Users list. The Delete button will enable:



Note

If the Delete button does not enable, it means that the current user cannot be deleted. Since there must always be at least one user in Database Oasis, you cannot delete the user that is currently logged into the software. To delete the current user, log out and log in as a different user.

3 Click Delete.

4 You will be warned that deleting a user is permanent and asked to confirm your decision to delete. Click Yes to remove the user.

Security

By default, users have full access to data and the ability to add and edit displays. Aside from the first user added, by default, new users do not have administrative rights, which include the ability to add and edit users and create or restore backups.

You are able to modify the security access for new users.

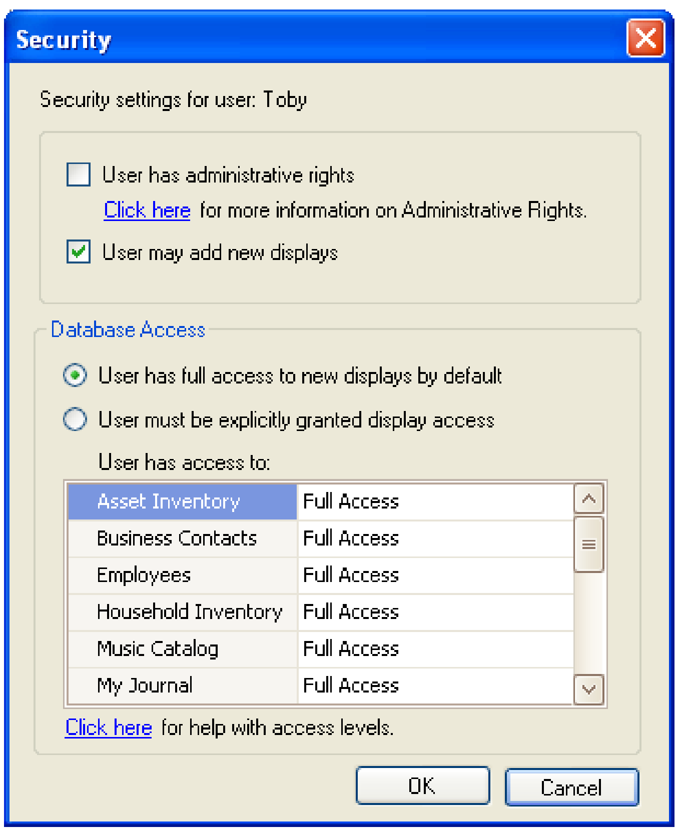
Setting User Security

1. Create or edit a user following the instructions in the *Setting up Users* section, earlier in this chapter.

2. Click the Security Access button.

> **Note**
>
> You will not be able to remove administrative rights from the user who is currently logged in. To change this user's security access level, log out and log in as a different user.

3. The Security screen will open:



4 The User has Administrative Rights check box lets you grant administrative rights to the user. Users with administrative rights have full access to all displays and are additionally able to run backups, restore from backup, and add, edit, and delete users. If this is selected, the rest of the options on this screen are disabled.

5 If the user is not an administrator, mark the User may add new displays check box if you would like to allow the user to create new displays. If this is unmarked, the user will not be able to access the Design a New Display, Import Design Template, or Copy Display Design options on the navigation pane or Displays menu.

6 The Database Access section allows you to grant the access level for individual displays in your database. The first radio button set determines whether users are given access to new displays by default. Select from the following options:

- If you would like the user to automatically have full access to new displays, select User has full access to new displays by default. This will grant the user rights to add and edit records and modify the display design for all new displays by default. (You may turn off access to specific displays, if desired.)
- If you would like to restrict access to new displays by default, select User must be explicitly granted display access. New displays will not appear on the Open a Display list on the Displays menu and navigation pane unless an administrator accesses this screen and explicitly grants access.

7 The User has access to: list shows all of your existing displays and lets you set the access level for each.

8 Select the desired display and click in the column to the right to set the access level for that display. Options include:

- Full Access – This is the default setting. It gives the user access to read and edit records, modify the display in the designer, and delete the display.

Note

If the user is not granted full access to at least one display, the Work with Existing Displays section will not appear on the navigation pane.

- Read / Edit Records – This gives the user full access to view add, edit, copy and delete records in the display, but not to edit the display in the designer or delete the display. If this is selected, the display does not appear in the Edit / Delete Display list, Export Design Template list, or the Copy Display list on the navigation pane or Displays menu.

- Read Only – This allows the user to open the display and to view records, but not add or edit records. If this is selected, only the navigation buttons on the display are available. The user will be able to view, but not edit records in list view. Also disabled are:

  Import
  Export
  Copy
  Create New Reports
  Manage Reports
  Save Lists
  Save Filters
  Save Sort
  Add, Delete, and Change in Links

- No Access – This is the default setting if User Must be explicitly granted display access is selected. If this is selected, the display does not appear in the Open a Display list on the navigation pane or Displays menu, the Copy Display list, the Export Design Template list, or the Edit / Delete Display list.

9 When you are satisfied with your selections, click OK to save the user's security settings.

Launching a Professional Edition Client

When using Database Oasis Professional Edition, you are able to have more than one workstation sharing the same data. In this case, the machine where the data is stored is called the server. All of the other workstations connecting to that data are called clients. When Database Oasis is first installed, you select the computer where you want to install the data by designating it as the server. All other workstations are installed as clients, meaning they will share the data on the server instead of having data installed locally.

Database Oasis Clients needs to know the path to where the data is installed in order to connect. The first time you log into a client, you will need to enter the path to the data file. You are also able to change the database a client installation is using by entering a different data path.

Note

In order to connect to the data in the specified path, you will need to configure a file share in Windows. Refer to the heading *Configuration for Professional Client Access*, in the *Installation* chapter of this manual for more information.

Help Finding the Data Path

When Database Oasis was installed, a default data folder named \DBOData was created. As part of installation, the administrator on the server computer must share the data folder so it is accessible to client computers. (Refer to the *Configuration for Professional Client Access* section in the Installation chapter for instructions.)

If you are using Windows Vista or Windows 7, the data folder on the server computer is located in the path C:\ProgramData\DBOData. For all other operating systems, the data is located in the path C:\Documents and Settings\All Users\Application Data\DBOData.

Note
If you don't see the data folder, it is usually because it is hidden in Windows. To unhide the folder, right click on your Windows Start button and select Explore from the menu to open Windows File Explorer. Select Folder Options from the Tools menu, then select the View tab. Make sure that the "Show hidden files and folders" option is selected.

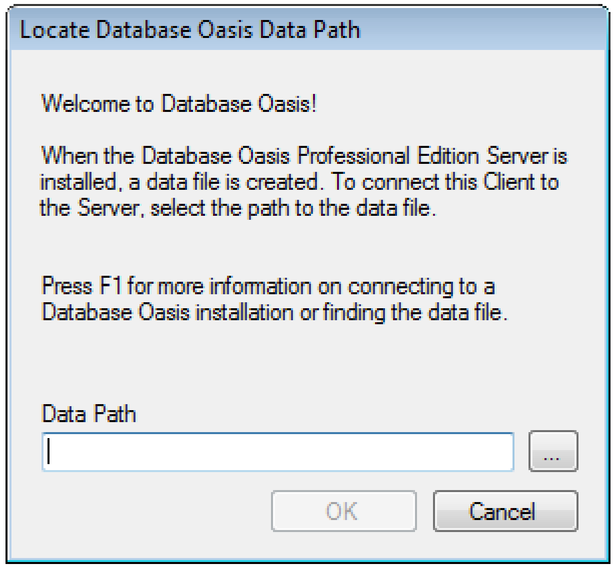
Hint
If you have trouble finding the path, you can search for the file dbmkSystem.vdb4 on the server machine.

The C:\ in the path indicates that the files are on the local hard drive. When navigating to a machine on your network, the C:\ will be replaced with a machine designation. This is usually the machine name. If your network or Windows share is configured to use a designation other than the machine name, you will need to consult your network administrator to get the appropriate path information.

Launching the Software on a Client

1 Launch Database Oasis from either the desktop or the program menu.

2 The Locate Database Oasis Data Path screen will open:



3 In the Data Path field, enter the path to the data file or press the ellipsis (…) button to open a Windows Browse for Folder screen where you can navigate to the path.

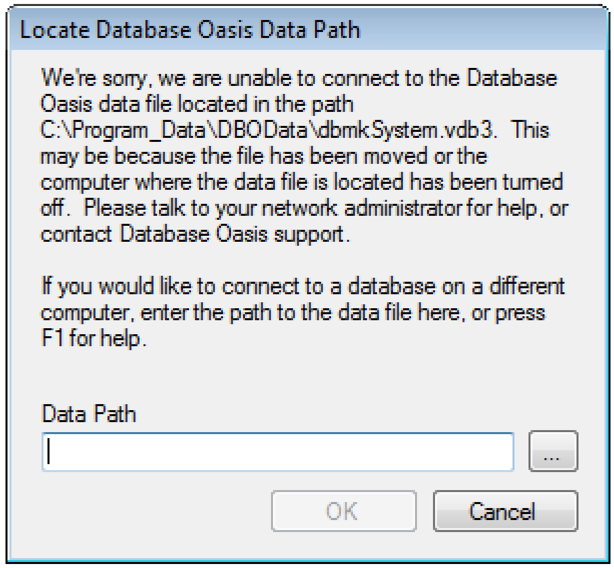
4 Click OK. The Client installation will register the location of its server. Database Oasis will need to shut down. When you launch it again, the client will automatically open the database located in the specified path.

Working with Clients

There are very few differences between working on a Client and working on the Server.

One major difference is that each time the client launches, it will check to make sure it can access the database located on the Server. This means that the computer where the database is installed should be left on so users will be able to access the database.

As long as Database Oasis is able to open the database, it will go straight into the software. If it cannot open the database, for example, if the Server computer is turned off, The Locate Database Oasis Data Path screen will reappear:

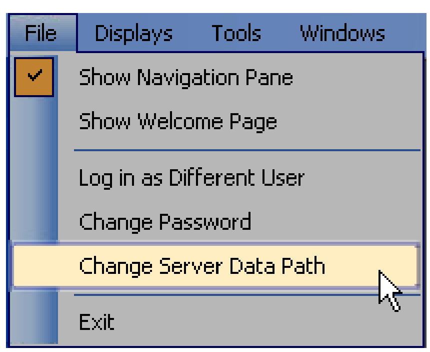


If your Server has been moved to another computer, or the machine name has changed, you can enter a new machine name in the Data Path field. If the Server is just temporarily shut down, click Cancel to exit Database Oasis until the Server is back up.

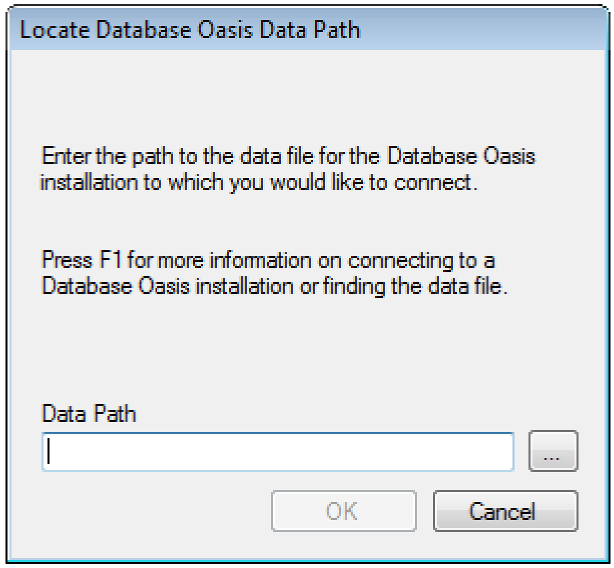
You can also change the Server in use with your Client at any time. This can be useful if you have information that you need to keep separated as it enables users working on Client installations to switch between Database Oasis databases.

Manually Changing the Server

1. Launch Database Oasis on the Client.
2. Click on Select Server on the File menu:



3 The Locate Database Oasis Data Path screen will open:



4 Enter the path to the data file in the Data Path field and click OK.

5 Database Oasis will close. Relaunch the software to complete the connection.

CHAPTER 5
CREATING NEW DATA DISPLAYS

Understanding New Display Options

There are a number of different ways you can create new data displays, depending on what you're trying to accomplish:

- You can create a brand new display to contain your data. In this case, you start with a blank page and build your display by adding the elements you want to use.
- You can import the design of a display someone else has created from a design template. A design template is a file that contains a description of a display. The software will read this file and create a display that matches the description. MKF Solutions has worked with people in different industries and with different interests to create a selection of sample displays for both professional and personal use. These displays are available as templates that can be imported into your installation of Database Oasis. Additionally, users of Database Oasis can create templates of their display designs that can be shared with other users. Once you've imported a design template, you can customize it to fit your needs.
- You can copy the design of any of the displays in your system, including displays that were imported from templates and displays you've created yourself. This can be very useful if you have multiple displays that will contain similar data.

Hint

If a lot of your displays will store information about people, you might create a display that just contains contact information such as address and phone number fields. You can then save time by copying it when starting new displays.

Creating a Display from a Blank Page

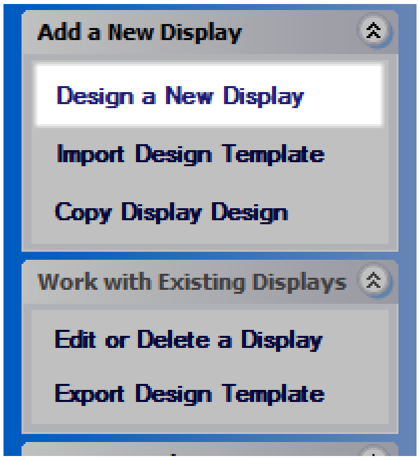
If you could create a piece of software to contain any information you like, what would it look like? What types of information would you keep in it? Would it be straight-to-the-point-functional, or would you decorate it with graphics and creative fonts?

Creating a display in Database Oasis is just that, designing a piece of software to fit your needs and personality. Of course, all of the technical parts of creating the software are handled for you. In just a few minutes you can go from a blank form to having a piece of software that is completely customized to you.

CREATING A DISPLAY FROM A BLANK PAGE:

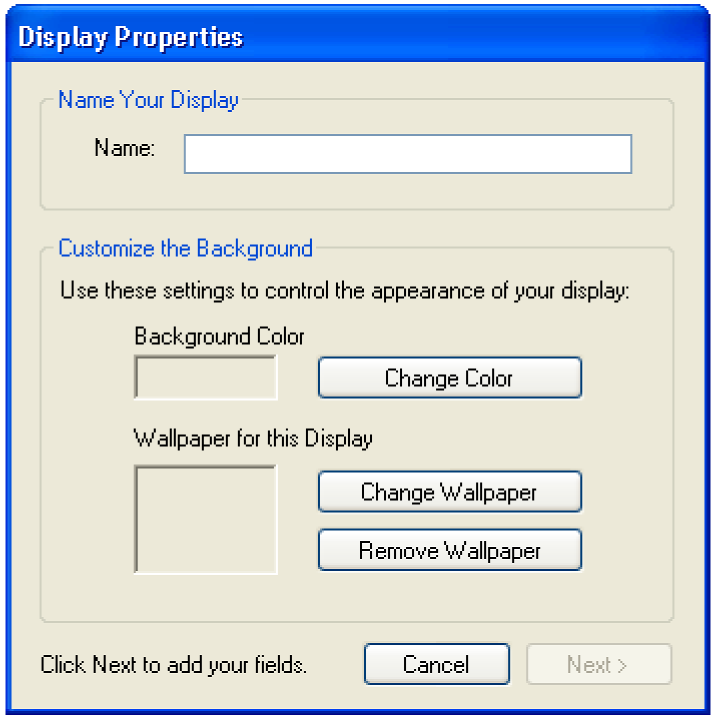
1 Start a new display using one of the following methods:

- From the Add a New Display section of the Navigation Pane, click Design a New Display:



- From the File menu, select Add New Display.
- Press Ctrl+N on your keyboard.

The Display Properties screen will open:



2 Enter a unique name for your display in the Name field. This name will appear in the title bar of the form and in any display selection lists.

3 The Background Color section controls the color of your display. The box will display the background color that is currently selected. The default color for displays is light gray. To select a different color, click the Change Color button. A Windows Color Picker screen will open. Select the desired color from the screen. (For more on using the Windows Color picker, see the *Windows Basics* section of *Chapter 1*.)

4 The Wallpaper feature allows you to use a tiled graphic as the background of your display. If you would like to use wallpaper, click the Change Wallpaper button to open a Windows Open screen where you can select the picture you would like to use as your wallpaper.

Warning!

Some graphics files can be very large. Every time you add or move something on your display, the system must redraw the graphic file. If you select a large graphic file, this can slow down work in the designer. If you find this happening, consider using a smaller graphic, or temporarily removing the background picture while you work in the display.

Note

If you select a wallpaper, the background color will only appear as the background color for boxes.

5 If you have set a wallpaper and decide that you no longer wish to use it, click the Remove Wallpaper button to remove the picture from your display. The display will return to the selected background color.

6 When you are satisfied with your selections, click Next > to proceed to the display designer where you will add the fields and other objects to your display. See *Exploring the Display Designer*, later in this chapter, for more information.

Creating a Display from a Design Template

In addition to the sample displays that were installed with Database Oasis, a number of additional templates that were available when you purchased the software were installed in the \Templates folder under your installation path ("c:\program files\database oasis" by default). A Templates.pdf file was also installed to that path, which gives a brief description of the templates that were included with your installation.

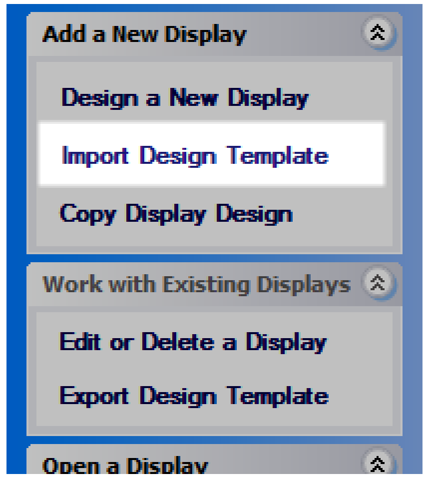
New templates are also periodically released. These templates can be accessed from the www.DatabaseOasis.com web site.

Importing a Design Template

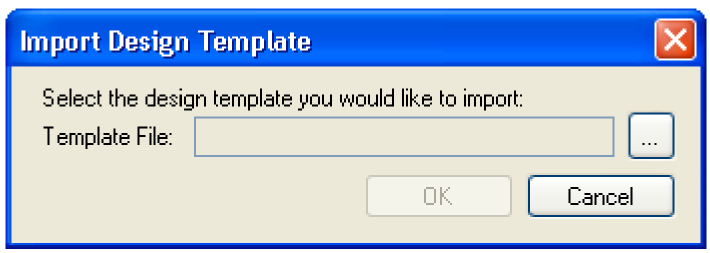
1 Import a template using one of the following methods:

- From the Displays menu, select Import Design Template.

- From the Navigation Pane, select Import Design Template:



2 The Import Design Template screen will open:



3 The Template File field displays the path and file name of the template you are importing. To populate this field, click the button to open a Windows Open dialog box where you can navigate to the desired template file. This will default to the \Templates folder under your installation path. If you have downloaded a template file to another location, navigate to that folder. Template files have the extension .mktx. Highlight the template file and click Open.

Note

Templates created prior to version 3.0 have an extension .mkt.

4 Click OK to import the selected template. There will be a pause as a new display is added from the template in the file. The new display will be given the same name as the original display from which the template was created. If there is already a display with that name, the name will be followed by (1) or the next available consecutive number.

5 The display is now installed and ready to use. If you wish to make any modifications to the display, see *Accessing Imported or Copied Displays in the Designer*, later in this chapter, for instructions.

Creating a Display by Copying

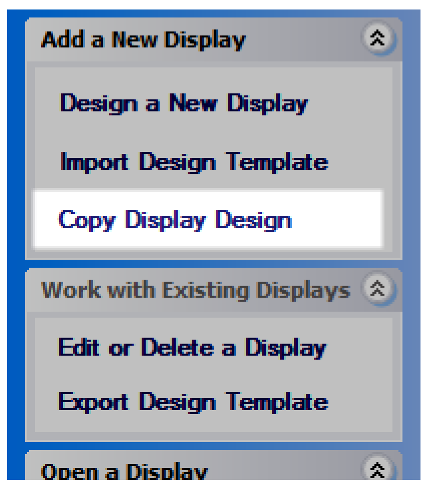
Copying a display design allows you to make a copy of the structure of your display, including the fields you have set up and the screen design. This is useful if you need to store data that is similar to what is stored in an existing display, but want to keep them separate. Once you have a copy of the display, you can modify it without impacting the original display.

> **Note**
>
> This feature only copies the structure of the display, not the data contained in the display.

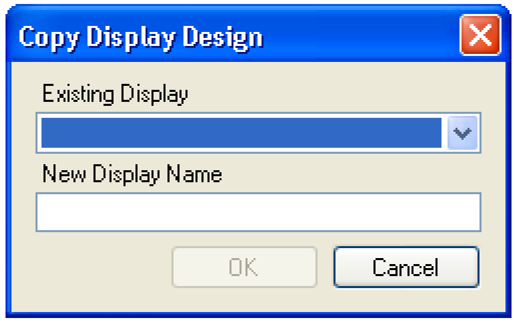
COPYING A DISPLAY

1 Copy a display using one of the following methods:

- From the Displays menu, select Copy Display Design
- From the Navigation Pane, select Copy Display Design:



2 The Copy Existing Display form will open:



3 The Existing Display list will contain all of the displays you currently have set up. Select the display whose design you would like to copy from the list.

4 Enter a unique name for the new display in the New Display Name field.

5 Click OK to begin copying the selected display. There will be a pause as a new display is added.

6 The display is now installed and ready to use. If you wish to make any modifications to the display, see *Accessing Imported or Copied Displays in the Designer*, below, for more information.

Accessing Imported or Copied Displays in the Designer

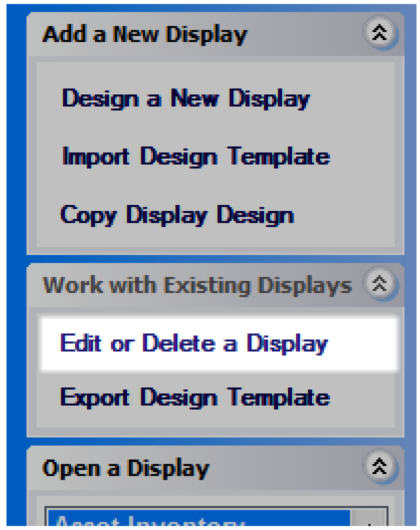
Once the display has been successfully copied or imported, you may wish to open it in the designer so you can make modifications.

Accessing a Display in the Designer

1 Use one of the following methods to access your display in the designer:

- From the main screen in Database Oasis, select Edit/Delete Existing Displays from the File menu.
- Press Ctrl+E on your keyboard.

- If you have the Navigation Pane open, select Edit or Delete a Display from the Work with Existing Displays box:



2 The Display Maintenance screen will open:

3 Highlight your new display on the list and click the Edit button.

Note

If you are in Basic Edition, you will not be able to edit a display that was created in Professional Edition if it includes Professional only functionality.

4 The display designer will open to the selected display.

Exploring the Display Designer

When you first open the display designer, you will be at the Designer Welcome screen:

This screen provides a brief summary of how to use the designer, as well as links to more detailed information and demos. You must close this screen before proceeding to work in the designer.

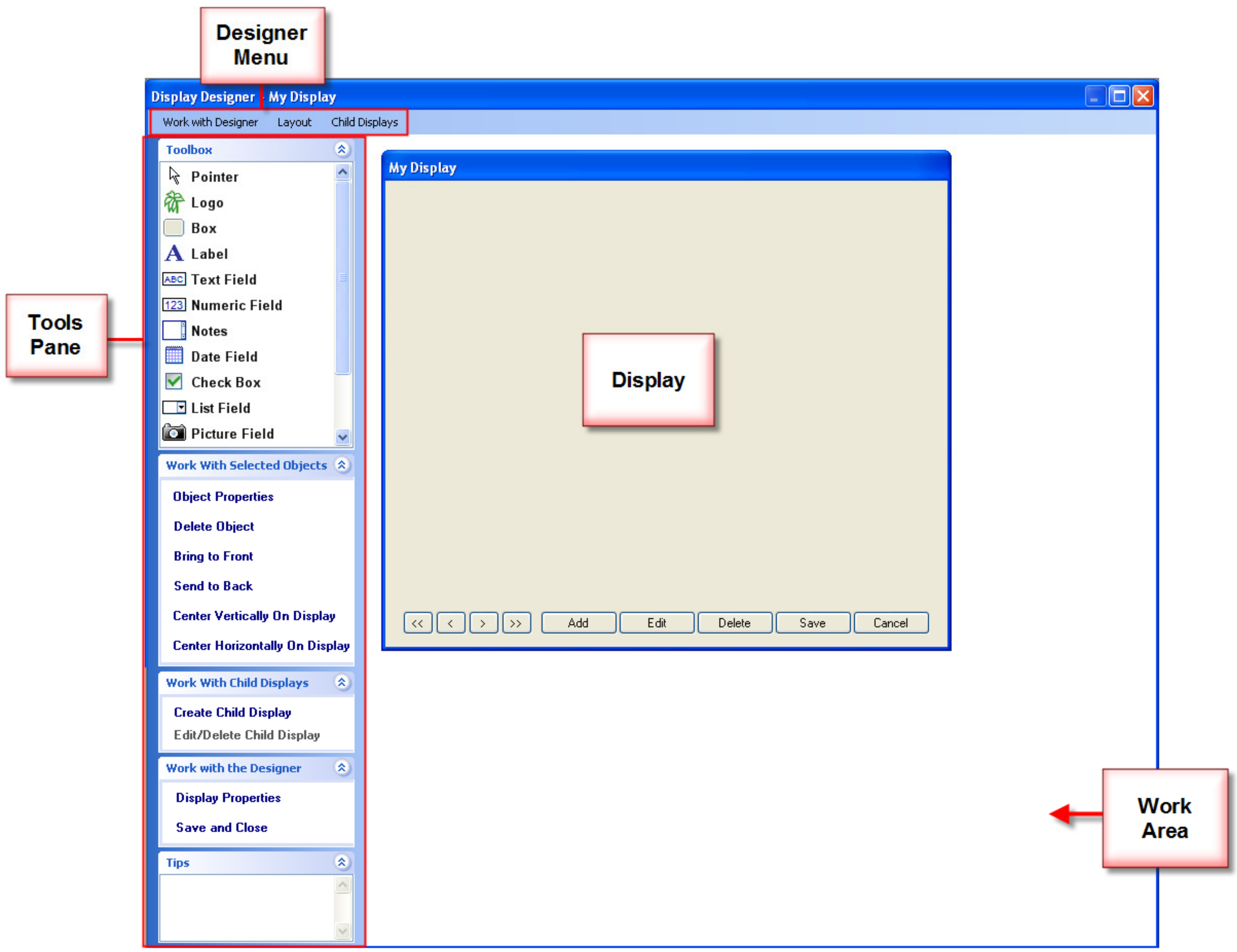
Closing the Designer Welcome Screen

1 Click the Start Working with Your Display Now button or the red X in the upper right-hand corner of the screen to close the Designer Welcome screen.

2 The next time you access the designer, this screen will appear again. If you do not wish it to appear, unmark the Display this page when opening the designer check box. If this check box is not marked, the Designer Welcome screen will not appear unless you open it.

3 If you close the screen and wish to access it again, select Designer Welcome Form on the Work with Designer menu.

Once the Designer Welcome screen is closed, you will be able to view the display designer. The display designer is the work area where you will create and edit your displays. It's broken up into four sections:



Display

This is a visual representation of the display you are creating. The way the display looks in the designer is exactly how it will look when you actually use the display in working mode.

Note
When the display is opened in working mode, a menu bar will appear at the top of the page. The display will be slightly larger to accommodate this menu.

If you are designing a new display from a blank page, the only thing appearing on the display itself will be the standard set of buttons. These buttons will be used when you are not in the designer to work with the records in your display. They are shown in the designer to allow you to control elements of their appearance, including position on the screen, size, and text.

You will build your display by adding items from the toolbox on the left. If you have added a new display by importing or copying, the items that were in the design template will appear on the new display.

Work Area

The work area is the blank area around your display that allows you to change the size of your display. See *Sizing a Display* in *Working with Displays in the Designer* section of *Chapter 6* for instructions.

Tools Pane

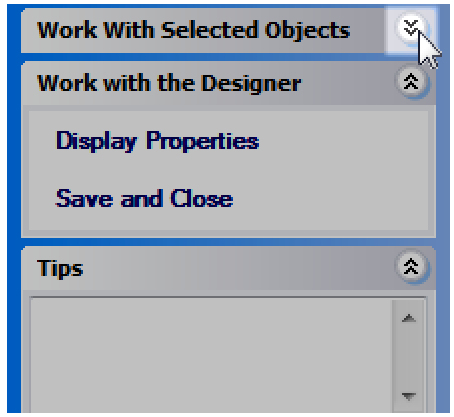
The Tools pane gives you quick access to the options you will use most frequently in the designer.

Note
This section provides quick reference for the options available in the Tools pane. Detailed instructions on each of these items are included in *Chapter 6, Building and Editing Displays*.

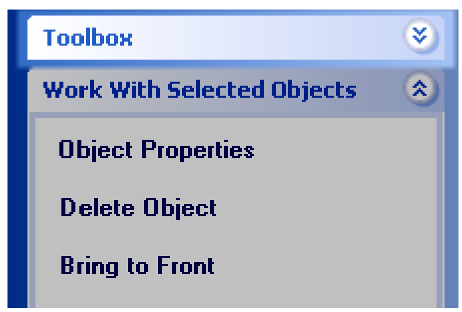
Each of the four sections in the Tools Pane can be collapsed or expanded. When you first enter the designer, the Work with Selected Objects section is collapsed by default.

Expanding or Collapsing a Section of the Tools Pane

1 Click on the double arrow at the top of the section:



2 If you expand a section, the double arrow will point up and the options in the section will appear. If you collapse a section, the section will collapse to a header and the double arrow will point down.



In the example above, the Toolbox section has been collapsed and the Work with Selected Objects section has been expanded.

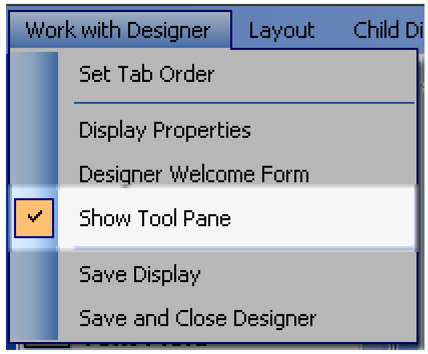
Hint

This is particularly useful if you are running in 800 x 600 screen resolution as it will allow you to collapse sections you are not currently using so you can view the tips section without scrolling.

This pane appears by default when you first access the designer. You may close and reopen this pane to adjust the amount of room available in the work area.

Closing the Tools Pane

1 Select Show Tool Pane from the Work with Designer menu:



2 The check mark will disappear from the menu item and the Tools pane will close.

Note

If you close the Tools pane, it will not automatically appear if you exit and come back into the designer. You must reopen the Tools pane using the steps below.

Reopening the Tools Pane

1 From the Work with Designer menu, select Show Tool Pane.

2 The tools pane will reappear.

Toolbox

The Toolbox contains the items you can add to the display. The tools available in the toolbox include:

 Pointer - The pointer is the one tool that is not used to add an item to the display. Instead it is the tool that is used when you want to select objects on the display. It can also be used to click off another tool if you decide you do not want to add that item.

 Logo - The Logo tool lets you decorate your display by adding pictures to the background of the display, such as a company logo. You can add as many pictures as you like, so this can also be used to add banners and other graphics to the display.

 Box - The Box tool lets you draw a box on the display. This is most often used to help group common items together for a more organized display.

 Label - The Label tool lets you put text on your display. This can be used to describe sections of fields or give instructions.

Text Field – Fields are the elements of a display that will actually contain your data. Text Fields are the most common type of field you will have in your displays. They can contain letters, numbers, and symbols such as @ # { }.

Numeric Field - Numeric Fields are similar to text fields, except that they can only contain numbers.

Auto Incrementing Field – Auto Incrementing fields are numeric type fields that automatically increases by one for each new record. They are commonly used to assign a unique number to each record.

Notes - Notes Fields are also similar to text fields, except that you can enter multiple lines of data. Where you would use a text field to store a name, you might use a notes field to keep notes on conversations you have had with the person.

Date Field – Date fields are used to store dates. When entering data in the field, you can select the date from a calendar. Database Oasis will recognize the value as a date, allowing you to sort records chronologically, or filter and search for records based on the selected date.

Check Box - A Check Box is a Yes/No flag that is displayed as a box. A mark in the box means yes. If the box is unmarked, it means No.

List Field - List fields allow you to pre-configure a list of items that can be entered in the field. When users click on an arrow next to the field, the list appears. Selecting an option from the list places that item in the field, facilitating quick and consistent data entry.

Calculated Field - Calculated Fields are an advanced type of field. They let you perform a calculation in a field instead of just displaying static data.

Picture Field - Picture Fields let you have record-specific graphics. For example, you might have a display that contains a coin collection with a picture of the coin for each.

PRO Child Rollup – If you have a child display set up in Professional Edition, you can have multiple child records associated with each parent record in this display. Child rollups allow you to view a table with information from the child level. As you scroll through your records, the information will update to reflect the children associated with the current parent record.

Work with Selected Objects Box

This set of tools provides quick access to some of the most common functions you will perform with objects on the display.

Object Properties - When you first add an object, you will be able to set the object's properties, such as whether or not to display field names and the size of the fonts. Object Properties allows you to get back into these settings for an existing object.

Delete Object – This removes an object and any related data from your display.

Bring to Front - This lets you move an existing item in front of any other items on the display.

Send to Back – This option allows you to make sure an object appears behind any other objects on the display. This is especially useful for boxes and logos where you may want fields to appear on top of the item.

Center Vertically On Display – This is used to center an object or a group of objects relative to the height of the display.

Center Horizontally On Display - This is used to center an object or a group of objects relative to the width of the display.

Work with Child Displays Box

This section provides access to adding and editing child displays. It is only available in Professional Edition.

Create Child Display - This menu option appears in Professional Edition and allows you to create a sub-display that is linked to the current display. This allows you to have multiple child records attached to a single parent record. For example, this might be used to add jobs to a customer display, or individual payments to an invoice. (See the *Creating Child Displays* section, later in this chapter, for more information.)

Edit/Delete Child Display - This menu option appears in Professional Edition and allows you to edit any child displays you've created for this parent display.

Work with the Designer Box

This box gives you access to the most common functions that are related to the display designer as a whole, rather than a selected object.

Display Properties - When you first added your display, you were able to enter the name, and select a background color and wallpaper, if desired. Display Properties allows you to access those settings again and make any necessary changes.

PRO See *Display Properties* in the *Working with Displays in the Designer* section of *Chapter 6* for more information on display properties.

Save and Close - When you are done working in the designer, select Save and Close to save your changes and return to the main work area.

Tips

This section provides quick tips about the selected tool or highlighted button. As you click on tools or move your mouse over buttons, this information will update with tips for the current Tools object.

Menu

The designer menus appear at the top of the designer screen. They contain all of the options you can select when working with your displays. Many of these options are also included in the Tools pane.

Note

This section provides quick reference for the options available on the menu. Detailed instructions on each of these items are included in *Chapter 6, Building and Editing Displays*.

Work with Designer Menu

The Work with Designer menu items include:

Set Tab Order – By default, the tab key on your keyboard will take you through the fields in your display in order from top to bottom / left to right. This option lets you set a different tab order.

Display Properties – When you first added your display, you were able to enter the name, and select a background color and wallpaper, if desired. Display Properties allows you to access those settings again and make any necessary changes.

Designer Welcome Form – The Designer Welcome screen is the page that comes up when you first launch the designer. This option allows you to reopen that screen if you have closed it or if you have elected to have it not appear when launching the designer.

Show Tool Pane – This option will open and close the Tools Pane.

Save Display – Depending on what you're doing in the designer, Database Oasis may automatically save as you work. If you would like to manually save, you may select this option.

Save and Close Designer – When you are done working in the designer, select Save and Close Designer to save your changes and return to the main work area.

Layout Menu

The Layout menu items include:

Bring to Front – This lets you move an existing item in front of any other items on the display.

Send to Back – This option allows you to make sure an object appears behind any other objects on the display. This is especially useful for boxes and logos where you may want fields to appear on top of the item.

Center Horizontally on Display – This is used to center an object or a group of objects relative to the width of the display.

Center Vertically on Display – This is used to center an object or a group of objects relative to the height of the display.

Align Left Edges – This option is used make sure that the left edges of all selected objects are perfectly aligned in a vertical row.

Align Right Edges – This option is used to make sure that the right edges of all selected objects are perfectly aligned in a vertical row.

Align Top Edges – This option is used to make sure that the top edges of all selected objects are perfectly aligned in a horizontal row.

Align Bottom Edges – This option is used to make sure that the bottom edges of all selected objects are perfectly aligned in a horizontal row.

Align Vertical Centers – This option allows you to center objects in a vertical line based on the objects' vertical centers. (If you drew a vertical line through the center of an object, this is the vertical center.)

Align Horizontal Centers –This option allows you to center objects in a horizontal line based on the objects' horizontal centers. (If you drew a horizontal line through the center of an object, this is the horizontal center.)

Delete – This removes an object and any related data from your display.

Properties – When you first add an object, you will be able to set the object's properties, such as whether or not to display the prompt and the size of the fonts. Object Properties allows you to get back into the settings for an existing object.

PRO Child Displays Menu

The Child Displays menu items include:

Create Child Display – This menu option appears in Professional Edition and allows you to create a sub-display that is linked to the current display. This allows you to have multiple child records attached to a single parent record. For example, this might be used to add jobs to a customer display, or individual payments to an invoice. (See the *Creating Child Displays* section, later in this chapter, for more information.)

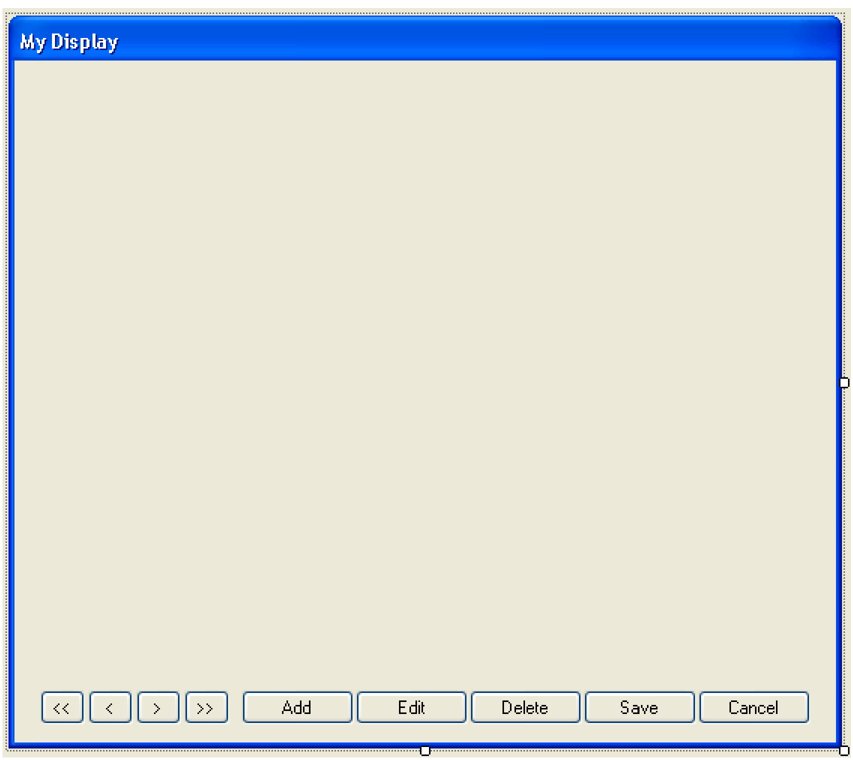
Edit Child Display – This menu option appears in Professional Edition and allows you to edit any child displays you've created for this parent display.

Once you are familiar with the designer, you are ready to start building your display.

CHAPTER 6
BUILDING AND EDITING DISPLAYS

Working with Displays in the Designer

When you first open the designer, your display will appear in the default size using the settings you selected in the Display Properties screen. The standard button set will appear at the bottom of the screen:



You may adjust these settings at any time.

Sizing a Display

The size of the display can be adjusted at any time to accommodate the objects you place on it.

CHANGING THE SIZE OF A DISPLAY

1 When you hover your mouse over the edge of a display, it will change to a double headed arrow. When the arrow appears, click and drag on the edges of the display to change the size.

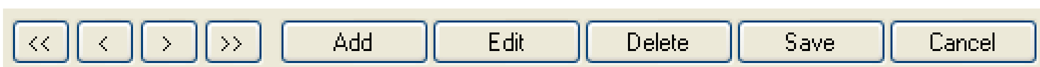
2 Drag on the right edge to make the display wider or narrower.

3 Drag on the bottom edge to make the display taller or shorter.

4 Click and drag on the small white box in the lower right corner of the display to size the display in both directions at once.

Customizing the Buttons

The basic button set appears on all new displays:



These buttons will be used when you are not in the designer to work with the records in your display. They are shown in the designer to allow you to control elements of their appearance, including position on the screen, size, and text. (See the *Working With Objects on the Display* section, later in this chapter, for information about moving and sizing objects.)

You can control the color and text of the buttons using Button Properties.

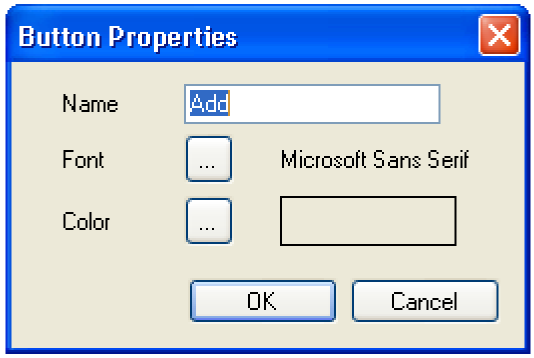
CHANGING THE APPEARANCE OF BUTTONS

1 Select the button whose properties you would like to change.

2 Access button properties using one of the following methods:

- Double click on the button on the display.
- Select Object Properties from the Work with Selected Object section of the Tools pane.
- Select Properties from the Layout menu.
- Right click on the object and select Modify Object Properties from the right click menu.

3 The Button Properties screen will open for the selected button:



4 If you would like to change the text that is displayed on your button, enter a new name in the Name field.

Note
Changing the name will not change the functionality of the button.

Note
If your entry is longer than the existing name, you may need to resize your button to accommodate it.

5 If you would like to change the font style that appears on your button, click the Font button to open a font selection screen. The sample text will display what your font will look like.

6 By default, buttons are the standard light gray in color. If you would like to use a different background color for your button, click the Color button to select a color from the Windows color picker. The box next to the Color button will display the background color of your button.

7 Click the OK button to save the changes to your button.

Display Properties

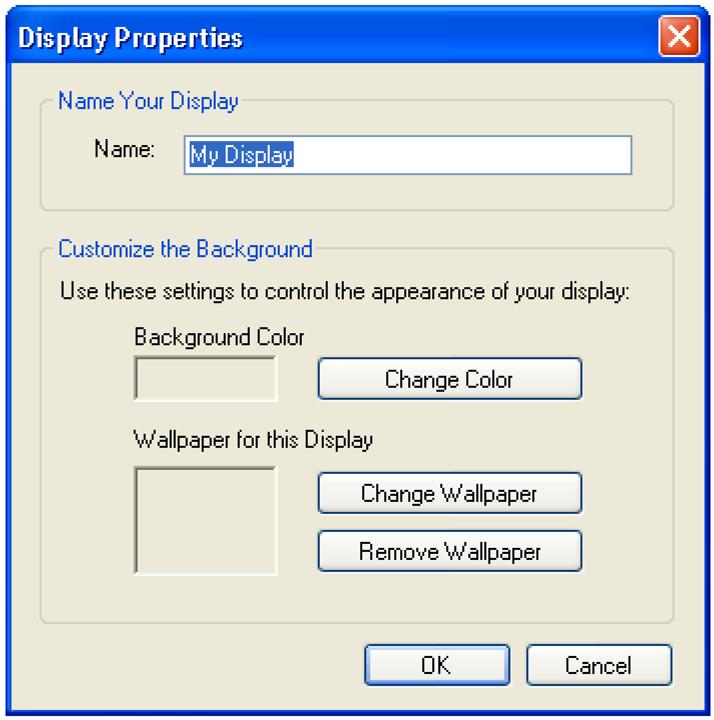
Display Properties automatically come up when you first add your display. You can get back into these properties again at any time to adjust the initial settings you entered.

CHANGING THE DISPLAY PROPERTIES

1 There are two ways to access Display Properties:

- Select Display Properties from the Work with the Designer Box in the Tools pane.
- Select Display Properties from the Work with Designer menu.

The Display Properties screen will open:



2 If you wish to change the display name, enter a new unique name for your display in the Name field.

3 If you wish to change the background color of your display, click the Change Color button. A Windows color picker screen will open. Select the desired color from the screen. (For more on using the Windows Color picker, see the *Windows Basics* section of *Chapter 1*.)

4 If you wish to add or change a wallpaper on the display, click the Change Wallpaper button to open a Windows Open screen where you can select the picture you would like to use as your wallpaper.

Warning!

Some graphics files can be very large. Every time you add or move something on your display, the system must redraw the graphic file. If you select a large graphic file, this can slow down work in the designer. If you find this happening, consider using a smaller graphic or temporarily removing the graphic while working in your display.

Hint

Windows provides several graphics files for use as desktop wallpaper that can be used on your display. These are generally located in the c:\windows or c:\winnt\ directory on your computer, depending on your operating system.

5 If you have set a wallpaper and decide that you no longer wish to use it, click the Remove Wallpaper button to remove the picture from your display. The display will return to the selected background color.

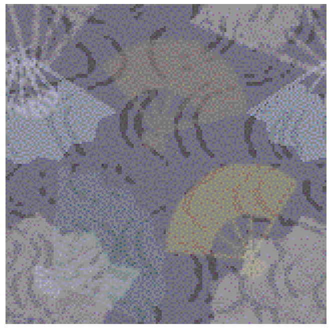
6 When you are satisfied with your selections, click OK to return to the display designer. Your changes will be reflected in the display.

Display Design

As you are creating your displays and setting the background color or wallpaper, there are a few design elements that you should keep in mind:

- It can be a lot of fun to play with bright colors, but if you will be spending a lot of time in a display, you may find that more muted tones will be easier on your eyes.
- Making sure that the edges of your fields line up where possible will make a big difference in how your display looks.
- If you are using both a background color and wallpaper, the background color will be used for boxes and the background of text objects, such as labels, check boxes, and the names of fields.

Looking at a sample display design, you may select the "River Sumida.bmp" file provided with Windows XP, which looks like this:

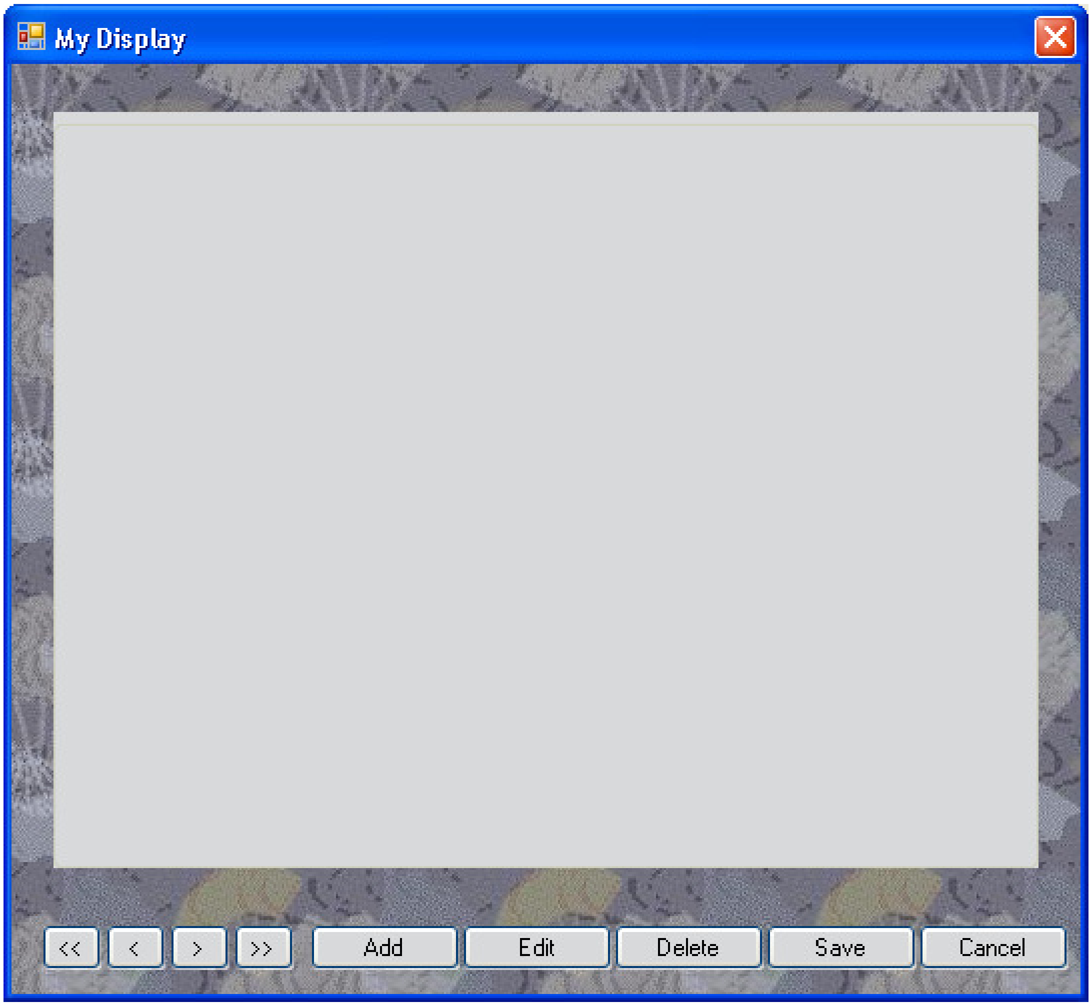


If you select this as the wallpaper for a display, it will tile to look like this:

Once you have selected the graphic file you would like to use, it is recommended that you find a background color that compliments the graphic. The background color will be used for boxes and text on the display.

Looking at the above example, the standard gray could work with this background picture, however, a color with a little more blue will compliment it slightly better. For example, accessing Display Properties and entering the red/green/blue values red=215, green=217, blue=219 in the Windows

Color Picker's Define Custom Color section creates a color that compliments this graphic nicely. Using those color setting, boxes and text items added to the display will look like this:



For this example, we also changed the button properties of each button to use the display's background color. (See *Customizing the Buttons*, earlier in this section, for instructions.)

Adding Objects to a Display

Once you are satisfied with your initial display settings, you are ready to start adding objects to your display. The objects that you can add to a display fall into two categories:

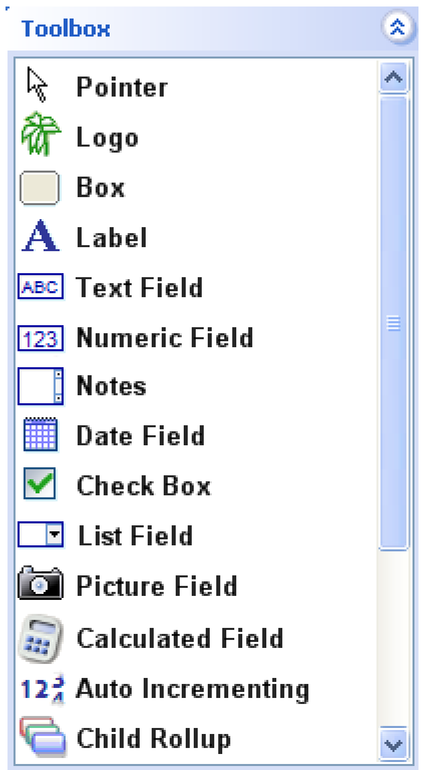
- Design elements are used to customize the appearance of the display. These objects do not contain data, but rather help you organize and decorate the display. Design elements will be the same for every record in your display. Design elements include logos, boxes, and labels.

- Data elements are the objects that will contain your data. These objects are fields that appear on the display as an empty frame. The data that is placed in the field will be different for every record. Data elements include text fields, numeric fields, notes fields, calculated fields, check boxes, and picture fields.

All of these objects are added using the Toolbox.

Using the Toolbox

The toolbox in the Tools pane provides access to all of the objects that you can add to a display.



Hint
Use the scroll box to see additional tools.

There are three ways you can add an item from the toolbox to a display: Double Click, Drag and Drop, and Click and Size.

Adding Items from the Toolbox using Double-Click

1 Use the scroll bar on the right side of the toolbox to locate the tool you would like to use.

2 Double click on the tool for the item you would like to add to your display. The properties box for the item will open.

3 Set the properties for the item using the appropriate *Setting Object Properties* section, below. When you save the properties, the item will appear in the upper left corner of the display in the default size.

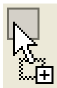
4 Move the item to the appropriate location on the display and size as needed using the instructions under *Working with Objects on the Display*, later in this chapter.

5 If you add multiple items in this fashion, they will be added on top of each other. You will need to click on each item and drag it into the desired position and size it if necessary.

ADDING ITEMS FROM THE TOOLBOX USING DRAG AND DROP

1 Use the scroll bar on the right side of the toolbox to locate the tool you would like to use.

2 Click on the desired tool in the toolbox and hold down the left mouse button while you move the mouse to the desired position on the display. Your mouse will appear like this:



When you release the mouse, the properties box will open.

3 Set the properties for the item using the appropriate *Setting Object Properties* section, below. When you save the properties, the new item will appear where you dropped it in the default size.

4 Size the item as necessary using the instructions under *Working with Objects on the Display*, later in this chapter.

ADDING ITEMS USING CLICK AND SIZE

1 Use the scroll bar on the right side of the toolbox to locate the tool you would like to use.

2 Select a tool from the toolbox by clicking on it with a single click of the mouse.

3 Draw the outline for the item on the display by clicking on the point in the display where you want the field to appear and holding the mouse button as you drag the item to the desired size. A box will appear where you drag, indicating the size that the item will be:

When you release the mouse, the properties box will open.

Hint

If you click on the screen instead of dragging, the object will be placed where you click in the default size.

4 Set the properties for the item using the appropriate *Setting Object Properties* section, below. When you save the properties, the new item will appear in the location and size of the box.

Note

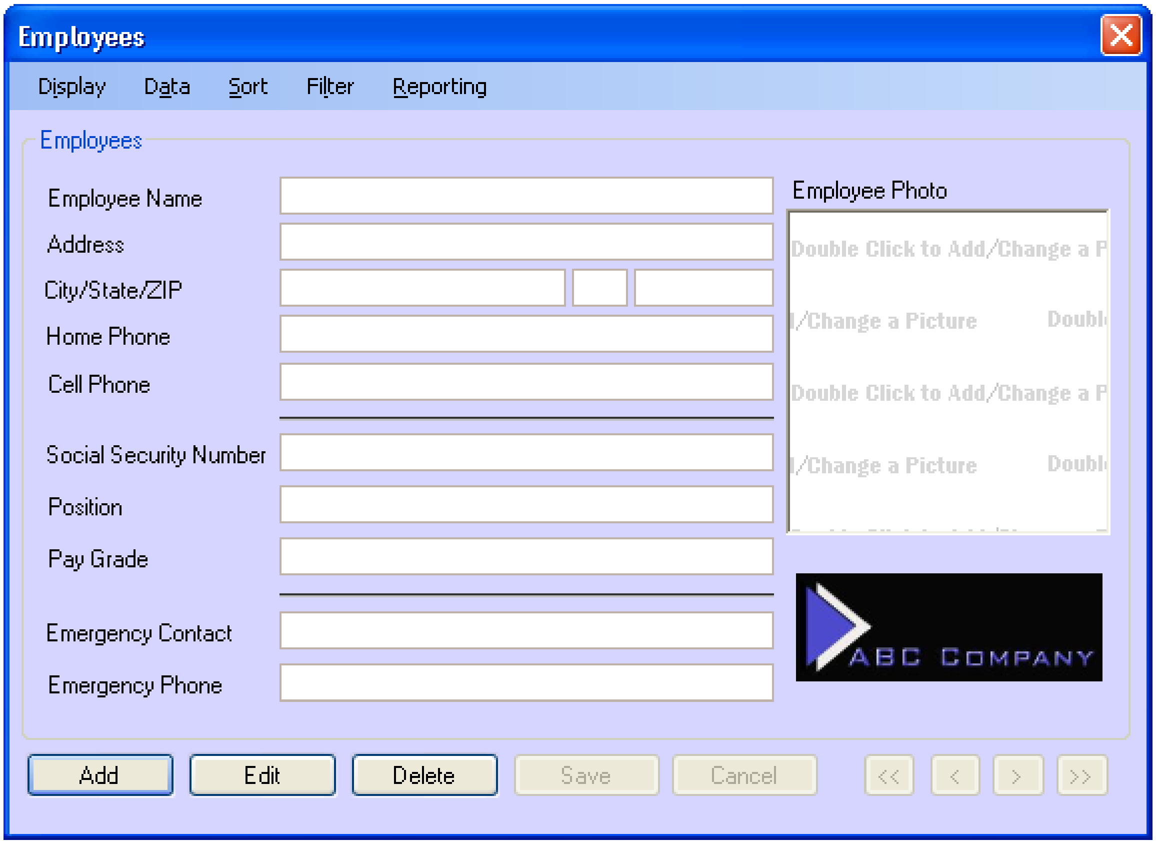
The height of text fields, numeric fields, and calculated fields is determined by the font that is used for the data in the field. The system will automatically adjust the field to the appropriate height to contain your data, but the width will remain the size that you specify.

Setting Object Properties

When you add items to your display from the toolbox, you will need to enter some basic information about the object, such as the name and font you would like to use. A properties box will open for each item you add, allowing you to fill in information relevant to that object. The following sections discuss each type of object you can add and provide instructions on completing the properties.

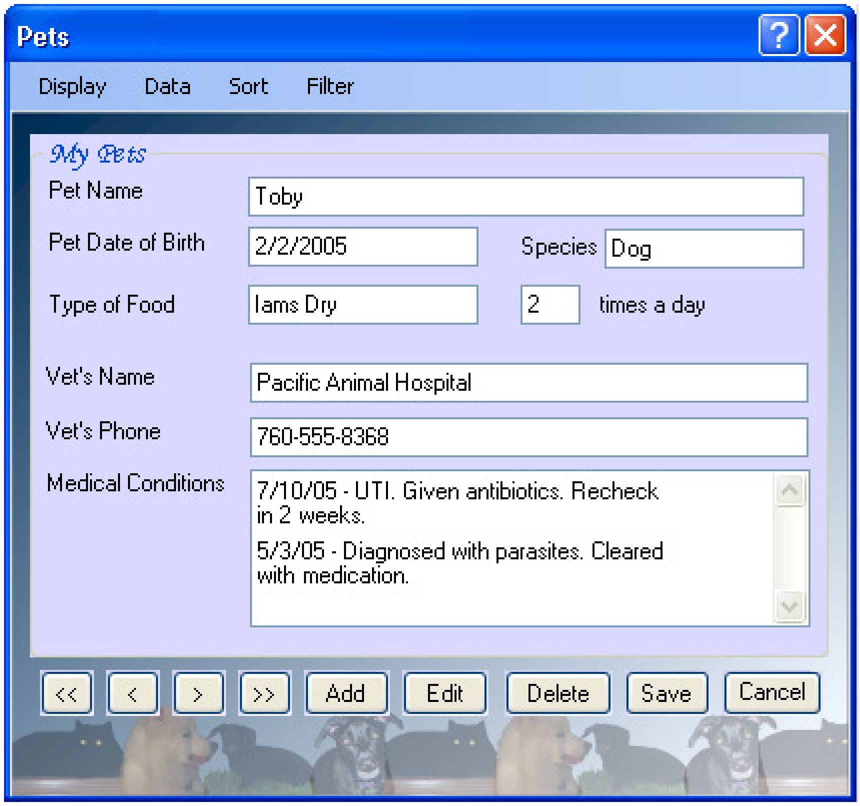
Using Logos on Your Display

The Logo tool allows you to place a picture, such as a logo, on your display. These differ from picture fields in that the same picture will appear on every record in your display. This tool can be used in many different ways. For example, you might use logos to place a company logo on a display:

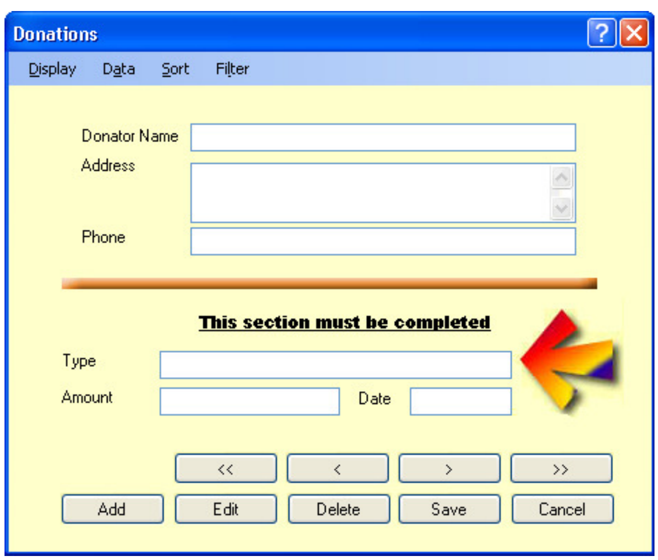


The logo tool can also be used if you would like to use a background picture that fills the display, but do not want it to tile. For example, I may want to use this graphic as my background:

If this was selected as the wallpaper and the display was smaller than the graphic, the graphic would be cut off. If the display was larger than the graphic, the graphic would tile. To avoid this, I can use the logo control to size this graphic to fit my display and put it behind my fields:



You can also use the logo tool to call attention to items on your display or to create your own decorative boxes and lines:



In this sample, there are two graphics on the page, the bar between the sections and the multi-colored arrow.

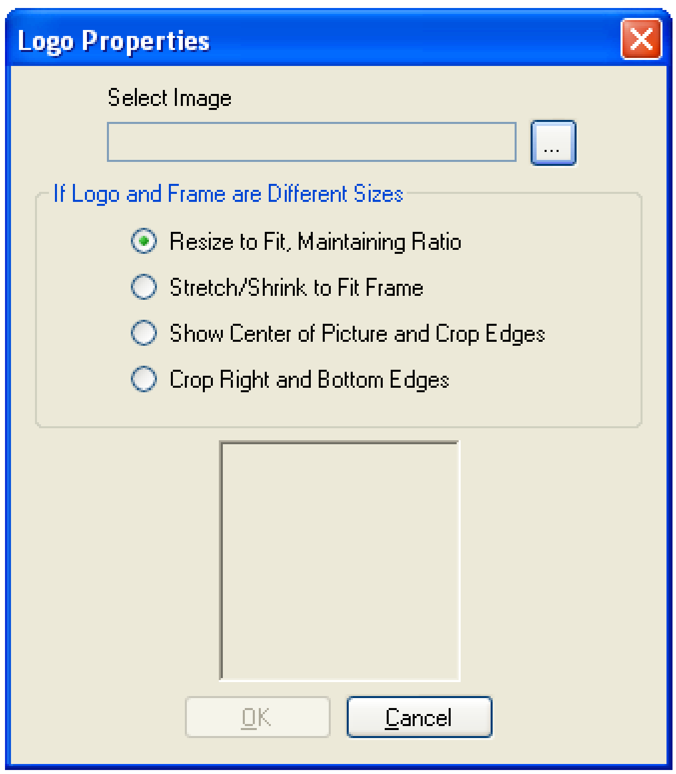
Many of the sample templates that were provided with your software or that are available for download from the www.databaseoasis.com website make use of the logo tool. You can review these displays to help get additional ideas on using graphics on your displays. The graphics that were used with any of the displays that you have downloaded are all available to you in the "c:\program files\database oasis\graphics" folder, including a selection of horizontal and vertical lines that can be used on your display.

Warning!

Some graphics files can be very large. Every time you add or move something on your display, the system must redraw the graphic file. If you select a large graphic file, this can slow down work in the designer. If you find this happening, consider using a smaller graphic.

Entering Logo Properties

1 Add a logo to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Logo Properties screen will open:



2 From the Select Image field, enter the path and file name of the picture file you would like to use, or click the button next to the field to access a Windows Open dialog box where you can navigate to the file.

Note

Once a graphic has been added as a logo, it is stored in the database. If you make any changes to the graphic file, you will need to access Logo Properties and select the graphic again.

3 The If Logo and Frame are Different Sizes radio buttons control how the picture should be handled if it does not fit within the frame that you have drawn for it.

- The Resize to Fit, Maintaining Ratio option will resize the picture to fit the frame, while using padding to maintain the height to width ratio of the image so it does not distort the picture. The edge (horizontal or vertical) of the picture that is proportionally the largest in comparison to the frame will be stretched or shrunk to fit within the frame. The proportionally smaller edge will be padded.

- Stretch/Shrink to Fit Frame will resize the picture to fit within the frame. If the picture is larger than the frame, it will be shrunk to fit. If the picture is smaller than the frame, it will be stretched to fit. If the dimensions of the picture are not proportional to the frame, the picture could be distorted when resized.

- Show Center of Picture and Crop Edges will center the picture within the frame. If the picture is larger than the frame, the edges will be trimmed to fit. If the picture is smaller than the frame, it will be centered with space around the edges.

Hint

Select this option if you are using one of the horizontal or vertical lines that provided in your "c:\program files\database oasis\templates\graphics" folder.

- The Crop Right and Bottom Edges option is similar to center and crop, but instead of centering, the picture is anchored to the upper left corner of the frame. If the picture is larger than the frame, it will be trimmed at the bottom and right edges. If the picture is smaller than the frame, there will be space around the bottom and right edges.

4 The sample picture at the bottom of the screen will show roughly how the picture will look with the different options. This can be used to help select the best sizing option for your graphic.

> **Note**
>
> Since this frame will not necessarily be of the same dimensions as the picture you are adding to the display, this is only an approximation. If the selected option does not work well with your display once you've saved the picture, you can access Logo Properties again by selecting Object Properties from the Tools Pane and adjust your settings.

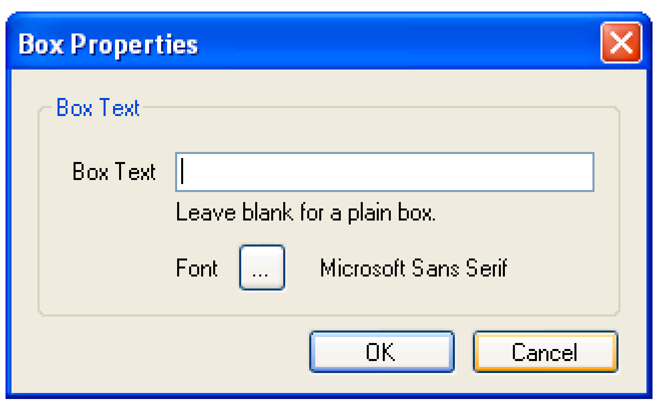
5 When you are satisfied with your settings, click OK. The graphic will be added to your display.

Using Boxes on Your Display

Boxes are used to make separations between groups of related objects. For example, you may have a display that contains basic customer information in one section, and job details in another. In this case, you may want to place a box around each of the groups of fields to create a logical separation. This not only makes the display more aesthetically pleasing, but also helps to make it easier to use.

Entering Box Properties

1 Add a box to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Box Properties screen will open:



2 You have the option of having a title appear at the top of your box to identify the contents. If you would like to use a title, enter it in the Box Text field. If you would prefer to have a plain box, leave this field blank. A box with the text will look like this:

A box without text will look like this:

3 If you have entered a title for your box, and would like to change the font used for the title, click the font button to open a Windows Font selection screen. The sample will show the font that is currently selected.

4 Click OK to add the box and return to the display.

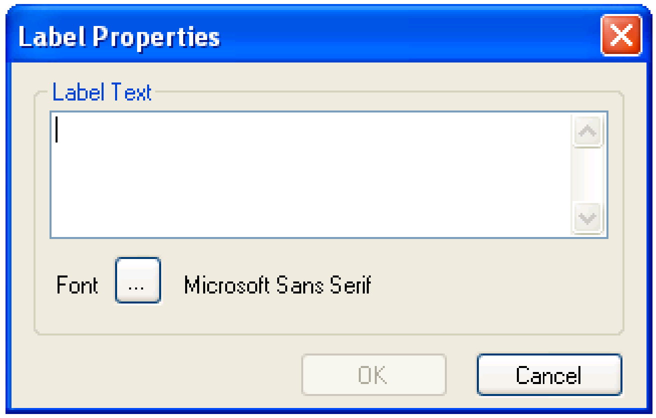
Using Labels on Your Display

Labels are on-screen text objects that are not attached to a field. They can be used to provide explanations, instructions, or to personalize your display.

Hint
Field prompts have to be unique; labels do not. Most field type objects give the option to display a prompt with the field. If you would like to use the same prompt for multiple fields, you can elect to not display the prompt and create labels instead.

Entering Label Properties

1 Add a label to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Label Properties screen will open:



2 Use the Label Text field to enter the text that you would like to appear in your label.

Note

Labels will appear as a single line. If you need your label to wrap to multiple lines, break the text up into separate labels.

3 If you would like to change the font used for the label, click the font button to open a Windows Font selection screen. The sample will show the font that is currently selected.

4 Click OK to save your label.

Using Text Fields on Your Display

Fields are used to store your data. Text fields are generally the most common objects used in most displays. Text fields allow you to enter any type of character, digit, or special character in the field. There are only four occasions when your data would not be stored in a text field:

- If you need to store freeform notes with the ability to wrap the data to multiple lines. In this case, you would use a notes field.
- If your data is a yes/no answer to a question, such as whether a customer will accept advertisement mailings. In this case, you could choose to use a text field and type “Yes” or “No” in the field, but it would be easier to use a check box instead.
- If your data is a picture that you would like to display with the record. In this case you would use a picture field.

- If you need to store some types of numbers. *In some cases*, you should store numbers in a numeric field, rather than a text field.

When thinking about whether to use a text field or a numeric field for numeric data, there are two things you need to consider: whether you might ever want to store anything besides numbers (such as special characters) in the field, and whether the numbers you will be storing should be read as a single number, or a series of digits.

Take, for example, a phone number. You will generally want to use the ( ) and - formatting characters with a phone number. In this case, you will need to use a text field rather than a numeric field.

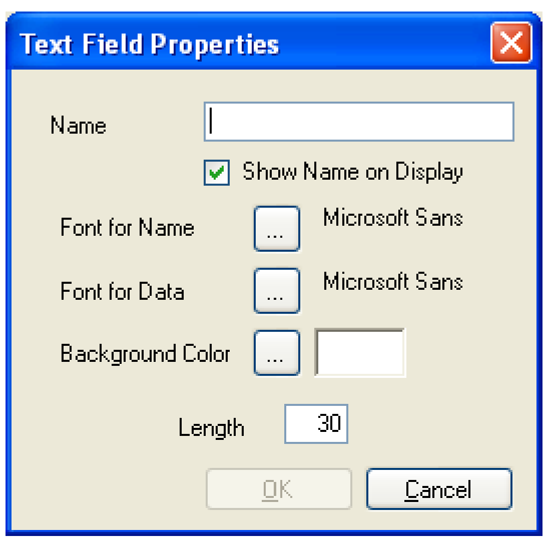
Additionally, when you place numbers in a text field, the software reads them as a string of individual digits. For example, in a text field, 10 is read as one, zero. When you use a numeric field, the software recognizes the digits as one number. In this case, 10 will be read as ten. This becomes a factor when sorting the contents of the field.

Again, using the phone number example, you would want the software to read and sort phone numbers as a series of digits. For example, (760) 555-1962 should be read as 7 6 0 5 5 5 1 9 6 2 rather than 7,605,551,962 (seven billion, six hundred five million, five hundred fifty-one thousand, nine hundred sixty two).

For an easy rule of thumb, unless you intend to do math calculations on the numbers contained in the field, consider using a text field.

Entering Text Field Properties

1 Add a text field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Text Field Properties screen will open:

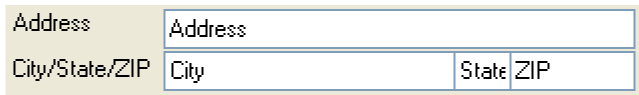


2 Enter a unique name that describes this field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this

is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

For example, you may have an address that contains the street address on one line, and City, State, and ZIP on the next line. If you want City, State, and ZIP next to each other with no prompt in between, you could unmark Display Prompt on each of these fields and put a label next to the entire line instead:



4. If you are displaying the name, the Font for Name setting controls the font that will be used for the name. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5. The Font for Data setting controls the font that will be used for the data you enter in your field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6. The Background Color field lets you control the background color of the text field. (This is the area where you will type your text in the field.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7. The Length setting controls how much text can be contained in your field. For example, if this is set to 30, you will only be able to enter up to 30 characters in the field. Field lengths are practically unlimited, but you should be aware that storage space will be reserved for the entire field length for each record, regardless of how much text is actually contained in the field. Additionally, if you enter more data in the field than can be contained in the display area, you will only be able to view all of the text if you click in the field and scroll to the right.

Note

If you have fields that need to contain a lot of data, consider using a Notes Field instead. This type of field only reserves space for the actual data that's contained in the field and it has the added advantage of wrapping data onto multiple lines, making it easier to view.

8. Click OK to save your field and return to the display.

123 Using Numeric Fields on Your Display

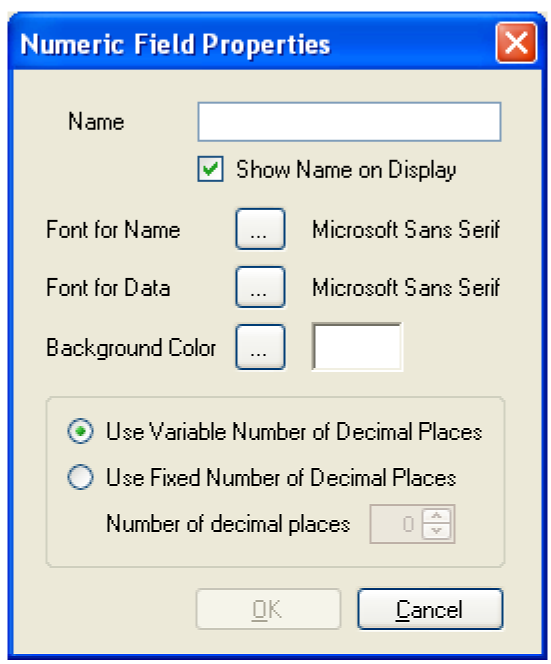
Numeric fields are special fields that contain only numbers. The only exceptions are that you will be able to place a decimal point (.) in the field, and/or the dash (-) at the beginning of the field to indicate that a number is negative. Commas will also automatically appear in the field as thousands separators.

Although you can place numbers in a text field, the software reads them as a string of individual digits. When you use a numeric field, the software recognizes the digits as one number. For example, in a numeric field, 10 will be read as ten. In a character field, 10 is read as one, zero. If you intend to do math calculations on the numbers contained in the field, you must use a numeric field. If you will need formatting characters with your number, such as the ( ) and - in a phone field, or the / in a date field, select a text type field instead.

> **Note**
>
> For more information on whether to use a numeric or character field to contain numbers, refer to the *Using Text Fields on Your Display* section, above.

ENTERING NUMERIC FIELD PROPERTIES

1 Add a numeric field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Numeric Field Properties screen will open:

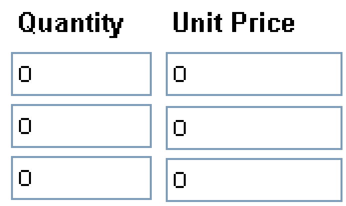


2 Enter a unique name that describes this field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this

is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

For example, you may have a column of similar numbers. In this case, you might choose not to display the name for each filed and use a label at the top of the column instead:



4 If you are displaying the name, the Font for Name setting controls the font that will be used for the field name on the display. If you would like to change the font, click on the button to select a font from the Font selection window. The sample text will display the font that will be used.

5 Font for Data controls the font that will be used for the data you enter in your field. If you would like to change the font, click on the button to select a font from the Font selection window. The sample text will display the font that will be used.

Hint

The most common type of font is a proportional font. A proportional font spaces the characters based on the width of each character, so the letter i takes up less space than the letter w. A non-proportional font assigns the same amount of space to each character, regardless of the width of the character. Non-proportional fonts are useful if you have columns of numbers you would like to line up. One of the most common non-proportional fonts is `Courier New`.

6 The Background Color field lets you control the background color of the numeric field. (This is the area where you will type your number in the field.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7 The decimal place radio buttons allow you to specify how many decimal places your field should use. If you do not require a specific number of decimal places for the data in the field, leave the Use Variable Number of Decimal Places radio button selected.

If this option is selected, the field will default to 0 with no decimal point. You will be able to place a decimal point in the field and have up to six decimal places following. For example, the field could contain 1, 1.5, or 1.25. Any zeros at the end of a decimal will be stripped off (e.g., if you enter 1.30, it will appear as 1.3).

8 If you would like to force the data to have the same number of decimal places in all records, select the Use Fixed Number of Decimal Places radio buttons. Enter the number of decimal places you would like to use in the Number of decimal places field by clicking the up arrow button to increase the number, or the down arrow button to decrease the number.

If this option is selected, the field will default to 0. and the number of decimal places selected, for example 0.00. Using the earlier example with two decimal places, your field would contain 1.00, 1.50, and 1.25.

Hint

If you would like to limit the field to whole numbers, set the number of decimal places to zero.

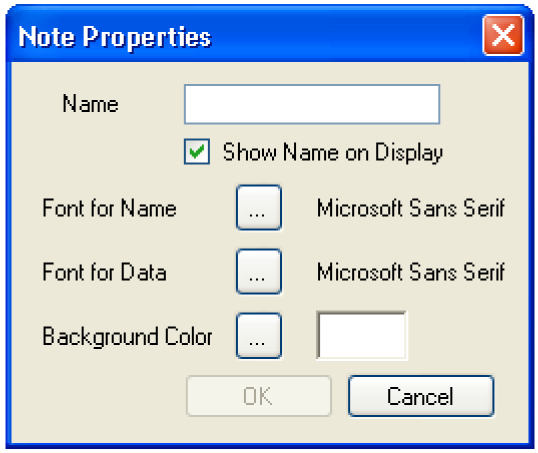
9 Click OK to save your field and return to the display.

Using Notes Fields on Your Display

Notes fields can contain an unlimited amount of data. The data will wrap to multiple lines within the field. If there is more data than will display in the frame of the notes field, scroll bars will appear at the right edge of the field to allow you to scroll down through the data.

Entering Notes Properties

1 Add a notes field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Notes Properties screen will open:



2 Enter a unique name for the field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 If you are displaying the name, the Font for Name setting controls the font that will be used for the name on the display. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5 The Font for Data setting controls the font that will be used for the data you enter in your notes field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6 The Background Color setting controls the background color of the notes field. (This is the area where you will type your text in the notes field.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7 Click OK to save your field and return to the display.

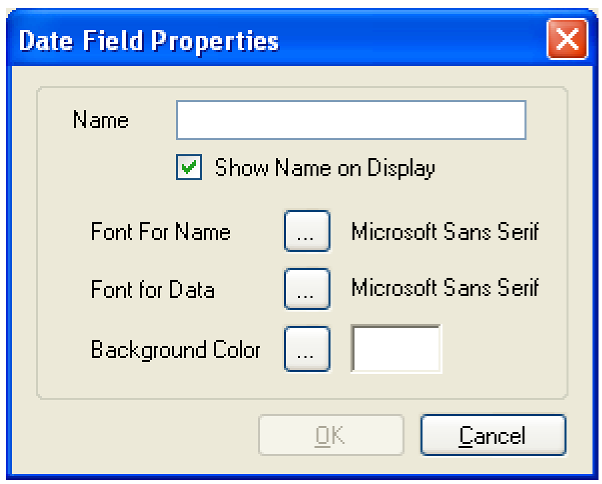
Using Date Fields on Your Display

Date fields are used to store dates. Date fields appear on the display with a calendar icon. When entering data in the field, users can either type in the date, or click on the icon to select the date from a popup calendar.

Data in the field will be formatted using your Windows date settings. Database Oasis will recognize the value as a date, allowing you to sort records chronologically, or filter and search for records based on the selected date.

ENTERING DATE FIELD PROPERTIES

1 Add a date field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Date Field Properties screen will open:



2 Enter a name that describes this date in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 If you are displaying the name, the Font for Name setting controls the font that will be used. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5 The Font for Data setting controls the font that will be used for the dates you enter in your field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6 The Background Color field lets you control the background color of the date field. (This is the area where you will enter the date in the field.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7 Click OK to save your date field and return to the display.

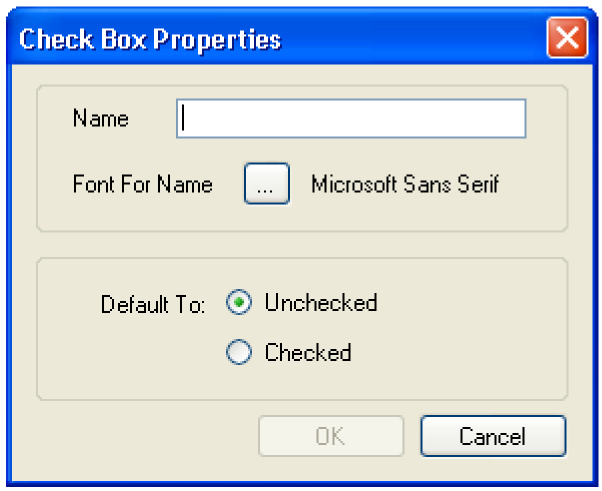
Using Check Boxes on Your Display

Check boxes are true/false flags that you can add to a display. For example, you may place a check box on your screen stating “Customer accepts mailers”

Check boxes appear as a small box on the display. When you click in the box, a mark appears. Using the above example, a mark would indicate that the customer does accept mailers. No mark would indicate that the customer does not accept mailers.

Entering Check Box Properties

1 Add a check box to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Check Box Properties screen will open:



2 Enter the text that you would like to use to describe what the check box should be used for in the Name field. This text will appear next to the check box on the screen. The name should be worded in such a way that a mark in the check box will indicate that the statement is true and no mark will indicate that the statement is false.

3 If you would like to change the font that is used for the check box name, click the Font for Name button to open a Font selection screen. The sample text will show what your font will look like.

4 This Default to radio buttons let you specify whether or not the check box should be marked by default. If you select Checked, the check box will be marked for any new records that are added to your display. If you select Unchecked, the check box will be unmarked for new records. You can mark or unmark the check box for individual records.

Note

If you add a check box to an existing display, the check box will be unmarked for all existing records, regardless of this setting.

5 Click OK to save your settings and return to the display.

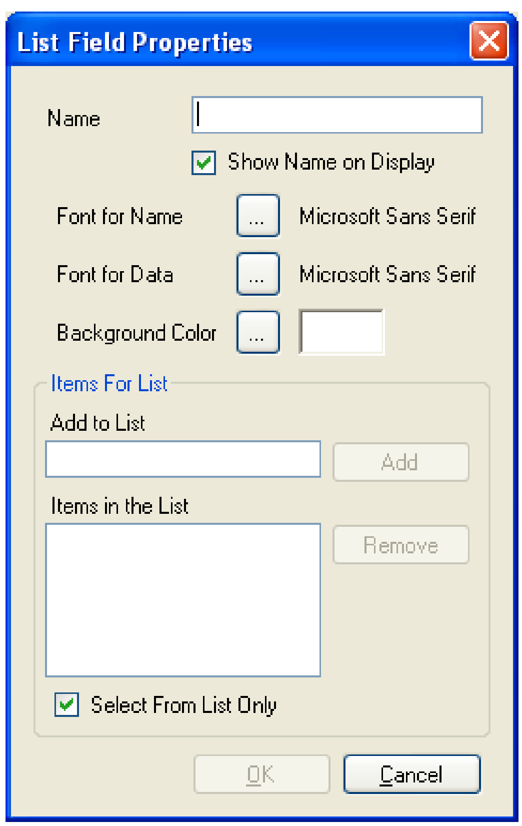
Using List Fields on Your Display

List Fields allow you to pre-configure a list of items that can be entered in the field. List fields appear on the display with a small arrow to the right of the field. When users click on the arrow, a list of data entry items appears. Selecting an option in the list places that item in the field, facilitating quick and consistent data entry.

For example, you may have a field for how the customer heard of your company. If users sometimes enter Phone Book and sometimes enter Yellow Pages, the entries will not appear together when filtering and sorting. Using a list field lets you standardize on one of the options and ensure that the data is consistent.

ENTERING LIST FIELD PROPERTIES

1 Add a list field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The List Field Properties screen will open:



2 Enter a name that describes this field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 If you are displaying the name, the Font for Name setting controls the font that will be used. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5 The Font for Data setting controls the font that will be used for the data you enter in your field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6 The Background Color field lets you control the background color of the numeric field. (This is the area where you will type your number in the field.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7 The Items for List section allows you to set up the items that will appear in the list when the field is used. To add an item to the list, enter it in the Add to List field and click the Add button. The option will appear in the Items in the List area.

8 The Items in List box displays the options that will be available in the list when the field is used on the display. To remove an item from the list, highlight it in the Items in the List box and click the Remove button. The item will disappear from the list.

9 The Select from List Only check box allows you to control whether users are able to type in the field, or must select from the list. If this check box is marked, users will not be able to manually type an entry in the field and must select from the list. If it is unmarked, users will be able to select from the list for faster data entry, but will also have the option of manually typing in the field if the desired data is not in the list.

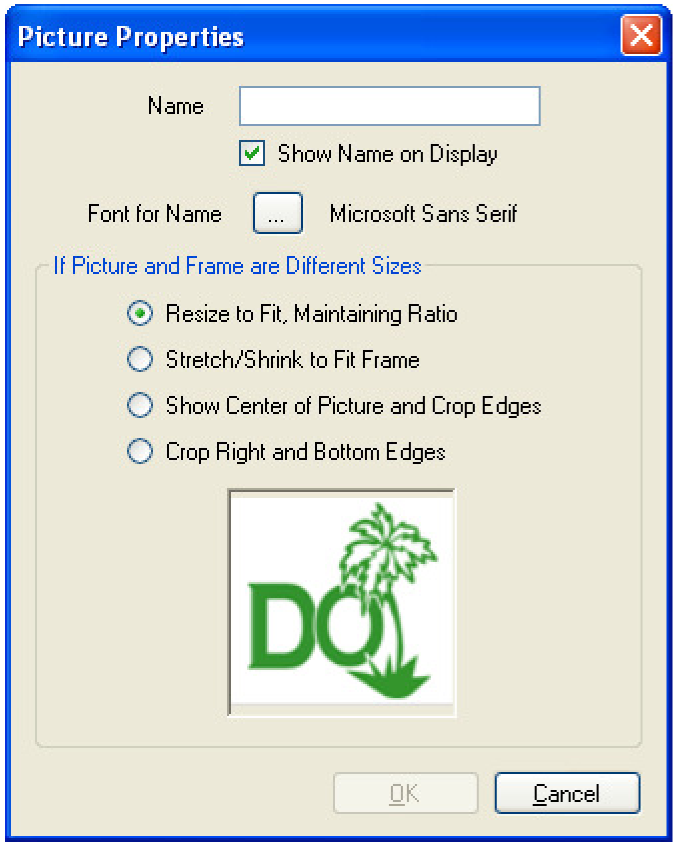
10 Click OK to save the field.

Using Picture Fields on Your Display

Picture Fields allow you to include record-specific pictures with your display. For example, if you have a display that catalogues collectibles, you may include a picture of each item in your collection with its description.

ENTERING PICTURE FIELD PROPERTIES

1 Add a picture field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Picture Properties screen will open:



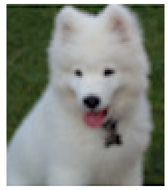
2 Enter a name that describes this field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 If you are displaying the name, the Font for Name setting controls the font that will be used. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5 When you add a picture field to a display, you draw a frame which sets the size of the picture. The pictures you add to your records may not be the exact size of the frame. The radio buttons on this screen control how pictures are adjusted to fit within the frame.

To demonstrate the options, we'll use two graphics of different sizes:



With a frame that is this size:

- The Resize to Fit, Maintaining Ratio option is similar to Stretch/Shrink to Fit Frame in that the picture will be resized, except that it will use padding to maintain the height to width ratio of the image so it does not distort the picture. The edge (horizontal or vertical) of the picture that is proportionally the largest in comparison to the frame will be stretched or shrunk to fit within the frame. The proportionally smaller edge will be padded. If it is short and long compared to the frame, it will be padded at the top and bottom edges:

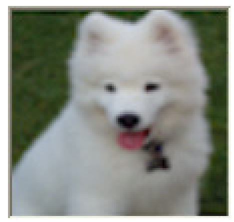
  

  If the picture is tall and narrow compared to the frame, it will padded at the left and right edges:

- The Stretch/Shrink to Fit Frame option will resize the picture to fit within the frame. If the picture is larger than the frame, it will be shrunk to fit:

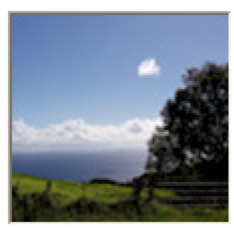
If the picture is smaller than the frame, it will be stretched to fit:



Note

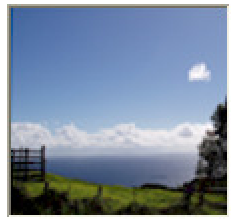
If the dimensions of the picture are not proportional to the frame, the picture could be distorted when resized.

- The Show Center of Picture and Crop Edges option will center the picture within the frame. If the picture is larger than the frame, the edges will be trimmed to fit:



If the picture is smaller than the frame, it will be centered with space around the edges:

- The Crop Right and Bottom Edges option is similar to Show Center of Picture and Crop Edges, but instead of centering, the picture is anchored to the upper left corner of the frame. If the picture is larger than the frame, it will be trimmed at the bottom and right edges:



If the picture is smaller than the frame, there will be space around the bottom and right edges:

6 Click OK to save your selection and return to the display.

Using Calculated Fields on Your Display

Calculated fields allow you to perform math on numeric fields, or string two fields together. For example, if you have a display that contains contact information, you may have separate fields for the first and last name and use a calculated field to display the full name.

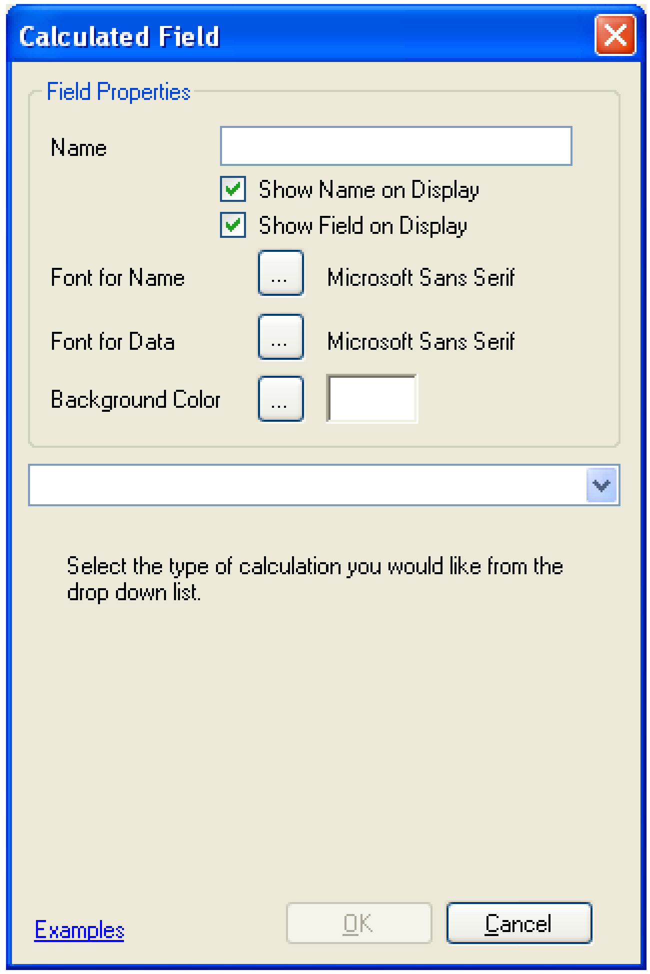
The results of your calculation will appear in the field on your display. You will not be able to directly modify the contents of the field.

There are six different types of calculations you can build:

- Math Calculation Using Two Numeric Fields
- Math Calculation Using a Field and Another Number
- Combine Two Fields
- Combine a Field and Another Value
- Sum or Average Numeric Fields
- Date Calculation - Date Before or After
- Date Calculation - Days Since

ENTERING CALCULATED FIELD PROPERTIES

1 Add a calculated field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Calculated Field Properties screen will open:



2 Enter a unique name for the field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 In some cases, you may need a calculation, but not actually want to show it on the display. For example, you may set up a calculation that is exclusively used in reports, or you may set up a calculation that is just required for a second calculation that you do want to display. The Show Field on Display check box lets you add a field without placing it on your display outside of the designer. (The field will continue to be visible in the designer so you can edit or delete it.) It will be available everywhere you have a field list, but will not appear on the display itself when you work with

records. Leave this check box marked to display the field, or unmark it to hide the field.

Hint

To save space on your display when working in the designer, consider sizing the field as small as possible and placing it at the edge of the display.

5 If you are displaying the name, the Font for Name setting controls the font that will be used for the name on the display. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6 The Font for Data setting controls the font that will be used for the results of the calculation that appear in the field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

7 The Background Color field lets you control the background color of the calculated field. (This is the area where the results of the calculation will appear.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

8 The Select the type of calculation list contains the types of calculations that you can set:

Math Calculation Using Two Numeric Fields - This option will allow you to perform a calculation based on the values in two numeric fields.

Math Calculation Using a Field and Another Number - This option will allow you to perform a calculation based on the value in a numeric field and a fixed value.

Combine Two Fields - This option lets you take the information in two fields and have them appear together in one field.

Combine a Field and Another Value - This option allows you to add something to the beginning or end of one of your fields.

Sum Numeric Fields - This option allows you to add together the values in a selection of multiple numeric fields.

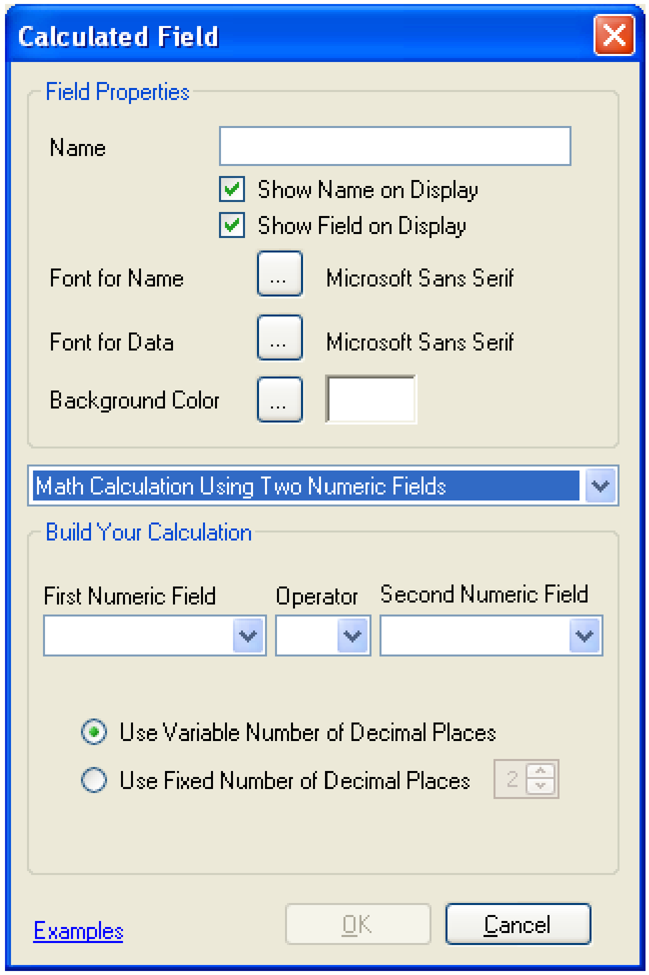
Date Calculation - Date Before or After – This option will return a date that is *X* number of days before or after the date contained in a date field.

Date Calculation - Days Since – This option will return the number of days that have passed since the date in a date field.

9 Follow the instructions below for each type of calculation.

SETTING A MATH CALCULATION USING TWO NUMERIC FIELDS

1 Add a calculated field following the instructions above and select the Math Calculation Using Two Numeric Fields option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 The First Numeric Field list will contain any numeric fields that you have added to your display. Select the first field you would like to use in your calculation from the list.

Note

The calculation will be analyzed in the order of the fields. If you are performing a calculation using subtraction or division, make sure you select the field you want the second number subtracted from or divided into in this first field.

3 Select the type of calculation you would like to perform from the list of math operators. Select:

+ (Add) to add the numbers contained in the fields;

- (Subtract) to subtract the number contained in the Second Numeric Field from the number contained in the First Numeric Field;

* (Multiply) to multiply the numbers contained in the First and Second Numeric Fields;

/ (Divide) to divide the contents of the First Numeric Field by the contents of the Second Numeric Field.

4 Select the second numeric field you would like to use in the calculation from the Second Numeric Field list.

Example: You have a display that tracks sales of a widget. You would like to be able to calculate sales tax on the price of the widget. Sales are made to people in different states, so each customer could have a different tax rate.

Solution: Add a numeric field to contain the price, and a second numeric field to contain the tax rate. Add a calculated field using the Math Calculation Using Two Numeric Fields option. Use the following setting:

From the First Numeric Field list, select your price field.

From the Operator list, select * [multiply].

From the Second Numeric Field list, select your tax rate field.

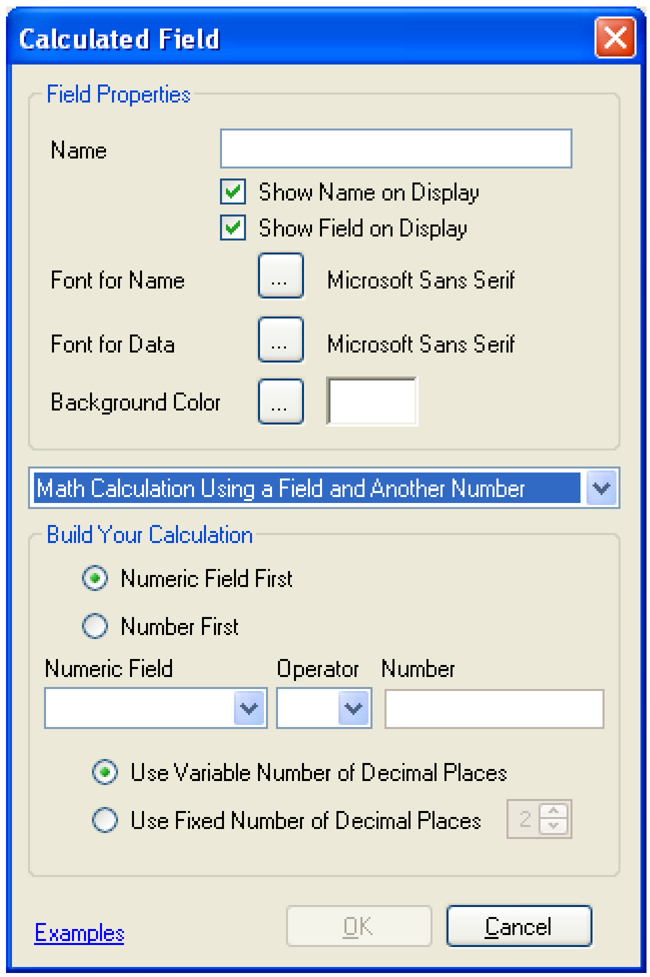
When you add records, enter the price of the widget in the price field and the appropriate tax rate in the tax rate field as a decimal. For example, if your tax rate is 7.5%, enter .075 in the field; if your tax rate is 6%, enter .06. If you enter $10.00 as your price, and .075 as your tax rate, the system will calculate sales tax and display $0.75 in the calculated field.

5 The decimal places radio buttons let you configure how many decimal places will display in the calculation results. Select Use Variable Number of Decimal Places if you would like to display the number of decimal places found in the data for the selected numeric fields. To specify the number of decimal places, select Use Fixed Number of Decimal Places and enter the number (up to six) in the field.

6 When you are satisfied with your settings, click OK to save the field and return to the display.

Setting a Math Calculation Using a Field and Another Number

1 Add a calculated field following the instructions above and select the Math Calculation Using a Field and Another Number option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 The radio buttons on the screen control the order in which the values will be calculated. This is useful in the case of a calculation using subtraction or division as it allows you to control whether the numeric field should be subtracted from or divided into the fixed number, or vice versa. If you would like your calculation to use the field first, leave the Numeric Field First radio button selected. If you would like your calculation to use the fixed number first, select the Number First radio button.

The Number and Numeric Field fields on the screen will change position based on your selection.

3 The Numeric Field list will contain any numeric fields that you have added to your display. Select the field you would like to use in your calculation from the list.

4 Select the type of calculation you would like to perform from the list of math operators. Select:

+ (Add) to add the number contained in the field and the constant value;

- (Subtract) to subtract either the constant value from the number contained in the field, or vice versa, depending on your selection for the order radio buttons, below;

* (Multiply) to multiply the number contained in the field and the constant value;

/ (Divide) to divide either the number contained in the field by the constant value, or vice versa, depending on your selection for the order radio buttons, below.

5 Enter the number that will be used in the calculation in the Number field.

Example: You have a display that tracks sales of a widget. You would like to be able to calculate sales tax on the price of the widget. Sales are only made to people locally, so each customer will have the same tax rate.

Solution: Once you have created the numeric field that will contain the price, add a calculated field using the Math Calculation Using a Field and Another Number option.

Use the following setting:

From the Numeric Field list, select your price field.

From the Operator list, select * [multiply]

In the number field, enter your tax rate. The tax rate should be entered as a decimal.

For example, if your tax rate is 7.5%, enter .075 in the field; if your tax rate is 6%, enter .06.

Make sure the Numeric Field First Radio button is selected.

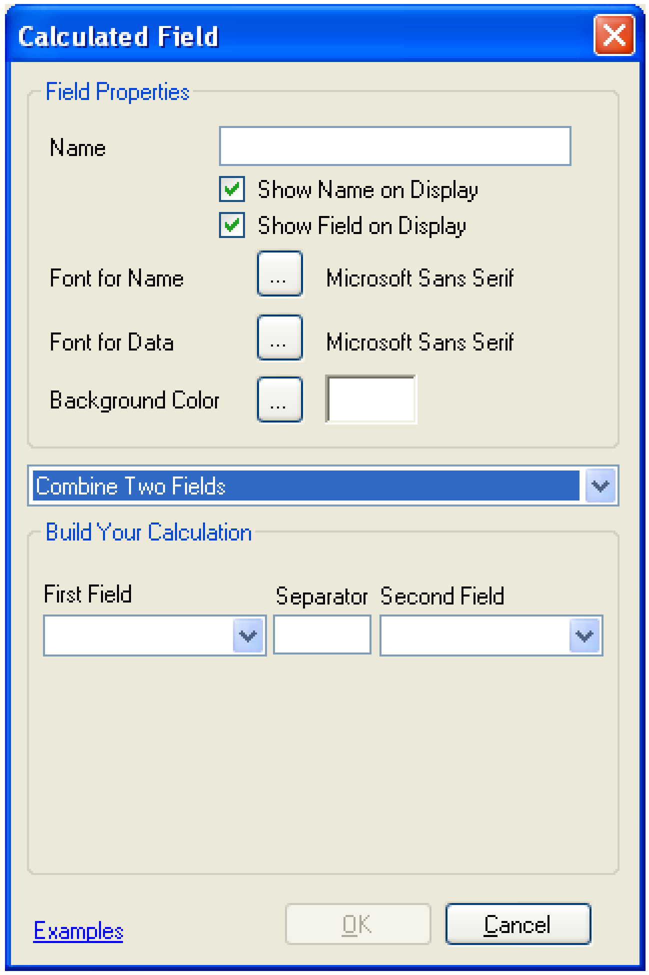
When you add records, enter the price of the widget in the price field. The system will calculate the sales tax based on your fixed value and display the tax in the calculated field. For example, if you enter $10.00 as your price and your sales tax was .08, the system will display $0.80 in the calculated field.

6 The decimal places radio buttons let you configure how many decimal places will display in the calculation results. Select Use Variable Number of Decimal Places if you would like to display the number of decimal places found in the data for the selected numeric fields. To specify the number of decimal places, select Use Fixed Number of Decimal Places and enter the number (up to six) in the field.

7 Click OK to save your calculated fields and return to the display.

COMBINING TWO FIELDS

1 Add a calculated field following the instructions above and select the Combine Two Fields option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 The First Field list will contain all of your text and numeric fields. Select the first field you would like to use from the list.

3 Use the Separator field to place a separation between the two fields. If is no separator entered, the contents of the two fields you select will be directly next to each other in the calculated field. By default, this will contain a space. If you would like the fields right next to each other with no space between them, remove the space from this field. If you would like a different separator, enter it in this field.

Hint
The separator text can be used to further expand on the relationship between the data in the two fields. For example, if your fields contain a due date and an amount due, you could place " is due on " as the separator text. The calculated field will then display: [amount] is due on [date].

4 Select the second field you would like from the Second Field list.

Example: You have a display that tracks membership information for your club, including dues payments. You have a field that contains the date when the next payment is due for each member, and a second field for the amount of the dues. You would like to have a field that displays the amount and due date together.

Solution: Once you have created a text field to contain the due date and a numeric field to contain the amount, add a calculated field using the Combine Two Fields option. Use the following settings:

From the First Field option, select the amount due field.

In the separator, enter " is due on " (without the quotation marks). Notice that there are spaces before and after the text. It's important that you include spaces around the "is due on" so that the words aren't right up against each other.

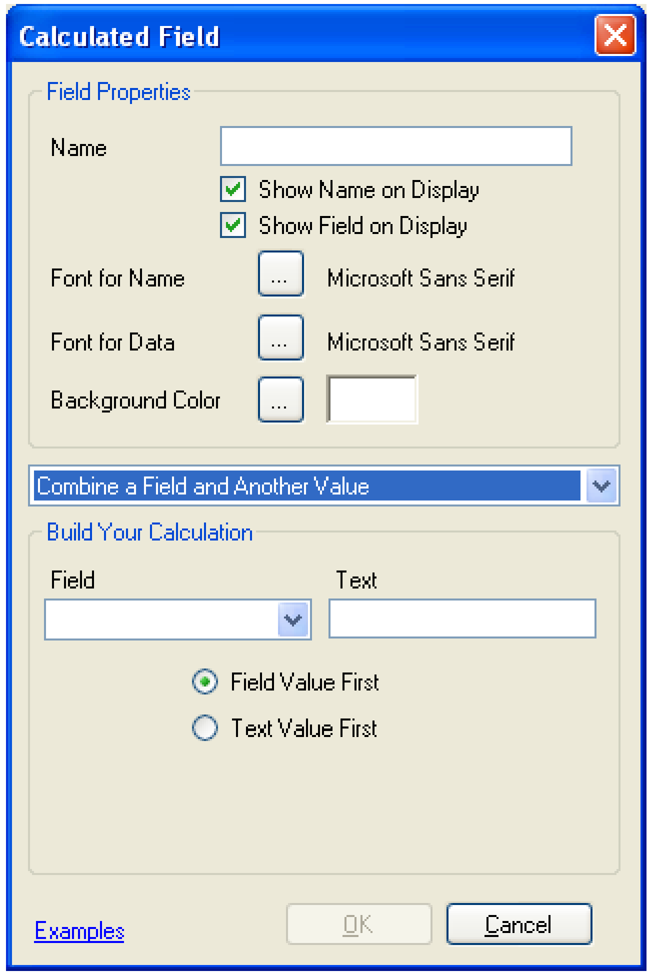
From the Second Field option, select the due date field.

When you add records, enter the due date and the amount due for each member. If the amount due is $30.00 and the due date is 5/23/07, the calculated field would display: 30.00 is due on 5/23/07.

5 Click OK to save your calculated fields and return to the display.

COMBINING A FIELD AND ANOTHER VALUE

1 Add a calculated field following the instructions above and select the Combine a Field and Another Value option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 The Field list will contain all of your text and numeric fields. Select the field you would like to use from the list.

3 Enter the text you would like to combine with your field value in the Text field.

4 The order radio buttons on the screen control the order in which the field data and text value will appear. If you would like your calculated field to display the field, then the text, leave the Field Value First radio button selected. If you would like to display the text, then the field value, select the Text Value First radio button. The Field and Value fields will change positions on the screen, based on your selection.

Example: You have a display that tracks donations for your non-profit organization. You have a field that contains the date of the last donation for each contributor. You would like a large message at the top of the screen that contains "The last donation was received on [date]."

Solution: Once you have created your date of last donation field, add a calculated field using the Combine a Field and Another Value option. Use the following settings:

From the Field list, select the date of last donation field.

In the Text field, enter "The last donation was received on " (without the quotation marks. Notice that there is a space after "on". It is importation that you include the space so the date isn't right up against the text.

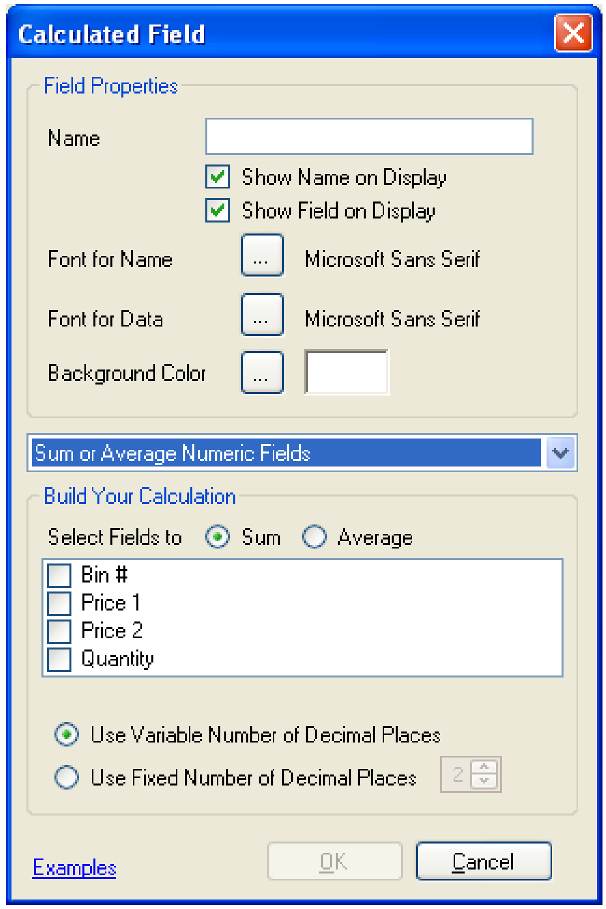
Select the Text Value First radio button.

When you add records, enter the last payment date for each contributor. If the last date was 6/12/06, the calculated field would read "The last donation was received on 6/12/06".

5 Click OK to save your calculated fields and return to the display.

SUM OR AVERAGE NUMERIC FIELDS

1 Add a calculated field following the instructions above and select the Sum or Average Numeric Fields option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 Specify whether you wish to add the fields together, or create an average. Select the Sum radio button to produce a total of the values in the fields, or the Average radio button to produce an average (total divided by the number of fields).

3 The Select Fields to Sum/Average list will contain all of the numeric fields that have been added to your display. Click in the check box next to each numeric field that you would like to include in your calculation. All fields with a mark next to them will be added together and either the total or the average will appear in your calculated field.

Example: You have created a display for keeping track of your calorie intake for the day. You have fields to contain the calories of breakfast, lunch, dinner, and two snacks. You would like a field that shows the total calories for the day.

Solution: Once you have created numeric fields for each of the meals and snacks, add a calculated field using the Sum Numeric Fields option. Use the following setting:

In the Select Fields to Sum list, place a check mark in each of the calories fields.

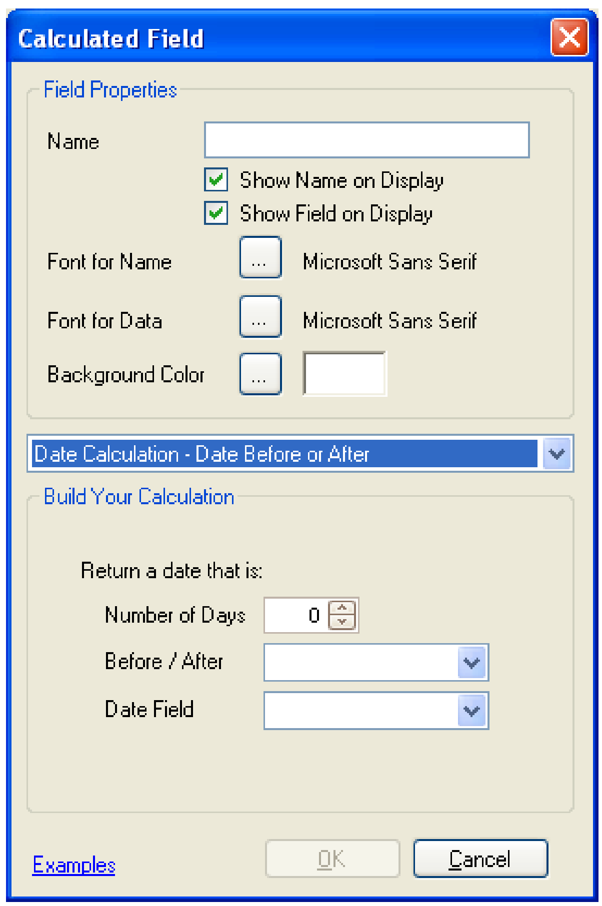
When you add your records, enter the calories in each of the appropriate fields and a sum will be automatically calculated when you save the record. For example, if you had 300 calories for breakfast, 520 calories for lunch, one snack of 150 calories, no second snack, and 730 calories for dinner, the calculated field will display 1700.

4 The decimal places radio buttons let you configure how many decimal places will display in the calculation results. Select Use Variable Number of Decimal Places if you would like to display the number of decimal places found in the data for the selected numeric fields. To specify the number of decimal places, select Use Fixed Number of Decimal Places and enter the number (up to six) in the field.

5 Click OK to save your calculated fields and return to the display.

Returning a Date Based on Another Date

1 Add a calculated field following the instructions above and select the Date Calculation - Date Before or After option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 In the Number of Days field, enter the number of days before or after the date in a date field you would like to calculate. The field can only contain whole numbers. Enter the date by typing in the field, or use the up and down arrow buttons to the right of the field (also known as spinner buttons) to increment the number up or down by one.

3 In the Before / After field, select whether you would like to return a date that is the specified number of days before or after the date in the date field. Select Before to return an earlier date. Select After to return a later date.

4 The Date Field list will show all of the date fields in your display. Select the date field that should be used as a basis for this calculation from the list.

Example: You have a display for keeping track of warranties. Products are under warranty for the first 30 days after purchase. You would like a field that shows the warranty expiration date.

Solution: Once you've set up a date field for the purchase date, add a calculated field using the Date Calculation – Date Before or After option. Use the following setting:

In the Number of Days field, enter 30.

In the Before / After field, select After.

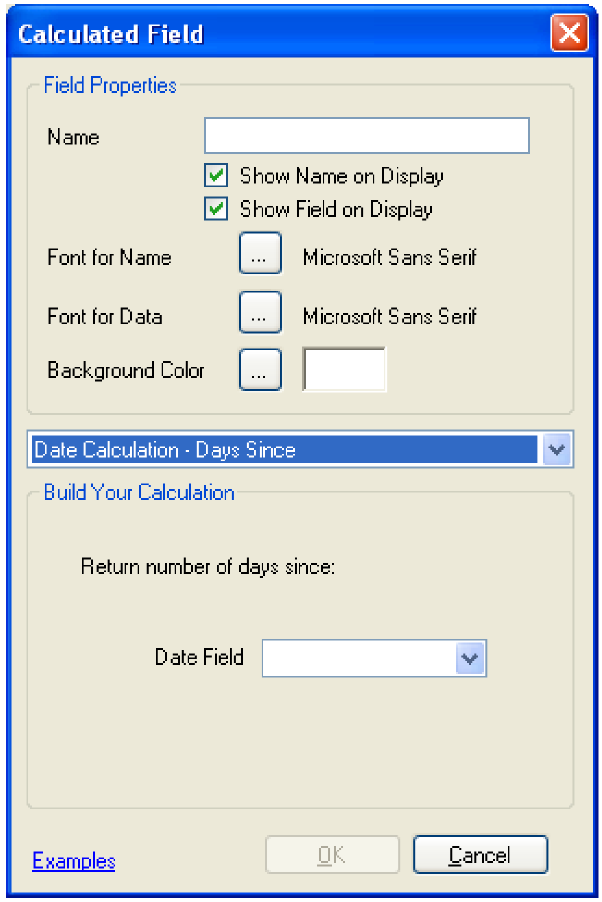
In the Date Field field, select Purchase Date.

When you add your records, enter the date of purchase in the Purchase Date field. The calculated field will automatically show the warranty expiration date.

5 Click OK to save your calculated fields and return to the display.

RETURNING THE NUMBER OF DAYS SINCE A DATE

1 Add a calculated field following the instructions above and select the Date Calculation – Days Since option from the Select the type of calculation list. The screen will expand to include the settings for this type of calculation:



2 The Date Field list will show all of the date fields in your display. Select the date field that should be used as a basis for this calculation from the list.

Example: You have a display that keeps track of payment due dates. You would like to send a reminder to any customer who are more than five days past due on their payments.

Solution: Once you've set up a date field for the payment date, add a calculated field using the Date Calculation – Days Since option. Use the following setting:

In the Date Field field, select Payment Due Date.

When you add your records, enter the customer's due date in the Payment Due Date field. The calculated field will automatically show the number of days since the payment was due. You may then set a filter where the value in the calculated field is greater than five.

Note

If the current date is before the date in the selected date field, the calculation will show as a negative number.

Hint

If you would like to calculate years, for example to return a person's age from his or her birth date, you can create a second calculated field that divides the number in the number of days by 365.

3 Click OK to save your calculated fields and return to the display.

Using Auto Incrementing Fields on Your Display

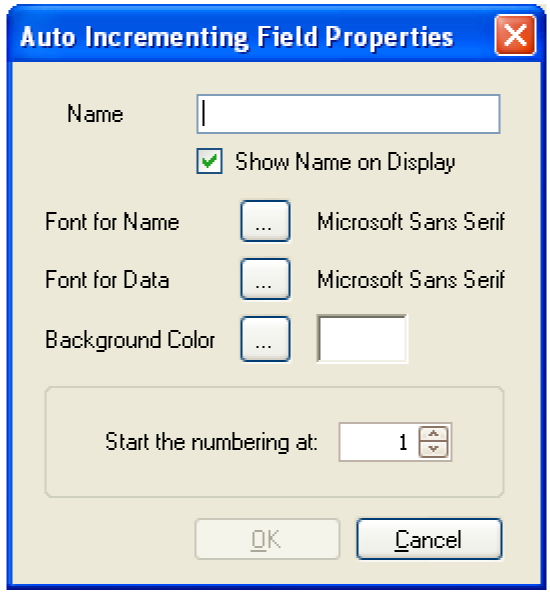
Auto incrementing fields are numeric fields that increment by 1 for each new record that you add. These are commonly used to create a unique number, such as a customer number or invoice number.

Hint

You can use an auto incrementing field in a calculated field to add a prefix or suffix to the number.

Entering Auto Incrementing Field Properties

1 Add an auto incrementing field to your display using one of the methods detailed in the *Using the Toolbox* section, above. The Auto Incrementing Field Properties screen will open:



2 Enter a unique name for the field in the Name field.

3 If you would like to include the name with the field on the display, mark the Show Name on Display check box. Unmark it if you do not want the name to display. If this is unmarked, the name will not appear on the display, but will be used to identify the field in list view windows and anywhere else the field is referenced.

4 If you are displaying the name, the Font for Name setting controls the font that will be used for the name on the display. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

5 The Font for Data setting controls the font that will be used for the number that is automatically populated in the auto incrementing field. If you would like to change the font, click on the button to select a font from the Font selection screen. The sample text will display the font that will be used.

6 The Background Color setting controls the background color of the auto incrementing field. (This is the area where the number will appear.) The default color is white. If you would like to use a different color, click the button to open the Windows Color picker. The box on the screen will display the selected color.

7 The Start the numbering at field controls the starting number for the first record that you add. For example, if you start the number at 1000, the first record will be numbered 1000, the second 1001, the third 1002, etc. The default starting number is 1.

Note

If you are adding an auto incrementing field to a display that already contains records, the starting number will be applied to the first record in your display.

8 Click OK to save your field and return to the display.

Using Child Rollups on Your Display

PRO If you have a child display set up in Professional Edition, you can have multiple child records associated with each parent record in this display. Child rollups allow you to view a table with information from the child level.

For information on using child rollups, refer to the *Adding Child Information to the Parent Level* heading in the *Creating Child Displays* section, later in this chapter.

Working with Objects on the Display

Once you have added the desired items to the display, you will need to arrange them in a way that makes the display as easy to use as possible. Here are some basic design principals you may find useful, especially if other people will be using your display:

- Pay attention to the order of the fields. Most people will look at a computer screen the way they look at a book. For most English speaking people, this means they will read the display from left to right, top to bottom. As you place items on the display, think about the order that the information should be entered and place the fields in that order where possible.
- Make sure the edges of the fields line up as much as possible. If the fields aren't aligned, the screen will have a jumbled look that can make it appear confusing, even when the order of the items is perfectly logical.
- Make sure that fields are sized so they are large enough to display the text that will be entered into the field. If the field can accommodate more data that the frame you've drawn for the field, users will have to click in the field and scroll to view the rest of the data. Aside from being inconvenient, this can be confusing as it may not be immediately evident that there is more data than displayed.

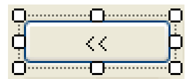
When putting the finishing touches on your display, you will no doubt need to know how to move and change the size of objects. You may also need to access an object's properties again to change the font, prompt, or other settings.

Selecting Objects

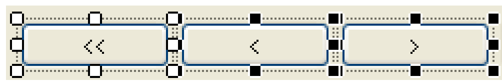
Before working with objects on your display, you first need to know how to select them.

SELECTING ITEMS IN A DISPLAY

1 Make sure the pointer is selected in the toolbox, then click with your mouse on a single item to select it. A selected item will have a box around it:



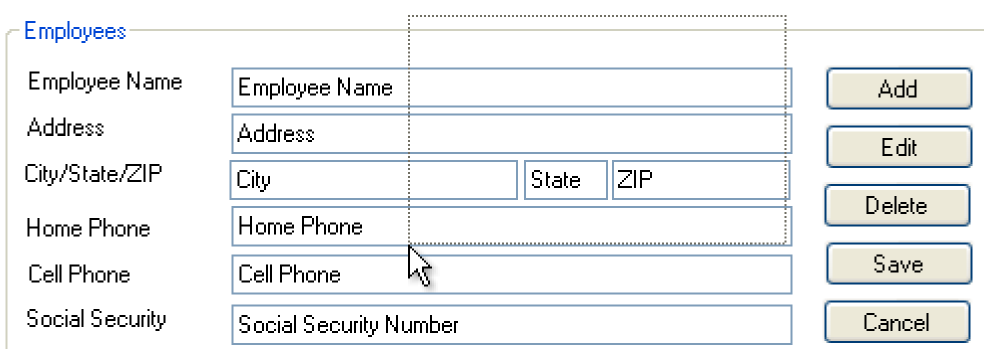
2 To work with multiple objects at the same time, hold down the SHIFT key on your keyboard while clicking on the objects. Boxes will appear around each object that is selected.



3 If you would like to deselect one of the objects, simply click on it a second time while holding down the SHIFT key. The box will disappear from just that object.

4 If you would like to deselect all objects, click off of them.

5 Another way to select objects is to draw a box around the objects you would like to select by dragging with your mouse. To do this, click on any area of the display that does not currently have an object on it. (Make sure you click outside of any boxes you have on the display.) Hold down the mouse button while you drag toward the items you would like to select. A bounding box will appear, indicating the area that you are selecting:



When you release your mouse, any item that is all or partially within the box will be selected. Using the above example, the Employee Name, Address, City, State, ZIP and Home Phone fields will be selected, as well as the Employees box. The prompts for the fields, the Cell Phone and Social Security Number fields, and the buttons will not be selected.

6 To add or remove items from the selection, hold down the SHIFT key while you drag a second time. Anything within the new box that was not previously selected will be added to the selection. Anything within the new box that was previously selected will be deselected.

Note

SHIFT acts as a toggle when selecting items. It will select anything that was not selected, or deselect anything that was previously selected.

Moving Objects by Dragging

Once you have the desired items selected, use the following instructions to move the items on the display.

DRAGGING ITEMS ON A DISPLAY

1 Click on the item you would like to move and hold down the left mouse button while moving the mouse to drag the item into another position. When the object is in the desired position, release your mouse button. This method is called drag and drop.

As you drag the item, the system will automatically line items up with other items that are near it. Blue snap lines will appear, allowing you to select which items you wish to align:

In the above picture, the blue snap lines show that the << button is being snapped to align vertically with the Add button and horizontally with the <, >, and >> buttons.

2 If you do not want to snap the item you are moving to another item, hold down the ALT key on your keyboard while dragging the item to turn off the snap lines.

3 If you have multiple items selected and would like to move them as a group, simply click and drag on any of the objects. All selected items will move together as a group, keeping their relative positions to each other.

Moving Objects with the Keyboard

Selected objects can also be moved using the arrow keys on your keyboard. This lets you nudge the object one pixel at a time.

Note
A pixel is a single dot in an image.

MOVING OBJECTS WITH THE KEYBOARD

1. Click on the item you would like to move.
2. Use the up, down, left, and right arrow keys on your keyboard to move the object one pixel.
3. If you would like to jump the object to the next snap line, hold down the ctrl key on your keyboard while pressing the arrow key.

Moving Objects Using the Alignment Tools

A quick way to move objects into position is to use the alignment options. This allows you to have objects automatically moved into a position relative to another object. For example, you can center an item on the display, or have an item moved so that its edges align with another item.

Center Objects on the Display

This option allows you to align objects based on the dimensions of the display. For example, you may have a page title that you would like to have centered horizontally:

It is also useful if you want to make sure that a group of objects appears in the very center of the display with equal space around the edges.

CENTERING OBJECTS ON THE DISPLAY

1 Select the object or objects you would like to center using any of the methods under the *Selecting Objects* heading.

2 If you would like move the object(s) to the horizontal center of the display, do one of the following:

- Select Center Horizontally on Display from the Layout menu.
- Select Center Horizontally on Display from the Work with Selected Object section of the Tools pane.
- Right click on the object, or any one of the selected objects in a group, to open small menu to the right of the object. Select Center Horizontally from the right click menu.

3 If you would like to move the object(s) to the vertical center of the display, do one of the following:

- Select Center Vertically on Display from the Layout menu.

- Select Center Vertically on Display from the Work with Selected Object section of the Tools pane.

- Right click on the object, or any one of the selected objects in a group, to open small menu to the right of the object. Select Center Vertically from the right click menu.

4. If you have multiple objects selected, the objects will keep their positions relative to each other and the block will be centered either across the width of the display if you have selected to center horizontally, or across the height of the display if you have selected to center vertically.

5. If you want the object(s) placed dead center, use both centering options one after the other.

Aligning the Edges of Objects

If you have groups of objects, having the edges aligned will generally make for a more visually pleasing display. As you click and drag items, the software will automatically provide snap lines to help you align the objects. It may be faster just to use one of the alignment options, especially if you're working with a group of objects.

Aligning Objects

1. Select the object to which you would like the other objects aligned by clicking on it.

2. Hold down the SHIFT key and select the object or objects you would like to move into alignment with the object selected in step 1.

3. From the Layout menu, select the desired alignment option using the following guidelines:

    - Select Align Left Edges to move the objects so that the left edges are perfectly aligned in a vertical row.

    - Select Align Right Edges to move the objects so that the right edges are perfectly aligned in a vertical row.

> **Note**
>
> When creating a row of fields, it is generally most aesthetically pleasing to have all of the fields the same size with both the left and right edges aligned. If it does not make sense to have the items the same size, it is more standard to align the left edges than the right.

- Select Align Top Edges to move the objects so that the top edges are perfectly aligned in a horizontal row.

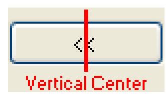
- Select Bottom Edges to move the objects so that the bottom edges are perfectly aligned in a horizontal row.

4 When you select the alignment option, the objects will be moved to align with the first object you selected.

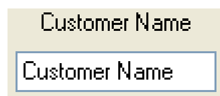
Centering Objects with Other Objects

This option is useful if you would like to align objects that are different sizes. They will allow you to have the objects positioned so that their centers are aligned either horizontally or vertically.

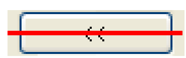
These options are based on either the horizontal or vertical center of the objects being aligned. If you drew a vertical line through the center of an object, this is the vertical center:



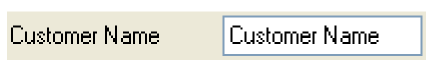
This option is useful if you want to center objects in a vertical line:



If you drew a horizontal line through the center of an object, this is the horizontal center:



This option is useful if you want to center objects in a Horizontal line:



CENTERING OBJECTS TO OTHER OBJECTS

1 Select the object to which you would like the other objects aligned by clicking on it.

2 Hold down the SHIFT key and select the object or objects you would like to move into alignment with the object selected in step 1.

3 From the Layout menu, select the desired alignment option using the following guidelines:

- Select Align Vertical Centers move the objects across the width of the display so that their vertical centers are aligned forming a vertical row. The objects will retain their relative positions to the height of the display.

- Select Align Horizontal Centers to move the objects across the height of the display so that their horizontal centers are aligned, forming a horizontal line. The objects will retain their relative positions to the width of the display.

> **Note**
>
> If you select to align both the vertical and horizontal centers of objects, they will appear on top of each other.

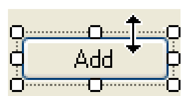
Resizing Objects

Each item that you can add to a display appears in a default size. Use the following instructions to change the size of your objects.

CHANGING THE SIZE OF OBJECTS

1 Select the item you would like to resize, following the instructions in *Selecting Items in a Display*, above.

2 Hover your mouse over the edges of the selected item. The mouse pointer will change to a double headed arrow:



When your mouse appears as a double headed arrow, instead of moving an item when you click and drag, it will change the size of the item.

3 To make an item larger, drag away from the center of the object from any edge. To make an item smaller, drag toward the center of the object from any edge.

> **Note**
>
> The height of text, numeric, and calculated fields is determined by the font used for the field. These will automatically be sized to accommodate the height of the data.

4 If you have multiple items selected, dragging on any of the items will size all of them at once.

Layering Objects

There may be occasions when you want objects to appear on top of other objects. For example, you may add a box around a group of objects, or use the logo control to add a graphic you wish to have appear behind other objects.

In the above example, a graphic of a 3D box appears behind the Song Title field. If one or more objects overlap, you can control which appears in front or behind the other objects.

Note

With the exception of boxes, when items are added, they are automatically placed in front of any existing items. (When boxes are added, they are automatically placed behind any existing items.)

USING BRING TO FRONT AND SEND TO BACK

1 Select the item you would like to move to the front or back.

Hint

You may want to bring an item in front of another item, but you can't click on it because it is hidden behind the other item. In this case, select the item that is currently in front and send that to the back instead.

2 If you would like to bring the item in front of all other items, use any one of the following methods:

- Select Bring to Front from the Work with Selected Object section of the Tools pane.
- Select Bring to Front from the Layout menu.
- Right click on the object and select Bring to Front from the right click menu.

3 If you would like to push the item in back of all other items, use any one of the following methods:

- Select Send to Back from the Work with Selected Object section of the Tools pane.
- Select Send to Back from the Layout menu.
- Right click on the object and select Send to Back from the right click menu.

Modifying Object Properties

Once you have objects on your display, you are able to re-access the same properties that were available when you first added the object.

ACCESSING OBJECT PROPERTIES

1 Select the object whose properties you would like to access following the instructions under *Selecting Objects*, above.

> **Note**
>
> You cannot access properties with multiple objects selected.

2 Open the object's properties screen using one of the following methods:

- Double click on the object on the display.
- Select Object Properties from the Work with Selected Object section of the Tools pane.
- Select Properties from the Layout menu.
- Right click on the object and select Modify Object Properties from the right click menu.

3 The object properties screen for the selected object will open.

> **Note**
>
> If you open object properties for a field prompt, the field's object properties screen will open instead of the Label Properties.

If you add an object in error, or determine that you no longer need an object, you can delete it from the display.

> **Note**
>
> If you are showing a field name on the display and wish to remove it, go into the field's properties and unmark the Show Name on Display check box rather than using delete. Deleting the name will also delete the field.

DELETING AN OBJECT

1 Select the object you would like to delete following the instructions under *Selecting Objects*, above.

Note
You cannot delete with multiple objects selected. If you wish to remove more than one object, you must delete them one at a time.

2 Delete the object using one of the following methods:

- Select Delete Object from the Work with Selected Object section of the Tools pane.
- Select Delete from the Layout menu.
- Right click on the object and select Delete from the right click menu.
- Press the Delete key on your keyboard.

3 If the object is a label, box, or logo, it will be removed from your display. If it is a field type object, a message will appear warning you that deleting the field will also delete the data from the field.

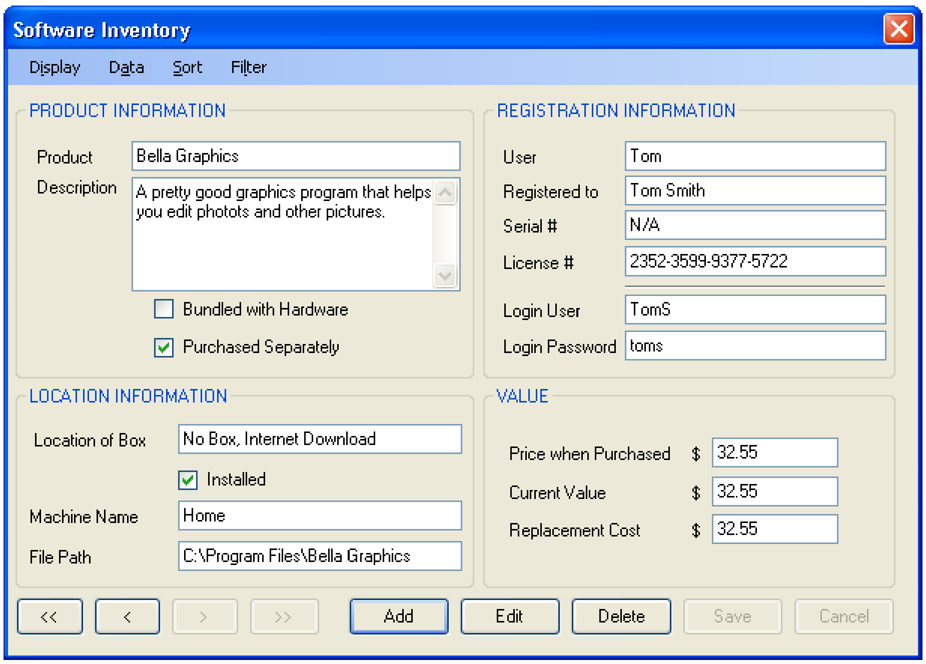
WARNING!
If you are deleting a field from a display that already contains data, the data in the field will be deleted. There is no undo for this action.

4 Click Yes at the message to delete the field.

Tab Order

Tab order controls how focus moves through fields on the display when you press tab on your keyboard. By default, when you press tab, focus will move through the fields from left to right, then top to bottom.

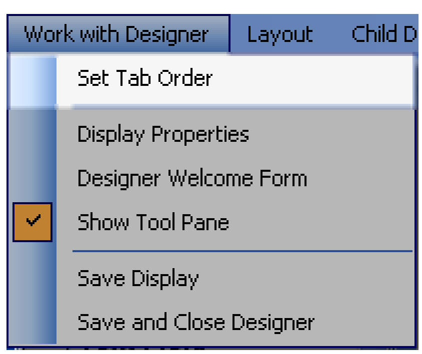
For example, in the following display, the default tab order would move from the Product field, to the User field, then to the Description field:



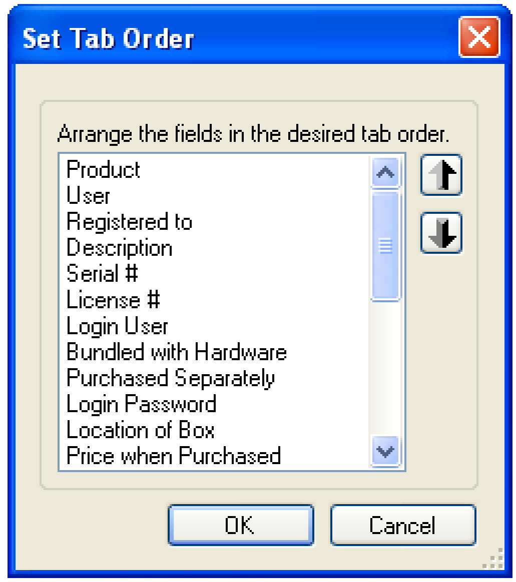
You may want to customize your display so you tab through fields in a different order. For example, in the above display, you may want to tab through the fields in the Product Information box, then move to the Location Information box.

Setting the Tab Order

1 Select Set Tab Order from the Work with Designer menu.



2 The Set Tab order screen will open with a list of the fields in your display:



3 Highlight the field whose order you would like to change and click the up or down arrow key to move the field in the list. Repeat for each additional field you would like to adjust.

4 When you are satisfied with the order of your fields, click OK.

Note

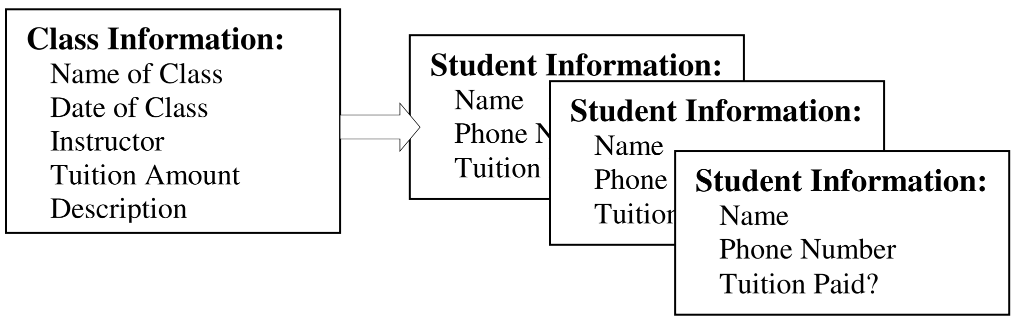
If you have not yet modified the tab order, when you add new fields or change the position of existing fields on your display, Database Oasis will automatically update the tab order based on the field's position. Once you set a custom tab order, Database Oasis will set the tab order for new fields based on their position, but it will no longer automatically change the tab order of fields when they are moved.

Creating Child Displays

PRO Child displays utilize relational database functionality. Because this is an advanced feature, it is only available in Database Oasis Professional Edition.

A child display is a display that is linked, or related, to another display called the parent. This allows you to have multiple sub-records linked to a master parent record.

For example, if you have a display that captures registrations for an upcoming class, you might have class information at the parent level, and registered students at the child level.



This type of display is commonly used to track things like contacts at a company, purchases by a customer, visits by a patient, etc.

If multiple records share common information, this allows you to enter that information once and share it among the children.

Before adding a child display, take a moment to plan the best way to structure your data. Any information that will be shared by all records should be captured at the parent level. Any information that would be unique to each record should be added to the child.

Adding Child Displays

Once you've set up the common data on the parent level, you can add your child display. Child displays are added from within the parent display.

WARNING!

Child displays are only available in Professional Edition. Once a display has a child, you will not be able to open it in Basic Edition.

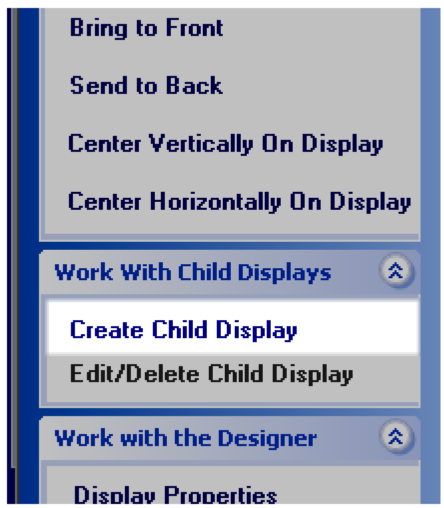
ADDING A CHILD DISPLAY

1 Open the parent for which you would like to add a child level.

2 Use one of the following methods to add a child display:

- Select Create Child Display from the Child Displays menu.

- Select Create Child Display from the Work with Child Displays section of the Tools pane.



3 A warning will appear informing you that displays with children cannot be opened in Basic Edition. Click Yes to continue.

4 Display Properties will open for the new display. Enter the property information following the guidelines in the *Creating a Display from a Blank Page* section, earlier in this chapter.

5 A new designer window will open with your child display. Set up your display following the guidelines used to set up the parent display.

Adding Parent Information to a Child Display

For the most part, setting up a child display is very much like setting up a regular display. The one exception is that you are able to show fields from your parent level on the child level.

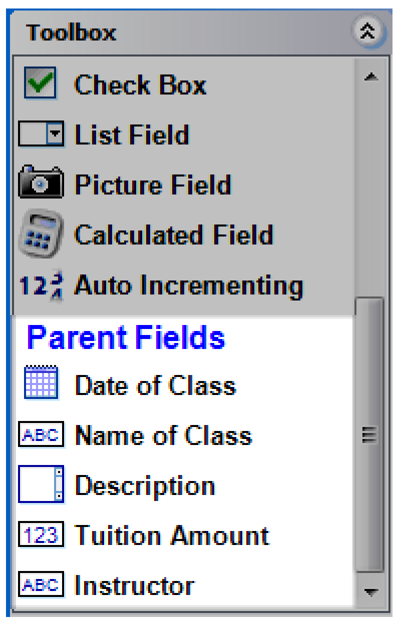
For example, if you are creating a child display to contain registered students for a class, you may want the class name and date to appear on the child records for quick reference.

Note

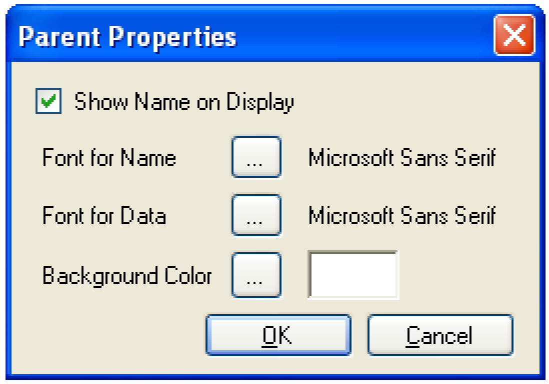
Parent fields on the child level are similar to calculated fields in that they are display-only. Parent fields can only be edited on the parent display.

ADDING PARENT FIELDS TO THE CHILD

1 In your child display, scroll to the bottom of the toolbox to see a list of the fields on your parent level. These will be labeled Parent Fields:



2 Add the desired parent field to your display following the guidelines under *Using the Toolbox*, above. Parent Properties will open:



Note

These properties only control how the field appears on your child display. Changing parent field properties on the child level does not affect the properties of the same field on the parent level.

3 Set the properties following the guidelines under *Setting Object Properties*, earlier in this chapter.

4 Once you have added all desired fields, save and close the designer to return to the parent display. (See the *Saving Your Work in the Designer* section, below, for instructions.)

Adding Child Information to the Parent Level

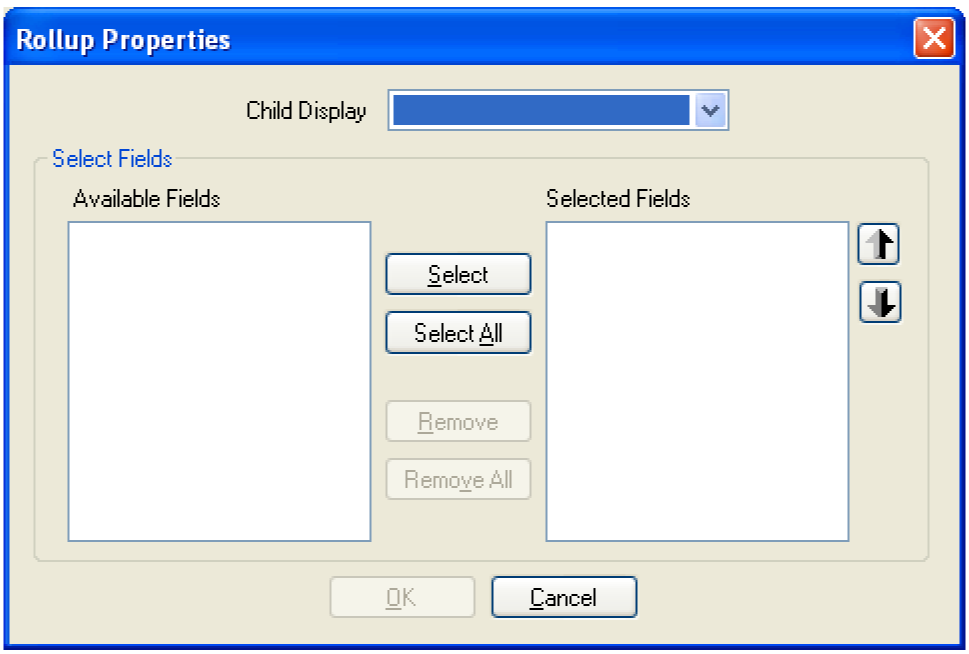
Once you've added a child display, you are able to include information about the children on the parent. You can view a list of all children associated with the current parent in a grid using the Child Rollup tool.

Adding a Child Rollup

1 Add or edit a display with a child level.

2 From the Toolbox, select Child Rollup.

3 Add the child rollup to your display following the guidelines under *Using the Toolbox*, above. The Rollup Properties screen will open:



4 Select which child display you would like to represent in this rollup from the Child Display field.

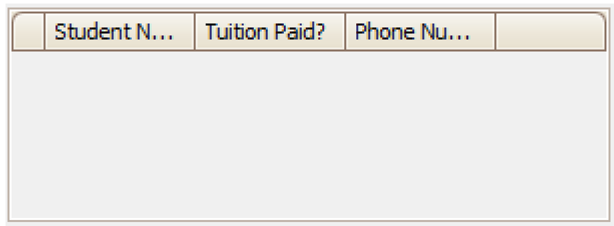
5 The Available Fields box will populate with the list of fields in the selected child display. To include a field in the rollup, double click on it or highlight it and click the Select button. The field will move from the Available Fields list to the Selected Fields list. To select all fields, click Select All.

6 If you have selected a field and decide you do not want to include it in the rollup, double click on it in the Selected Fields list or highlight it and click Remove. It will move back to the Available Fields list. If you would like to clear the Selected Fields list and start over, click Remove All.

7 When child records are displayed in the rollup, fields will be shown in the order that they appear in the Selected Fields list. The arrow buttons next to the Selected Fields list allow you to move fields up or down in the list to change their order in the rollup.

Highlight a field in the Selected Fields list and click the appropriate button until the field is in the desired position.

8 When you are satisfied with your selections, click OK to save the rollup. The rollup will appear on your display.



9 Position and size the child rollup box following the guidelines under *Working with Objects on Your Display*, earlier in this chapter.

Note

Column widths are adjusted when you work with the display outside of the designer.

Edit a Child Display

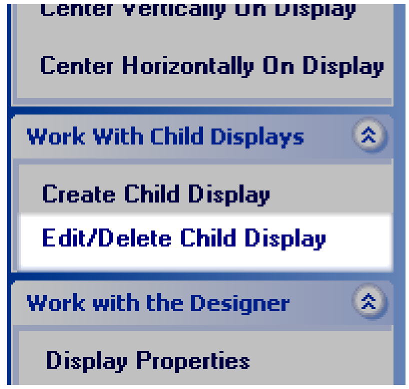
If you've closed your child display and returned to the parent, you may re-open it again at any time to make additional edits.

EDITING A CHILD DISPLAY

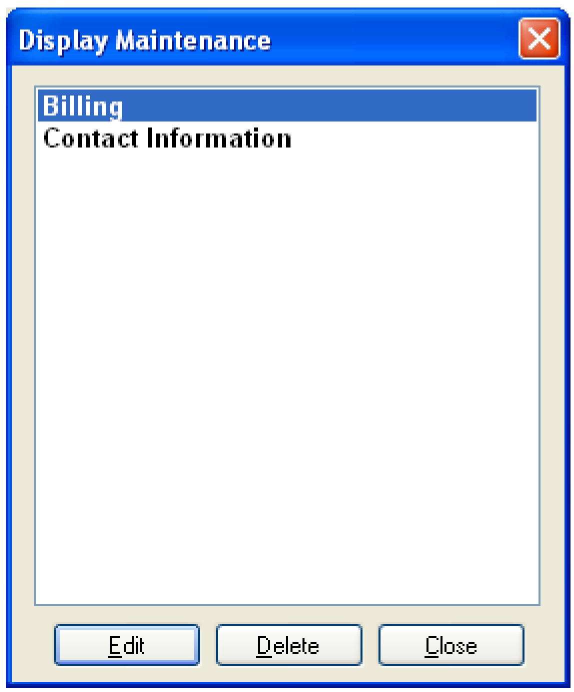
1 From the parent display, use one of the following methods:

- Select Edit/Delete Child Display from the Child Displays menu:

- Select Edit/Delete Child Display from the Work with Child Displays section of the Tools pane:



2 The Display Maintenance screen will open with a list of the child displays for this parent:



3 Highlight the child display you would like to edit and click the Edit button.

4 The child display will open.

Delete a Child Display

If you decide you no longer want a child display you've added, it may be deleted.

DELETING A CHILD DISPLAY

1 From the parent display, use one of the following methods:

- Select Edit/Delete Child Display from the Child Displays menu.

- Select Edit/Delete Child Display from the Work with Child Displays section of the Tools pane.

2 The Display Maintenance screen will open with a list of the child displays for this parent.

3 Highlight the display you would like to delete and click the Delete button.

4 A message will appear warning you that this action will permanently delete the display and any data contained in the display and asking if you would like to continue.

5 Select Yes to delete the display or No to cancel the deletion.

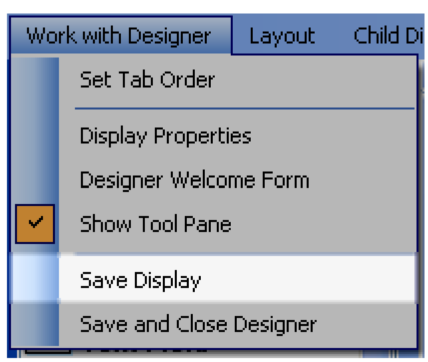
WARNING!
Once you have deleted a display, it cannot be retrieved without a backup.

Saving Your Work in the Designer

As you work in the designer, your work is periodically saved for you. When you exit the designer, any unsaved work will be automatically saved. You can also manually save work while in the designer.

SAVING IN THE DESIGNER

1 Select Save Display from the Work with Designer menu:



SAVING AND EXITING THE DESIGNER

1 You may exit the designer using one of the following methods:

- From the Tools pane, select Save and Close in the Work with the Designer box.
- Select Save and Close Designer from the Work with Designer menu.

Editing Displays

Once you have added your display, placed all of the desired items on the display, and positioned and sized everything, you may never need to make modifications to that display. Chances are, however, that as you work with the display, you may discover ways that it could be improved.

You can make modifications to your display at any time.

> **Note**
>
> Child displays are edited by first editing the related parent, then selecting Edit/Delete Child Display from the Child Displays menu or Tools pane. See *Edit a Child Display*, earlier in this chapter.

MODIFYING AN EXISTING DISPLAY

1 Make sure you have a current backup of your displays following the instructions in the *Backing up Your Data* section in *Chapter 9*.

2 Use one of the following methods to begin editing your display:

- From the main screen in Database Oasis, select Edit/Delete Existing Displays from the File menu.
- From the main work area, press Ctrl+E on your keyboard.
- If you have the Navigation Pane open, select Edit or Delete a Display from the Work with Existing Displays box.

3 The Display Maintenance screen will open:

4 Highlight the display you would like to edit and click the Edit button.

Note
If you are in Basic Edition, you will not be able to edit a display that was created in Professional Edition if it includes Professional only functionality.

5 The display designer will open to the selected display.

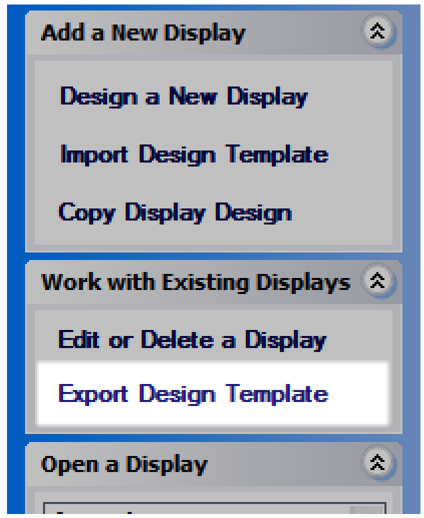
Exporting Design Templates

If you would like to share the display you have created with another user of Database Oasis, you can quickly create a distributable design template file. A design template is a file that contains a description of a display. The software will read this file and create a display that matches the description.

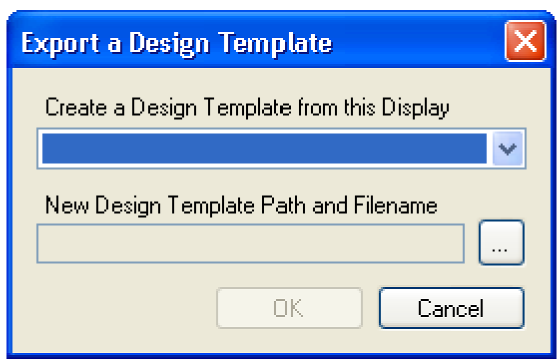
CREATING A TEMPLATE

1 Access the Export a Design Template screen using one of the following methods:

- Select Export Design Template from the Displays menu on the main menu bar.
- Select Export Design Template from the Navigation Pane:



2 The Export a Design Template screen will open:



3 The Create a Design Template from this Display list will show all of the displays in your installation. Select the display on which you would like to base your template from the list.

4 The New Template Path and Filename field will display the path and file name for the new template file that will be created. Click the button next to the field to open a Windows Save dialog where you can navigate to the desired location and enter a name for template file.

Hint

Be sure to give your file a descriptive name that will help others identify the purpose of the display described by template.

5 Click OK to create a template file with the .mktx extension in the specified location.

Note

Templates created prior to version 3.0 have an extension .mkt.

Note

Child displays will be included in the template if you export a Professional Edition display that has child displays associated with it.

Deleting Displays

If you have a display that you no longer need, you can simply delete the entire display. Deleting displays is done from the main work area, outside of the designer.

Hint

As you're learning to work with the designer, you can create temporary displays to experiment in. When you are done practicing, delete these displays to help keep your display list clean.

Note

Child displays are deleted by first editing the related parent, then selecting Edit/Delete Child Display from the Child Displays menu or Tools pane. See *Delete a Child Display*, earlier in this chapter.

DELETING AN EXISTING DISPLAY

1 Make sure you have a current backup of your displays following the instructions in the *Backing up Your Data* section in *Chapter 9*.

2 Use one of the following methods to access your displays for deletion:

- From the main screen in Database Oasis, select Edit/Delete Existing Displays from the File menu.

- From the main work area, press Ctrl+E on your keyboard.

- If you have the Navigation Pane open, select Edit or Delete a Display from the Work with Existing Displays box.

3 The Display Maintenance screen will open.

4 Highlight the display you would like to delete and click the Delete button.

WARNING!

5 If there are child displays associated with the display, they will also be deleted. A message will appear warning you that this action will permanently delete the display and any data contained in the display and asking if you would like to continue.

6 Select Yes to delete the display or No to cancel the deletion.

WARNING!

Once you have deleted a display, it cannot be retrieved without a backup.

CHAPTER 7
WORKING WITH RECORDS IN DATA DISPLAYS

Opening Displays

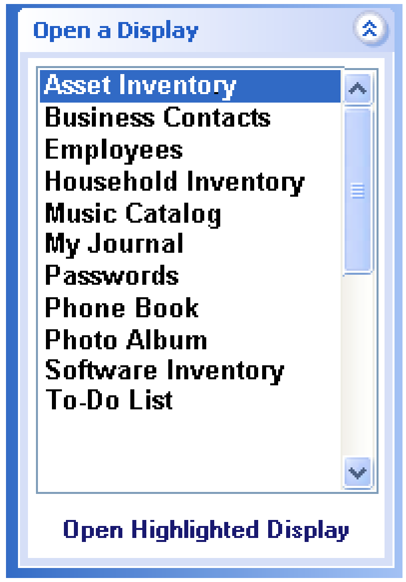
The first thing you will need to do in order to work with your data displays is to open them in the main work area. There are three ways to open a display:

- You can open a display from the Navigation pane if it is open.
- You can open a display from the menu.
- You can open a display using the keyboard.

Note
If you are in Basic Edition, you will not be able to open a display that was created in Professional Edition if it includes Professional only functionality.

Opening a Display from the Navigation Pane

1 Locate the Open a Display section of the Navigation Pane:



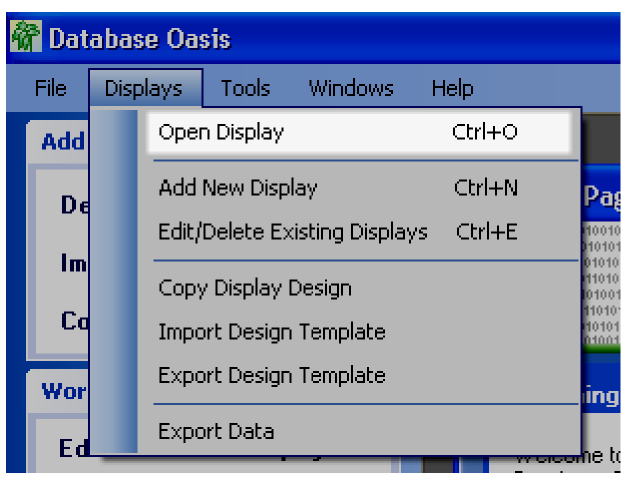
2 Highlight the display you would like to open and do one of the following

- Double click on the display in the list;
- Click the Open Highlighted Display button.

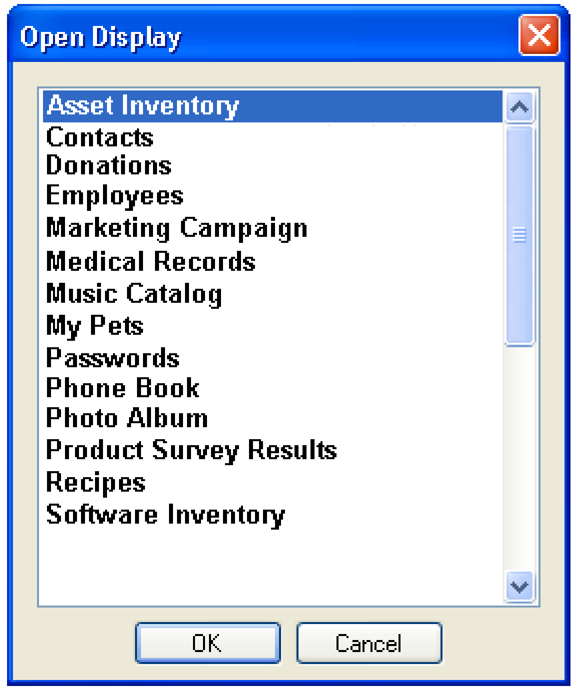
3 The display will open in the main work area.

Opening a Display from the Menu

1 From the main menu, select the Open Display option on the Displays menu:



2 The Open Display screen will open:



3 Highlight the display you would like to open and do one of the following

- Press the Enter key on your keyboard;
- Double click on the display in the list;
- Click the OK button.

4 The display will open in the main work area.

Opening a Display Using the Keyboard

1 From the main work area, press Ctrl+O on your keyboard.

2 The Open Display screen will open.

3 Highlight the display you would like to open and do one of the following

- Press the Enter key on your keyboard;
- Double click on the display in the list;
- Click the OK button.

4 The display will open in the main work area.

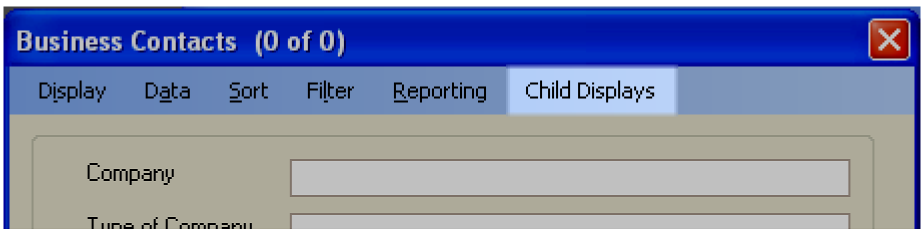
Opening Child Displays

PRO Child displays are an advanced feature only available in Database Oasis Professional Edition.

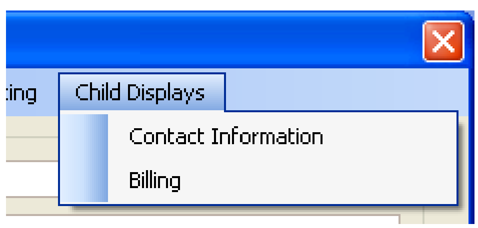
If you are using Professional Edition, you may have displays that include a child level. Child displays let you relate multiple related records to one parent record. This can be useful for tracking things like visits to a doctor, students in a class, or jobs for a customer.

Opening a Child Display

1 Open the parent display using one of the methods described above. A Child Displays option will appear at the far right of the menu:



2 Select Child Displays. A menu will appear with the child displays associated with this parent.

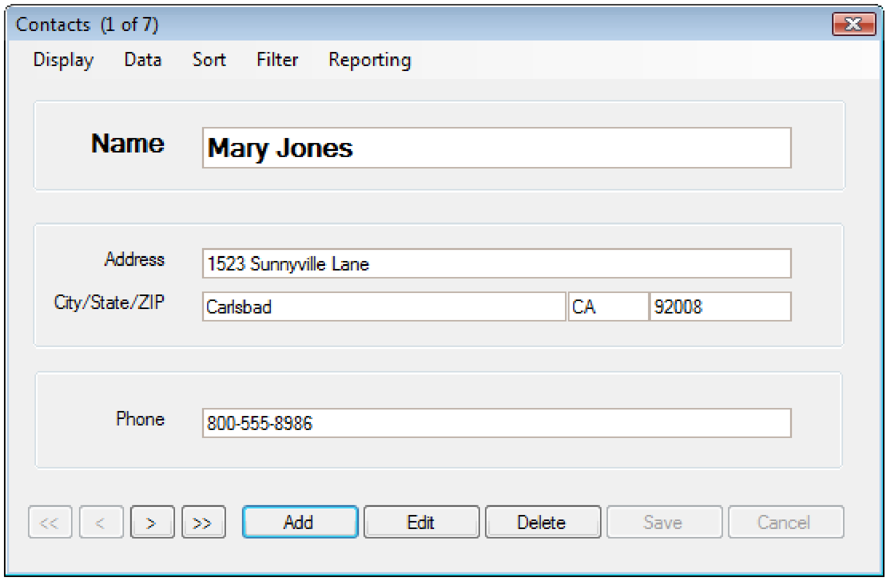


3 Select the desired display from the list.

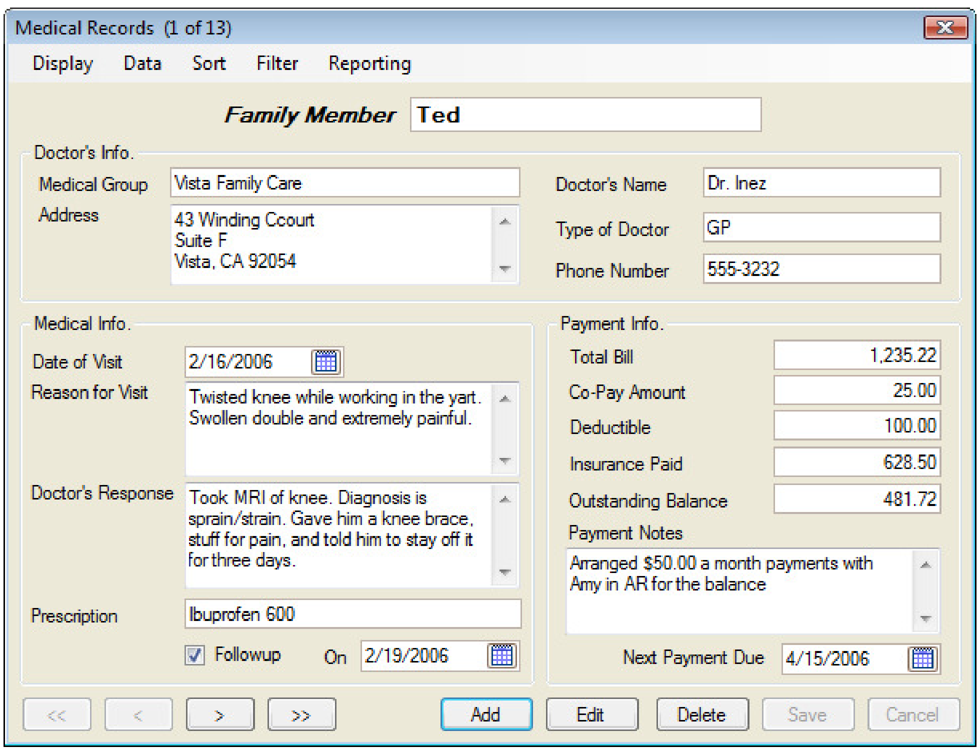
4 The child display will open.

Exploring the Display

Data displays are completely customizable forms where you can add and work with your records. The size, shape, color, and objects on the display are completely up to you. For example, you may design a very simple display to contain contact information:



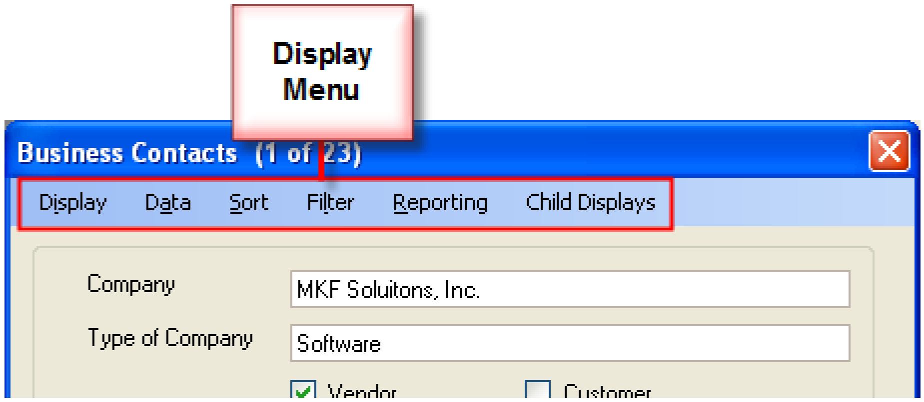
Of course, at least some of your displays may end up a bit more elaborate:



Whatever design you choose, there are a few items that will be common to every display.

Display Menu

Every display will have a menu at the top that gives you access to options for working with your records:



Each display that you have open will have its own menu. Changes made using the options on these menus will only affect records in the associated display.

Display Menu

The Display menu provides options that impact the display itself.

Print – This option allows you to create a quick printout of the data in your display.

PRO Refresh – If you have multiple users using the display at the same time, this option will check the database for recent changes and refresh the data in your copy of the display. Data is automatically refreshed as you work in the display, but this option will force a refresh to ensure you have the latest changes. You can also press F5 to refresh the data.

Purge all Records – This option will delete all records in your display.

WARNING!

This will remove all of your records. There is no undo. Make sure you have a backup of your database before proceeding.

Close - This will close the current display. If you have any unsaved changes to your records, they will be automatically saved.

Data Menu

The Data menu provides options for working with your records.

Find – This option allows you to search for a specific record using a value in a text or notes field.

List View - This option will allow you to view your records in a tabular format. This is useful because it allows you to view multiple records at the same time. This option also gives you access to printing your data.

Saved Lists – If you have previously saved a list view configuration, this option will allow you to bypass the setup screen and go directly into a list view with the fields already selected.

Import – This option will allow you to bring data from another source into your display.

Export - This option will allow you to copy your data out to an external file that can be printed or viewed in other software applications.

Copy – This option will create a copy of the current record.

Links – This option lets you link files, websites, and e-mail addresses to the current record and launch the items from Database Oasis.

Sort Menu

The Sort menu allows you to work with options to control the order of your records.

Sort by - This will open the Sort By Field screen where you can control the order in which your records appear in the list view and when scrolling. For example, if you are looking through a phone book, you may want to set the sort order to the last name field.

Saved Sorts – If you have previously saved a sort order, this option will allow you to set the order without going into the setup screen.

Clear Sort - If you have a sort set, this option will turn it off. You will go back to viewing records in the order in which they were added.

Filter Menu

The Filter menu allows you to work with options to control what records are currently available.

Set Filter - Filters let you limit the records that you are currently viewing to only include a specified subset. For example, you may be working with a display that contains recipes and want to only view recipes with a preparation time that's under an hour.

Saved Filters – If you have previously created and saved a filter, this option will allow you to set the filter without going into the setup screen.

Clear Filter - Selecting this menu item will remove the filter if one is set. You will return to viewing all records in your display.

Reporting Menu

The Reporting menu provides access to the custom report generator where you can create new reports, and allows you to run and maintain previously created reports.

PRO This feature is only applicable to Database Oasis Professional Edition.

Create New Report – This option opens the Custom Report Designer at a new, blank report.

Run Report – This option opens the Select Report to Run screen, where you can select to print a previously created report.

Delete Report – This option opens the Delete Report screen, where you can select to delete a previously created report.

Edit Report – This option opens the Edit Report screen. Selecting a previously created report at this screen will open that report in the Custom Report Designer.

Child Displays Menu

The Child Displays menu appears if you have set up a child display. It allows you to open one or more child displays.

PRO This feature is only applicable to Database Oasis Professional Edition.

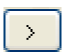
[List of displays] – Each child display you have set up will appear on the menu. Selecting a display from the list will open the child.

Buttons

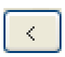
The standard button set will appear on every display:

When you're designing a display, you have the ability to move these buttons, change the size, change the color, and even change the text that appears on the button face.

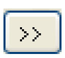
Although you can change the appearance, the functionality of each button will remain the same for all displays.



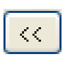
This button is called the Next button. It is used to scroll to the next record.



This button is called the Previous button. It is used to scroll back to the previous record.



This button is called the Last button. It will jump to the very last record.



This button is called the First button. It will jump to the very first record.

This button is used to add a new, blank record to your display.

This button will allow you to begin editing a record in your display.

This button is used to delete a record from your display.

This button is available if you are adding or editing a record. Clicking this will save your changes.

This button is available if you are adding or editing a record. Clicking this will discard your changes.

The following instructions reference these buttons by their default names. If you have changed the text on any of the buttons, please substitute your button names when following the instructions.

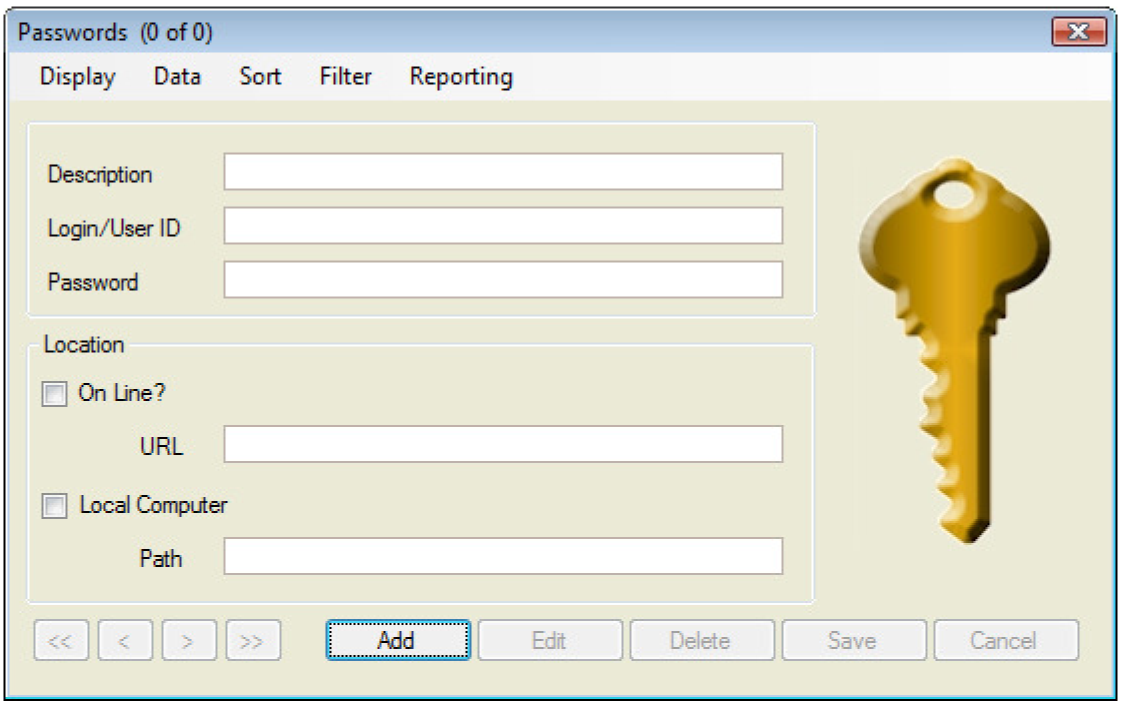
Adding Records

Once you have your display set up, you are ready to begin populating it with your data.

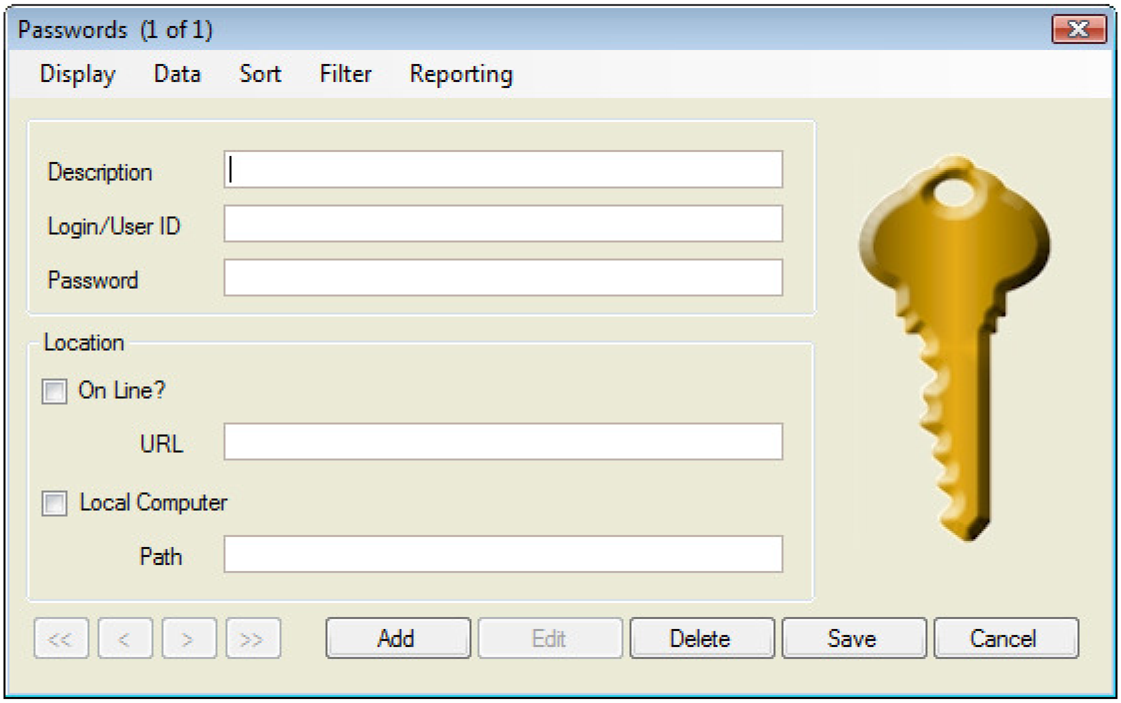
ADDING RECORDS TO A NEW DISPLAY

1 Open the display to which you would like to add records.

2 If there are no existing records in a display, you will be at a blank record. All of the buttons will be dimmed with the exception of the Add button and the record count on the title bar will say (0 of 0):



3 Click Add. The Delete, Save, and Cancel buttons will become available:



4 Input your data using the guidelines under *Inputting Data*, later in this chapter.

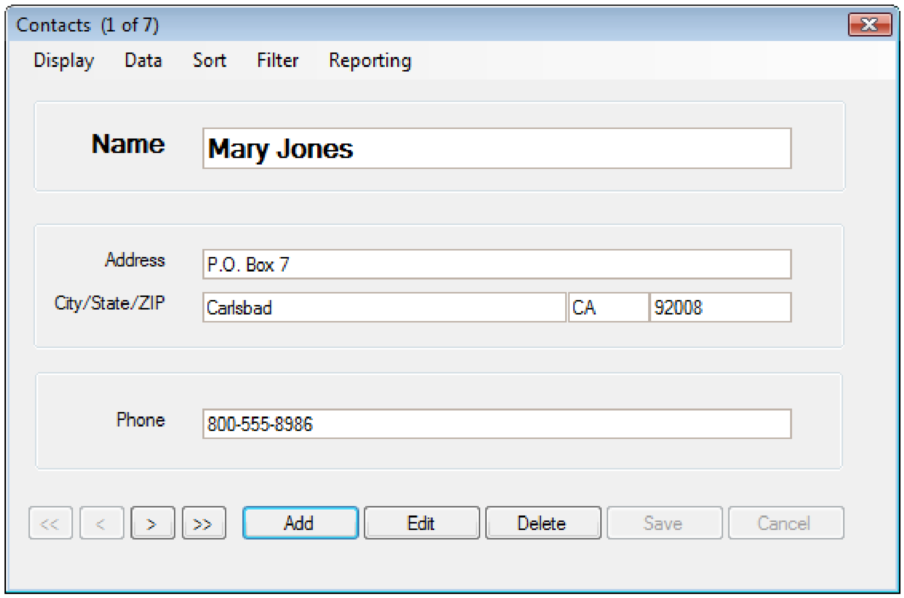
5 When you are satisfied with your changes, click Save. If you wish to discard the new record, click Cancel.

Hint
Changes will automatically be saved if you move off the record, for example, by scrolling to another record, clicking the Add button, or closing the display, without canceling. If you will be adding multiple records, simply click Add again to save and start a new record.

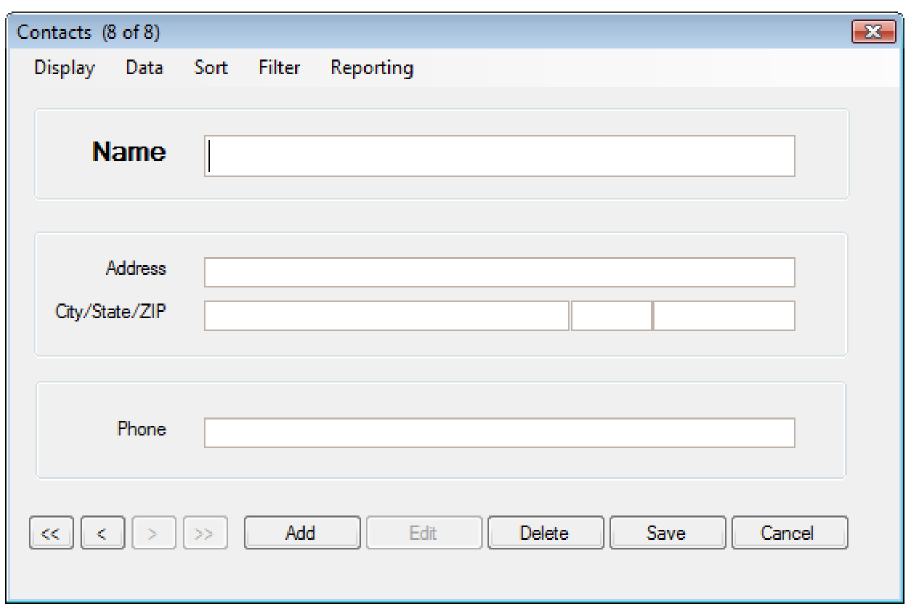
Adding Records to a Display with Data

1 Open the display to which you would like to add records.

2 When you first open the display, you will be at the first record that was added. The Save and Cancel buttons will be dimmed out:



3 Click Add. You will be at a new, blank record. The Save and Cancel buttons will become available:



4 Input your data using the guidelines under *Inputting Data*, below.

5 When you are satisfied with your changes, click Save, or click Add to save and start a new record. If you wish to discard the new record, click Cancel.

Adding Records to a Child Display

PRO Child displays are only available in Database Oasis Professional Edition.

If you have a child display set up in Professional Edition, you can have one or more child records associated with each parent record in the display. When you open the child level, you are automatically viewing the records for the currently open parent. When you add a record at the child level, it is automatically added to the current parent.

For example, if you have a display that stores information about classes offered at a school, you may have a child level to capture students in each class. To add a student to a class, you would first navigate to the class at the parent level, then add the student at the child level.

ADDING A RECORD TO A CHILD DISPLAY

1 Open the display to which you would like to add a record.

2 Navigate to the parent record to which you would like to add a child record. (For help with locating the parent record, see *Viewing Records*, later in this chapter.)

3 Select Child Displays from the menu. A sub menu will open with the child display:

4 Select the child display to which you would like to add a record. The display will open.

5 Click Add. You will be at a new, blank record. The Save and Cancel buttons will become available:

6 Input your data using the guidelines under *Inputting Data*, below.

7 When you are satisfied with your changes, click Save, or click Add to save and start a new record. If you wish to discard the new record, click Cancel.

Copying Records

It is possible that you may have more than one record with very similar data. The copy feature lets you quickly add a new record based on an existing record. The copy can be edited without changing the original record.

Adding Records by Copying

1 If you would like to make a copy of an existing record, select Copy from the Data menu. A new record will be added with the exact same information as the original record. You can now edit the new record without affecting the original record.

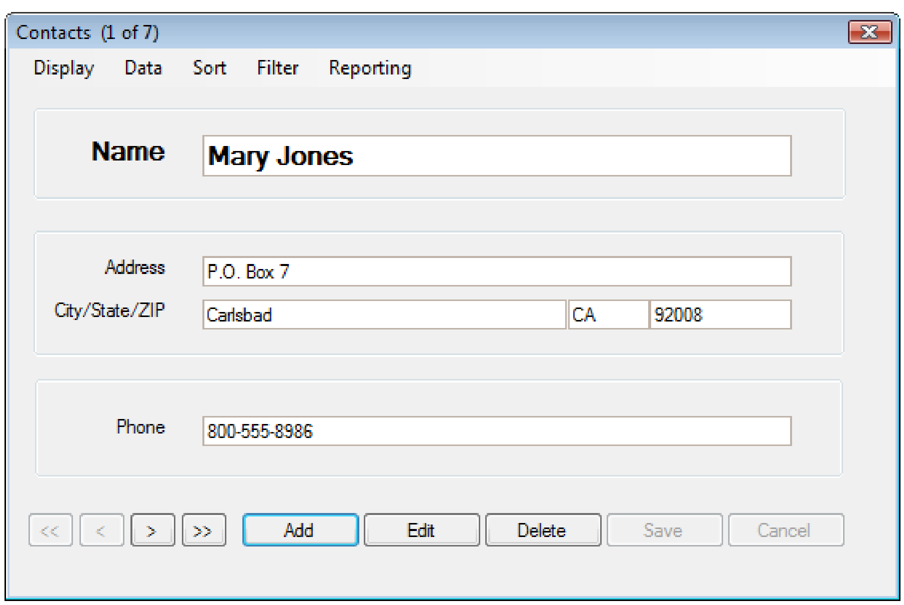
Editing Records

Editing is very similar to adding, with the exception that you are making changes to data that was previously added rather than imputing new data.

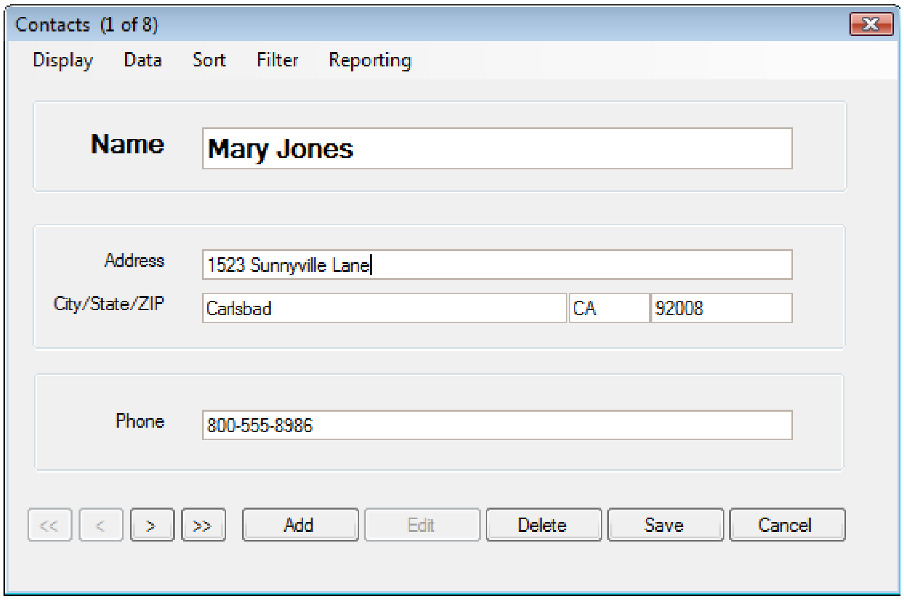
Editing Existing Records

1 Open the appropriate display.

2 Locate the record you would like to edit. (For help with locating records, see *Viewing Records*, later in this chapter.)



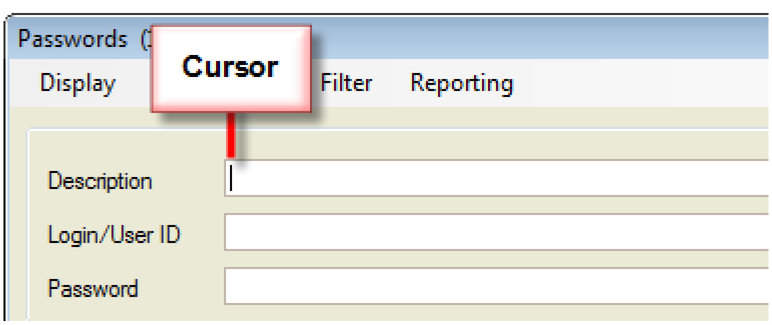
3 Press the Edit button, or simply start typing in the field containing the data you would like to edit. For example, you may want to change the P.O. Box in the above record to a street address. Simply delete the contents of the Address field and type in the desired street address:



4 When you are satisfied with your changes, click the Save button. If you would like to discard your changes, click Cancel. The record will revert to the original data.

Inputting Data

Data is entered into the fields on the display. When you click Add or Edit, your cursor will automatically be positioned in the first field at the top of your display:



Simply start typing to enter or edit data. (Refer to the *Windows® Basics* section of *Chapter 1* for help with entering data in a field.) To move to another field, click in the field or press the Tab key on your keyboard to move through fields in tab order. Unless another tab order was specified in the designer, the default tab order is left to right, top to bottom.

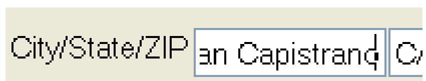
There are some rules that apply when entering data, depending on the type of field you're working with.

Inputting Data in Text Fields

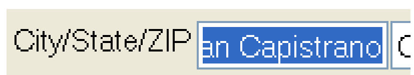
Text fields are the easiest fields to work with. To input data into a text field, simply start typing. Text fields can contain any type of characters, including letters, numbers, and symbols. The only limitation is the length of the field that was entered when the field was added. For example, if your field has been set up to contain a maximum of 10 characters, you will not be able to type the 11th character into the field.

When the text field was added to your display, a frame was created to display the data. It is possible that the length of the field that was entered when the field was added allows more characters than can be displayed in the frame. In this case the text will appear cut off:

In order to see the rest of the data in the field, you can either press the right arrow key on your keyboard to scroll over:



Or you can click in it with your mouse and drag to the right:



Inputting Data in Numeric Fields

Numeric type fields are limited to only containing numbers and the symbols related to numbers, such as the decimal point, comma, and negative indicator. Numeric fields can be a maximum of 17 digits, plus the decimal places. This will allow a number up to 99,999,999,999,999,999. Commas will automatically be placed in the field at the thousands marks.

The number of decimal places you can put in the field depends on the settings that were selected when the field was added. If the field was added to contain a fixed number of decimal places, the numeric field will default to the selected formatting when you add a new record. For example, if it is set to contain two decimal places, new records will contain 0.00 in the field. When you enter a number in the field, pressing the decimal/period (.) key on your keyboard will move your cursor past the decimal point so you can enter the decimal place data.

If the field has been configured to contain a variable number of decimal places, it will allow for a variable number of decimal places, up to six. If you press the decimal/period (.) key on your keyboard, it will place a decimal point at the cursor position.

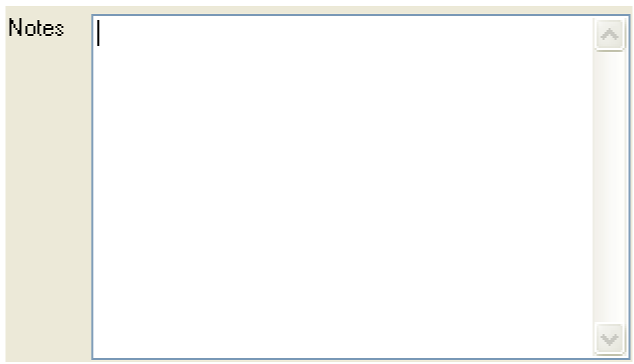
To make a number negative, press the - key on your keyboard from anywhere in the field. The - character will appear at the beginning of the number. To return the value to a positive number, delete the - character from the field.

Inputting Data in Auto-Incrementing Fields

Auto incrementing fields look like numeric fields, with the exception that you cannot manually enter or edit data in the field. When you first add a record, 0 appears in the field; when you save the record, the number automatically increments by 1 from last number used.

Inputting Data in Notes Fields

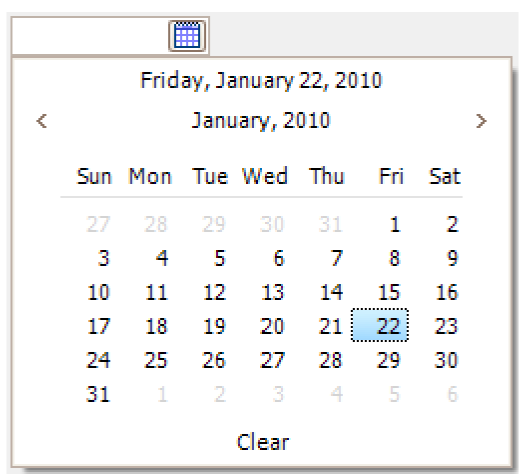
Notes fields are very similar to text fields, with the exception that you can wrap to multiple lines in the field. You can also press Enter on your keyboard in the field to start a new line of text. A notes field will look something like this:



The size of the field was determined when it was added to the display. If you enter more data than can be seen, the scrollbar to the right of the field will be enabled, allowing you to scroll down to view the hidden data.

Inputting Data in Date Fields

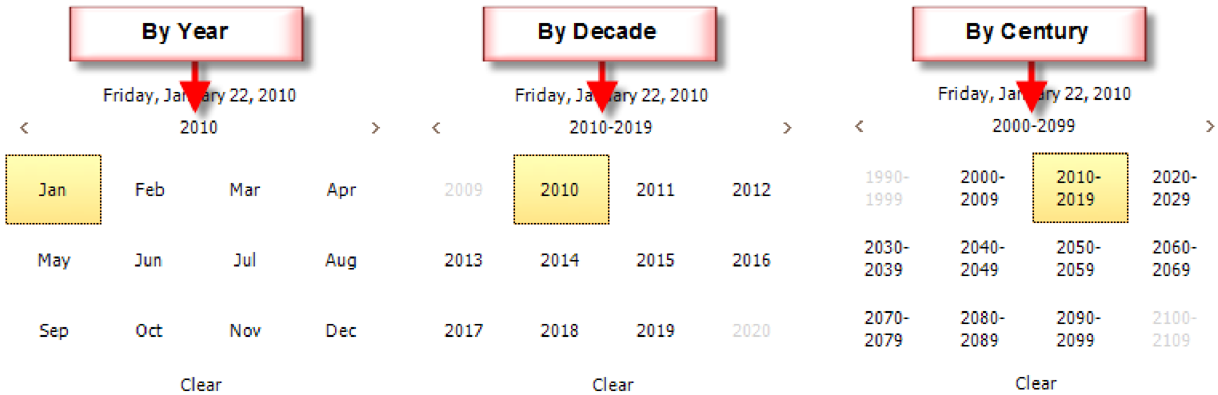
Date fields are pre-formatted to contain dates. As soon as you click in a date field, a popup calendar opens:



The date at the top of the calendar shows the current day's date. You can select today's date at any time by clicking on this section.

The left and right arrows on the top edges of the calendar let you scroll the display. The scroll increment is indicated below the current date display. By default, the arrows scroll by one month at a time.

Click on the scroll increment indicator (in the above example, click on January, 2010) to zoom out and scroll by year. Click a second and third time to scroll by decade or century:



When viewing by century, scroll to the desired century and click on the decade you would like. The calendar will zoom in to the decade view. When viewing by decade, scroll to the desired decade and click on the year you would like. The calendar will zoom into year view. When viewing by year, scroll to the year and click on the desired month to return to the default view.

Once you have located the appropriate month and year, click on the desired date. The date will be entered in the field. The date format will default to the format you have set up in Windows.

You can edit the date by typing in the field, or by selecting a different date from the pop-up calendar.

To edit the date using the calendar, click on the calendar button to the right of the field to reopen the pop-up calendar.

To edit the date by typing in the field, enter the appropriate value in the first section of the field:

In the example above, you would enter the month. You can also increment the value by pressing the up or down arrow key on your keyboard.

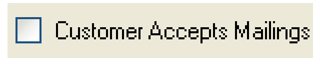
Once you have entered the desired value, use the right arrow key to move to the second section:

You will only be able to enter a valid date value in each section of the field. For example, you cannot enter 20 in the month section of the field.

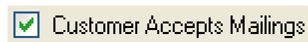
To remove a date from the field, open the calendar and click Clear.

Inputting Data in Check Boxes

Check boxes are a simple yes/no flag. They appear on the display as a small box, followed by a name indicating what the check box is used for:



In the above example, the check box indicates whether or not the customer accepts mailings. Data is entered in the check box by clicking in it, or tabbing to the check box and pressing the spacebar on your keyboard. Either action will toggle the check mark in the box:

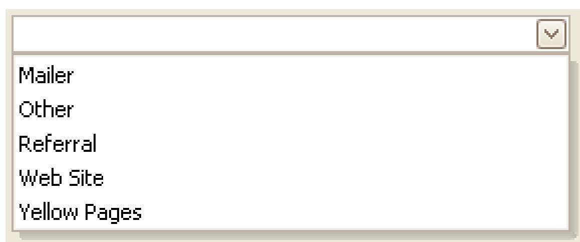


Using the above example, a mark would indicate that the customer does accept mailers. No mark would indicate that the customer does not accept mailers.

Inputting Data in List Fields

List fields appear with a small arrow next to the field:

When you click on the arrow, a list of options appears:



This list contains the values that were set up for the field. Clicking on an option places that item in the field:

When the list field was set up, the person who created the field was given the option to allow users to type in the field, or limit it to only allow entries selected from the list. If the field has been configured to allow you to type in the field, you will be able to click in the field and a cursor will appear. If the field has been configured to only allow selections from the list, when you click in the field the list will open.

Inputting Data in Picture Fields

A picture field will initially appear as an empty frame:

In order to enter a picture in the field, you must select the graphic file you would like to use. To select the file, simply double click in the field to open a Windows Open dialog.

Note	
PRO	When you select pictures in Professional Edition, make sure that they are stored on a shared network drive and that all users are mapped with the same drive letter.

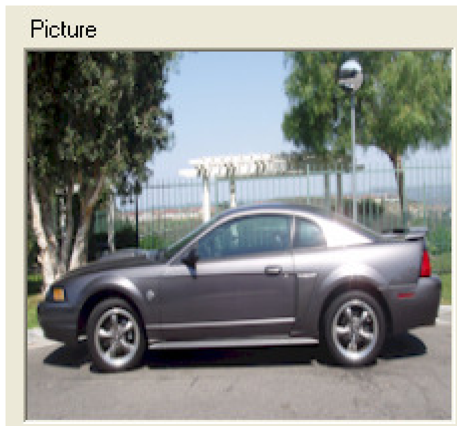
As soon as you select a graphic file, the Picture screen will open:

This will display the path to the graphic, as well as a thumbnail of the selected picture.

Note

The proportions of the sample may or may not match the proportions of your picture field on the display.

If you would like to change the picture, click Select Picture to access the Windows Open dialog again. When you are satisfied with your picture selection, click Close. The selected picture will be displayed in the field:

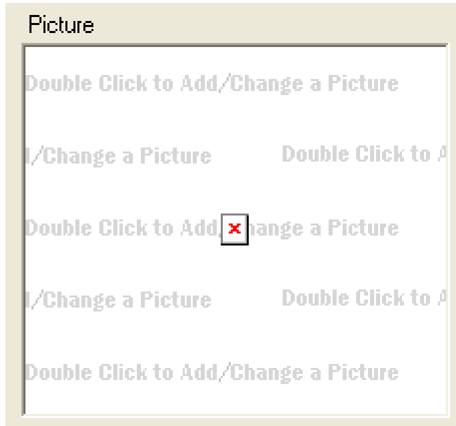


To change or remove a picture, simply double click again to access the Picture screen. To change the picture, click Select Picture. The Windows Open screen will appear. To remove the picture, select Clear Picture. The picture field will return to the empty frame.

Note

As you make changes to the picture, they will automatically be saved to the picture field. If you would like to cancel the changes, click the Cancel button on the record.

When you add a picture, what is actually saved is the path to the graphic file. If the file is ever deleted or moved, the picture in the record will be replaced with a red X:

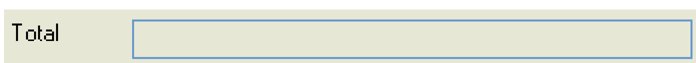


Double click on the picture field to clear the path reference or select another graphic file.

Inputting Data in Calculated Fields

Calculated fields allow you to perform math on numeric fields, or string together two fields or a field and another value. (Refer to *Using Calculated Fields on Your Display* in *Chapter 6* for more information on the types of calculations that are available.)

Calculated fields will appear dimmed out on your display:

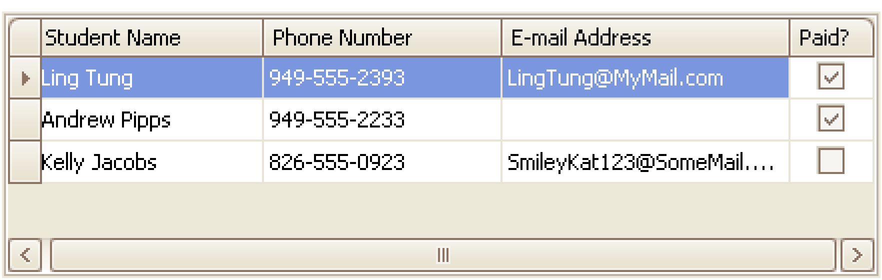


The data in the field is populated automatically based on the calculation as soon as a record is saved. Calculated fields do not require or allow any manual data entry.

Inputting Data in Child Rollups

PRO Child displays are only available in Database Oasis Professional Edition.

If you have a child display set up in Professional Edition, you can have multiple child records associated with each parent record in this display. Child rollups allow you to view a table with information from the child level. As you scroll through your records, the information will update to reflect the children associated with the current parent record.



Student Name	Phone Number	E-mail Address	Paid?
Ling Tung	949-555-2393	LingTung@MyMail.com	☑
Andrew Pipps	949-555-2233		☑
Kelly Jacobs	826-555-0923	SmileyKat123@SomeMail....	☐

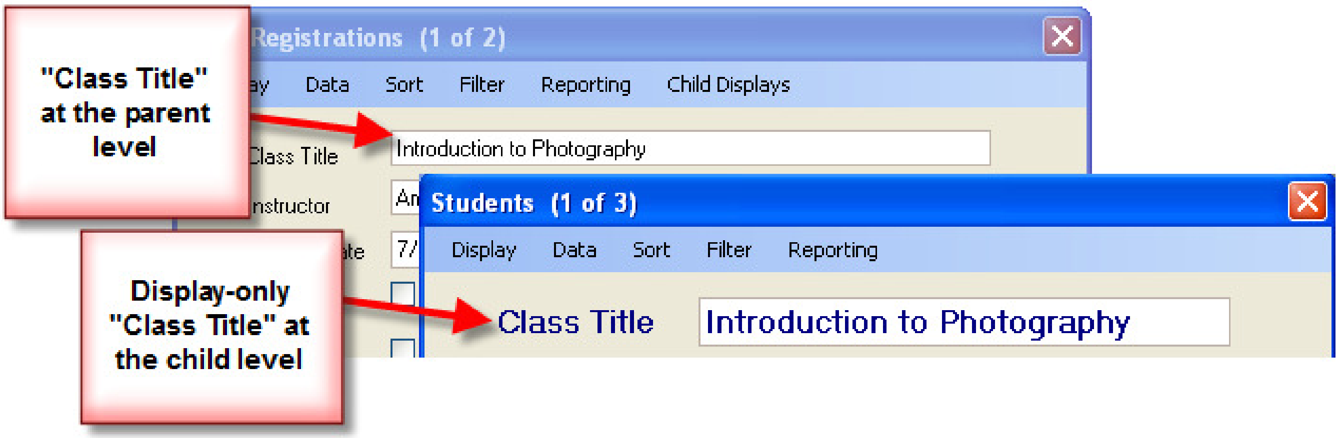
If you have the child level open, any filter or sort order set at the child level will be reflected in the rollup. (Refer to the *Sorting Records* and *Filtering Records* sections, later in this chapter, for details.)

The data that appears in the rollup is pulled from the child level. To modify it, you must open the child level and edit the child record directly. (See *Opening Child Displays*, earlier in this chapter, for details.)

Inputting Data in Parent Fields

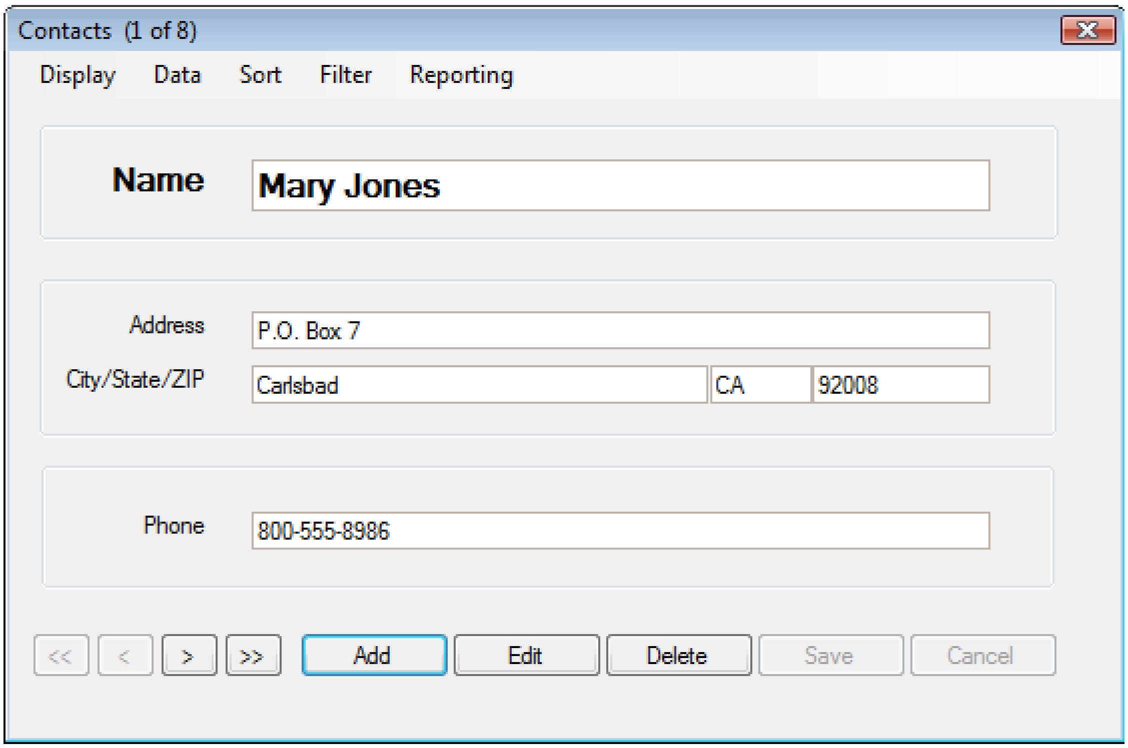
PRO Child displays are only available in Database Oasis Professional Edition.

If you have a child display set up in Professional Edition, you can display data from the parent record on the child level. Parent fields are display only and must be edited on the parent level. These fields will appear like normal fields, except you will not be able to edit them.



Viewing Records

Records can be viewed in two formats: the single record view or the list view. By default, when you first open a display, you will be viewing the first record you added in single record view:



Using this example, all of the information on this page belongs to Mary Jones. Any changes that you make to this record will only affect Mary Jones.

The title bar of the display tells you how many records are in your display and what record you are currently viewing:

In the above example, you are viewing record 1 of 8 total records in the display.

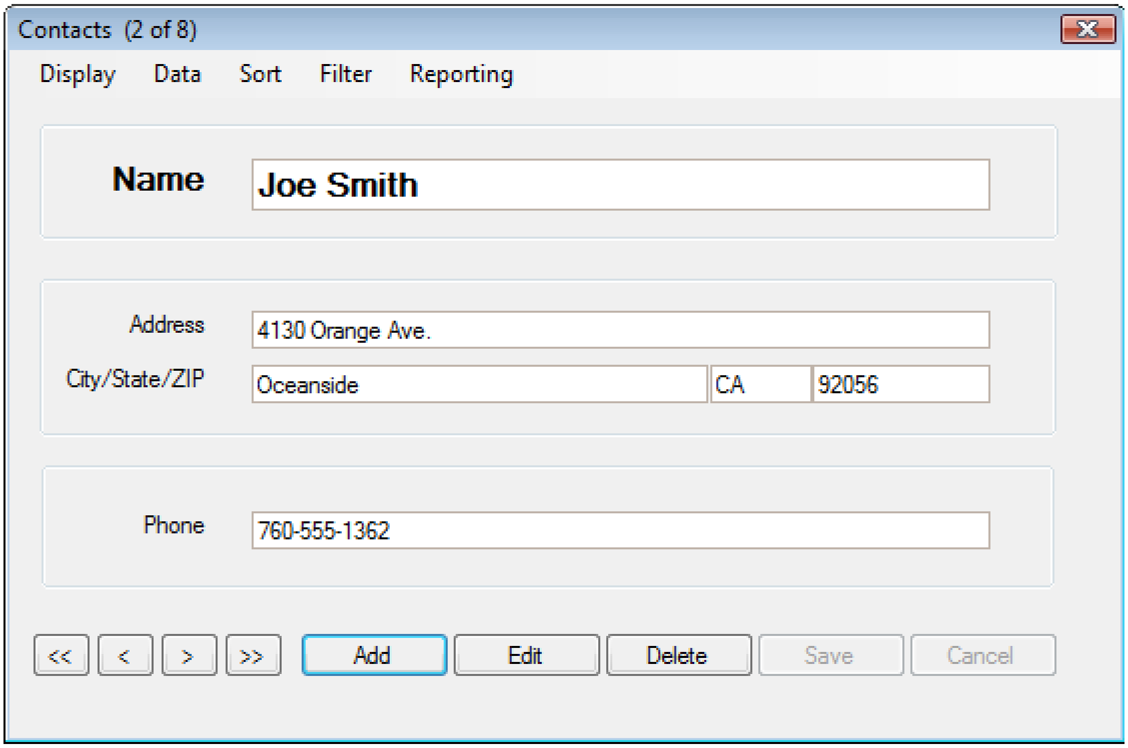
Note

It is possible to set a filter so you only view a sub-set of records in your display. If a filter is set, the record count will show the number of records in the filter. Refer to *Filtering Records*, later in this chapter, for more information.

Scrolling

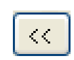
You can move to the next record by using the scroll buttons:

Use the Next button  to view the next record that was added to the display:

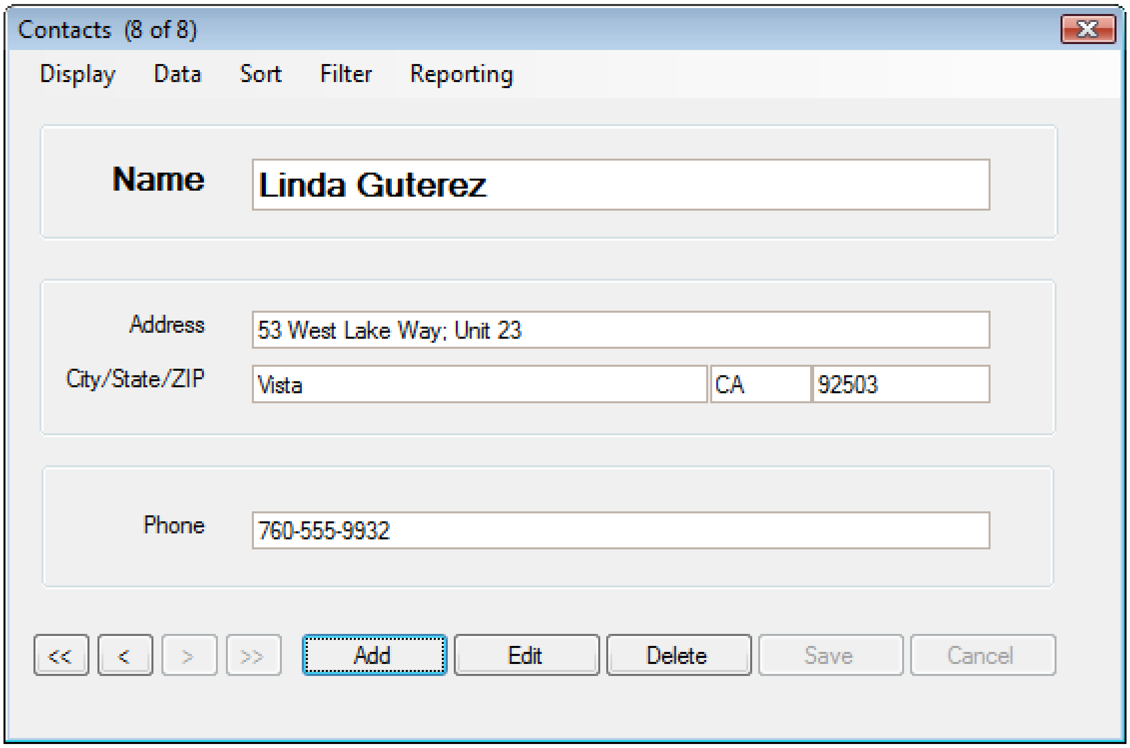


You are now viewing information related to Joe Smith. Any changes you make here will only affect Joe's record. If you click the Previous button , you will move back to Mary Jones' record.

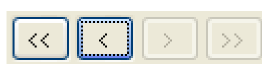
Unless you have a sort set, you will scroll through the records in the order in which they were added. (See *Sorting Records* below for more information.)

Since Mary Jones' record was the first record added to the display, clicking the First button  will automatically take you to her record. (If you are sorting your records, it will take you to the first record in order of the sort.)

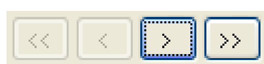
To quickly move to the record that was added most recently (or the last record in order by your sort) click the Last button :



If the Next and Last buttons dim out, it means you are at the very last record:



If the Previous and First buttons dim out, it means you are at the very first record:



If you do not have any records in your display, or you have only one record, all four buttons will be dimmed out:

Sorting Records

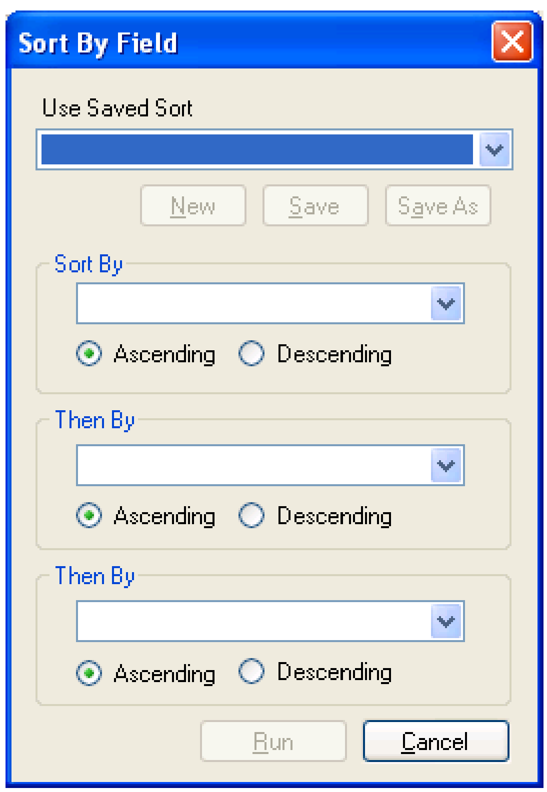
Sorting lets you control the order in which records are presented. For example, if you have a display that contains contact information, you may want to sort by last name. Records will appear in order of the sort when scrolling, in the list view, when printing, and when exporting. If there is no sort in place, such as when you first open the display, records will appear in the order in which they were added.

SORTING RECORDS

1 Open the display you would like to sort.

2 From the menu inside the display, select Sort By from the Sort menu:

3 The Sort By Field screen will open:



Hint

If you have previously set up a sort and saved it, you can select it from the Use Saved Sort list. The screen will update to show the sort criteria. Refer to *Saving and Recalling Sorts*, later in this section, for details.

4 Click the arrow next to the list field in the Sort By section and select the field on which you would like to sort. For example, if your display contains names and addresses and you want to see people in order by last name, you would select the field that contains last names.

5 Select the Ascending radio button if you would like to see records in alphabetical order going from A to Z. If your field is a numeric field, this will go from the smallest number to the largest.

Select Descending if you would like to see records in alphabetical order going from Z to A, or numbers going from the highest to the lowest.

If you have a text field that contains numbers (rather than a numeric field type), it will sort by the value of each digit in order. So 10 would be seen as 1 and 0 as opposed to ten. For example, sorting in ascending order with a character field, the numbers 1 through 10 would sort:

1
10
2
3
etc...

To have records sort by the value, make sure your field type is numeric.

If you are sorting on a check box, records with unmarked check boxes will appear first in ascending order, followed by records with marked check boxes.

If you are sorting on a notes field, the records will be sorted in order of the first characters in the field. Numbers in the first position of a notes field will sort following the rules for text fields.

6 Use the second and third sets of sort criteria if you would like to sub-sort. This is useful if several records will have the same value in the field you selected as the primary sort. This allows you to further sort those matching records based on another field.

For example, if you have a display that contains names, you could sort on last name, then by first name. A display that contains:

First Name	**Last Name**
Larry	Smith
Maria	Ruiz
Bob	Adams
Kurt	Smith
Adam	Kuznetsov
April	Smith

Would sort like this:

First Name	**Last Name**
Bob	Adams
Adam	Kuznetsov
April	Smith
Kurt	Smith
Larry	Smith
Maria	Ruiz

You could use the third sort criterion to put people with the same first and last name in order by ZIP code.

7 If for any reason you would like to clear your sort and start over, click the New button. The fields blank out so you can start from scratch.

8 Click Run to set the sort. Now when you scroll through your records, they will appear in the order you specified.

9 When you are done using the sort, select Clear Sort from the Sort menu to return to viewing records in the order in which they were added.

Saving and Recalling Sorts

Once you have set up a sort, you can save it for quick access in the future. For example, if you frequently need to see your address book in order by last name, then first name, you can create a sort on those values and recall it, without having to set it up each time.

In addition to being able to quickly set a previously saved sort, you can access any saved sort in the Sort By Field screen where you can modify it if necessary, or quickly create a new sort based on an existing one.

SAVING SORTS

1 Set up your sort following the instructions under *Sorting Records*, above.

2 As soon as you select a field in the Sort By section, the Save button becomes available.

3 Click Save.

4 The Save Sort screen opens:

5 Enter a name for your new sort in the Name field.

6 Click OK.

7 You will return to the Sort By Field screen with the name of your new sort in the Use Saved Sort list:

8 To set the selected sort, click Run.

USING A SAVED SORT

1 If you would like to set a saved sort without going back into the Sort By Field screen, select Saved Sorts from the Sort menu.

2 The Saved Sorts screen will open:

3. Select the desired sort from the list and click Run. Your records will be in order by the sort.

Modifying a Saved Sort

1. Select Sort By from the Sort menu to open the Sort By Field screen.

2. Select the sort you would like to modify from the Use Saved Sort list.

3. The Sort criteria fields will update with the settings from the selected sort.

4. Make any desired changes to the sort. At this point, you have the option to overwrite your existing sort, or save a copy to a new name.

5. To overwrite your existing sort, just click Save.

6. To save a new copy, click Save As. The Save Sort screen will open where you can name your new sort. When you click OK, both the original sort and the new sort will be in the Use Saved Sort list, with the new sort selected.

7. Toggle between any of the saved sorts by selecting them from the Use Saved Sort list.

Deleting a Saved Sort

1. If you no longer need a sort you previously saved and would like to delete it, select Saved Sorts from the Sort menu.

2. The Saved Sorts screen will open.

3. Highlight the sort you would like to remove and click Delete.

Note
If you delete the sort that is currently being used in the display, it will be cleared. Your records will go back to the order in which they were added.

Filtering Records

Filtering your data allows you to only work with a select group of your records. For example, if you are working in an advertising campaign display, you may want to only view records for customers who accept e-mail solicitations.

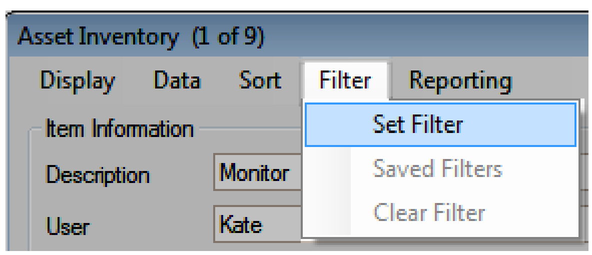
Database Oasis Basic Edition lets you set a filter on one field. Database Oasis Professional Edition lets you set a filter on up to 12 fields.

> **Note**
>
> If you are viewing a child display in Professional Edition, a filter is automatically applied to show only records associated with the current parent. Any filter you set at the child level will be applied on top of the parent record filter.

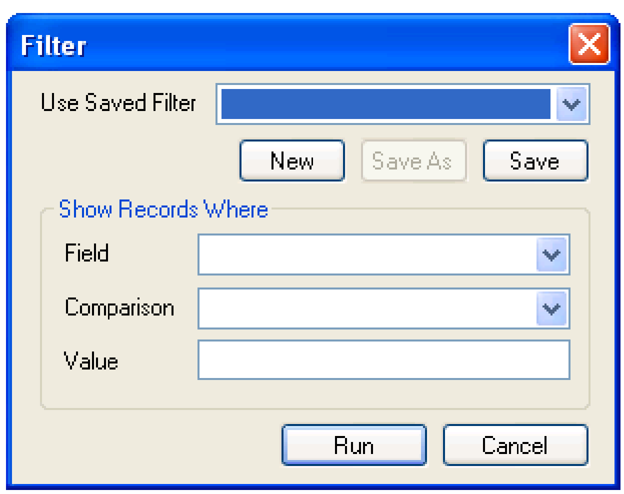
Filters in Basic Edition

SETTING A FILTER IN BASIC EDITION

1 From the menu inside the display, select Set Filter from the Filter menu:



2 The Filter screen will open:



Hint

If you have previously set up a filter and saved it, you can select it from the Use Saved Filter list. The screen will update to show the filter criterion. Refer to *Saving and Recalling Filters*, later in this section, for details.

3 The Field drop-down list will show all of the fields in your display (with the exception of picture fields). Select the field that you would like to use in your filter from the list.

4 Comparisons let you specify how the value in a field should compare to the value in the filter criterion when determining whether or not the record should be included in the filter. The Comparison drop-down list will include all of the comparisons that are available for your selected field type.

- Equal = A record will only be included in the filter if the value in the field in your display exactly matches what you enter in the Value field in your filter. (The capitalization does not need to match.)

- On = This option appears if you have selected a date field. It functions the same as Equal.

- Does Not Equal = A record will only be included in the filter if the field does not match what you enter in the Value field in your filter.

- Is Greater Than = If your field is numeric, a record will only be included in the filter if the numeric value in the field is higher than what you enter in the Value field in the filter. For example, if you have a display for accounts receivable, you could use this to only view clients who have a balance over $1000.

  If you have a character field, a record will only be included if the first characters in the field are later in the alphabet than what is entered in the Value field. For example, if you have a display that contains names and you would like to work with people whose last name starts with M or later, you could use this comparison with L as the value. If you have to stop working after just getting through the Mc's, in your next work session, you could enter Mc in the Value field and easily pick up where you left off.

  If you have a character field that contains numbers, the software will analyze each number in order, rather than the value of the number. For example, if you enter Is Greater Than a Value of 9 and have a record with 11 in the field, the filter will look at the 1 in the first position and the record will get filtered out. If you are working with a numeric field instead, the software will recognize 11 as being greater than 9 and include the record in the filter.

- After = This option appears if you have selected a date field. It functions the same as Is Greater Than.

- Is Greater Than or Equal = This is similar to Is Greater Than, with the exception that it includes records that match what is entered in the filter Value, whereas Is Greater Than does not. For example, if you have a display that contains names and you enter L as the Value using Is Greater Than, you'll get everyone with a last name starting with M or higher. If you use Is Greater Than or Equal, you'll get everyone with a last name starting with L or higher.

- On or After = This option appears if you have selected a date field. It functions the same as Is Greater Than or Equal.

- Is Less Than = This work exactly the same as Is Greater Than, only it includes records where the number in a numeric field is smaller than the Value, or characters in a character field are lower in the alphabet than the specified Value.

- Before - This option appears if you have selected a date field. It functions the same as Is Less Than.

- Is Less Than or Equal = This works exactly the same as Is Greater Than or Equal, only with records where the value/character is lower than what is specified in the Value field.

- On or Before = This option appears if you have selected a date field. It functions the same as Is Less Than or Equal.

- Contains = This is similar to Equal, but only requires that the field contains the value, rather than requiring that it exactly matches. For example, you may have first and last names in a single field. Using Contains with a value of Smith will bring up John Smith and Mary Smith. If you used Equal, it would only bring up records where Smith was the only thing in the field.

- Does Not Contain = This is similar to Contains, but will include records that do not have the specified value in the field.

Notes

The Contains and Does Not Contain options are only available for text and notes fields. (These are the only options available for notes fields).

If you have selected a check box field, the only available comparison is Equals.

> If you have selected a date field for your filter, Not Equal, Contains, and Does Not Contain options will not be available.

5 Enter the value that should be compared to the data in the selected field. (See step 4, above, for a discussion on how the records will be analyzed against this value with each comparison type.)

- If you have selected a text, numeric, notes, or calculated field for your filter, type the value in the field or leave the value blank to search for empty fields.
- If you have selected a date field, click the icon next to the field to select a date from the pop-up calendar.
- If you have selected a list field, click the icon next to the field to select the value from the list. If your list field allows you to type in the field rather than just selecting from the list, you can also type in the filter value or leave the value blank to search for empty fields.
- If you have selected a check box field, the Value field provides a list that contains Checked or Unchecked. Select the appropriate option from the list.

6 Click Run to execute your filter. When you scroll through your records, only records that meet the filter will be included. Records that do not meet the filter will be hidden. The record count on the display's title bar will update to show the number of records in the filter:

7 When you are ready to return to viewing all records, select Clear Filter from the Filter menu.

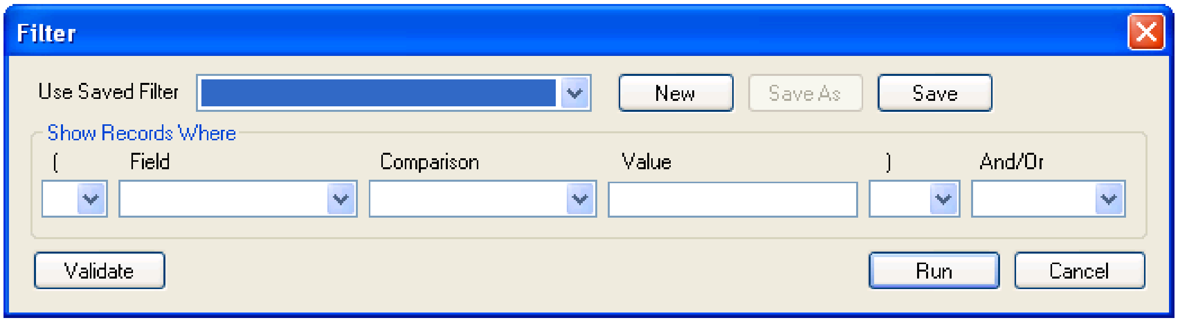
Filters in Professional Edition

> **PRO** Multi-line filtering is an advanced feature that is only available in Professional Edition.

SETTING A FILTER IN PROFESSIONAL EDITION

1 From the menu inside the display, select Set Filter from the Filter menu:

2 The Filter screen will open:



Hint

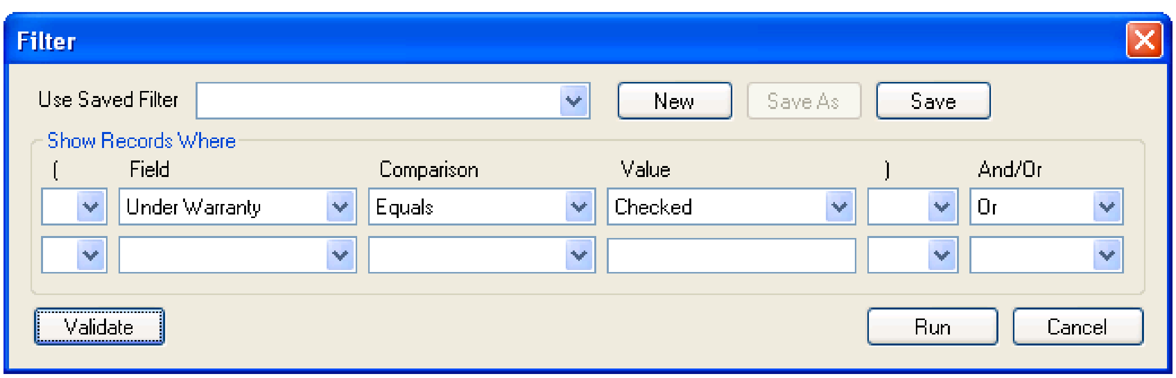
If you have previously set up a filter and saved it, you can select it from the Use Saved Filter list. The screen will update to show the filter criteria. Refer to *Saving and Recalling Filters*, later in this section, for details.

3 Add the first filter line using the guidelines under *Setting a Filter in Basic Edition*, above.

4 To add the next line, open the And/Or drop down list and make a selection using the following guidelines:

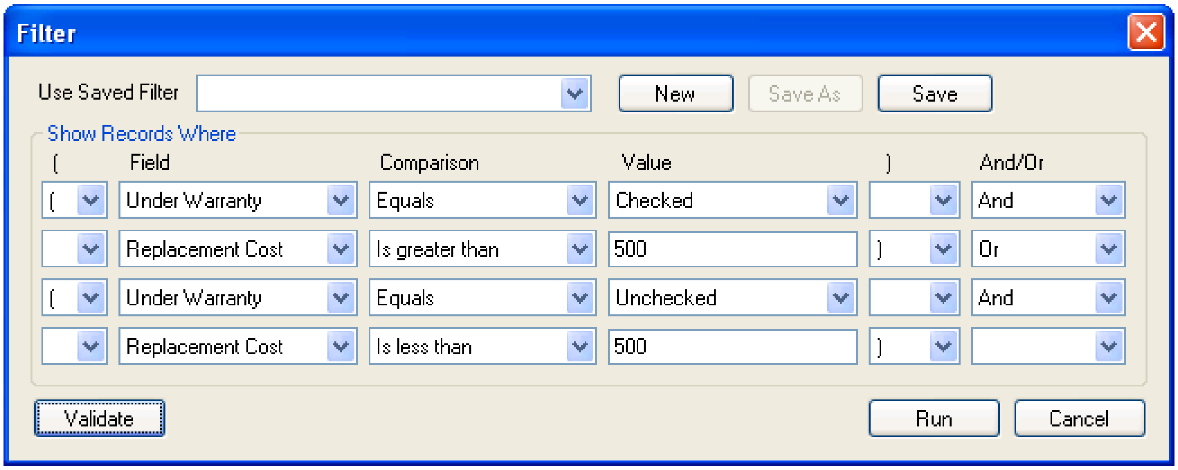
- Select And if you would like the filter to only include records that meet both criteria.
- Select Or if you would like the filter to include record that meet either criteria.

5 When you make a selection from the And/Or list, a second line will be added to the filter screen:



6 Continue adding lines (up to 12) until all of your filter conditions are entered.

7 Use the open and close parentheses fields to group your filter criteria. For example:



The above filter will find records where either

(Under Warranty is checked and Replacement Cost is more than $500)
Or
(Under Warranty is not checked and Replacement Cost is less than $500)

You can select up to three parentheses, which allows you to create up to two sub-groupings.

8 If you need to remove a line, select Remove Line from the And/Or list. The lines below will move up.

Note

When you remove a line, be sure to check your And/Or value on the line above to make sure it is still applicable. If you are using groupings, you should also check your parentheses to make sure they are still valid.

Note

If you have the maximum number of lines in a filter, the And/Or field is dimmed out. To remove the last line, you must first remove one of the lines above.

9 When you have finished creating your filter, click the Validate button. This runs a check on the filter to make sure that it is valid. If the filter is invalid, check the following:

- Make sure that the Field, Comparison, and Value fields are filled in for all lines.
- Make sure that you have an even number of open and close parentheses, and that the open parentheses are before the close parentheses.
- Make sure that the value is compatible with the field type on all lines. (For example, you cannot have a letter in a numeric field.)

10 Once you are satisfied with your filter, click Run. When you scroll through your records, only records that meet the filter will be included. Records that do not meet the filter will be hidden. The record count on the display's title bar will update to show the number of records in the filter:

11 When you are ready to return to viewing all records, select Clear Filter from the Filter menu.

Saving and Recalling Filters

Once you have set up a filter, you can save it for quick access in the future. This is especially useful in Professional Edition if you have filters with multiple criteria.

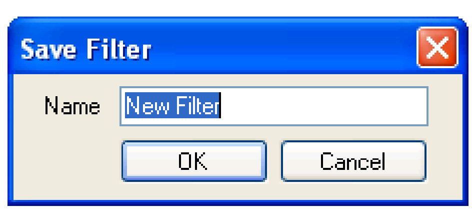
In addition to being able to quickly set a previously saved filter, you can access any saved filter in the Filter screen where you can modify it if necessary, or quickly create a new filter based on an existing one.

SAVING FILTERS

1 Set up your filter following the instructions under *Setting a Filter in Basic Edition* or *Setting a Filter in Professional Edition*, above.

2 Click Save.

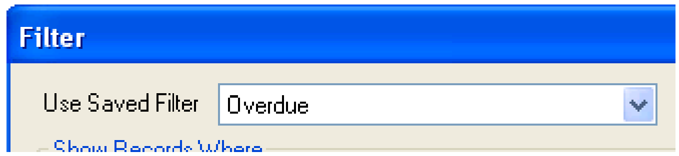
3 The Save Filter screen opens:



4 Enter a name for your new filter in the Name field.

5 Click OK.

6 You will return to the Filter screen with the name of your new filter in the Use Saved Filter list:

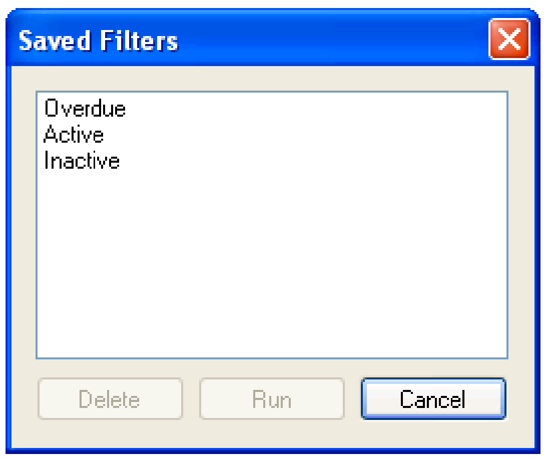


7 To set the selected filter, click Run.

Using a Saved Filter

1 If you would like to set a saved filter without going back into the Filter screen, select Saved Filters from the Filter menu.

2 The Saved Filters screen will open:



3 Select the desired filter from the list and click Run. When you scroll through your records, only records matching the selected filter will appear.

Modifying a Saved Filter

1 Select Set Filter from the Filter menu to open the Filter screen.

2 Select the filter you would like to modify from the Use Saved Filter list.

3 The filter criteria fields will update with the settings from the selected filter.

4 Make any desired changes to the filter. At this point, you have the option to overwrite your existing filter, or save a copy to a new name.

5 To overwrite your existing filter, just click Save.

6 To save a new copy, click Save As. The Save Filter screen will open where you can name your new filter. When you click OK, both the original filter and the new filter will be in the Use Saved Filter list, with the new filter selected.

7 Toggle between any of the saved filters by selecting them from the Use Saved Filter list.

DELETING A SAVED FILTER

1 If you no longer need a filter you previously saved and would like to delete it, select Saved Filters from the Filter menu.

2 The Saved Filters screen will open.

3 Highlight the filter you would like to remove and click Delete.

Note
If you delete the filter that is currently being used in the display, it will be cleared. You will go back to viewing all records.

Searching for Records

If you wish to locate a specific record, you can use Find to search your display for a value in a text or notes field. For example, you may have a display that contains your customers and wish to locate the XYZ company. If you know that the text "XYZ" will be located in the Company field, you can use Find to search for the record.

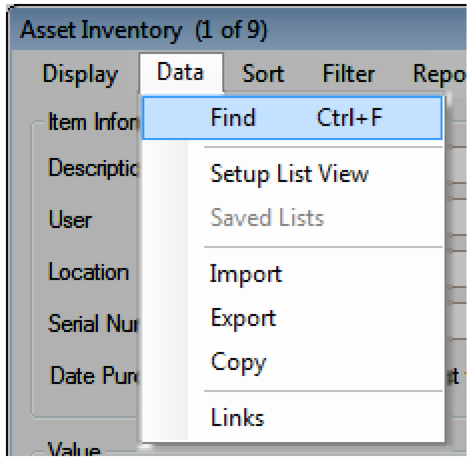
Note
Find at the Professional Edition child level only searches the current parent.

SEARCHING FOR RECORDS

1 Open the display containing the record you would like to locate.

2 Open the Find screen using one of the following methods:

- From the File menu, select Find:



- Press CTRL+F on your keyboard.

3 The Find screen will Open:

4 Select the field that contains the data you're searching for from the In Field list.

5 Enter the text that identifies the record you would like to locate in the Find field. For example, if you wanted to locate a customer record for the XYZ company, you could enter *XYZ* in the field.

> **Note**
>
> The search will locate whole words, anywhere in the field. For example, you may search a field that contains first and last names for *Sam*. It would find "Sam Smith", and "Mary and Sam Jones", but it would not find "Samuel Baker". Be aware as well that differences in punctuation could cause a record not to be found. For example, if you are searching for *Inc*. in a company field, a record containing Inc without the period would not be located in the search.

6 Click Find Next or press ALT+F. The first record that matches your search criterion will open. If this is not the record for which you are looking, press Find Next again. The search will continue to bring up matching records until it has gone through all records in your display.

> **Note**
>
> If you have a filter set, Find will only locate records that are within the filter. If you wish to locate a record that is outside of the current filter, remove the filter before searching.

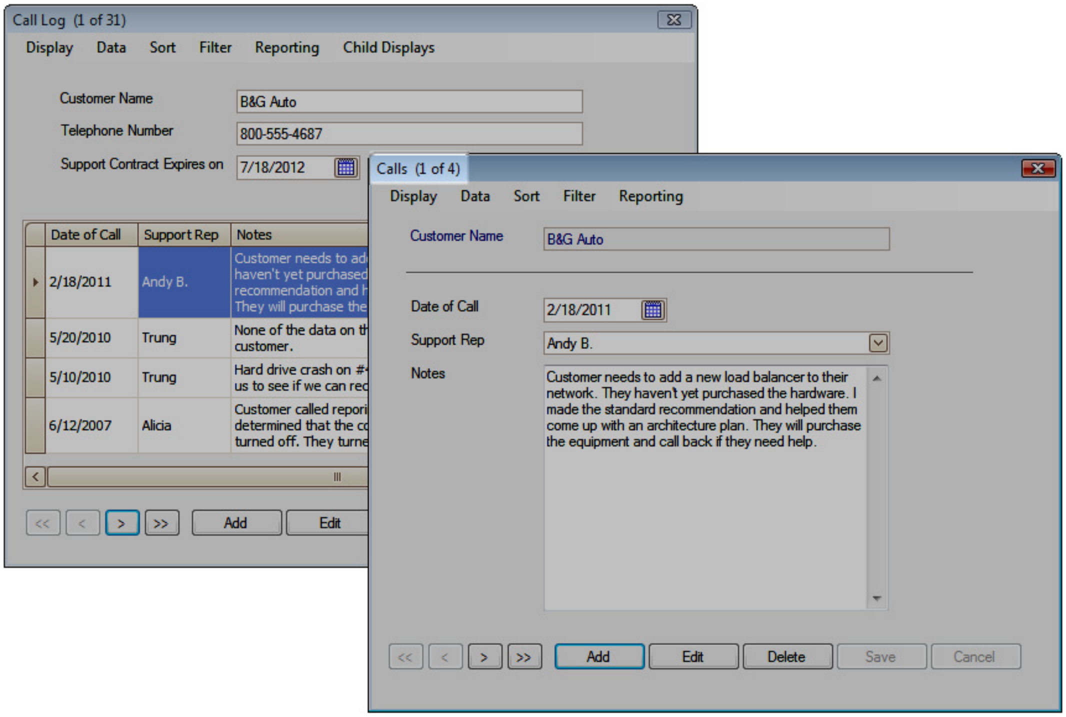
7 Click Close when you are finished searching.

Viewing Records in a Child Display

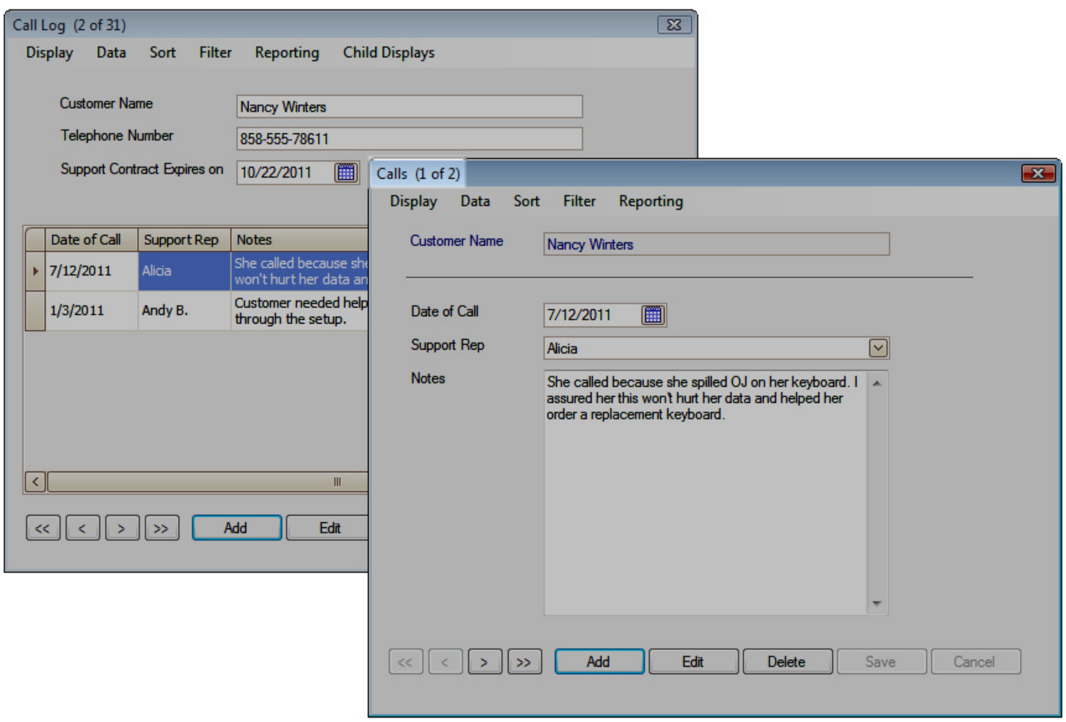
PRO Child displays are an advanced feature that is only available in Professional Edition.

Viewing records in a child display is very similar to viewing records in any other display. You may scroll records and set sorts and filters just like you would at the parent level. The one notable exception is that when viewing or searching for records at the child level, you will only see the records for each parent.

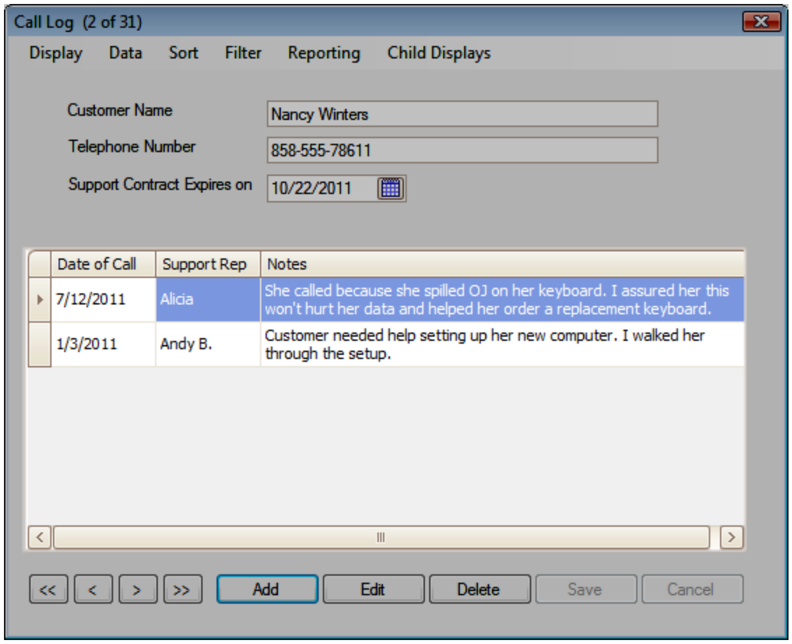
The title bar of the display indicates how many child records are associated with the current parent:



In this example, there are four call log records associated with the B&G Auto parent record. In the same display, there are only two call logs for the Nancy Winters parent record:

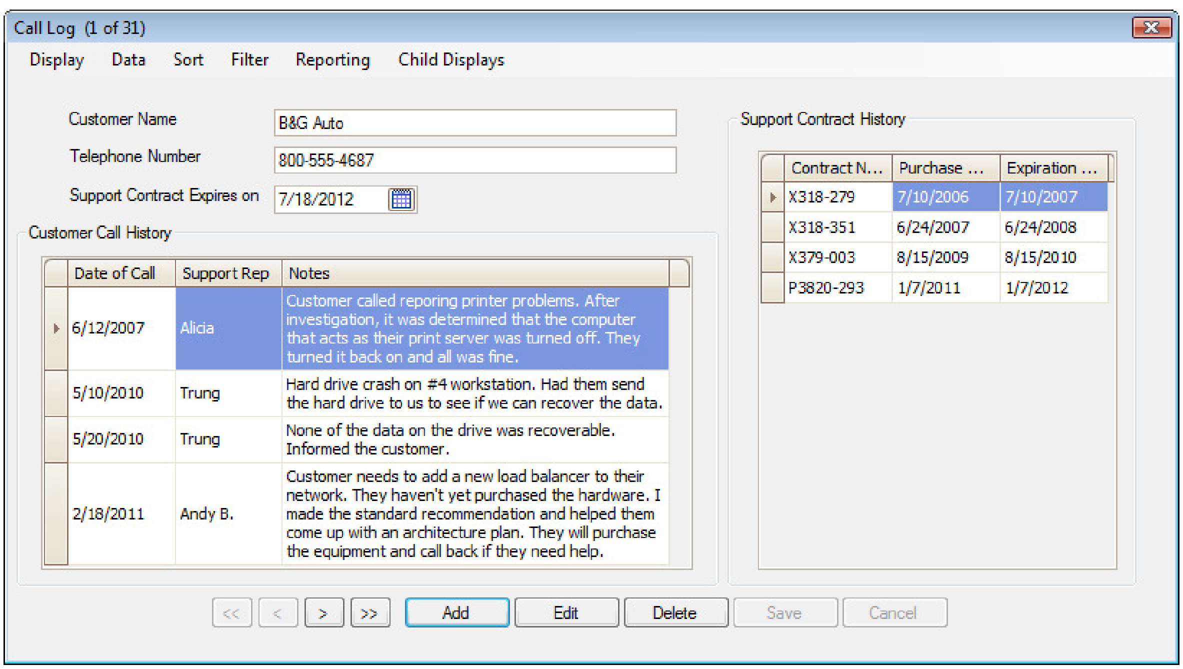


If you've added a child rollup to the parent level, you can also see details of the child records in the rollup, without opening the child level:



If you set a sort or filter at the child level, it will be reflected in the parent level rollup.

If you have more than one child level associated with your display, you can have multiple child rollups and view data from each child independently.



Viewing Records in List View

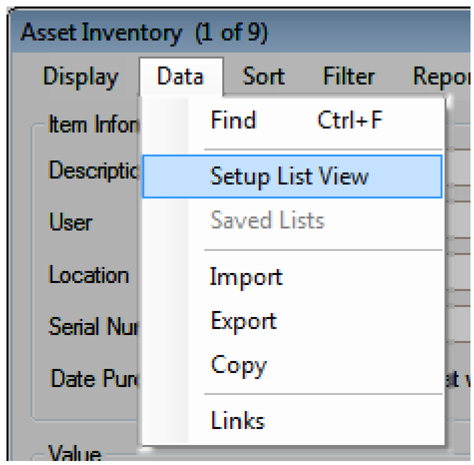
List View provides a tabular list of your records. This is convenient because it allows you to see more than one record at a time and compare data from multiple records side-by-side.

Lists may be set up for one time viewing, or saved for future access.

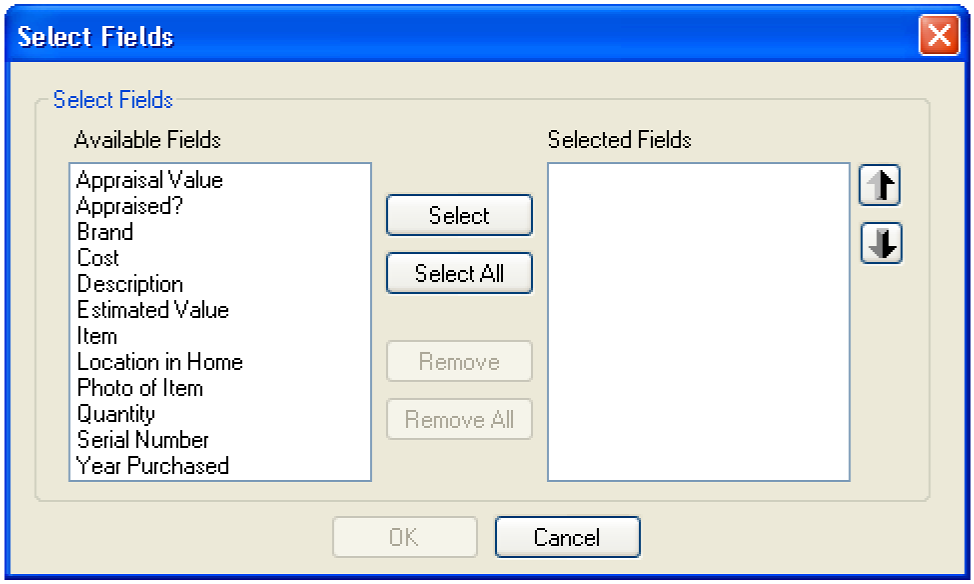
Setting up List View

1 Open the display that contains the data you would like to view.

2 From the Data menu, select Setup List View:



3 The Select Fields screen will open:

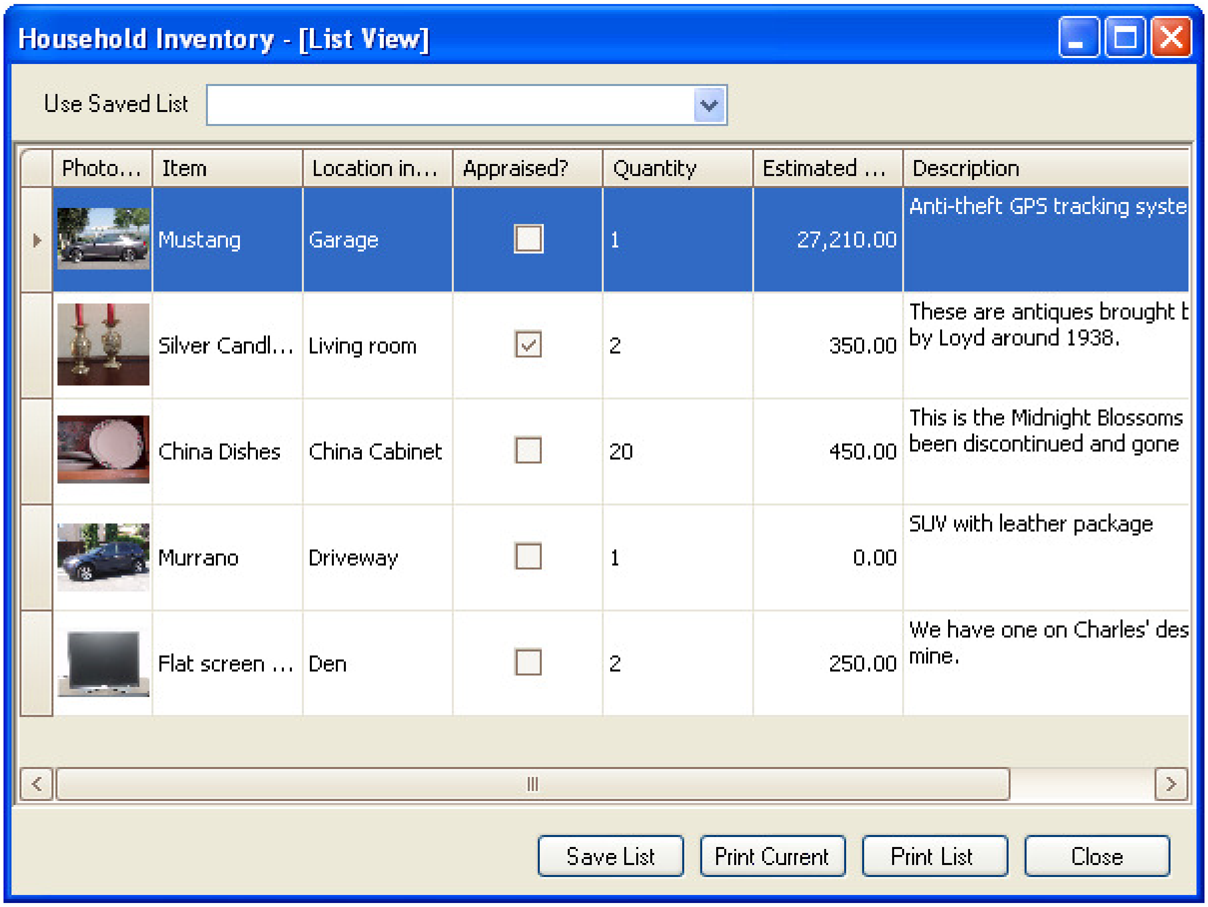


4 This screen allows you to control what fields are shown in the list and in what order they appear. The Available Fields box provides the list of fields in your display. To include a field in the list view, double click on it or highlight it and click the Select button. The field will move from the Available Fields list to the Selected Fields list. To select all fields, click Select All.

5 If you have selected a field and decide you do not want to view it in the list, double click on it in the Selected Fields list or highlight it and click Remove. It will move back to the Available Fields list. If you would like to clear the Selected Fields list and start over, click Remove All.

6 When the list view is displayed, fields will be shown in the order that they appear in the Selected Fields list. The arrow buttons next to the Selected Fields list allow you to move fields up or down in the list to change their order in the list view. Highlight a field in the Selected Fields list and click the appropriate button until the field is in the desired position.

7 Click OK to open the list view with the selected fields:



8 The grid on the screen shows the records in your display. Each row is a separate record. Each column is one field in the record. Using the example above, the first row contains information about the Ford Mustang. The second row contains information about the sliver candlesticks, and so on.

9 The list view will open at a default size. If you have more columns than can be displayed, a horizontal scroll bar will appear at the bottom of the screen. If you would like to make the screen wider to accommodate more fields, hover your mouse along the right edge of the screen. It will change to a double headed arrow. Click and drag to size the screen.

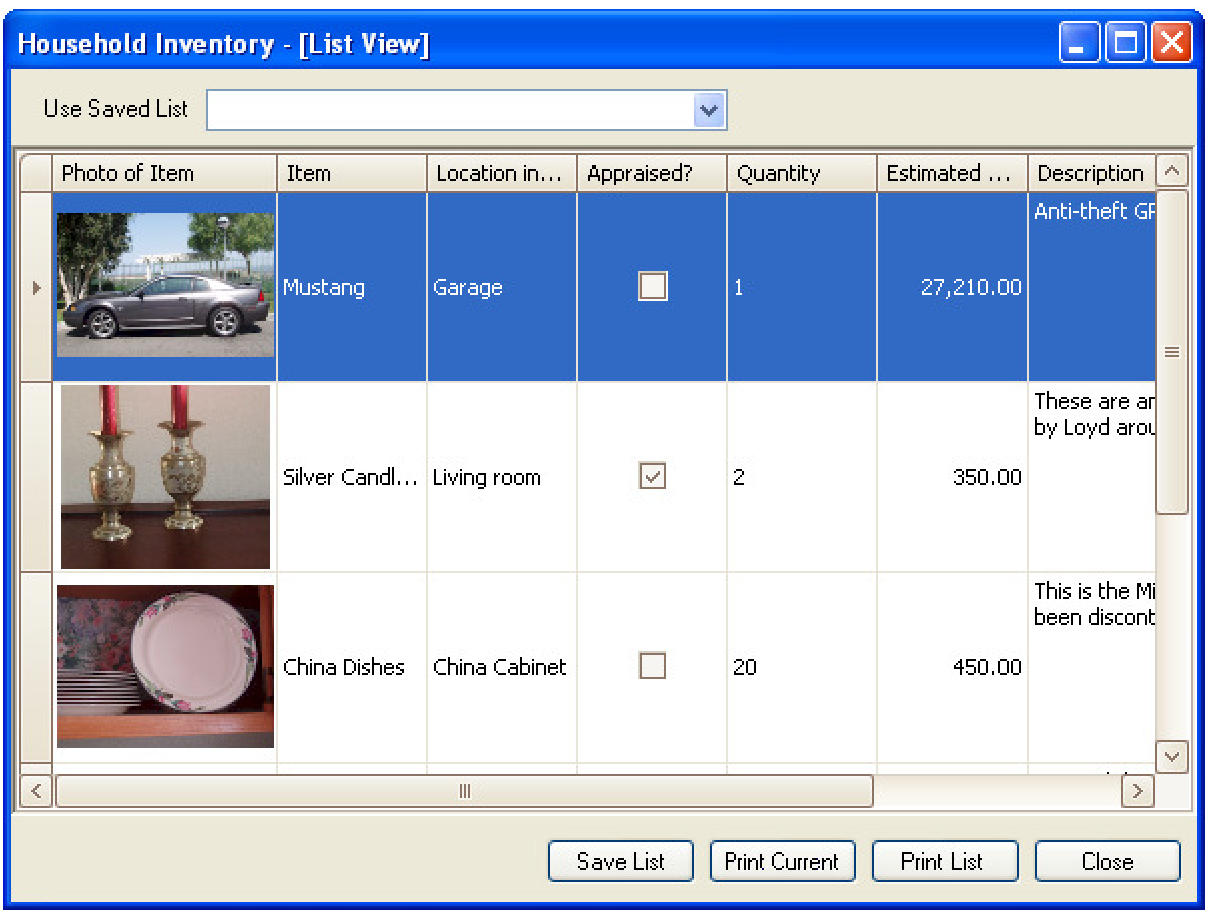
10 A solid gray area below the grid, as shown in the example above, indicates that the default height of the list view is taller than what is necessary to accommodate the number of records being displayed. If there are more rows of data than can be displayed, the gray area will not be seen and a vertical scroll bar will appear along the right edge of the screen. If you would like to make the screen taller to accommodate more records, or you would like to make it smaller to remove the space below records, hover your mouse along the bottom edge of the screen. When it changes to a double headed arrow, click and drag to size the screen.

11 If there is more text in the field than can be displayed, it will be followed by an ellipsis (...). If you hover your mouse over the field, the full contents of the field will be visible in a tooltip.

12 You can change the size of the columns or the height of the rows by clicking and dragging. Simply hover your mouse over the bar between the field names:

13 Or the bar between the rows in the first column:

14 The mouse will change to a double headed arrow. Click and drag to change the size of the column or the height of the row:



Hint

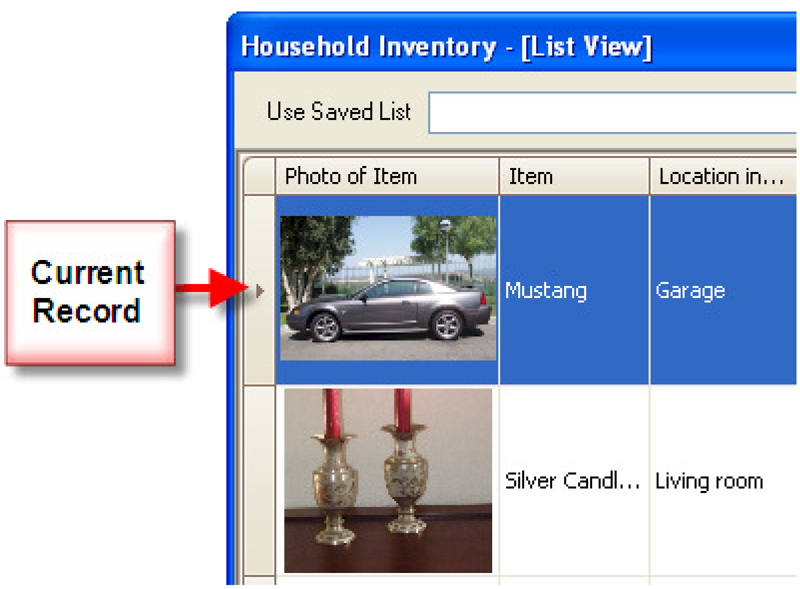
If you double click on the bar between the field names, the column will automatically size to accommodate the field with the most data.

15 If you change the height of a row, all of the rows will adjust to the new size. The only exception to this is notes fields. The height of records with notes fields will be automatically adjusted to display all of the text in the note and cannot be sized smaller.

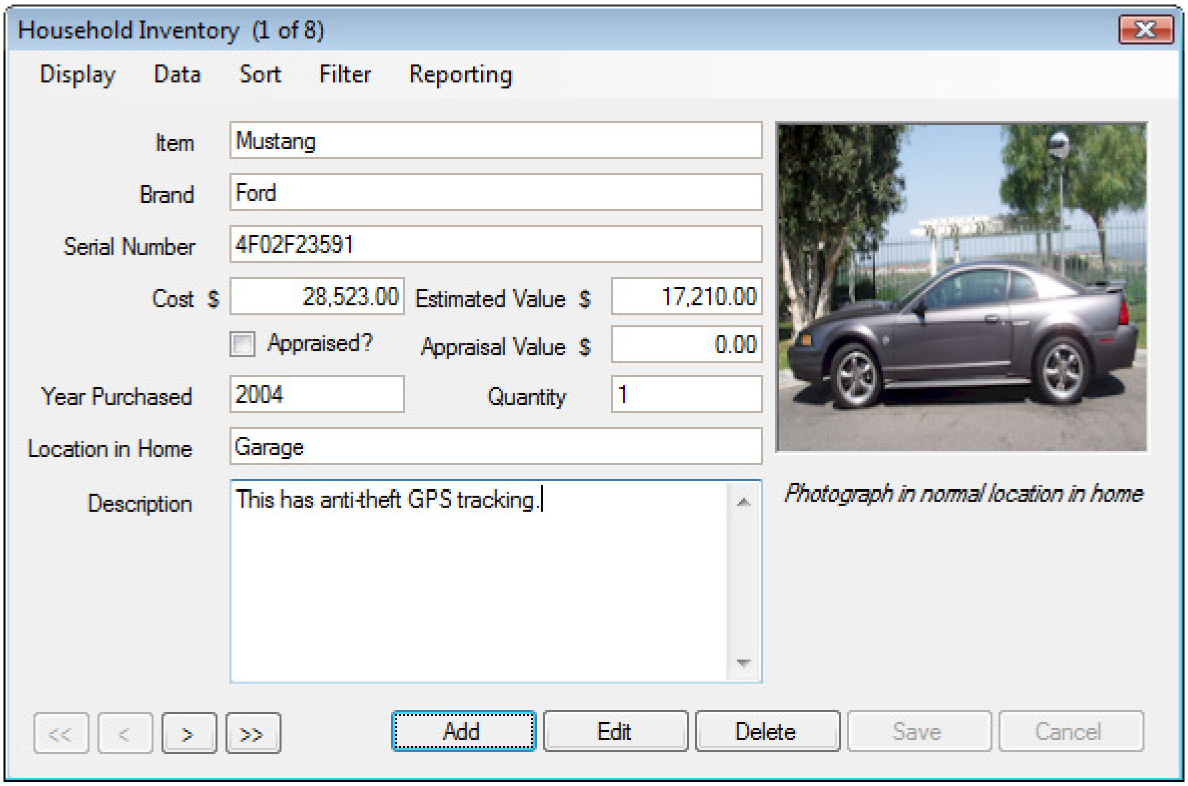
16 If you have picture fields in your display, the picture will shrink to fit the field in the list, but will maintain its relative proportions. For example, if your picture is 4 inches tall by 2 inches wide, and you size the field in the list to be 1 inch square, the picture will appear 1 inch tall by 0.5 inches wide. If a picture is smaller than the field in the list, it will appear centered in the field at its actual size. Rows with picture fields have a default minimum height of 50 pixels and cannot be sized smaller.

17 The list view can be left open while you work in your display, allowing you to work with the list and individual records at the same time. This list will be synchronized with the records you are viewing in your display. If you have a filter in place, only records that match the filter will be shown here. If you have a sort in place, records will appear in the order of the sort.

18 The record that is showing in your display will also be selected in the grid. The gray arrow in the first column indicates the current record:



19 In the above example, the Ford Mustang is selected, and therefore the record currently open in your display:



20 If you change records in your display view, the arrow will move to the appropriate line in the list. If you click on a different record in your list view, the arrow will move and your display view will update to show that record.

21 If you would like to save your list view so it may be quickly accessed again later, refer to *Saving List Views*, below.

22 When you are done working with the list view, click Close to exit the screen.

Saving and Recalling List Views

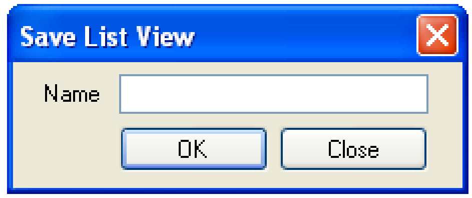
Once you have set up your list view, you can save it for quick access in the future. This is especially useful if you have a particular view that you will need to access and/or print regularly.

Saving List Views

1 Set up your list view following the instructions under *Setting up List View*, above.

2 Once you have the list how you want it, including the size of the window and columns, click Save List.

3 The Save List View screen opens:



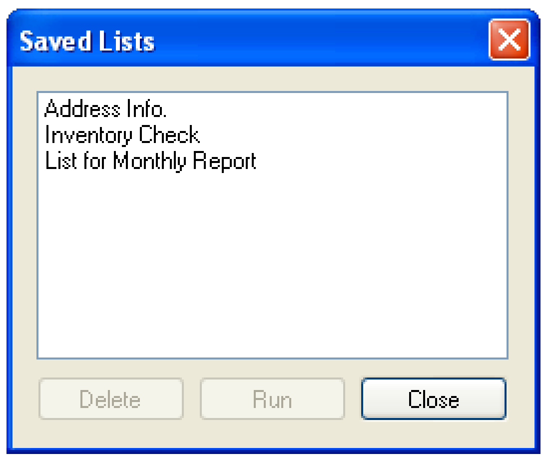
4 Enter a name for your new list view in the Name field.

5 Click OK.

6 You will return to list view with the name of your new list in the Use Saved List field.

Viewing Saved List Views

1 Select Saved Lists from the Data menu to open the Saved Lists screen.



2 Highlight the list you would like to view and click Run.

3 List View will open to the selected list.

4 If you would like to modify the size of the size of the window or columns in the saved list, make any necessary changes following the guidelines under *Setting up List View*, earlier in this section. When you are satisfied with your selections, click Save List. The next time you open the list view, the changes will be reflected.

Note
If you don't save the changes, the list view will revert to the last saved size the next time it is opened.

Note
If you save changes to the size of the window and columns, the changes will be in effect for all users in Professional Edition.

5 If you would like to view a different list, select it from the Use Saved List field. You may toggle between any of your saved list views.

Deleting a Saved List View

1 If you no longer need a list view you previously saved and would like to delete it, select Saved Lists from the Data menu.

2 The Saved Lists screen will open.

3 Highlight the list view you would like to remove and click Delete.

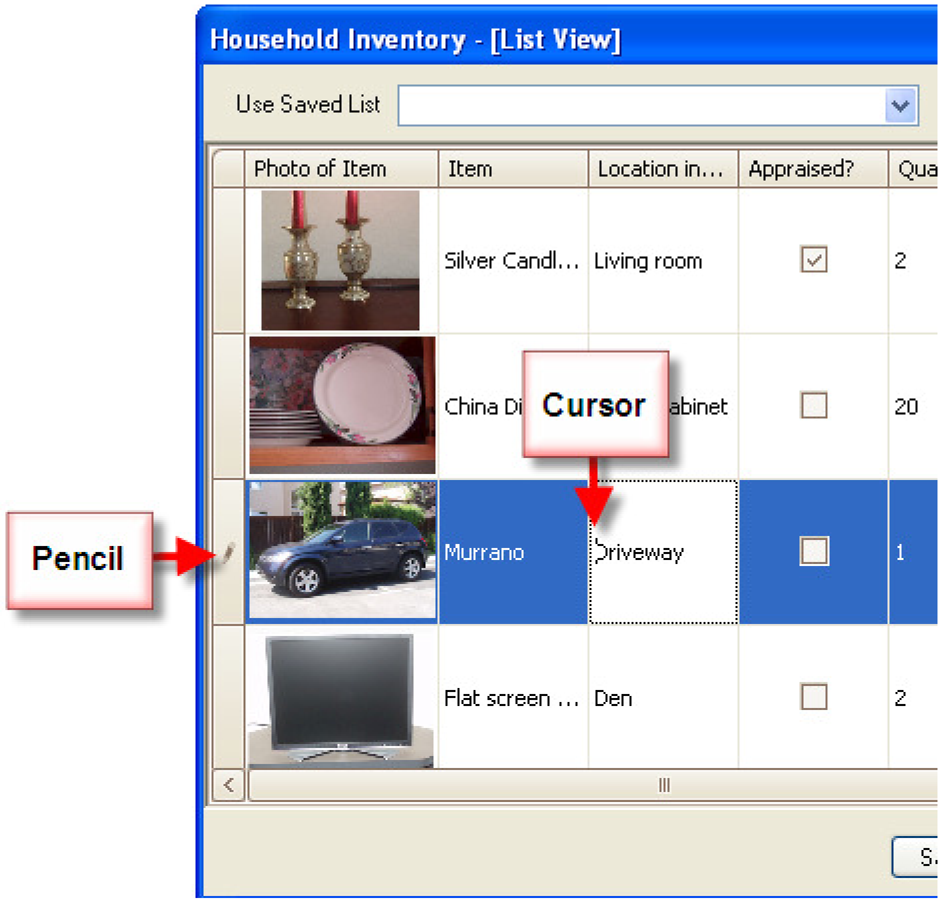
Editing Data in List View

You can edit and add data directly in the list view. This can be particularly useful if you need to make quick changes to multiple records.

Editing Data in List View

1 Open the list view and size the screen, rows, and columns as desired.

2 Click in the field you would like to edit. When you click in a field, a cursor will appear in the field and a pencil will appear in the first column:



3 In the above example, the Location in… field for the Nissan Murrano is selected. Type at the cursor point to make edits as you would in display view.

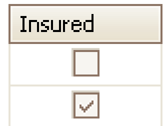
4 Use the following guidelines for editing different field types:

Text Fields – There are no differences when editing text fields in list view versus display view.

Numeric Fields – There are no differences when editing numeric fields in list view versus display view.

Date Fields – The calendar icon will only appear in the date field when you click in the field. Also, the up and down arrow keys will move you to the next and previous records, rather than incrementing the date.

Check Boxes – Check boxes appear as a box in the column:

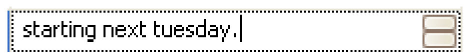


You can edit check boxes by either clicking on them, or clicking in the column and pressing the spacebar on your keyboard.

List Fields – The arrow will only appear in the list when the field is selected. Other than that, there are no differences when editing a list field in list view versus display view.

Picture Fields – You cannot edit picture fields in list view.

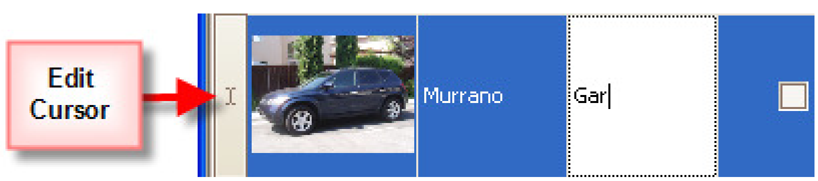
Notes Fields – Edit data in a notes field by simply typing in the field. If the field is sized smaller than necessary to accommodate the text you enter, scroll bars will appear to the right of the field:



Click the buttons to scroll up or down to view additional data.

As soon as you click out of the notes field, it will expand to accommodate the data:

5 As soon as you make a change to the data, the pencil will be replaced with an insertion cursor, indicating you are editing a record:



6 Changes will be saved as soon as you leave the field.

Linking to Records

Links let you associate files on your computer, websites, and e-mail addresses with a Database Oasis record. When you have the record open, you can access the link screen and quickly launch the associated item. For example, you may want to be able to view the .pdf file of an unpaid invoice from a vendor record, open a software program from the Software Inventory display, or launch your music player to listen to a song in the Music Catalog display.

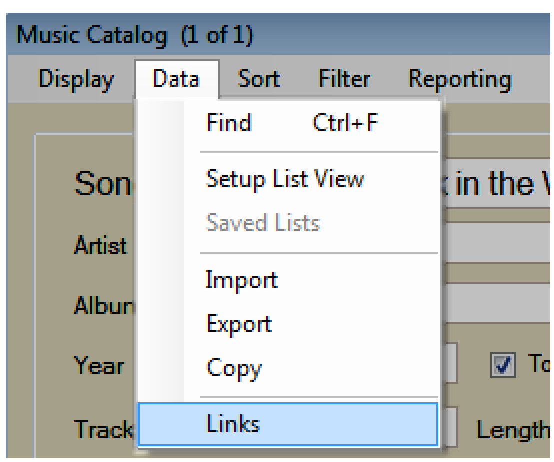
Links work using your Windows file associations. These associations tell Windows what software to use for various types of files. If you can double click on a file in Windows File Explorer and have it launch, you can launch it directly from within Database Oasis. Refer to your Microsoft Windows documentation for help with Windows file associations.

> **Note**
>
> Linked items remain stored on your hard drive in their original location. They are not copied to the database.

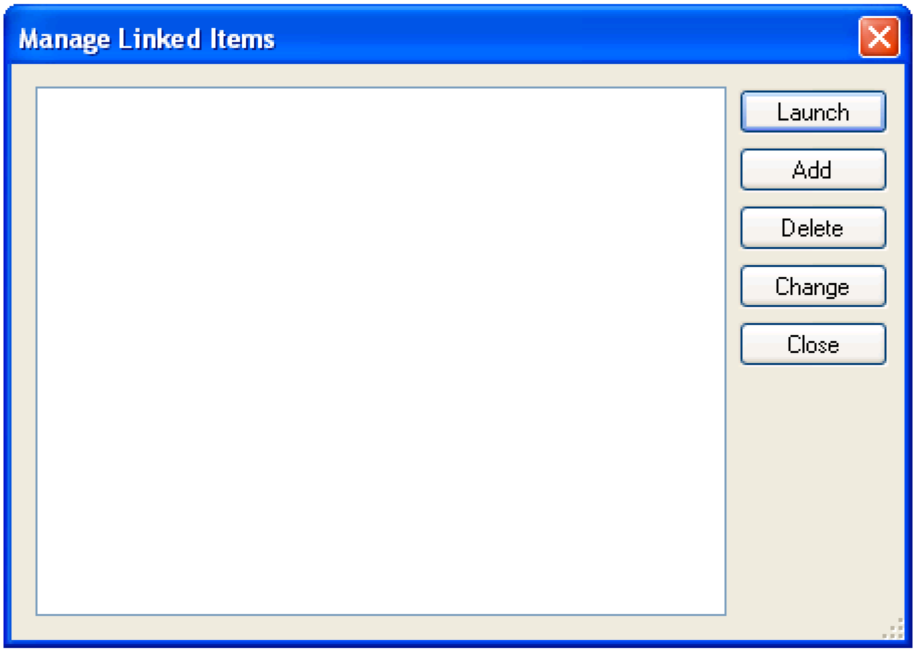
Linking Items to a Record

1. Open the display that contains the record to which you would like to link a file.

2. Locate the desired record and select Links from the Data menu:

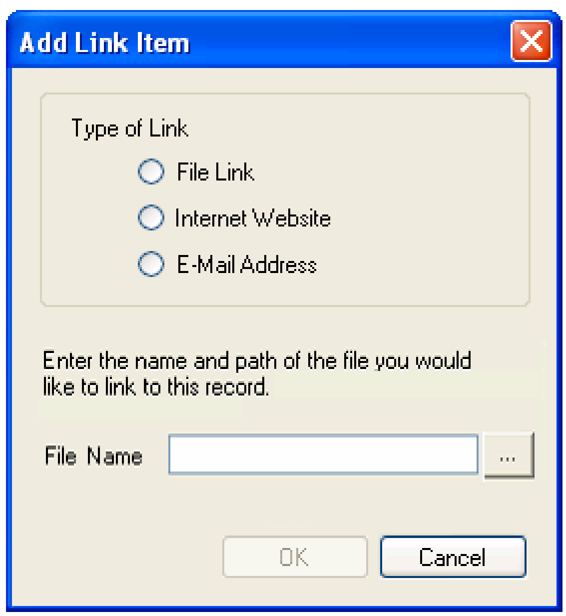


3 The Manage Linked Items screen will open:



4 Click Add.

5 The Add Link Item screen will open:



6 Select the Type of Link you would like to create.

- File Link lets you link to a file on your computer. This enables you to launch the file in the associated application.

- Internet Website lets you enter a website URL. This enables you to launch your web browser at the specified website.

- E-Mail Address lets you enter an e-mail address. This enables you to launch a new piece of mail in your e-mail software with the specified address already entered.

7 Enter the file or address to which you would like to link in the field.

- If you are linking to a file, enter the full path and file name, or click the ellipse button to locate the file using the Windows Open dialog box.

Note
When a user launches the file, it will use the path that is entered. If the path from your computer is different than the path on the other user's computer, the file will not launch. Make sure that files are stored on a shared network drive and that all users are mapped with the same drive letter.

- If you are linking to a website, type the URL in the field.

- If you are linking to an e-mail address, type the full address.

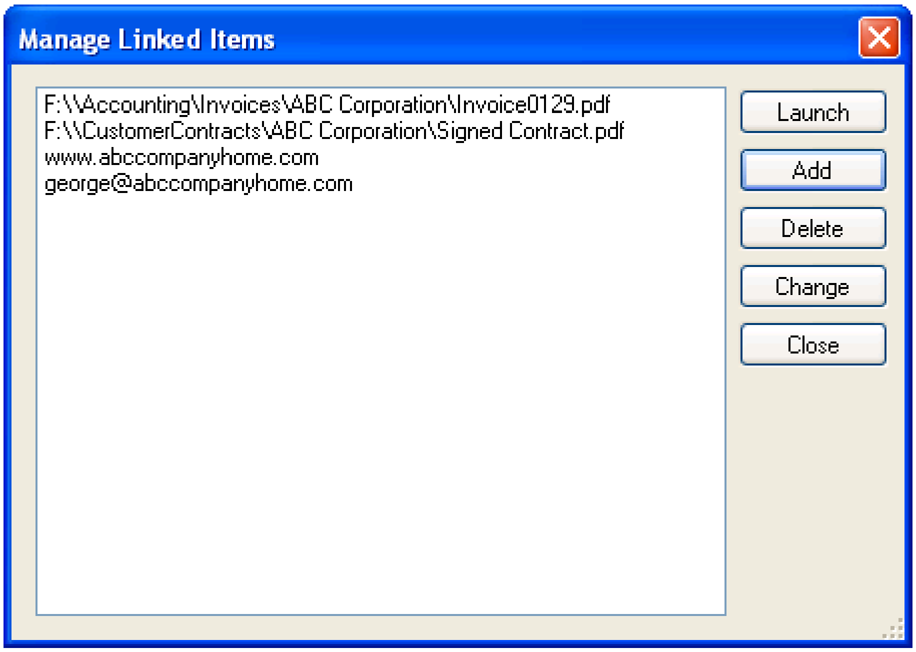
8 When you are satisfied with your link, click OK. You will return to the Manage Linked Items screen with the new link in the list.

Launching Linked Items

1 Open the record with the linked item you would like to launch.

2 Select Links from the Data menu.

3 The Manage Linked Items list will open with the links that have previously been set up:



4 Highlight the link you would like to open and click Launch.

5 If you have selected a file link, the file will open in the associated application. If you have selected a website, your browser will open to that page. If you have selected an e-mail address, a new e-mail will open in your mail software with the address in the To field.

Managing Links

Once you have created your links, you can maintain them in the Manage Linked Items screen.

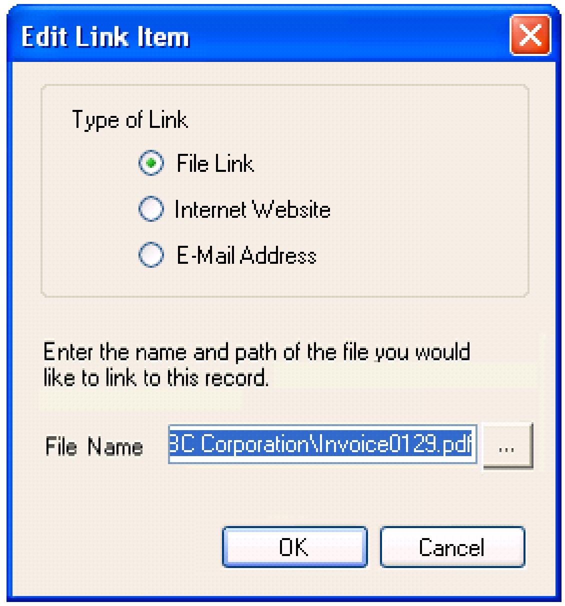
EDITING LINKS

1 To change link information, open the record with the linked item you would like to launch and select Links from the Data menu.

2 The Manage Linked Items list will open with the links that have previously been set up.

3 Highlight the link you would like to change and click Change.

4 The Edit Link Item screen will open:



5 Make any necessary changes to the linked item and click OK.

DELETING LINKS

1 From the Manage Linked Items list, highlight the link you would like to remove and click Delete.

Note

This only deletes the association between the item and the record. If you are deleing a file link, it does not delete the file itself.

Printing Records

The print feature allows you to create a printout of the records in your display. In addition to being able to send the printout to your printer, you can also print to one of several supported file types, and have the file automatically attached to an e-mail to facilitate sharing data.

> **Hint**
>
> If you need to create mailing labels or apply additional formatting to your printouts, use the export feature, detailed later in this chapter, to create a file that can be opened in a word processor.

There are two types of printout available:

- You can create a quick printout that lets you print for either the current record, or all records in the current filter.
- You can print records in tabular format using list view.

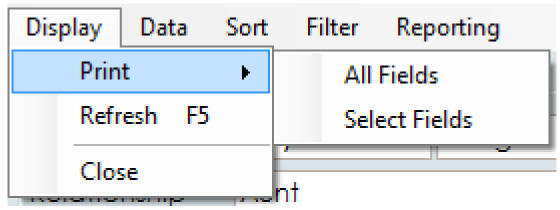
Printing Individual Records

This option allows you to create a quick printout of one or more fields in your data with one field per line. You have the option of printing a single record or all records in the current filter. If you select to print all records, records will print using the current sort order.

PRINTING RECORDS

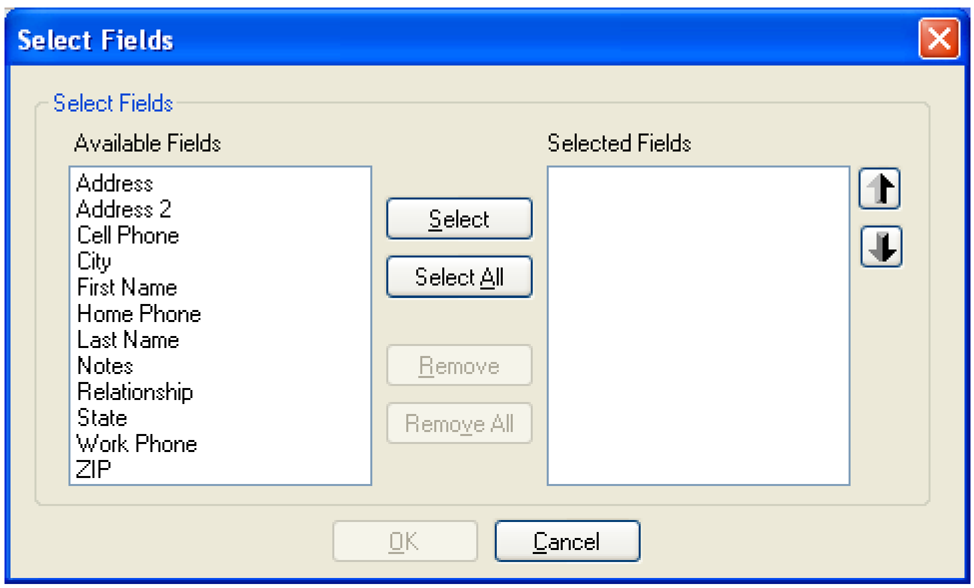
1. Open the display whose data you would like to print.
2. If you would like to limit the records that are printed, set a filter using the instructions under *Filtering Records*, earlier in this chapter.
3. If you would like your records to print in a particular order, set a sort using the instructions under *Sorting Records*, earlier in this chapter.
4. From the Display menu on the display, select Print.

5 A menu will appear giving you the option to print all fields, or select the fields to print:



6 If you would like to print all fields, skip to step 12, otherwise, select Select Fields.

7 The Select Fields screen will open:



8 The Available Fields box provides the list of fields in your display. To include a field in the printout, double click on it in this list or highlight it and click the Select button. The field will move from the Available Fields list to the Selected Fields list. To select all fields, click Select All.

9 If you have selected a field and decide you do not want to include it in the printout, double click on it in the Selected Fields list or highlight it and click Remove. It will move back to the Available Fields list. If you would like to clear the Selected Fields list and start over, click Remove All.

10 When the records are printed, the data will be listed in the order that the fields appear in the Selected Fields list. The arrow buttons next to the Selected Fields list allow you to move fields up or down in the list to change their order in the printout. Highlight a field in the Selected Fields list and click the appropriate button until the field is in the desired position.

11 When you have the fields you would like in the order you would like them, click OK.

12 The Print screen will open:

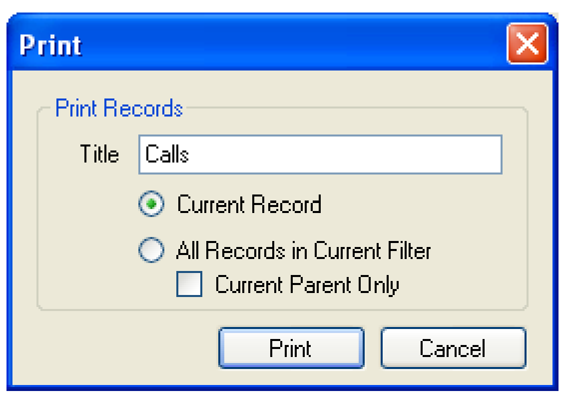
13 The Title field allows you to enter a title that will print at the top of the printout. This defaults to the name of your display. Enter a different name if desired, or delete the contents of the field if you do not want a title.

14 The Current Record and All Records radio buttons allow you to specify whether you would like to print the only the record that is currently open in the display, or all records. Select the desired radio button.

Note

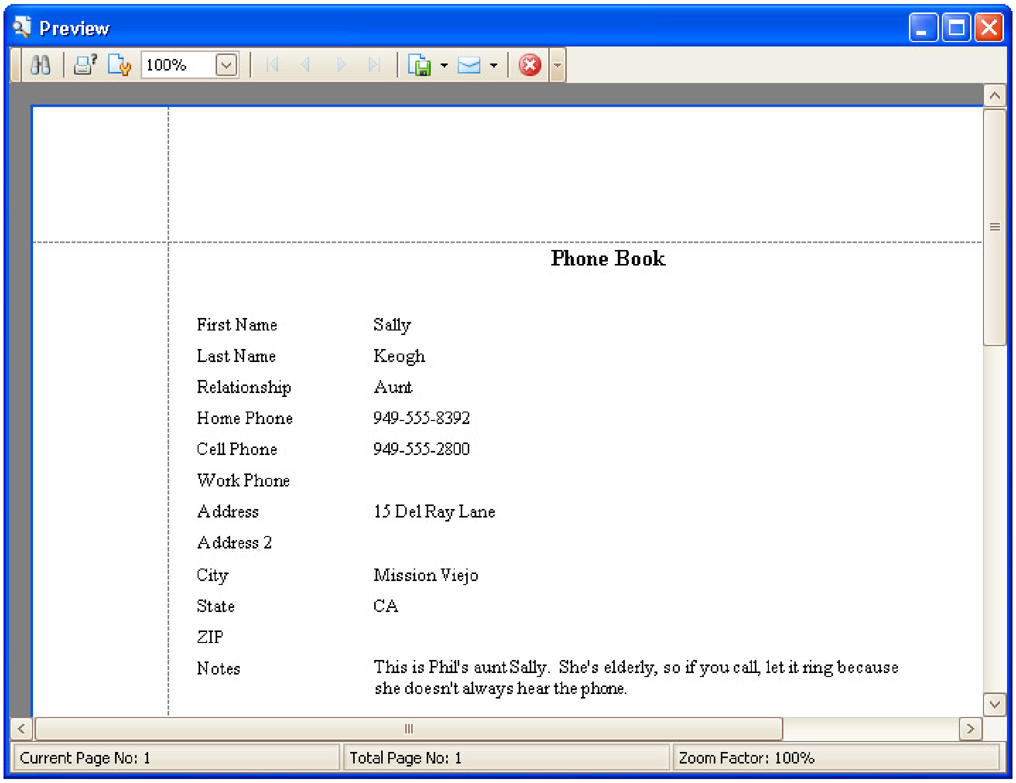
If you have a filter set, the All Records prompt will toggle with All Records in Current Filter. If this is selected, the printout will include all records in the currently set filter only.

15 If you are printing from a child level in Professional Edition, the Print screen will include a Current Parent Only check box:



Selecting Current Parent Only allows you to limit your printout to records associated with the current parent. Leave this unmarked to print all child level records, regardless of the parent.

16 Click Print to open a print preview where you can control the settings for your printout.



17 See *Print Preview*, later in this section for details.

Printing from List View

Printing from list view gives you the option of printing your data in tabular format, or printing the currently highlighted record.

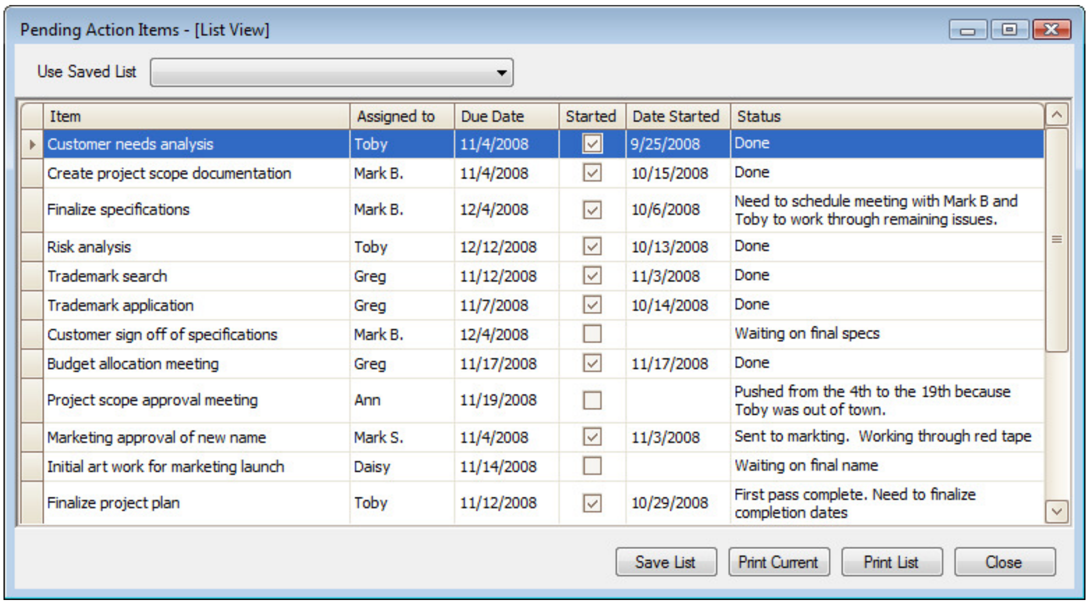
Printing a Single Record

Printing a single record in list view is similar to printing from the File menu and selecting to print the current record, described under *Printing Individual Records*, above. The only difference is that you may launch the printout directly from the list view screen.

PRINTING A SINGLE RECORD FROM LIST VIEW

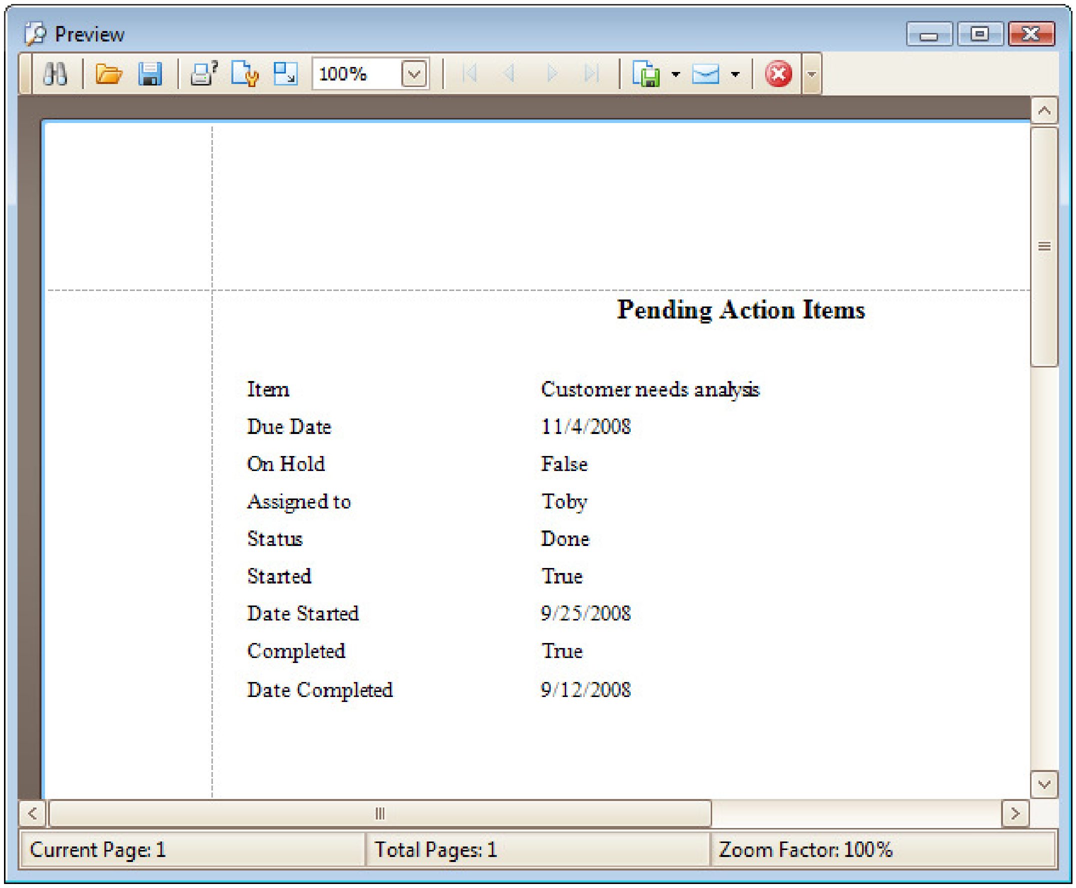
1 Open the display whose data you would like to print.

2 Open an existing list view, or set up a new one following the instructions in *Viewing Records in List View*, earlier in this chapter. The list view screen will open with your selections:



3 Highlight the record you would like to print in the list.

4 Click Print Current to open a print preview where you can control the settings for your printout.



5 See *Print Preview*, later in this section for details.

Printing the List

The Print List option allows you to print your data in tabular format. You are able to control the list of fields that are printed and the order in which they appear by setting up your list view with the desired configuration.

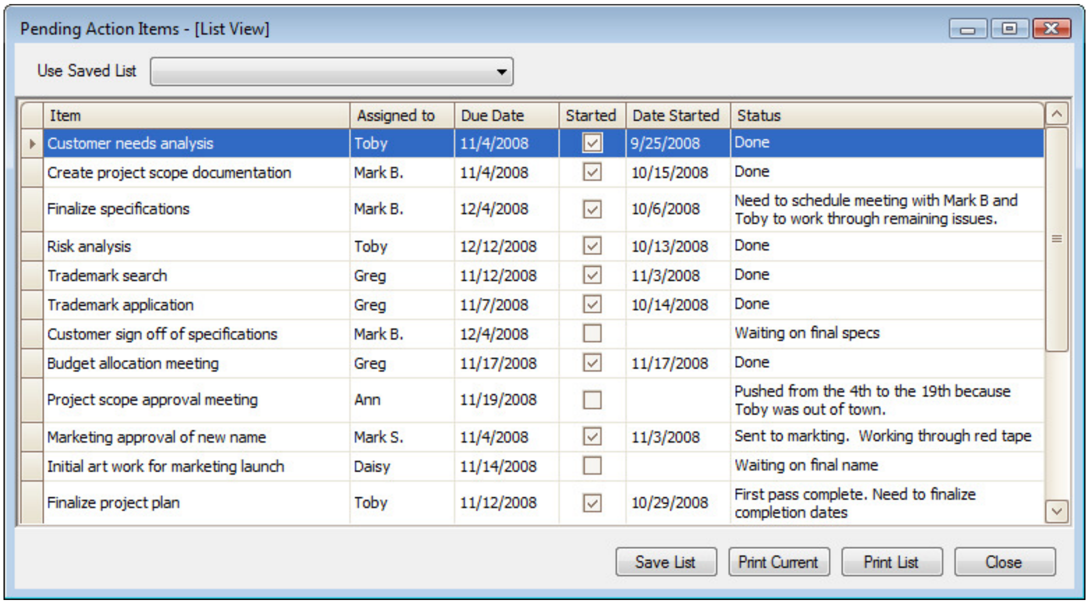
Printing Records from List View in Tabular Format

1 Open the display whose data you would like to print.

2 If you would like to limit the records that are printed, set a filter using the instructions under *Filtering Records*, earlier in this chapter.

3 If you would like your records to print in a particular order, set a sort using the instructions under *Sorting Records*, earlier in this chapter.

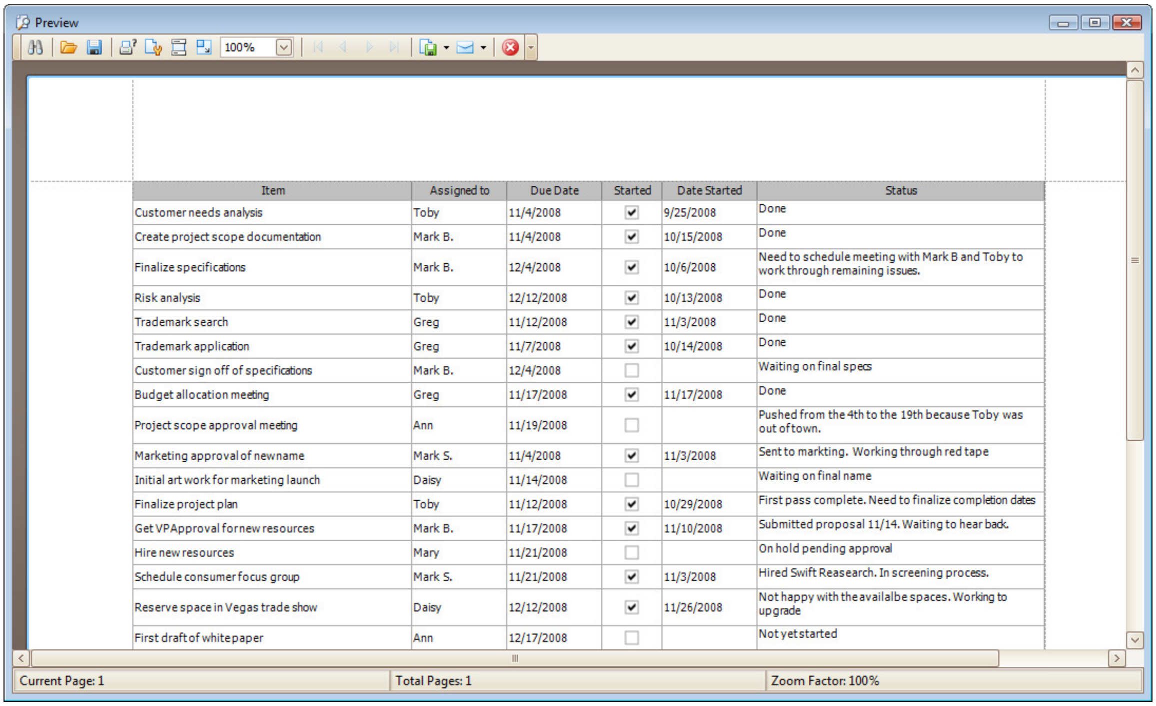
4 Open an existing list view, or set up a new one following the instructions in *Viewing Records in List View*, earlier in this chapter. The list view screen will open with your selections:



5 When the records are printed, the width of the columns will match what is displayed in list view. If the columns are not wide enough to accommodate the text, the data may be cut off. Adjust the size of the columns following the instructions under *Opening List View*, earlier in this chapter.

6 When records are printed, the height of the rows will match the height of the rows in the list. Adjust the height of the rows following the instructions under *Opening List View*, earlier in this chapter. Make sure that your rows are tall enough to accommodate pictures, if you are including them in the list.

7 Click the Print List button. The Print Preview screen will open where you can control the settings for your printout.



Item	Assigned to	Due Date	Started	Date Started	Status
Customer needs analysis	Toby	11/4/2008	✓	9/25/2008	Done
Create project scope documentation	Mark B.	11/4/2008	✓	10/15/2008	Done
Finalize specifications	Mark B.	12/4/2008	✓	10/6/2008	Need to schedule meeting with Mark B and Toby to work through remaining issues.
Risk analysis	Toby	12/12/2008	✓	10/13/2008	Done
Trademark search	Greg	11/12/2008	✓	11/3/2008	Done
Trademark application	Greg	11/7/2008	✓	10/14/2008	Done
Customer sign off of specifications	Mark B.	12/4/2008	☐		Waiting on final specs
Budget allocation meeting	Greg	11/17/2008	✓	11/17/2008	Done
Project scope approval meeting	Ann	11/19/2008	☐		Pushed from the 4th to the 19th because Toby was out of town.
Marketing approval of new name	Mark S.	11/4/2008	✓	11/3/2008	Sent to markting. Working through red tape
Initial art work for marketing launch	Daisy	11/14/2008	☐		Waiting on final name
Finalize project plan	Toby	11/12/2008	✓	10/29/2008	First pass complete. Need to finalize completion dates
Get VPApproval fornew resources	Mark B.	11/17/2008	✓	11/10/2008	Submitted proposal 11/14. Waiting to hear back.
Hire new resources	Mary	11/21/2008	☐		On hold pending approval
Schedule consumer focus group	Mark S.	11/21/2008	✓	11/3/2008	Hired Swift Reasearch. In screening process.
Reserve space in Vegas trade show	Daisy	12/12/2008	✓	11/26/2008	Not happy with theavailalbe spaces. Working to upgrade
First draft of white paper	Ann	12/17/2008	☐		Not yet started

8 See *Print Preview*, below, for details.

Print Preview

The print preview window opens when you select to print your data. This window allows you to configure your printout settings, or select to print the data to an alternative file type, such as an Excel spreadsheet or an HTML page that can be posted to a website.

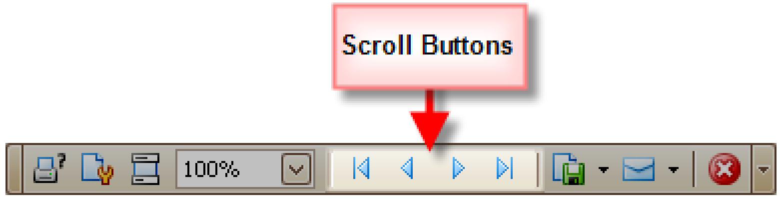
Using Print Preview

1 Access Print Preview by printing from the Display menu or list view, as described earlier in this chapter.

2 When Print Preview opens, it displays the contents of your printout as it will appear on paper when printed. Print preview defaults to 8½ x 11 paper in landscape mode (i.e., the printout will be 11 inches wide and 8½ inches tall). Use the scrollbars to review the records that will be printed to verify that all of the data appears properly.

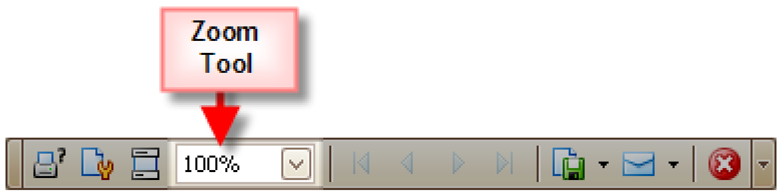
3 If you are printing from list view, the width of the columns will maintain the relative proportions to each other that were set up in list view, but will expand or contract to fill the printable area. You may need to adjust the width of the columns in list view, or reduce the number of fields you are displaying.

4 If there is more than one page of data, use the scroll buttons to view additional pages of data:



If these buttons are unavailable, it means you only have one page of data.

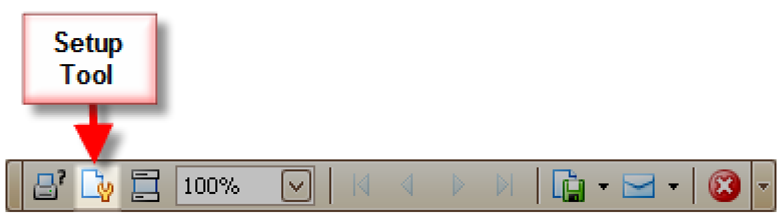
5 Use the Zoom field on the toolbar to change the size of the preview.



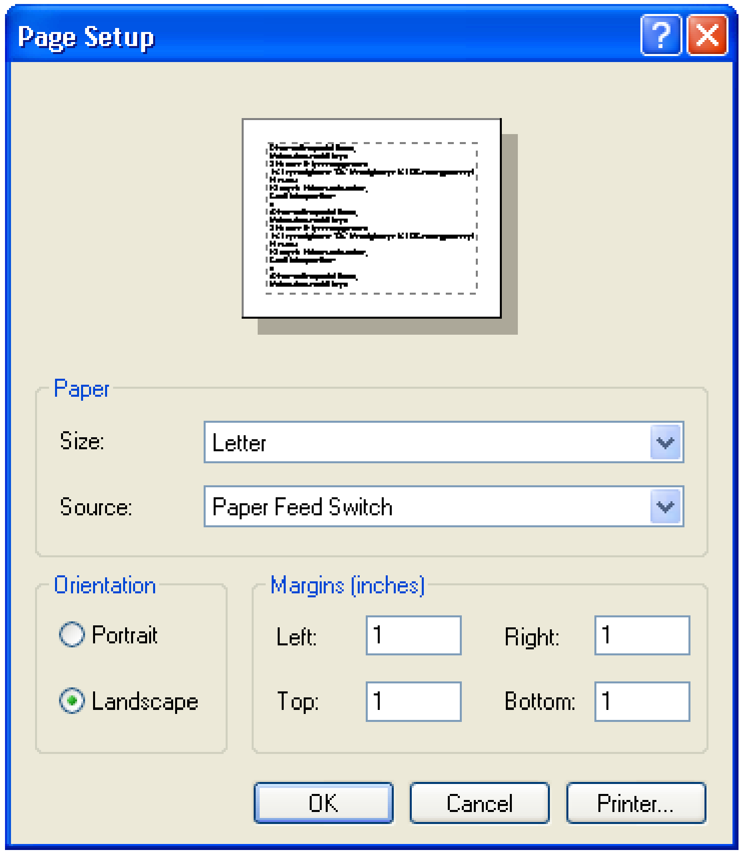
6 If the zoom is set to 100%, the preview will appear the same size as it will print. Increasing the number over 100% allows you to zoom in and magnify your preview. Decreasing the number allows you to zoom out and view more of your data on the screen.

Note
Zooming in or out only impacts the preview screen and will not affect your final printout.

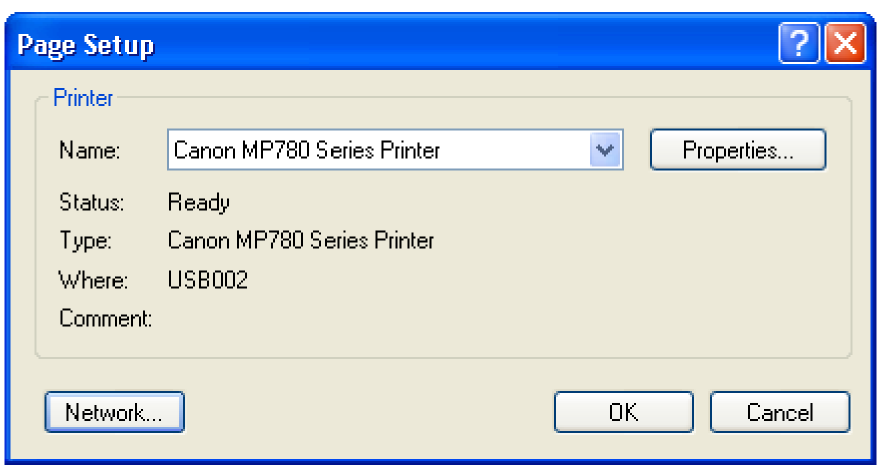
7 Use the Setup tool on the toolbar to change the paper size or orientation.



8 The Page Setup screen will open:



9 This screen will automatically detect the default printer you have set up in Windows and offer options that are compatible with that printer. If you would like to use a different printer, click the Printer… button to open a second Page Setup screen with a list of the accessible printers:



10 The Name list will display all of the printers you have set up in Windows. Select the desired printer from the Name field.

11 If you would like to control any of the printer settings, click the Properties button. This will open the printer properties specific to your printer. Refer to the documentation that came with your printer for help with these options.

Note

If you are on a network, the Network button will allow you to select a printer on the network. Clicking this button will bring up the Connect to Printer screen. This is an advanced feature that should be performed by someone who is familiar with adding a network printer. If you are unfamiliar with this process, it is recommended that you configure your printer using Windows' Add Printer Wizard instead.

12 When you are satisfied with your printer selection, click OK to return to the first Page Setup screen.

13 The Paper Size field allows you to specify the type of paper you are using. This will default to Letter, which is 8½ x 11 inch paper. If you are using a different size, such as A4 or legal sized paper, select your paper from the list. This list will be limited to paper sizes that are compatible with your printer.

14 Depending on your printer, you may be able to load paper in different places. For example, some printers have separate trays for different size paper. The Source list will display the options that are available for your printer. Select the appropriate paper source from the list.

15 The Portrait/Landscape radio buttons allow you to specify your page orientation. If you would like your printout to print in the standard portrait mode, select the Portrait radio button. If this is selected and you are using 8½ x 11 inch paper, the printout will be 8 ½ inches wide and 11 inches tall. Select the Landscape radio button to have the printout print in landscape mode. If this is selected and you are using 8½ x 11 inch paper, the printout will be 11 inches wide and 8½ inches tall.

Hint

If you are printing a quick printout from the Display menu, consider leaving this set to Portrait. If you are printing from list view, unless you are only printing a limited number of fields, it is recommended that you print in landscape mode to ensure your data will fit on the page.

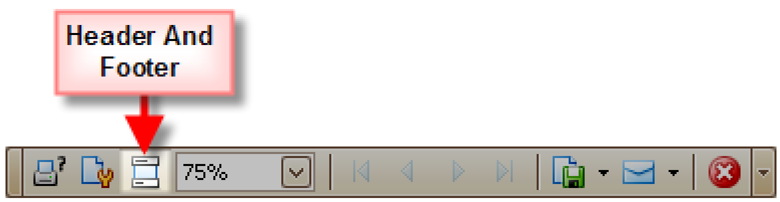
16 The margin settings control how much white space is around your printout. Enter the margin size, in inches. To enter a size that is less than one inch, use decimal places.

Hint

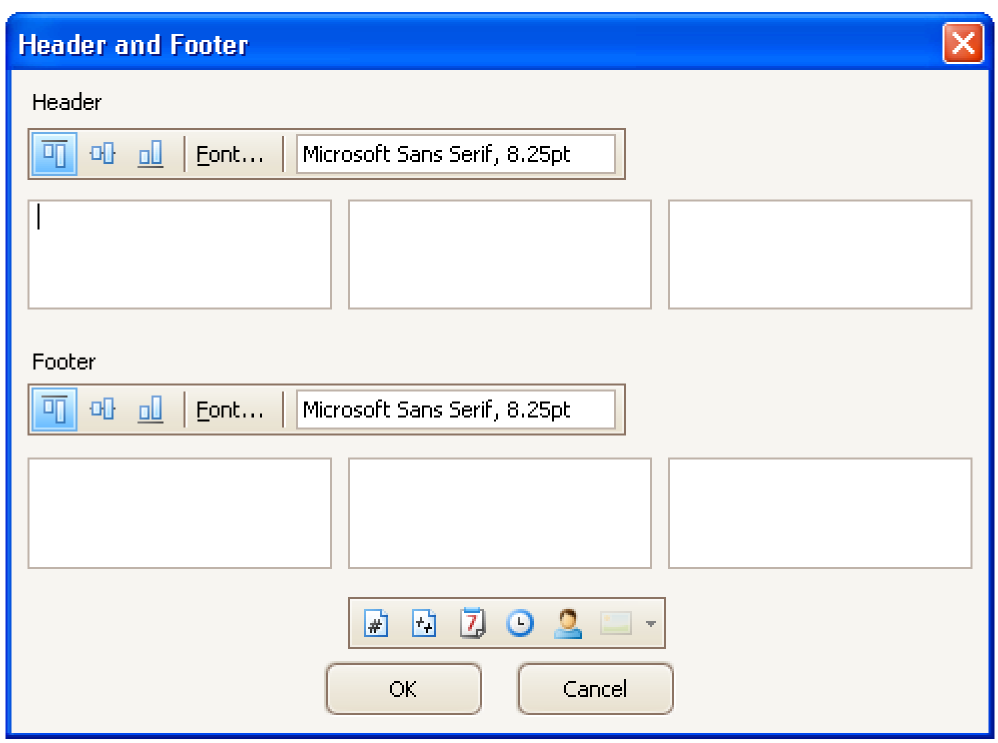
If you are printing a list and have a large number of fields, it is recommended that you reduce the left and right margins to allow for the maximum number of fields on the page.

17 Click OK to save your changes and return to the print preview screen.

18 If you would like to add header or footer information to your printout, click the Header And Footer tool on the toolbar:



19 The Header and Footer screen will open:



20 Header information will appear in the top margin of your printout. Footer information will appear in the bottom margin. You can control whether the details appear at the

top of the margin, centered in the margin, or at the bottom of the margin using the location buttons:

- Select the  button to put the header/footer at the top of the margin. For headers, this will be at the top of the page. For footers, this will be below the data printout.

- Select the  button to center the text in the margin.

- Select the  button to place the header/footer at the bottom of the margin. For headers, this will be just above the data printout. For footers, this will be at the bottom of the page.

21 Type the information you would like to have appear in the header or footer in the boxes. If you would like the information to align at the left margin, place it in the first box. If you would like it be centered on the page, place it in the middle box. If you would like it aligned at the right margin, place it in the third box.

Hint

You can place information in more than one box. For example, you may place a title for the printout centered in the header, and have the date it was printed appear at the right margin.

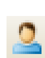
22 The buttons at the bottom of the screen allow you to include variable information in the header and footer:

- Select the  button to include the page number on each page.

- Select the  button to include the page number and the total number of pages (for example, Page 1 of 5).

- Select the  button to include the date of the printout.

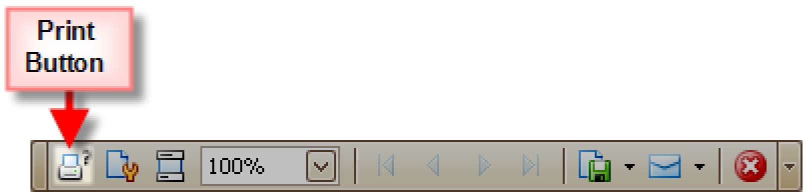
- Select the  button to include the time of the printout.

- Select the  button to include your user name that was set up in the Windows operating system.

23 If you would like to change the font of your header and/or footer, click the Font button to select the font from a Font dialog.

24 When you are satisfied with your header and footer, click OK to return to the preview screen.

25 When you are satisfied with the appearance of your data, click the Print button on the toolbar:



26 The Print screen will open where you can send the document to your printer.

Printing Options

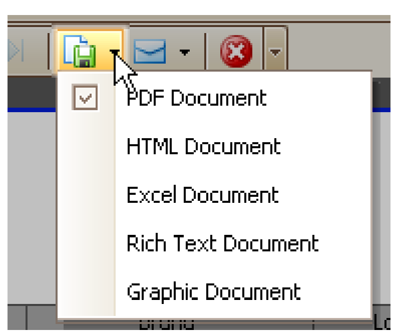
In addition to printing to a printer, you have the option of printing to a file. Database Oasis supports printing to the following file types:

- PDF
- HTML
- Microsoft Excel®
- Rich Text (RTF)
- Graphic File (BMP)

PRINTING TO A FILE

1 Set up your printout following the instructions under *Printing Records*, above.

2 From the print preview toolbar, click on the arrow next to the Export Document tool:



This will display the list of compatible file formats.

Hint

Clicking on the button itself will default to the last selected format.

3 Select the format you would like to use from the list. A Windows Save As dialog will open.

4 Navigate to the location where you would like to save the file, give the file a unique name, and click Save.

5 Once you have saved the file, exit print preview.

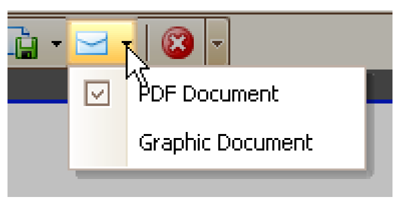
EMAILING PRINTOUTS

Note

You must have an e-mail client configured in Windows to use this feature.

1 Set up your printout following the instructions under *Printing Records*, above.

2 Click on the arrow next to the Send Email tool on the toolbar:



This will display the list of file formats that can be sent via e-mail.

Hint

Clicking on the button itself will default to the last selected format.

3 Select the format you would like to use. You can e-mail either .pdf files, or graphic files in the .bmp format.

4 A Windows Save As dialog will open. Navigate to a location where you would like to save the file, give the file a unique name, and click Save.

5 As soon as you save the file, an e-mail will open with the specified file attached. Select the recipient, complete the body of the message, and click Send.

Deleting Records

If you have added a record that you no longer want, it is very easy to remove it from your display.

Deleting a Records

1. Open the display with the record you want to delete.
2. Locate the record you will be deleting.
3. Click the Delete button. A message will appear asking you to confirm your decision to delete the record.

WARNING!

Deleting a record is permanent. There is no undo for this action.

Note

Deleting a parent record in Professional Edition will also delete its children.

4. Click Yes to delete the record. You will be moved to the next record in the display.

Importing Data

The import feature allows you to bring data from another source into one of your displays in Database Oasis. Before importing, you should do the following:

1. Determine the format of your import file. Database Oasis allows you to import either delimited files, or Microsoft Excel® spreadsheets.

   If you are importing an Excel spreadsheet, make a note of the worksheet name that contains the data you want to import.

The second type of file you can import is called a delimited file. This is just a text file where each field is separated by a character called a delimiter. The delimiter denotes the end of one field and the start of the next. For example, a comma delimited file with basic contact information may look like this:

```
Mary Jones,P.O. Box 7,Carlsbad,CA,92008,800-555-8986
Joe Smith,4130 Orange Ave,Oceanside,CA,92056,760-555-1362
Thanh Nugyen,385 Palm,Del Mar,CA,92109,858-555-9811
Linda Guterez,53 West Lake Way; Unit 23,Vista,CA,92053,760-555-
9932
```

The above example uses commas as the delimiter. Wherever there is a comma, it indicates that it is the start of a new field. When importing a delimited file, you should find out in advance what the delimiter is.

2. Make sure your Database Oasis display has fields to contain your import data. If there's a field in your import file that is not in your display, you can add the field to your display.

Note

You don't necessarily have to import all of the fields. If there is a field in your import file that is not in your display, and you don't care about the data in the field, you can simply ignore it.

3. Make sure the fields in your display can contain the data you are importing. You should check the following for each of the fields you will be importing into:

   - If you are importing into a text field, make sure the data you're importing isn't too long to be contained in the field. When a field is added, you specify how many characters of data it can contain. If you have a field that can only contain 30 characters of data and try to import 50 characters, you will receive a warning message that data will be lost if you continue with the import. To avoid having data cut off, you should edit the display and increase the amount of data the fields can contain so that they are big enough for the data you are importing.
   - If you are importing into a numeric field, make sure there are only numbers in the import data in all records. Numeric fields can only contain numbers, decimal points, commas, and the negative number indicator (-). If you are importing into a numeric field and any of your records contain non-numeric data, the import will stop and you will be required to fix the data before proceeding.
   - If you are importing into a numeric field, make sure your data doesn't have more decimal places than the field allows. For example, if your numeric field is set to contain two decimal places and you try to import data that has four decimal places, the import will proceed, but the data will be truncated. It is recommended that you verify the decimal places prior to import and increase the number of decimal places allowed in your numeric field if necessary.

- If you are importing into a check box, your data must be in one of the following formats:

  True / False

  .T. / .F.

  If the data is in any other format, the import will stop and you will be required to fix the data before proceeding.

> **Note**
>
> Database Oasis exports check boxes in the format True/False.

- If you are importing into a date field, the date format used for your data must match the date format that is configured as the Short Date in Windows (e.g., if the data you are importing is 12/30/2010, the Windows date format must be MM/DD/YYYY). If the date format does not match, the import will stop and you will be required to fix the data before proceeding. To verify your Windows date format, refer to the Regional and Language Options settings in the Windows Control Panel.

4. Verify the integrity of your import file.

- If you are using a delimited file, make sure the delimiter is not being used in the data. For example, if you are using a comma as a delimiter and you have “My Company, Inc.” in a field, “My Company” and “Inc.” will be viewed as two fields. This will throw off all of the fields following this data for that record.
- If you are using an Excel spreadsheet, make sure that the file does not contain any non-text type data in the fields you will be importing. For example, you are able to include ActiveX controls such as check boxes and command buttons to an Excel spreadsheet. If any of the incoming records contain these data elements, an error will be returned and the import will stop.
- Make sure that all records in your import file contain the fields you are importing. If you are using a delimited file, the system will determine how many fields there are by the number of delimiters. For example, if you are importing:

  First Name,Last Name,Status
Mary,Jones,Active
Pete,Fleming,
Armando,Ruiz,Inactive
May,Chung

  The software will expect to find three fields in each record of the data, the First Name field, the Last Name field, and the Status field. Although Pete Fleming has nothing in the Status field, there is a comma at the end of the last name indicating the start of the next field. The software will interpret this as an empty field. May Chung also has nothing in the Status field, but there is no comma after her last name. The software will not recognize the field and return an error which will stop the import. This is a rare error that only occurs if the import file you are using does not follow data standards. If this occurs, you can either edit your data to contain the comma or choose not to import the offending field. In the above example, as long as the Status field is not being imported, the import will proceed without error.

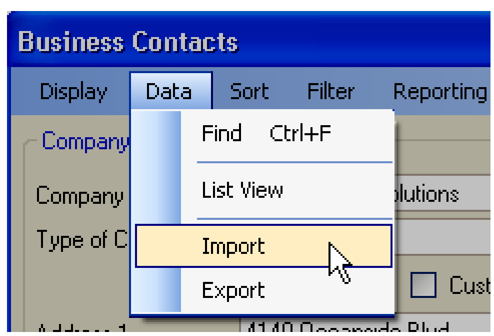
Hint
This error can also occur if you have blank lines at the end of our file. Make sure to delete any blank lines prior to running the import.

If you are not sure if your import data meets these conditions, you can always use the Validate button in import to see if it passes the data validation. The system will go through a full check of your file against your display and return a list of any errors it finds with details on exactly which fields and records had problems. You can use this information to modify your display or manually clean up your data file before bringing it into Database Oasis.

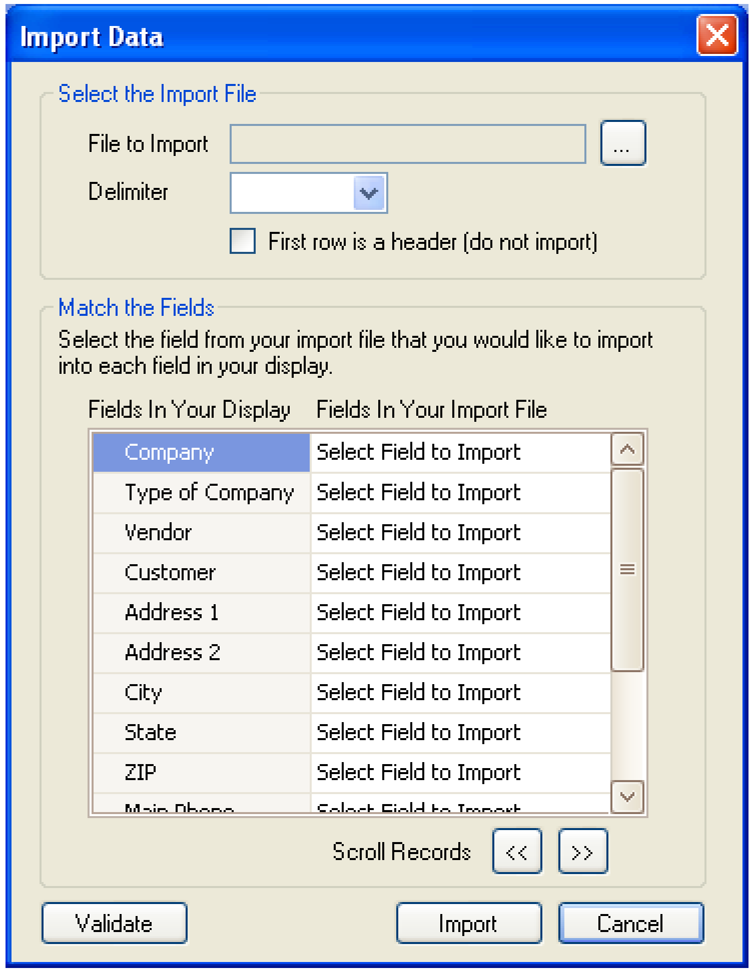
Importing Data

1. Open the display you would like to import data into.

2. From the Data menu inside the display, select Import.

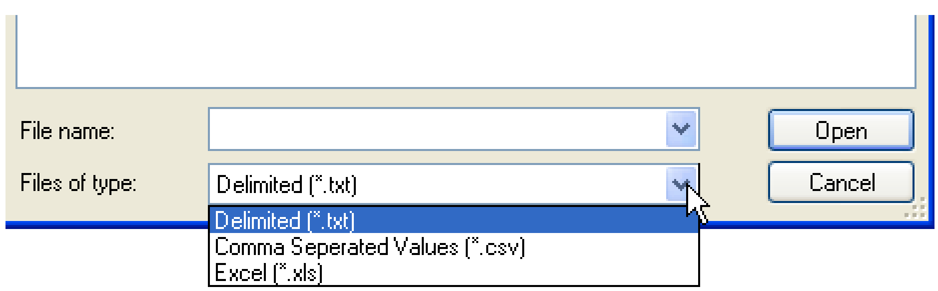


3 The Import Data screen will open:



4 Click the button next to the File to Import field to select your import file. A Windows Open dialog will open.

5 Use the Files of Type field at the bottom of the screen to choose the file type of your import file:



You can import a standard delimited file with the extension .txt, a comma delimited text file with the extension .csv, or an Excel spreadsheet with the extension .xls.

Note

Comma delimited files frequently have the extension .csv, but you can also have .txt files with a comma as the delimiter.

6 Once you have selected the file type, navigate to your import file and click Open.

7 If you select a delimited file, enter the delimiter used in your import file in the Delimiter field. The drop-down list contains the comma, tab, and pipe character delimiters, or you can type the delimiter character in the field.

If you have selected an Excel spreadsheet as your import file, Delimiter will toggle with Worksheet. Select the worksheet that contains your data.

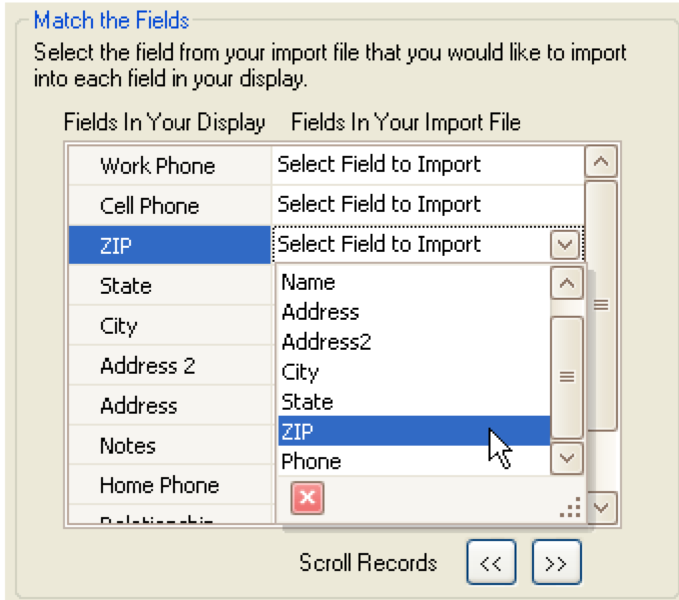
Hint

New Excel files default to three worksheets named Sheet1, Sheet2, and Sheet3. Most of the time, data is found on Sheet1.

8 In many import files, the first row of data provides a header with the names of the fields. If this is the case in your import file, mark the First row is a header (do not import) check box. The first row will be available to help identify the fields when you're matching them to fields in your display, but it will not be imported as a record. Unmark this check box if your import file does not have a header and the first row should be imported.

9 The Match the Fields section allows you to select the field from your import file that should be placed in each field in your display. The Fields In Your Display list will show all of the text, numeric, and notes fields you have in your display.

10 Next to each field in your display is a Select Field to Import field. These fields are used to select the field from your import file that will be imported into the corresponding field in your display. When you click in the Select Field to Import field, a drop-down arrow will appear. Click the arrow to open a list of the fields in your import file.



11 When you open the list, it will display the first record in your import file. Highlight the field that corresponds to the field in your display and click to select it.

Hint

If you know the first letter of the value you are selecting in the Select Field to Import list, you can tab to the field and press that letter on your keyboard. The list of fields will open and only show options that start with that letter.

12 In cases where there is no header row in your import file, it is possible that not all of the fields will be populated in the first record. This may make it difficult to identify the fields in order to select the appropriate target field from your display. If this is the case, you can use the Scroll Records buttons to view other records in your import file to help identify your field. You can scroll any of the first 10 records in your import file. Click the >> button to view the next record. Click the << button to go back to the previous record.

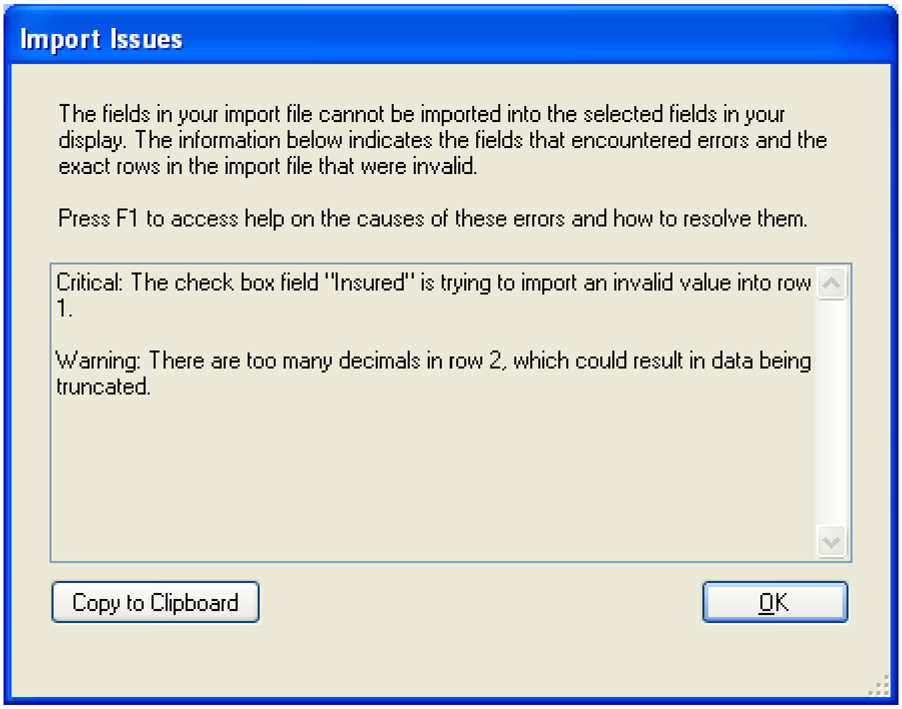
13 Continue matching fields until all of the fields in the Fields In Your Import File list that you want to import have been matched to fields in the Fields In Your Display list.

Hint

You do not necessarily have to import all of the fields in your import file. You may also import the same field in your import file into more than one field in your display, if desired.

14 If you select a field in error, select the Clear Selection option at the top of the Fields In Your Import File list to remove the selection.

15 At any time, you may check your field mapping by clicking the Validate button. If there are any data mismatches, the Import Issues screen will appear providing the field and record number(s) that don't conform to the rules:

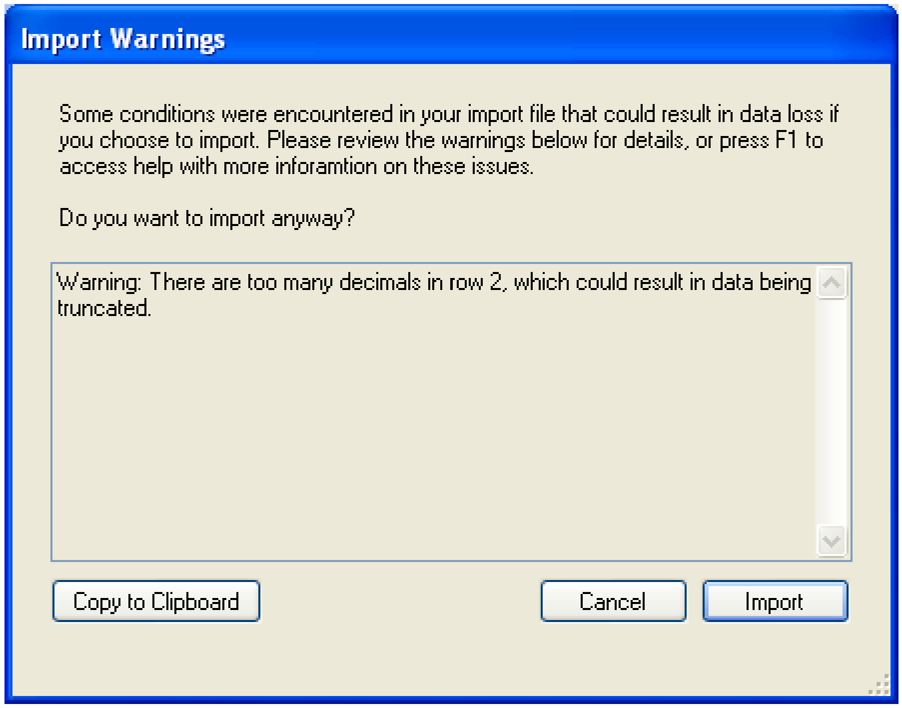


16 Use the data in this screen to resolve any issues with your import mappings. There are two classifications of issues that may be displayed: Critical issues must be resolved before importing; Warnings will allow you to complete the import, but may have undesirable results. (Refer to the introduction of this section for more information on the possible errors and their causes.) If you encounter errors with the import, you can select another field from your display to contain the data, manually edit your import file so it can be contained in the field, or modify the field in the designer so it can contain the import data.

17 If you would like to copy the list of import issues to your clipboard for reference outside of import, select Copy to Clipboard. You may then paste the list into a text editor or word processor to review the issues.

18 When you are satisfied with your field selections, click the Import button.

19 Database Oasis will analyze your import file against the fields in your display. If there are any remaining issues that weren't resolved during validation, the Import Issues screen will appear. If there are critical errors, you will not be able to complete the import without resolving them. If there are only warnings, you will be given the option to continue with import or go back and correct the issue:



20 To continue with the import, click Import; or to return to the Import screen to correct the issues, click Cancel.

21 Once the import file has passed validation, the import process will begin. There will be a pause as new records are created in your display for each of the records in your import file.

Importing Data at the Child Level

PRO Child level displays is an advanced feature. Because of this, it is only available in Database Oasis Professional Edition.

If you are importing data at the child level in Professional Edition, you must associate the records you are adding with an existing parent level record. This is done by matching a field in your import file to a field at the parent level. For example, you may have a display that is structured like this:

Parent:

Company
Address
City
State
ZIP
Phone

Child:

First Name
Last Name
Title
Extension

The data you are importing may look similar to this:

Company	First Name	Last Name	Title	Extension
A&B Auto	Tim	Schmidt	Owner	201
Bella's Diner	Lien	Yao	Accountant	N/A
Bella's Diner	Bella	Rosini	Owner	N/A
Impact Graphics	Saanjh	Patel	Graphic Artist	43
A&B Auto	Nick	McConnel	Mechanic	205

In this case, you would map the Company field in your import data to the Company field in your Parent display, and map the First Name, Last Name, Title, and Extension fields to the Child level. When you import, two child records will be added to A&B Auto, two child records will be added to Bella's Diner, and one child record will be added to Impact Graphics.

Hint

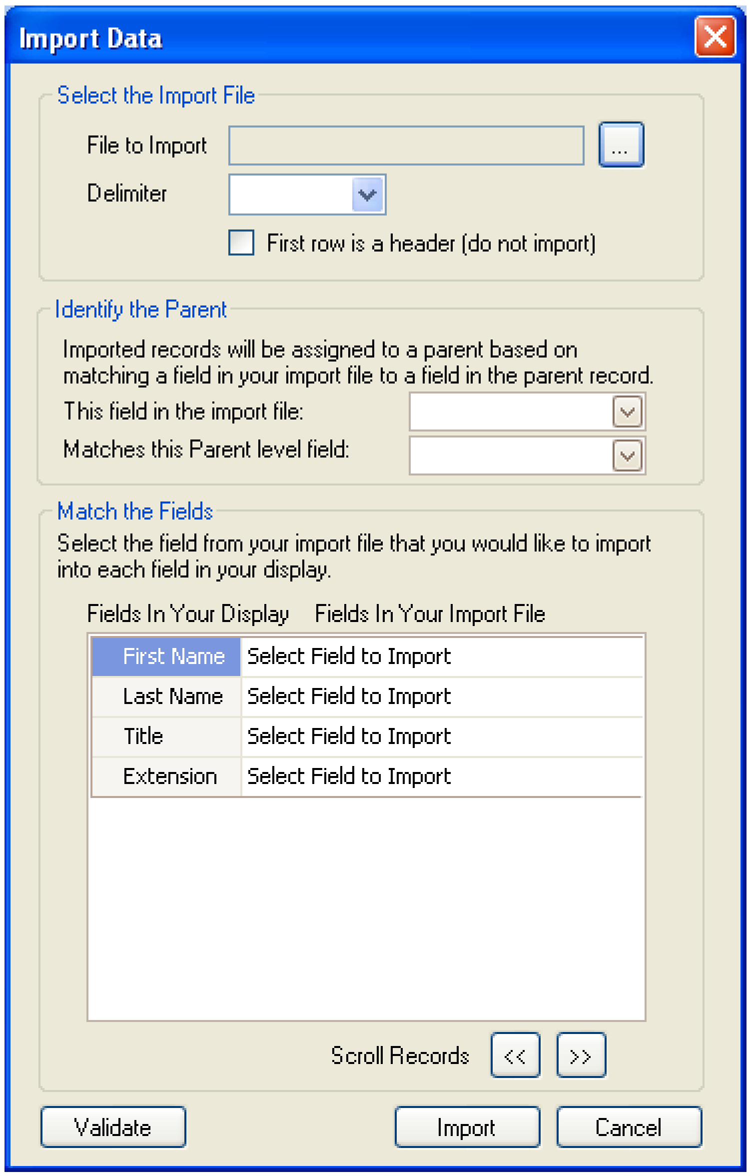
If your import file contains both parent and child level information, you can import once at the parent level to create the parent records, then a second time using the same file at the child level to create the associated child records.

IMPORTING DATA AT THE CHILD LEVEL

1 Open the child level display into which you would like to import.

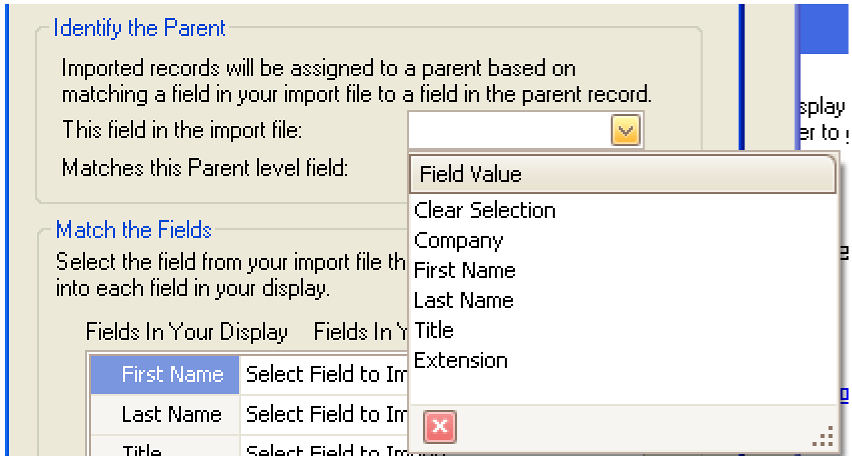
2 From the Data menu inside the display, select Import.

3 The Import Data screen will open with the addition of a section to identify the parent:



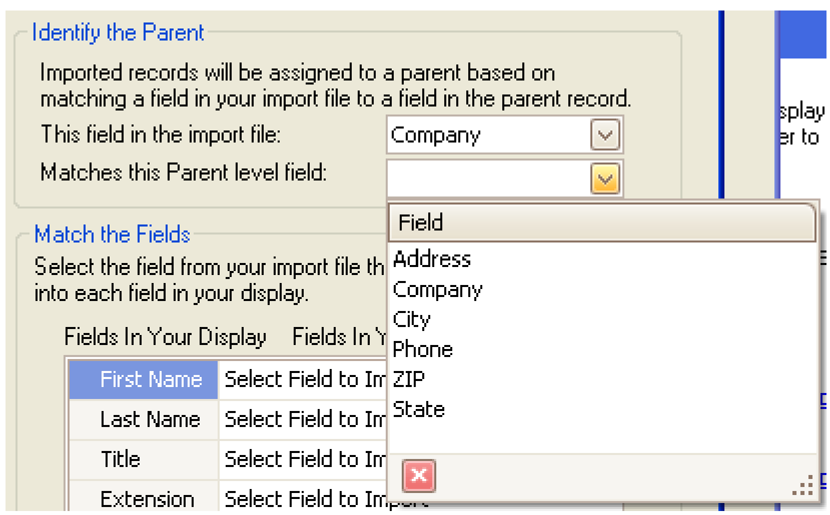
4 Select the import file and delimiter following the instructions under *Importing Data* above.

5 In the Identify the Parent section, click on the arrow next to the This field in the import file field to open a list of the fields in your import file:



6 Select the field in the data you are importing that corresponds to a field from your parent level.

7 Click on the arrow next to Matches this Parent level field to open a list of fields at the parent level:



8 Select the field from the parent that is contained in the data being imported.

9 Finish setting up your import following the instructions under *Importing Data* above.

10 When the import is run, Database Oasis will look at the value in the field selected under This field in the import file in your import file. It will search the parent level for a record that contains that same value in the field selected under Matches this Parent level field. If a match is found, it will add the child record to that parent. If no match is found, the child record will not be added.

Exporting Data

The export feature allows you to copy the data in your displays to another file format that can be opened by other applications. This can be useful for things like printing mailing labels, viewing data in a spreadsheet application, or sharing information with someone who does not have Database Oasis.

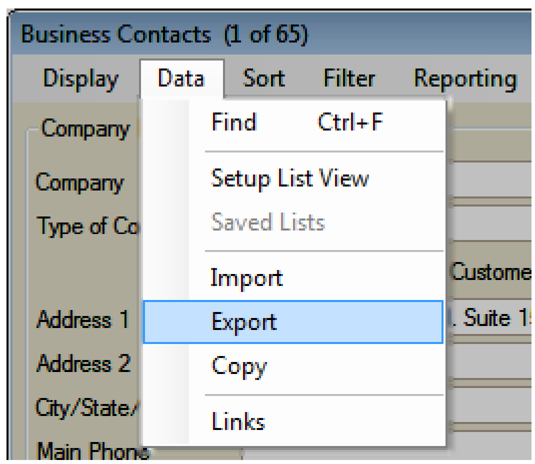
Exporting Data

1 Open the display containing the data you would like to export.

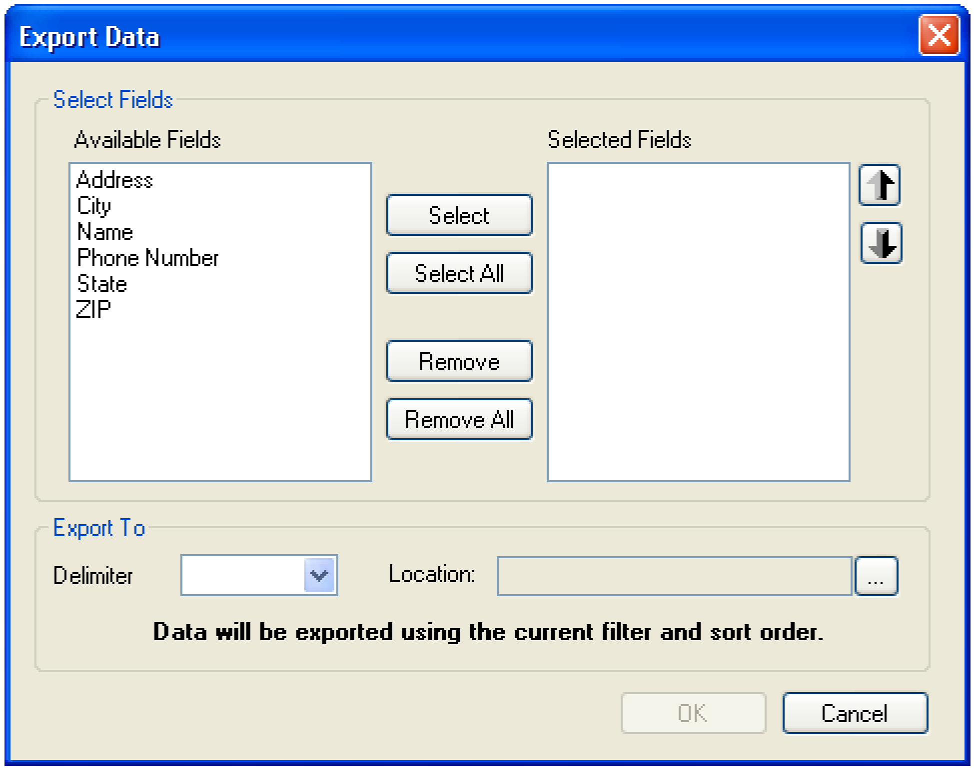
2 If you would like to limit the records being exported, set a filter following the instructions under *Filtering Records*, earlier in this chapter.

3 If you would like the records to appear in a particular order in the exported file, set a sort following the instructions under *Sorting Records*, earlier in this chapter.

4 From the Data menu inside the display, select Export.



5 The Export Data screen will open:



6 The top section of the screen controls what fields should be included in the export. The Available Fields box provides the list of fields in your display. To include a field in the export, double click on it in this list or highlight it and click the Select button. The field will move from the Available Fields list to the Selected Fields list. To select all fields, click Select All.

7 If you have selected a field and decide you do not want to export it, double click on it in the Selected Fields list or highlight it and click Remove. It will move back to the Available Fields list. If you would like to clear the Selected Fields list and start over, click Remove All.

8 When the export is run, the data will be listed in the order that the fields appear in the Selected Fields list. The arrow buttons next to the Selected Fields list allow you to move fields up or down in the list to change their order in the output file. Highlight a field in the Selected Fields list and click the appropriate button until the field is in the desired position.

9 The export file will have one record per line with the fields separated by a delimiter. A delimiter is simply a character that you have specified to denote the end of one field and the start of the next. For example, a comma delimited file with basic contact information may look like this:

```
1,Mary Jones,P.O. Box 7,Carlsbad,CA,92008,800-555-8986
2,Joe Smith,4130 Orange Ave,Oceanside,CA,92056,760-555-1362
3,Thanh Nugyen,385 Palm,Del Mar,CA,92109,858-555-9811
4,Linda Guterez,53 West Lake Way; Unit 23,Vista,CA,92053,760-555-
9932
```

The above example uses commas as the delimiter. Wherever there is a comma, it indicates that it is the start of a new field. The most common types of delimiters are commas, tabs, and the pipe character: |. These delimiters are available in the drop down list. If you would like to use a different type of delimiter, just type the character you would like to use in the field. Each field in your output file will be separated with exactly the characters you specify.

WARNING!

If you select a delimiter that's found in your data, the application that you use to read the output file may view the data as being in two separate fields. If you are exporting a notes field, or other fields that contain punctuation, make sure you use a delimiter that you know won't be found in the data.

10 The Location field allows you to set the path and file name of the export file that will be created. Click the button to open a Windows Save As dialog box. Navigate to the desired location for the file and enter a new file name in the File Name field on that screen. When you save at that screen, the path and file name will be displayed in the Location field.

11 The OK button will become available as soon as you enter an output file name in the Location field. Click this to proceed with the export. If you have accessed this screen from a display, the records will be exported using the filter and sort order that is currently active on the display.

Note

If there are Notes field included in the export, paragraph breaks will be replaced with two spaces in the exported file.

CHAPTER 8
REPORTING

Custom Report Designer

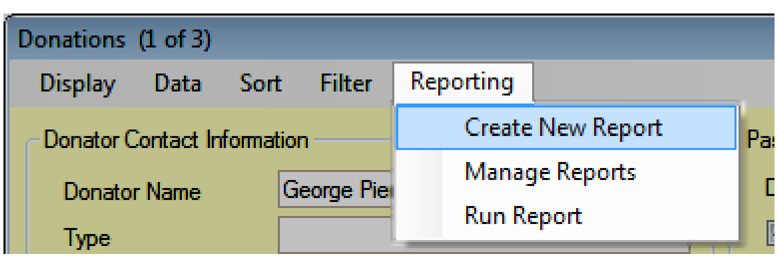
PRO Custom reporting is an advanced feature. Because of this, it is only available in Database Oasis Professional Edition.

The custom report designer allows you to design reports for your display that can be saved and printed at any time.

STARTING A NEW REPORT

1 Open the display on which you would like to report.

2 From the Reporting menu, select Create New Report:

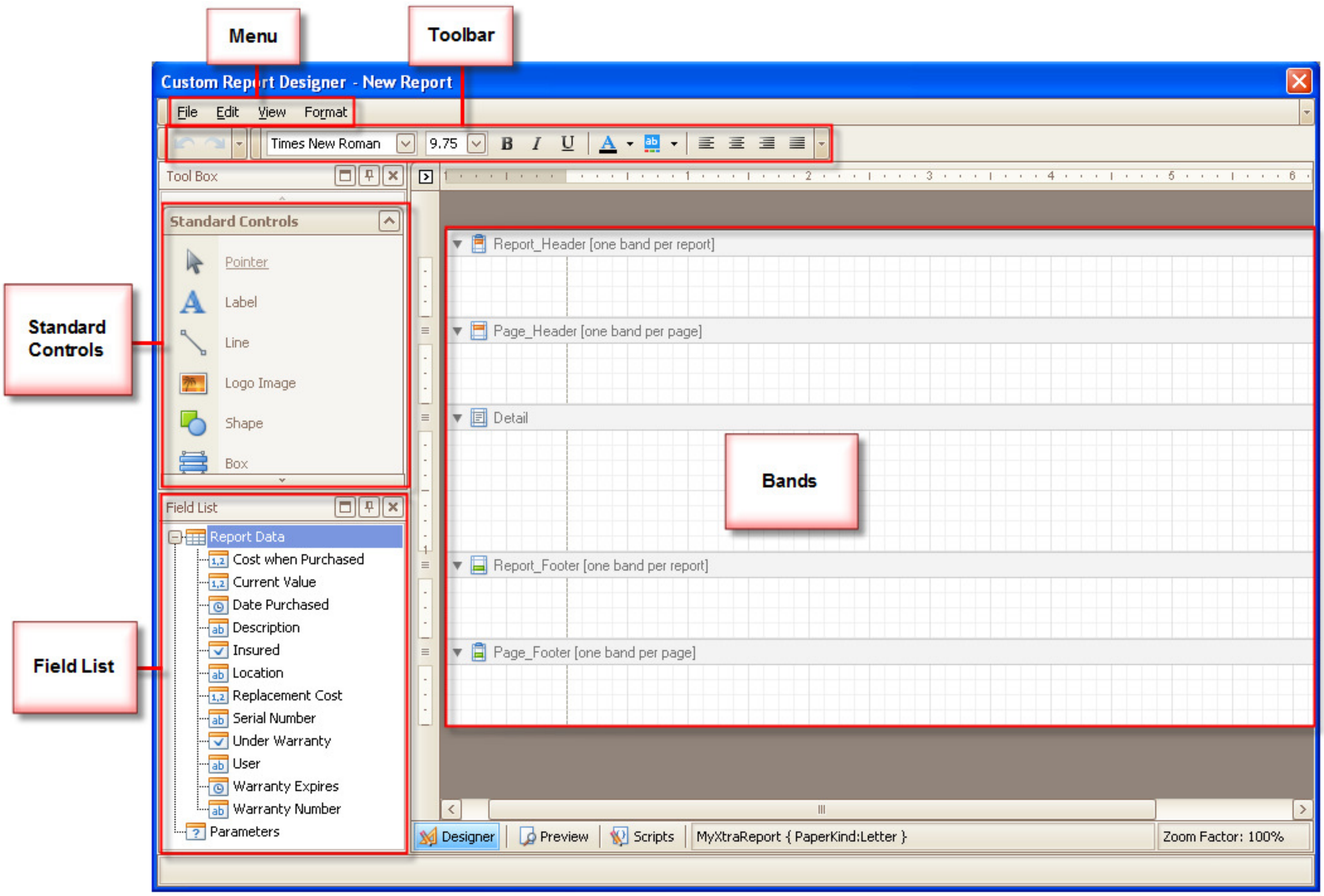


Note

The Reporting menu will only appear if you are using Database Oasis - Professional Edition.

3 The Custom Report Designer will open.

Exploring the Screen



The report designer is broken up into five sections, the report bands, the menu, the toolbar, the standard controls, and the field list.

Report Bands

The report bands represent the areas of the report where the information from your display will appear. There are five bands that appear by default:

Report Header – The report header band appears at the top of the report. It can be used to contain a report title or other information such as the name of the person who prepared the report, or the date.

Page Header – The page header band appears at the top of each page of the report. It can be used if you would like the page number to appear at the top of the report, or for other information you would like on each page.

Hint

If you want to print a report in tabular format and would like the field headings at the top of the page rather than repeated for each record, put them in the page header.

Detail – The detail band should contain the fields that you want to report on.

Report Footer – The report footer band appears on the last page of the report. It can be used to contain summary information such as report totals.

Page Footer – The page footer band appears at the bottom of every page of the report. This can be used if you want the page number to appear at the bottom of the report, or have other information that should appear on each page.

There are also four optional bands that can be added to the report:

Group Header – The group header band allows you to group data in your report based on a specific field. Anything entered in the band will be repeated each time the group information changes.

Note

Having a group header band is necessary to specify report groupings. The band may be left empty if you do not need header information at the start of each new group.

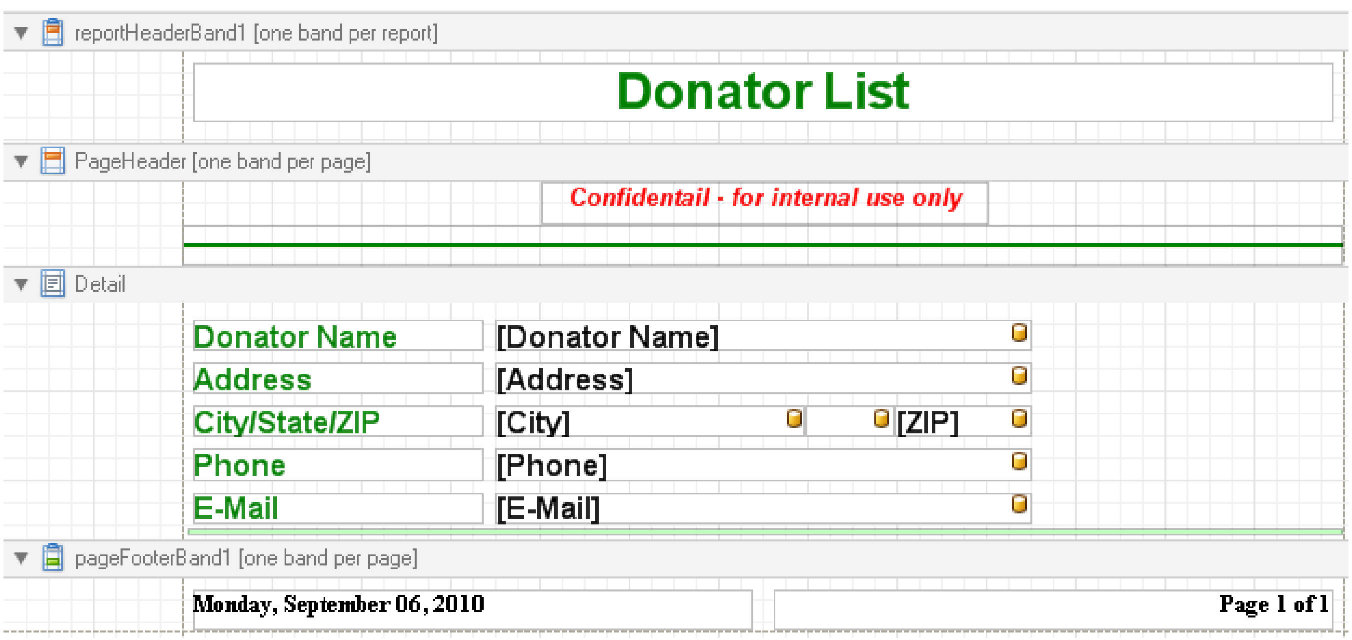
Group Footer – If you are using groups in your report, the group footer band will appear at the end of each group break. It can be used to contain summary information such as group totals.

Bottom Margin – The bottom margin band allows you to adjust the size of the page footer band. If selected, it adds an additional band below the page footer that may be dragged up or down, increasing or decreasing the size of the page footer. The space for the bottom margin band itself does not print.

DetailReport – This band allows you to create a sub report. For example, you may want to change the page layout on a section of your report, or if you have a child level, you may want to print data from each record's children.

For example, you may wish to print out an address list.

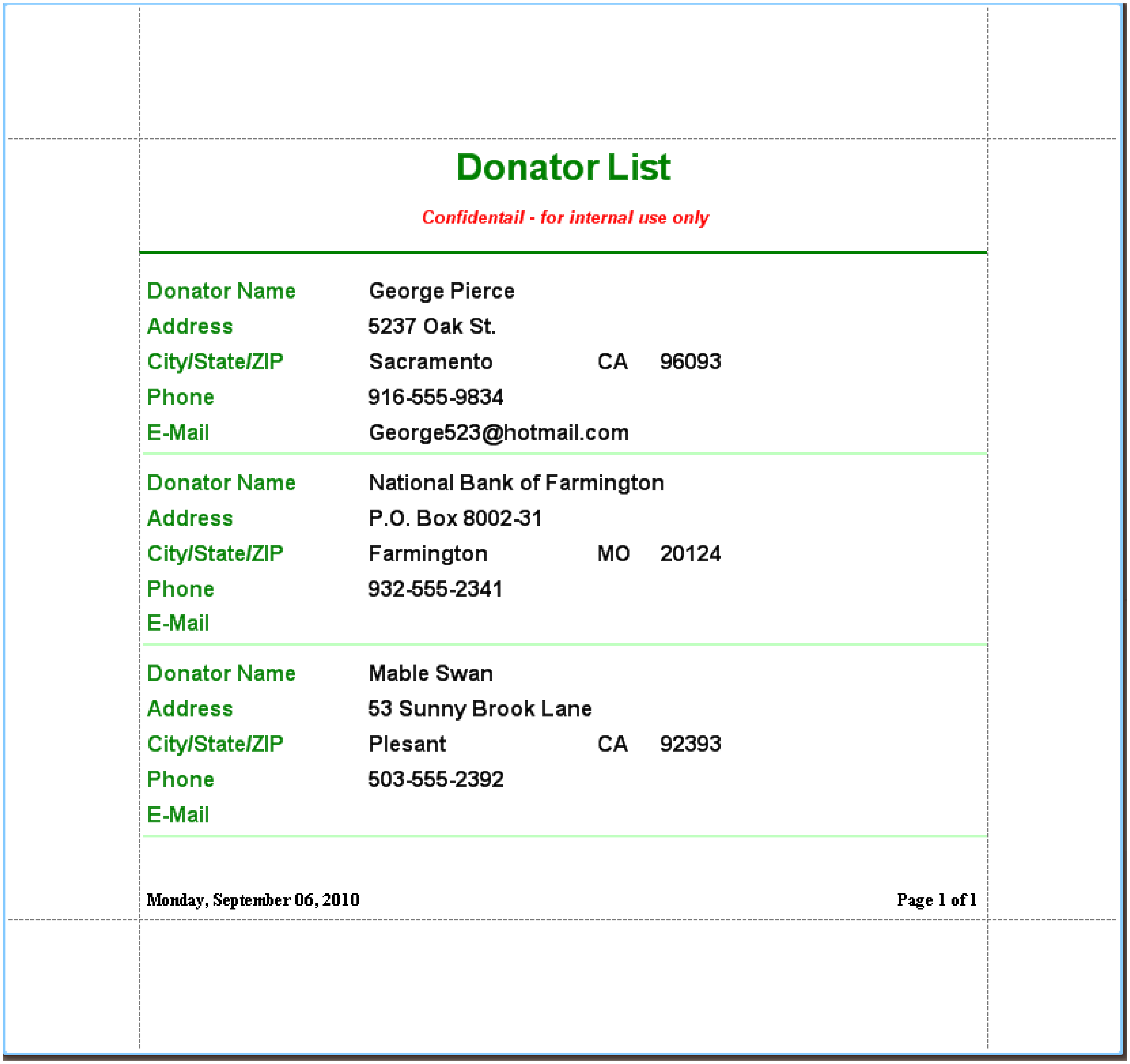
Your report may look something like this:



In the above example, the report header band contains the title of the report. The page header contains a notice that the contents are confidential which will appear on every page. The detail band contains the address fields from the display. The footer band contains a page count and the date on which the report is printed. The report footer and group bands were not used.

When this report is printed, the text "Donator List" text will appear on the first page of the report only. The text "Confidential – for internal use only" will appear at the top of each page. The page number and date will appear at the bottom of each page. The items in the detail band will be repeated for each record in your display.

When printed, this report will look like this:



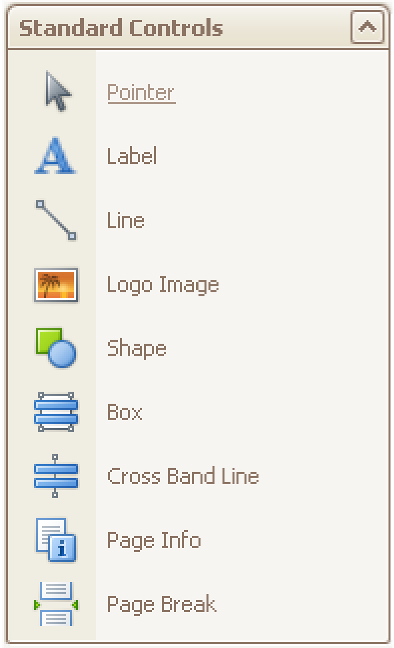
Donator List

Confidentail - for internal use only

Donator Name	George Pierce		
Address	5237 Oak St.		
City/State/ZIP	Sacramento	CA	96093
Phone	916-555-9834		
E-Mail	George523@hotmail.com		
Donator Name	National Bank of Farmington		
Address	P.O. Box 8002-31		
City/State/ZIP	Farmington	MO	20124
Phone	932-555-2341		
E-Mail			
Donator Name	Mable Swan		
Address	53 Sunny Brook Lane		
City/State/ZIP	Plesant	CA	92393
Phone	503-555-2392		
E-Mail			

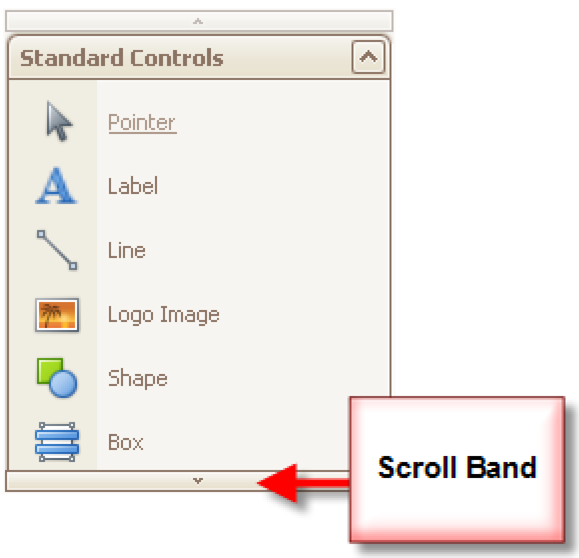
Monday, September 06, 2010 Page 1 of 1

Tool Box/Standard Controls



The Tool Box contains standard controls that can be used to work with the report. You add controls to the report by clicking on them in the list, then dragging them to the report surface.

Depending on how you have the report designer sized, the standard controls may not all fit in the box. In this case, a small scroll band will appear at the bottom of the control list.

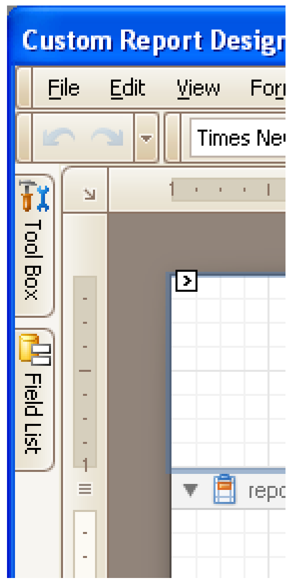


Click on the arrow to scroll the list. When you scroll down, an arrow will appear at the top of the list, allowing you to scroll back up. Alternatively, you can click and drag on the bottom edge of the list to make the box bigger.

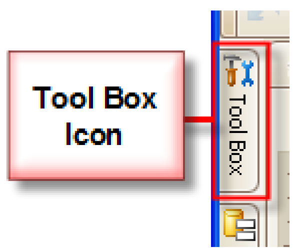
At the top of the box, there are options that allow you to hide or close the tool box. Options include:

- This option maximizes the tool box. As long as this is depressed, the Field List box will be hidden so the tool box is the only list appearing in the left hand pane. When this is selected, the button will toggle to appear like this: . To restore the field list, click the button again.

- This option allows you to auto-hide the tool box. It “tacks” the tool box to the side, optimizing the space available in the report bands:



The tool box appears as an icon on the side of the report designer window:



When you hover your mouse over the icon, the tool box will reappear until you move your mouse off of it. If you select an option on the tool box, the box will stay visible until you click off of it. When the tool box is open, the icon will toggle to appear like this: . Clicking this will restore the tool box so it is always visible.

- This option closes the tool box. The tool box will remain closed until the next time you go into the report designer.

Tool box options include:

Pointer – If you have clicked on another tool box option and decide you do not wish to add it to the report, you can select this option to clear your previous selection.

Label – This option allows you to add text to the report, such as report titles or field names. It can also be used to add summary information such as report totals.

Line – This option allows you to add a line to your report.

Logo Image – This option allows you to add a picture to your report. This is similar to the logo control in the display designer.

Shape – This option allows you to draw a shape, such as a circle or arrow, on your report.

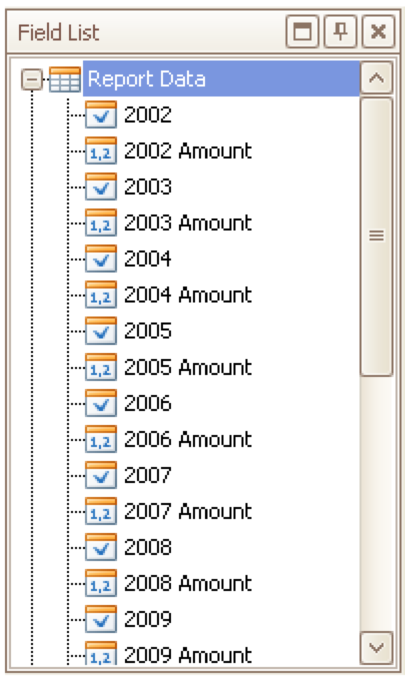
Box – This option allows you to add a box around items in your report that encompasses multiple bands. For example, you may want a box around the entire report, including header and footer information.

Cross Band Line – This option allows you to draw a vertical line that extends across multiple bands.

Page Info – This option allows you to include report information such as the date or the page count in your report.

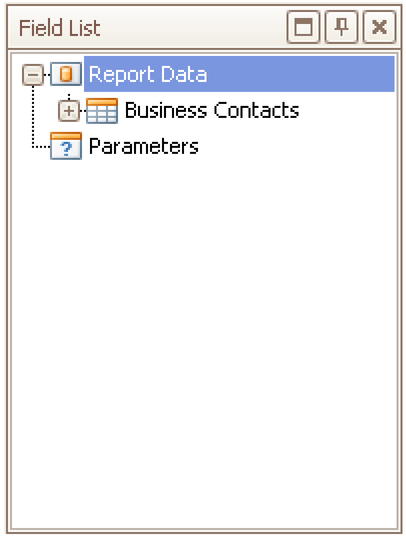
Page Break – This option allows you to place a page break in your report. For example, you may want each record to start on a new page.

Field List



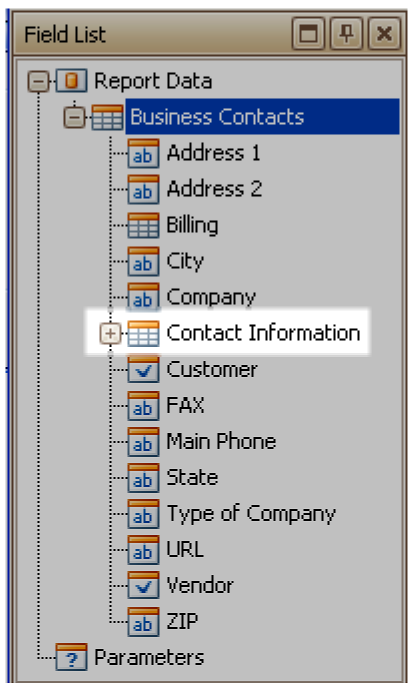
The field list includes all of the fields in your display that can be included in a report. Fields can be dragged from this list to the report bands.

If your display contains a child level, the field list may open collapsed:

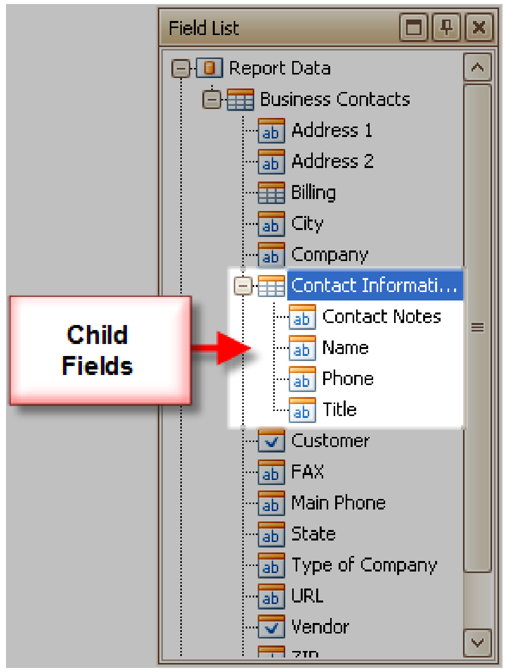


Click the [+] next to the display name to expand the field list:

Items in the list with a plus mark [+] next to them indicate a child display:



Click the [+] to expand the list and show child fields.



At the top of the box, there are options that allow you to hide or close the field list. Options include:

 - This option maximizes the field list. As long as this is depressed, the Tool Box will be hidden so the field list is the only list appearing in the left hand pane. When this is selected, the button will toggle to appear like this: . To restore the tool box, click the button again.

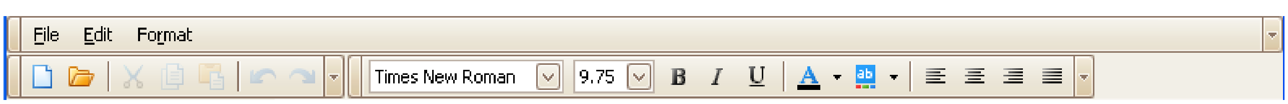
 - This option allows you to auto-hide the field list. It “tacks” the field list to the side, optimizing the space available in the report bands. The field list appears as an icon on the side of the report designer window.

When you hover your mouse over the icon, the field list will reappear until you move your mouse off of it. If you select a field, the box will stay visible until you click off of it. When the field list is open, the icon will toggle to appear like this: . Clicking this will restore the field list so it is always visible.

 - This option closes the field list. The field list will remain closed until the next time you go into the report designer.

Menu and Toolbar

At the top of the Report Designer screen, you will find the default menu and toolbar.



The menu and toolbar provides access to commands for working with the designer.

The File menu items include:

Label / Report Wizard – This option opens the Report Wizard. The wizard gives you the option of setting up a label format or creating a quick report layout.

Save – This option allows you to save your report as you work. The first time you save, you will be asked to name the report. After the first time, the previously saved report will be updated when you select this option and you will not be prompted for a name.

Save As – This option allows you to save your report under a different file name. When you select this option, you will be prompted to enter a new name for the report. Your original report will remain unchanged under the old file name and a new report will be created with the current changes.

Exit – This option will exit the Report Designer. If you have any unsaved changes, you will be prompted to save. If you select not to save, your changes will be discarded.

The Edit menu items include:

Undo – This option will reverse the most recent change to the report. If you select this option more than once, it will undo the previous change.

Redo – This option will become available if you have selected Undo. It allows you to remake a change that you have undone.

Delete – This option will delete the selected item. You can also delete an item by pressing the Delete key on your keyboard.

The View menu items include:

Designer – This option shows the design surface where you build your report.

Preview – This option shows a preview where you can see how the report will look when printed. It also gives access to the page setup option.

Toolbars – This option allows you to set what toolbars display. When you click on the arrow, you have access to a sub-menu that includes:

Main Toolbar – this toolbar provides undo and redo tools.

Formatting Toolbar – This toolbar provides formatting options, such as color and font, for objects on the report.

Layout Toolbar – This toolbar provides alignment options for objects on the report.

Status Bar – This option allows you to toggle the status bar at the bottom of the report designer on or off.

Standard Controls – This option lets you view a toolbar with the options that are available in the Standard Controls window in the Toolbox. This is useful if you want to close the Standard Controls section of the Toolbox to make more room for your field list. By default, this toolbar opens to the left of the Toolbox, but in may be dragged to the top of the page if desired.

Customize – This option opens a toolbar Customization screen that provides options to view the available toolbars and commands, and an Options tab that lets you personalize your menus and toolbars.

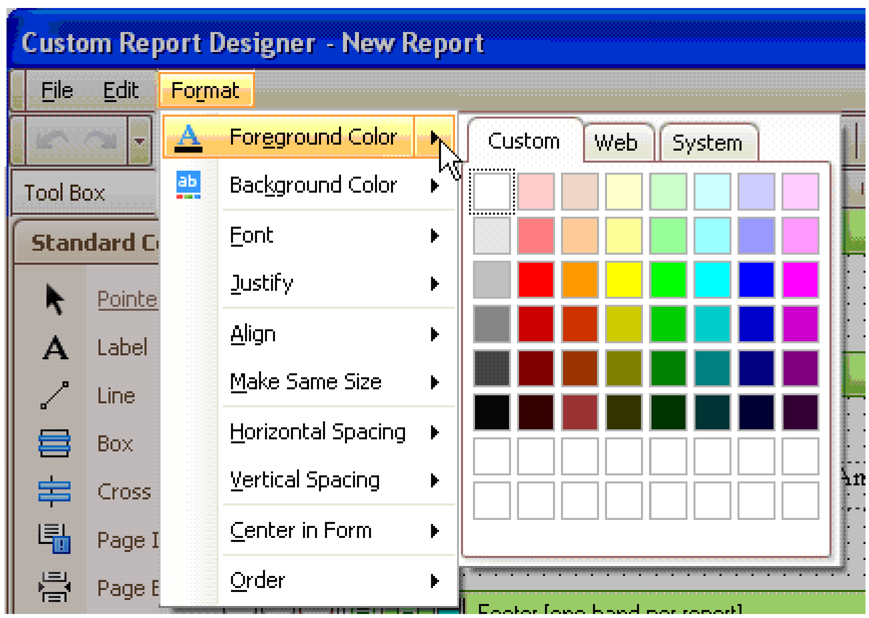
Window – This option opens a sub-menu that allows you to control what windows display. You can toggle the toolbox on or off, the field list on or off, or open up an advanced properties grid.

Note

The Properties grid provides access to hidden properties of the report and objects on the report. Unless you are an advanced user or working with Database Oasis support, you should not modify these properties.

The Format menu items include:

Foreground Color – This option allows you to set the text or line color of a selected object. When you click on the arrow a color picker opens where you can select a color.



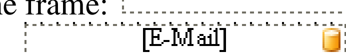
For example, if you set the foreground color of a field to red, it would look like this:

Background Color – This option allows you to set the background color for the selected object. When you click the arrow, the color picker described under Foreground Color opens. The selected color will fill in the frame of the object. For example, if you set the background color of a field to light gray, it would look like this:

Font – This option allows you to make changes to the text of the selected item. When you click on the arrow, you have access to a sub-menu with options to set the font to **Bold**, *Italic*, or Underline.

Justify – This option allows you to control the alignment of the text for the selected object. Clicking on the arrow opens a sub-menu with the following options:

Left – The text will be aligned to the left edge of the frame: 

Center – The text will be centered within the frame: 

Right – The text will be aligned to the right edge of the frame: 

Justify – Text will generally be left aligned. If there is more than one line of text, for example in a notes field, it will be spaced evenly within the frame so that it aligns to both the right and left edges.

Align – This menu item provides a sub-menu with options for aligning multiple objects to each other. Select the objects you wish to align, then select the appropriate menu option. The top three items are used for aligning objects in a column. Options include:

Lefts – This will allow you to align the left edges of the items.
Centers – This will center objects in the column.
Rights – This will align the right edges of the items.

The bottom three items are used for aligning objects in a row. Options include:

Tops – This will align the top edges of the items
Middles – This will center the objects in the row.
Bottom – This will align the bottom edges of the items.

Make Same Size – This option allows you to adjust one or more selected objects so they are the same size. Options include:

Width – This will match the width of the objects to whichever object was selected last.
Height – This will match the width of the objects to whichever object was selected last.
Both – This will match both the height and width of the objects to whichever object was selected last.

Horizontal Spacing – This menu provides options to allow you to control the spacing between objects in a row. Options include:

Make Equal – This will arrange the objects so that there is equal space between each item.
Increase – This will pad the space between each of the objects, moving them further apart.
Decrease – This will remove space between each of the objects, bringing them closer together.
Remove – This will remove all space between the selected objects so that they are right next to each other.

Vertical Spacing – This menu provides options to allow you to control the spacing above and below objects in a column. Options include:

Make Equal – This will arrange the objects so that there is equal space above and below each item.
Increase – This will pad the space above and below each of the objects, moving them further apart.
Decrease – This will remove space above and below each of the objects, bringing them closer together.
Remove – This will remove all space above and below the selected objects so that they are right on top of each other.

Center in Form – This menu provides options for centering objects in the report. Options include:

Horizontally – This will center the object horizontally within the report margins.
Vertically – This will center the object vertically within the current band.

Order – This option allows you to layer objects by moving the selected item either in front of or behind other items in the report.

Bring to Front – This will move the selected object in front of all other objects in the report.
Send to Back – This will move the selected object behind all other objects in the report.

The toolbars provide quick access to many of the options that are available on the menu. Options include:

Main Toolbar:

Undo – This option will reverse the most recent change to the report. If you select this option more than once, it will undo the previous change.

Redo – This option will become available if you have selected Undo. It allows you to remake a change that you have undone.

Formatting Toolbar:

Font – This option allows you to select the font that you would like to use for the text of the selected item.

Font Size – This option allows you to select the point size of the font that is being used for the text of the selected item. A higher number will appear larger; a lower number will appear smaller.

Bold – This option will apply a **bold face** font to the text in the selected object.

Italic – This option will *italicize* the text in the selected object.

Underline – This option will <u>underline</u> the text in the selected object.

Foreground Color – This option allows you to set the text or line color of a selected object. When you click on the arrow a color picker opens where you can select a color.

Background Color – This option allows you to set the background color for the selected object. When you click the arrow, the color picker described under Foreground Color opens. The selected color will fill in the frame of the object.

Left – The text will be aligned to the left edge of the frame.

Center – The text will be centered within the frame.

Right – The text will be aligned to the right edge of the frame.

Justify – Text will generally be left aligned. If there is more than one line of text, for example in a notes field, it will be spaced evenly within the frame so that it aligns to both the right and left edges.

Format Toolbar:

Note

This toolbar is turned off by default. Most of the options are available from the Format menu.

To Grid – This allows you to align objects by snapping them to the gridlines. When you press this tool, any selected objects will snap to the closest top/left gridline.

The next three tools provide options for aligning multiple objects to each other. They are only available if more than one object is selected. Select the objects you wish to align, then select the appropriate tool.

Lefts – This will allow you to align the left edges of the items.
Centers – This will center objects in the column.
Rights – This will align the right edges of the items.

The next three tools provide options for aligning objects in a row. They are only available if more than one object is selected.

Tops – This will align the top edges of the items
Middles – This will center the objects in the row.
Bottom – This will align the bottom edges of the items.

The next four tools provide options for controlling the width and height of objects.

Width – This will match the width of the objects to whichever object was selected last.
Size to Grid – This option will increase or decrease the height and width of the selected object(s) to align with the grid.
Height – This will match the width of the objects to whichever object was selected last.
Both – This will match both the height and width of the objects to whichever object was selected last.

The next four tools provide options for controlling the spacing between objects in a row. They are only available if multiple objects are selected.

Make Equal – This will arrange the objects so that there is equal space between each item.
Increase – This will pad the space between each of the objects, moving them further apart.
Decrease – This will remove space between each of the objects, bringing them closer together.
Remove – This will remove all space between the selected objects so that they are right next to each other.

The next four tools allow you to control the spacing above and below objects in a column. They are only available if multiple objects are selected.

Make Equal – This will arrange the objects so that there is equal space above and below each item.
Increase – This will pad the space above and below each of the objects, moving them further apart.

Decrease – This will remove space above and below each of the objects, bringing them closer together.
Remove – This will remove all space above and below the selected objects so that they are right on top of each other.

The next two options allow you to center objects in the report.

Horizontally – This will center the object horizontally within the report margins.
Vertically – This will center the object vertically within the current band.

The final two tools allow you to layer objects by moving the selected item either in front of or behind other items in the report.

Bring to Front – This will move the selected object in front of all other objects in the report.
Send to Back – This will move the selected object behind all other objects in the report.

Standard Controls Toolbar:

Note

This toolbar is turned off by default. The options are available from the Standard Controls section of the toolbox.

Pointer – If you have clicked on another tool box option and decide you do not wish to add it to the report, you can select this option to clear your previous selection.

Label – This option allows you to add text to the report, such as report titles or field names. It can also be used to add summary information such as report totals.

Logo Image – This option allows you to add a picture to your report. This is similar to the logo control in the display designer.

Line – This option allows you to add a line to your report.

Shape – This option allows you to draw a shape, such as a circle or arrow, on your report.

Box – This option allows you to add a box around items in your report that encompasses multiple bands. For example, you may want a box around the entire report, including header and footer information.

Cross Band Line – This option allows you to draw a vertical line that extends across multiple bands.

Page Info – This option allows you to include report information such as the date or the page count in your report.

Page Break – This option allows you to place a page break in your report. For example, you may want each record to start on a new page.

Using the Report Wizard

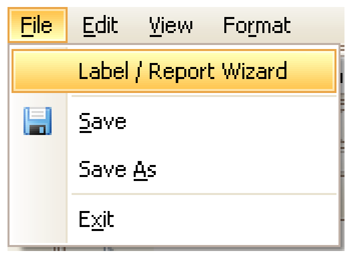
The easiest way to start a new report is using the Report Wizard. The wizard gives you two options:

Label Report - This option allows you to select the type of label from a list of standard label formats and sets the report area to print the labels.

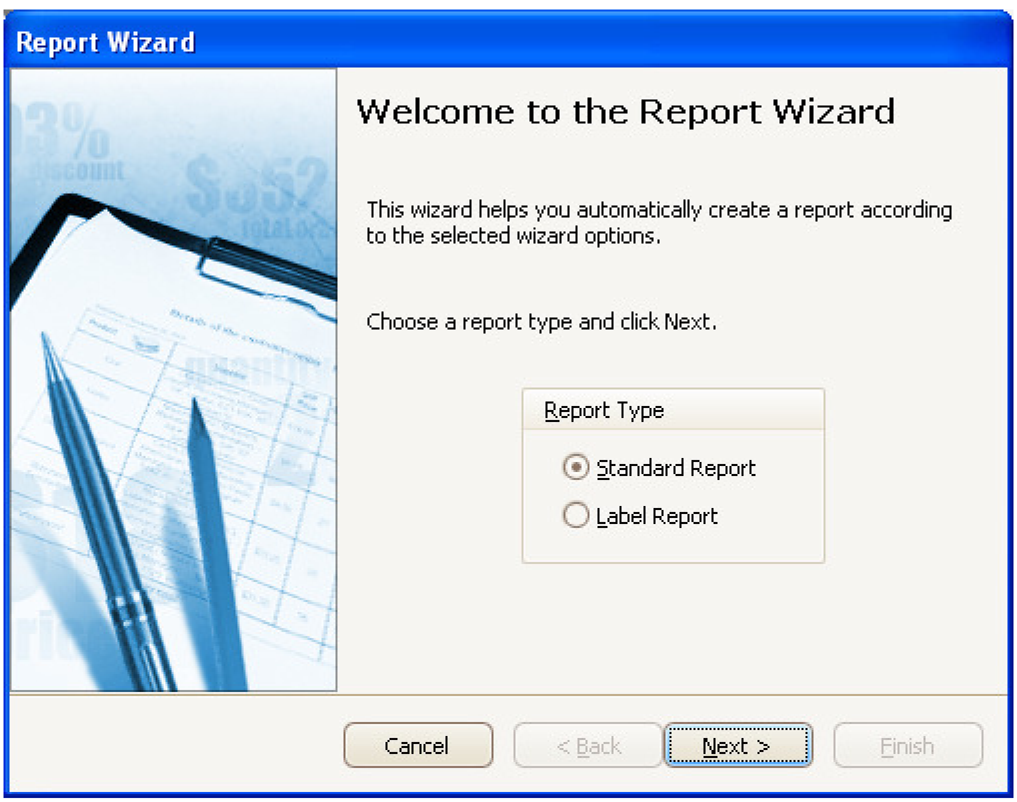
Standard Report – This option allows you to quickly configure a report by specifying the list of fields you would like included and lets you choose from a selection of standard report layouts.

Launching the Report Wizard

1 Inside the Report Designer, select Label / Report Wizard from the File menu.



2 The Report Wizard will open:



3 Select the desired report type from the Report Type radio buttons. Refer to the appropriate section below for instructions.

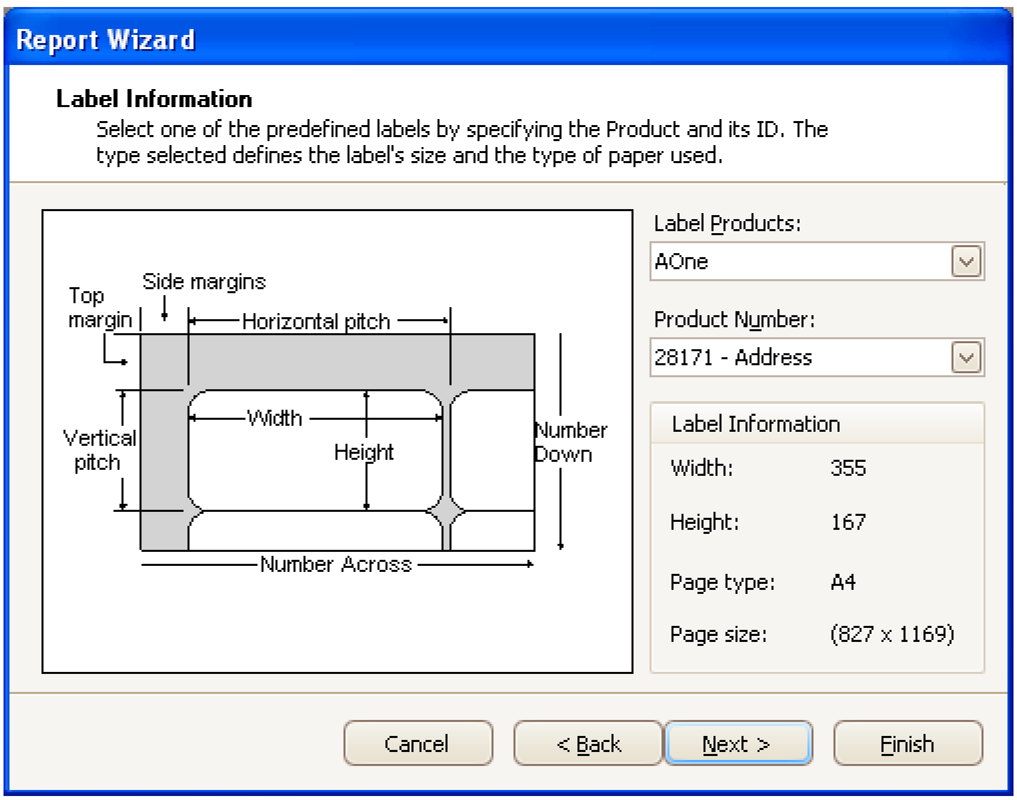
Setting up Labels

The Report Wizard allows you to configure your report area for one of a selection of standard label types.

CREATING A LABEL REPORT

1 Launch the report wizard following the steps under *Launching the Report Wizard*, above.

2 On the first page, select the Label Report radio button. The Label Information page will open:



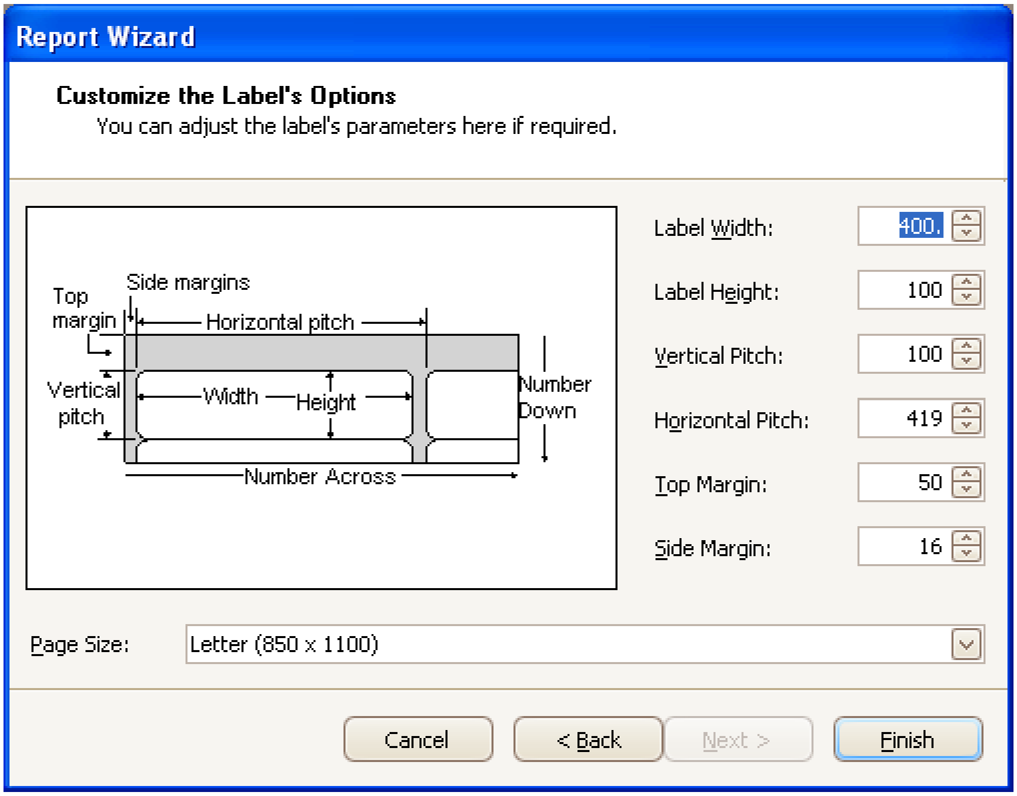
3 Select the brand of your labels from the Label Products list. The Product Number field will update with labels by the selected manufacturer.

4 Select your labels from the Product Number field and click Next.

Hint

In addition to labels, you can select options such as business cards, greeting cards, ID badges, and more.

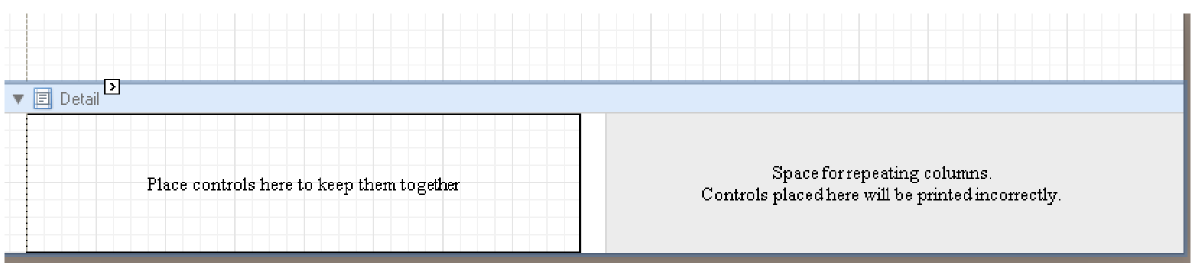
5 The Customize the Label page will open:



6 The label size automatically adjusts to the product you selected, and for the most part, you should not need to adjust the label options. If for some reason you would like to make an adjustment to the size or paper type, you may do so on this screen.

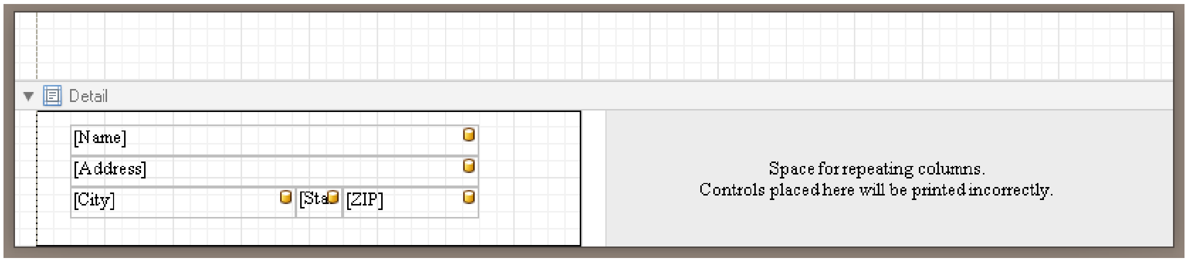
7 When you are satisfied with your labels, press Finish.

8 You will be returned to the report designer with the design area adjusted to the label settings:

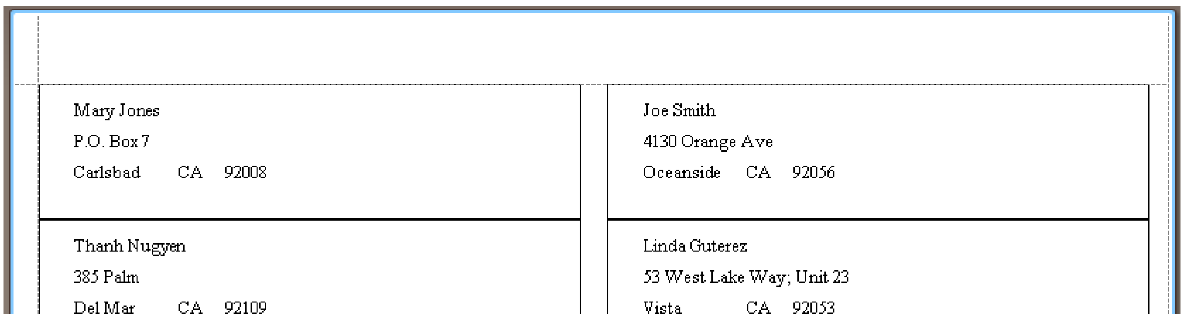


9 The white area provides the space where you should place your fields. The gray area is reserved for printing in columns.

10 Drag the desired fields into the white area to set up your labels:



The final labels will look like this:



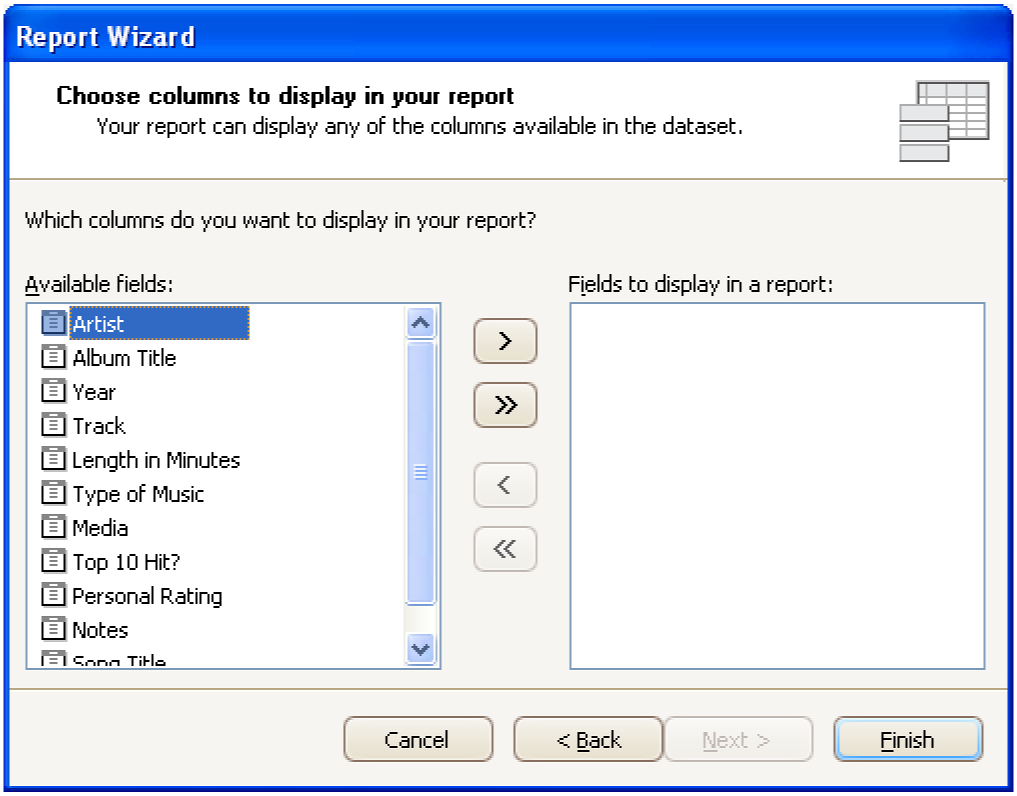
Setting up a Standard Report

The Standard Report option in the report wizard lets you quickly lay out your report by selecting the fields and choosing from a selection of layout options. The fields will be automatically added to the report, where you can make any desired adjustments.

Creating a Standard Report

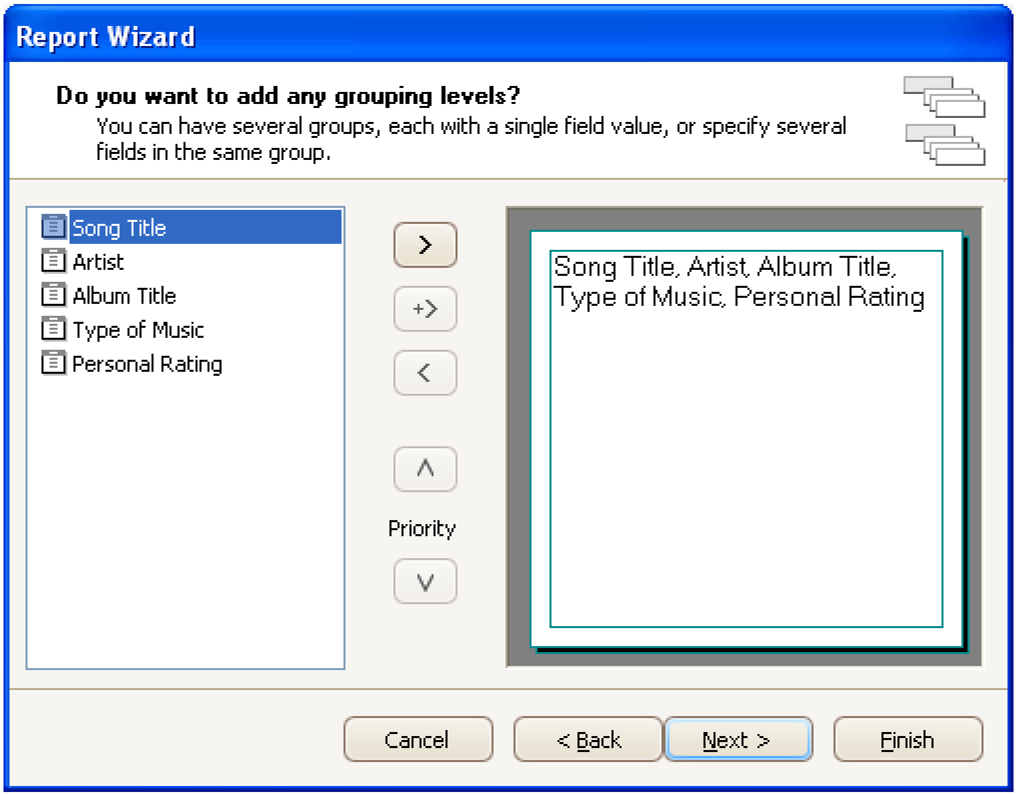
1 Launch the report wizard following the steps under *Launching the Report Wizard*, above.

2 On the first page, select the Standard Report radio button. The Choose Columns page will open:



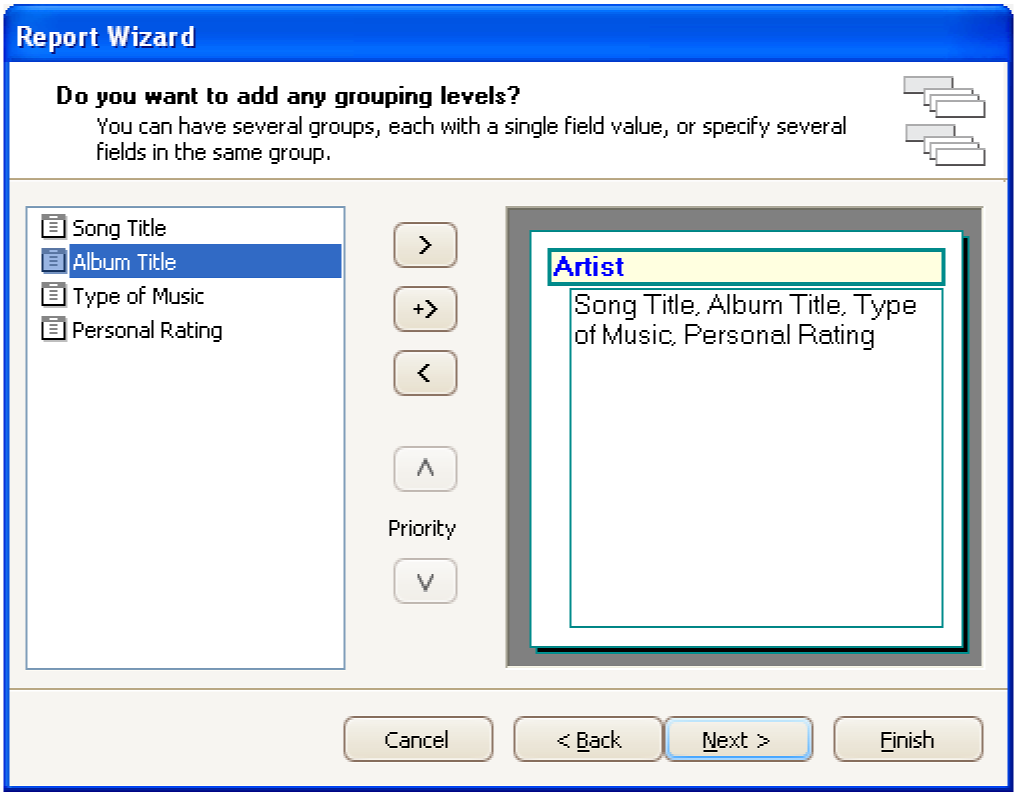
3 The Available Fields box provides the list of fields in your display. To include a field in the report, double click on it in this list or highlight it and click the > button. The field will move from the Available Fields list to the Fields to display in a report list. To select all fields, click the >> button.

4 When you are satisfied with your fields, click Next. The grouping page will open:



5 Database Oasis allows you to using groupings in reports to automatically group related information and generate summary information for the group. (For more information on grouping, see the heading *Groups in Custom Reports*, later in this chapter.)

6 If you would like to create a group for the report, select the field on which you would like to group from the list on the left and press the > button. To include more than one field in the grouping, highlight the second field and press the +> button. For example, you may want to group on both city and state. This would allow you to have Paris, IL and Paris, TX in different groups. The selected field(s) will move to the list on the right:

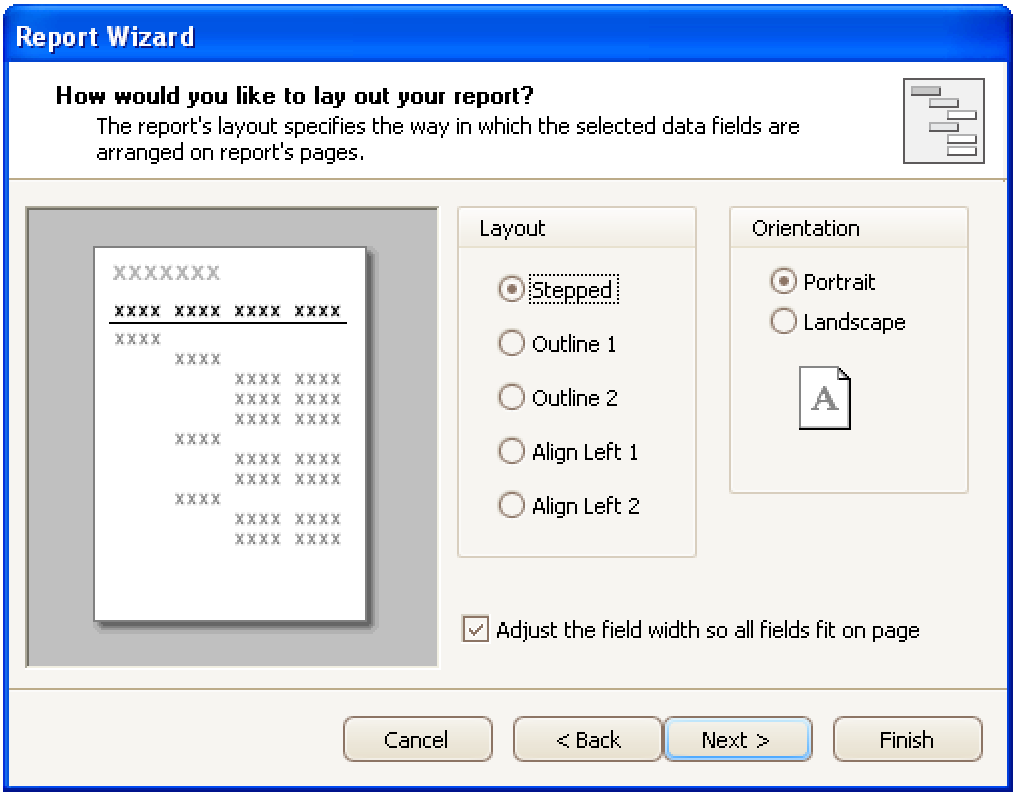


7 You may continue to add fields to create sub groupings, if desired. Adjust the priority of the groupings by highlighting them and clicking the Λ and V arrow buttons.

8 To remove a grouping, highlight it in the list on the right, and click the < button.

9 When you are done setting up your groups, click Next >.

10 The layout page will open, providing options to control how fields are arranged on the page:



11 Select from the Layout radio buttons. The report example on the left will update to show an example of the selected layout. The available options will vary, depending on whether you've included groupings in your report. If you have not included a grouping, options are:

- Columnar – Select this option to have data appear with one field per line, with the field label in the first column, followed by the field data.

- Tabular – Select this option to arrange data in tabular format (similar to list view), with the field labels appearing once for all records across the top of the page and corresponding data aligned below the labels with one record per row.

Note

Consider changing to landscape orientation when using this option.

- Justified – Select this option to arrange the fields with field labels appearing above the data. Fields will be side-by-side so they fill the width of the page. If not all fields fit, remaining fields will be placed on the next line, until all of the fields have been added.

If you have included a grouping, options are:

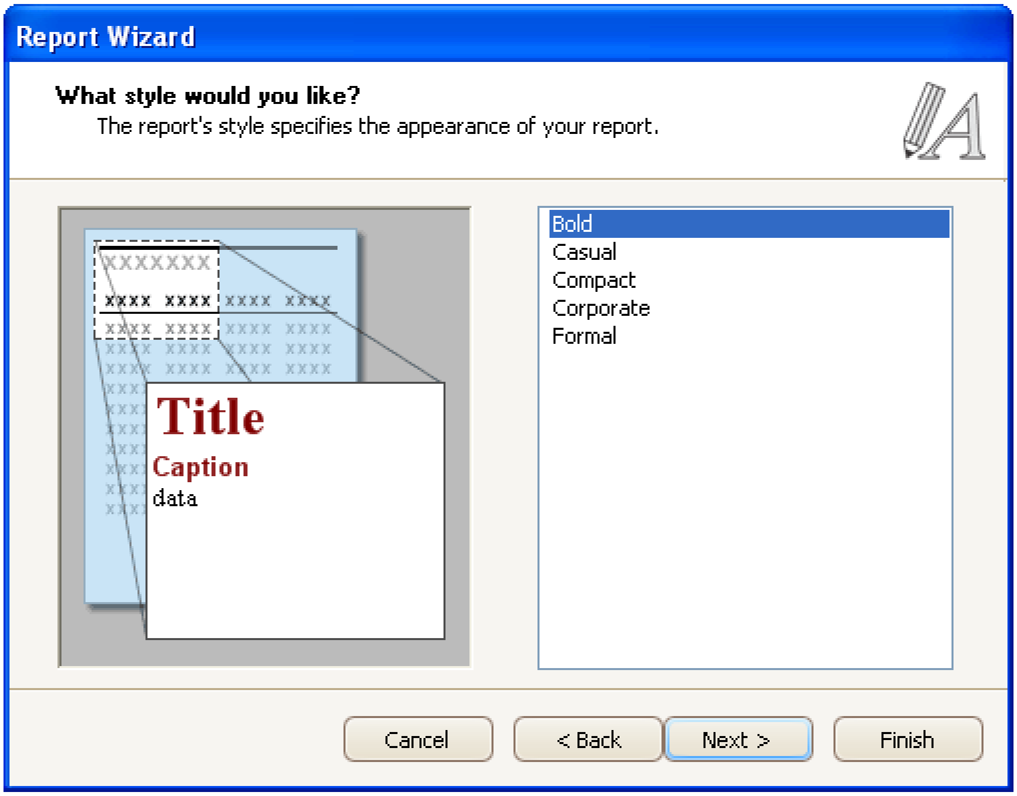
- Stepped – This option is similar to the Tabular option with the field labels appearing once for all records across the top of the page. The field on which you are grouping will appear left aligned below the labels once for all records in the group. The remaining fields will appear indented in the detail band below group field.
- Outline 1 – This option will place the field on which you are grouping in the group band with the label to the left of the field data. If you have a sub-grouping, the label and field will appear indented on the following line. The field labels for the remaining fields will appear indented on the following line, with the field data in tabular alignment beneath them.
- Outline 2 – This option is similar to Outline 1, with the exception of the arrangement of the separator lines.
- Align Left 1 – This option is similar to the outline options, with the exception that sub-group headings and group details are left aligned rather than indented.
- Align Left 2 – This option is similar to Align Left 1, with the exception of the arrangement of the separator lines.

12 Select the Adjust the field width so all fields fit on the page option to have the report designer automatically size the fields so they all fit. If this option is not selected, the fields may run off the edge of the page. You are able to manually adjust the field sizes once the wizard is complete.

Note
This option is particularly important with any of the tabular layouts.

13 Select whether you would like to have the report print in Portrait (taller than it is wide) or Landscape (wider than it is tall) page orientation.

14 When you are satisfied with your layout options, click Next > to open the style page:



15 This page allows you to specify the default font style for the report. The sample on the left will update to reflect your selections. Options include:

- Bold – This option places the report title in Times New Roman, 20 pt. bold font. Field labels are in Arial, 10 pt. bold font. Field data is in Times New Roman, 10 pt. font. The report title and field labels are red.

- Casual – This option places the report title in Tahoma, 24 pt. bold font. Field labels and data are in Arial, 10 pt. font, with the labels bolded. The report title is green.

- Compact – This option places the report title in Times New Roman, 21 pt bold font. Field labels and data are in Times New Roman, 10 pt font.

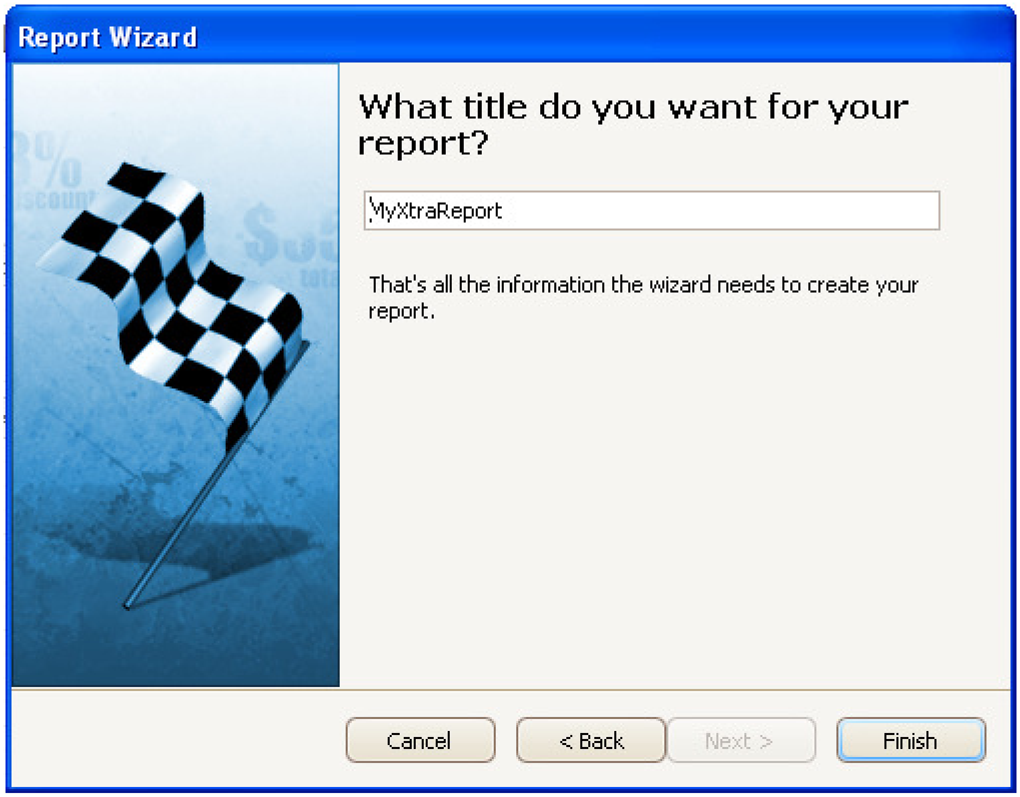
- Corporate – This option places the report title in Times New Roman, 20 pt. bold italic font. Field labels are in Times New Roman, 20 pt. bold italic font. Field data is in Arial 8 pt. font. The report title and field labels are blue.

- Formal – This option places the repot title in Times New Roman, 24 pt. bold font. Field labels are in Times New Roman 10 pt. bold font. Field data is in Times New Roman 8 pt. font.

Note

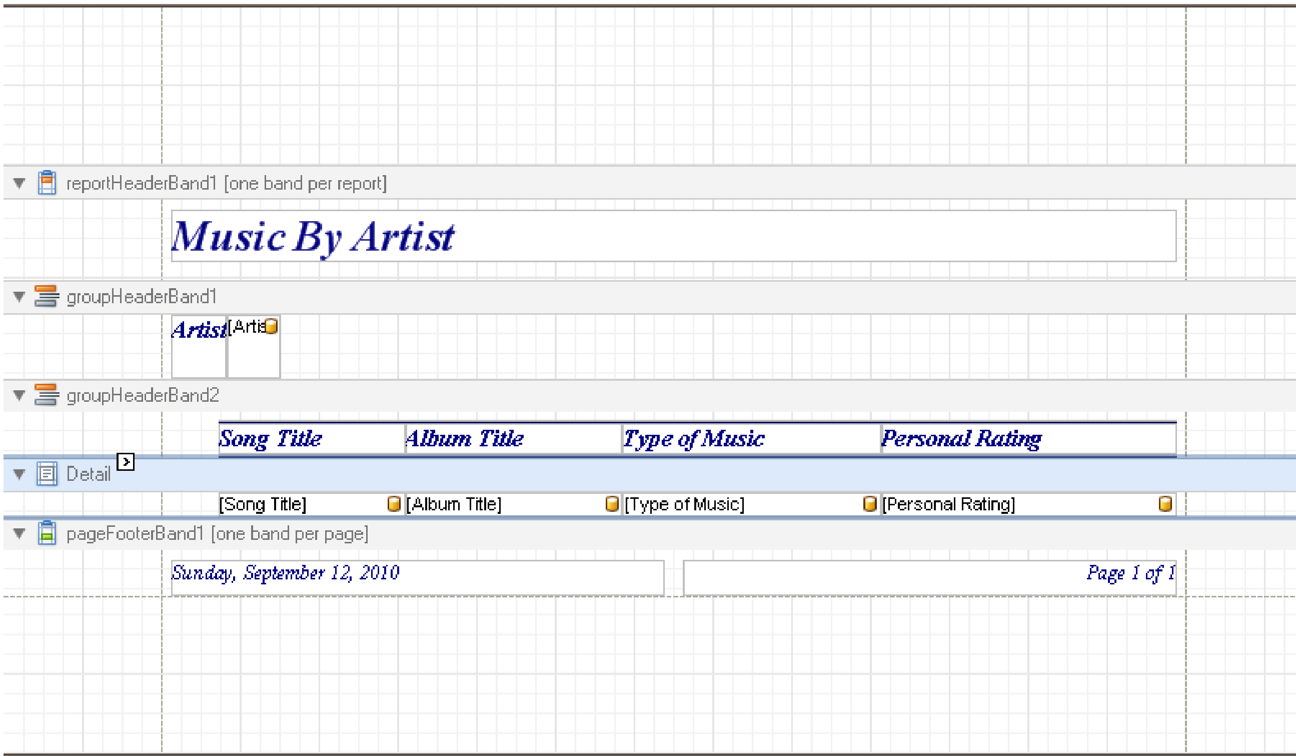
Fonts may be adjusted in the report designer once the wizard is complete.

16 Once you have made a style selection, click Next > to open the report title page:



17 Enter the title you would like to appear at the top of the report.

18 Click Finish to exit the wizard. The report design surface will populate with the fields and layout you have selected:



19 Use the guidelines in the remainder of this chapter to add additional objects to the report, make any desired changes to the visual elements, and save your report.

Setting up Your Report

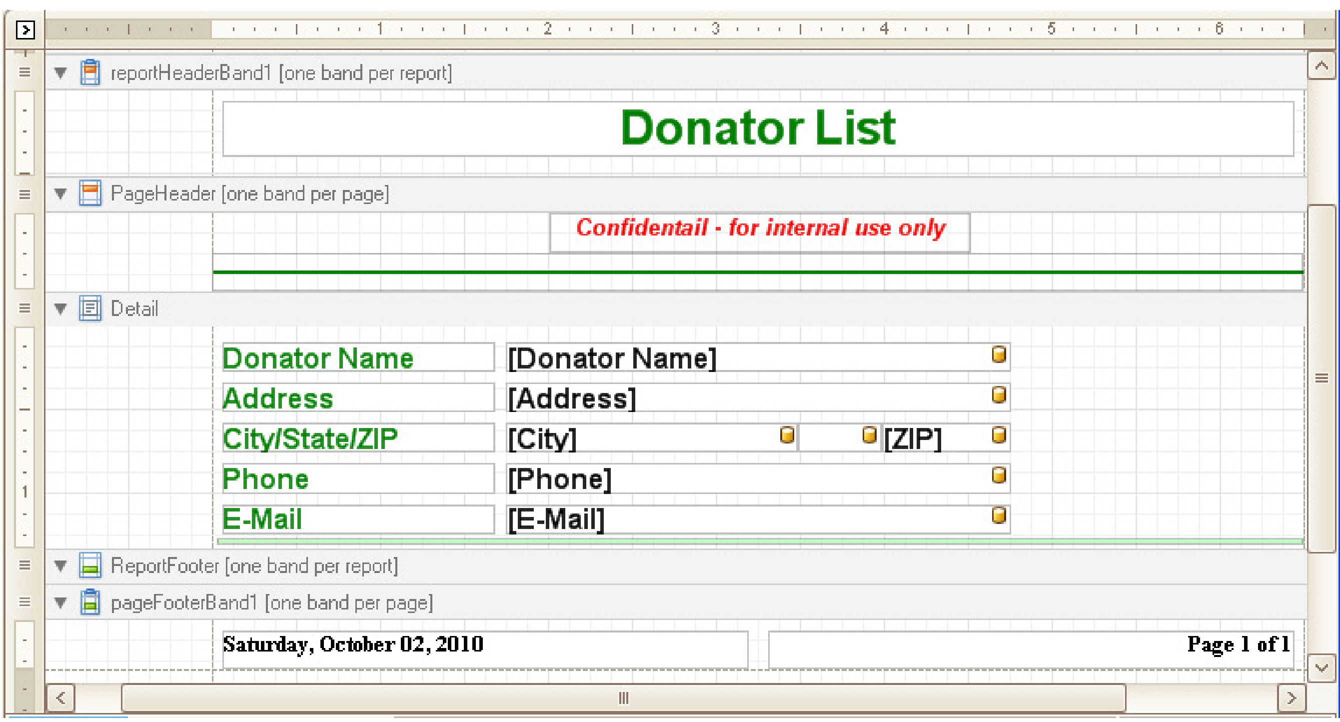
Before adding fields and other objects to your report, you may wish to set up the report area and configure the band properties. This includes setting up any data groupings you want to include, and configuring the report to include data from any child level displays you may have.

Note
Margin size and page orientation (portrait or landscape) are configured in preview mode.

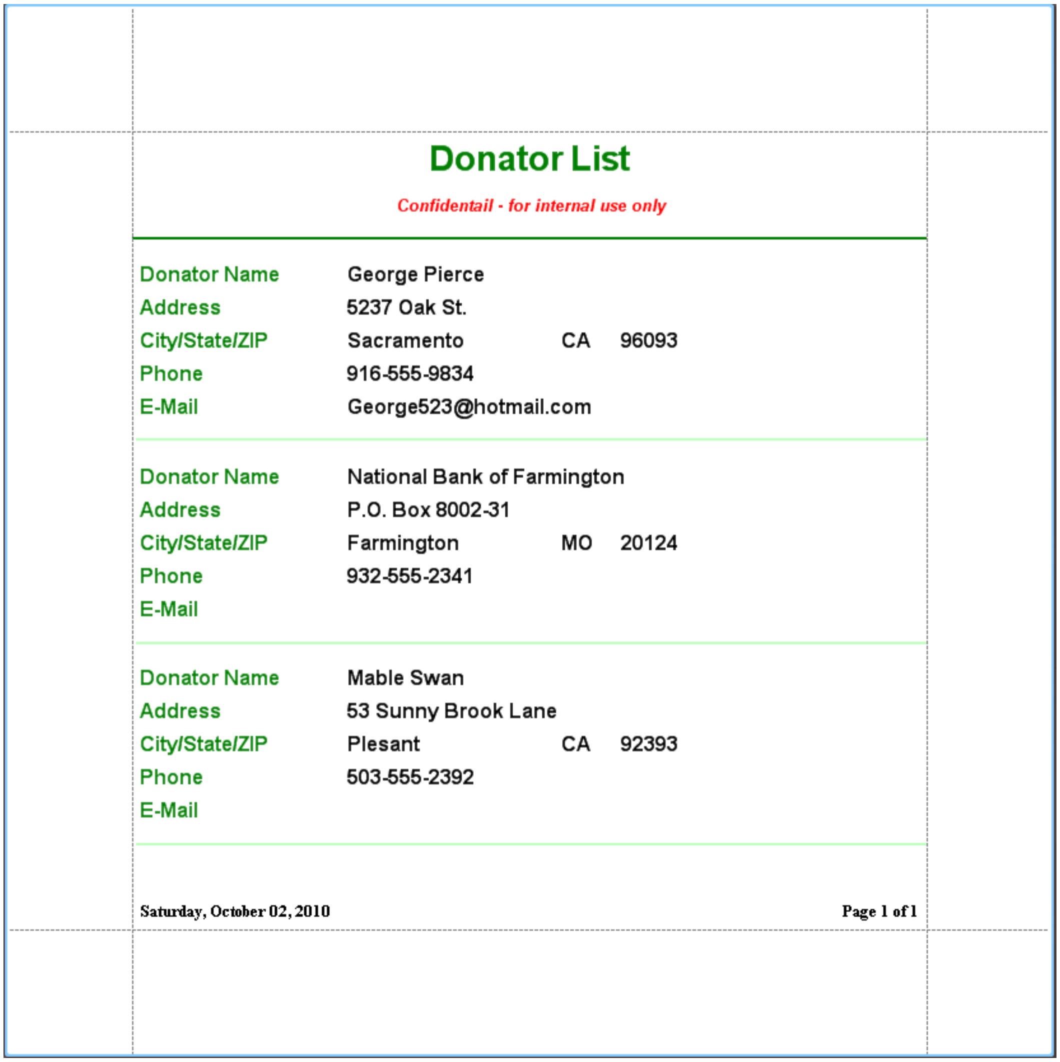
Sizing Report Bands

When a report is printed, each record in the report will be the height of the detail band. The amount of space that's reserved for the headers and footers will also be based on the size of the respective bands.

For example, if you create a report with a detail band that looks like this:



Your report will print like this:



Donator List

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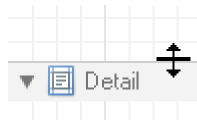
Donator Name	George Pierce		
Address	5237 Oak St.		
City/State/ZIP	Sacramento	CA	96093
Phone	916-555-9834		
E-Mail	George523@hotmail.com		
Donator Name	National Bank of Farmington		
Address	P.O. Box 8002-31		
City/State/ZIP	Farmington	MO	20124
Phone	932-555-2341		
E-Mail			
Donator Name	Mable Swan		
Address	53 Sunny Brook Lane		
City/State/ZIP	Plesant	CA	92393
Phone	503-555-2392		
E-Mail			

Saturday, October 02, 2010 Page 1 of 1

You should size each band so that it is tall enough to contain the objects you wish to add to it, but does not have a lot of empty space. You can adjust the size of the bands using drag and drop.

Changing the Size of a Band

1 Hover your mouse over the top of the band. It will change to a double headed arrow:



2 Click and drag the band up or down until it is the appropriate size.

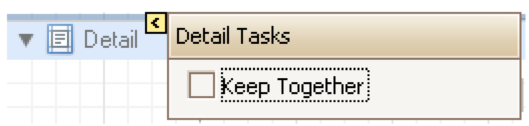
Band Properties

Band Properties allow you to select how the report should handle individual records spanning multiple pages when printed.

Setting Band Properties

1 Click on the band you would like to select. The selected band will be blue and a small arrow will appear next to the band name:

2 Click on the arrow. A band properties box appears next to the band name:



3 Mark the Keep Together check box if you would like to keep individual records together when printed, if possible. If this is selected, the report generator will determine if a record will fit in the space left on the page. If not, it will push that entire record to the next page. If this is left unmarked, it will print as much of the record as will fit on the first page, and complete the record on the second page.

4 Click off the band properties box to close it and save your changes.

Removing Bands from a Report

If you are not using a particular band, you may remove it from the report designer.

REMOVING A BAND

1 Right click anywhere within the band you would like to remove and select Delete. The band will be removed from the report.

Note

You cannot delete the detail band.

Groups in Custom Reports

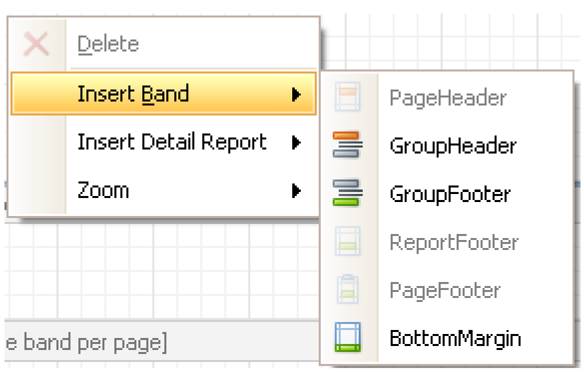
In some reports, it may be desirable to group information based on a particular field. For example, you may want to count how many customers you have in each state, or get the total dollar value of all inventory you have in each product category.

Group bands allow you to automatically group related information in your report and generate summary information for the group. You can also use the group header to enter a title that will appear each time the group value changes. For example, if you group on the city in which your customers live, you may place the City field in the group header band to appear as a title for each city.

In order to group data in your report, you must first add the group header band, then specify what field should be used for the grouping.

ADDING A GROUP HEADER BAND TO A REPORT

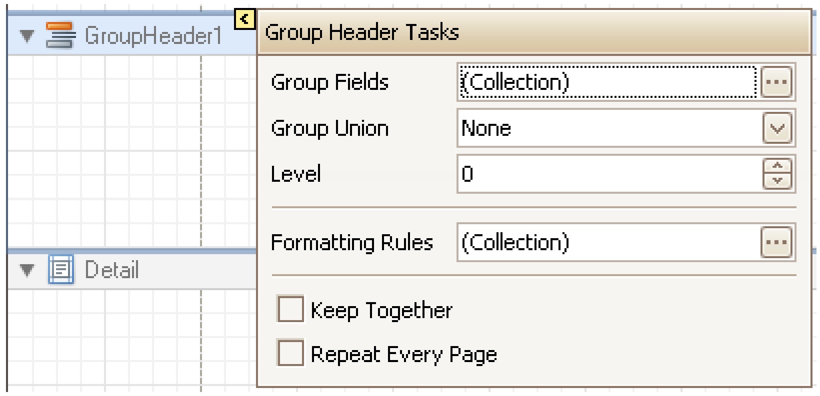
1 Right click anywhere on the report surface and select Insert Band. A menu opens with the band options:



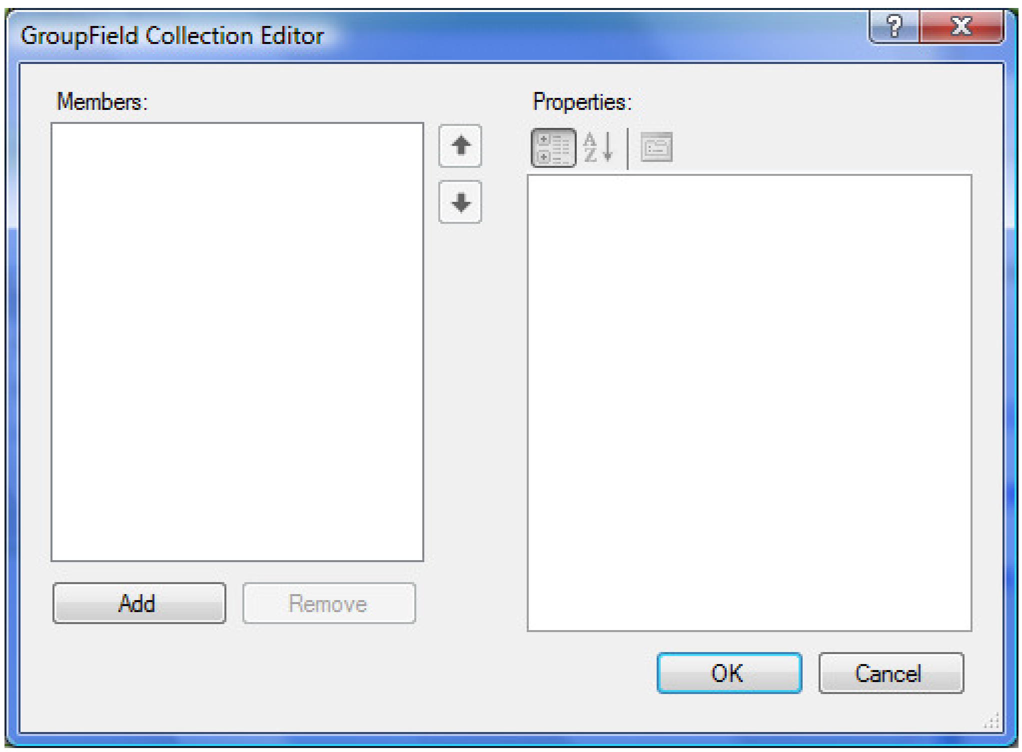
2 Select GroupHeader. A group header band will be added above the detail band.

3 Click on the group header band to select it. A small arrow will appear next to the band name.

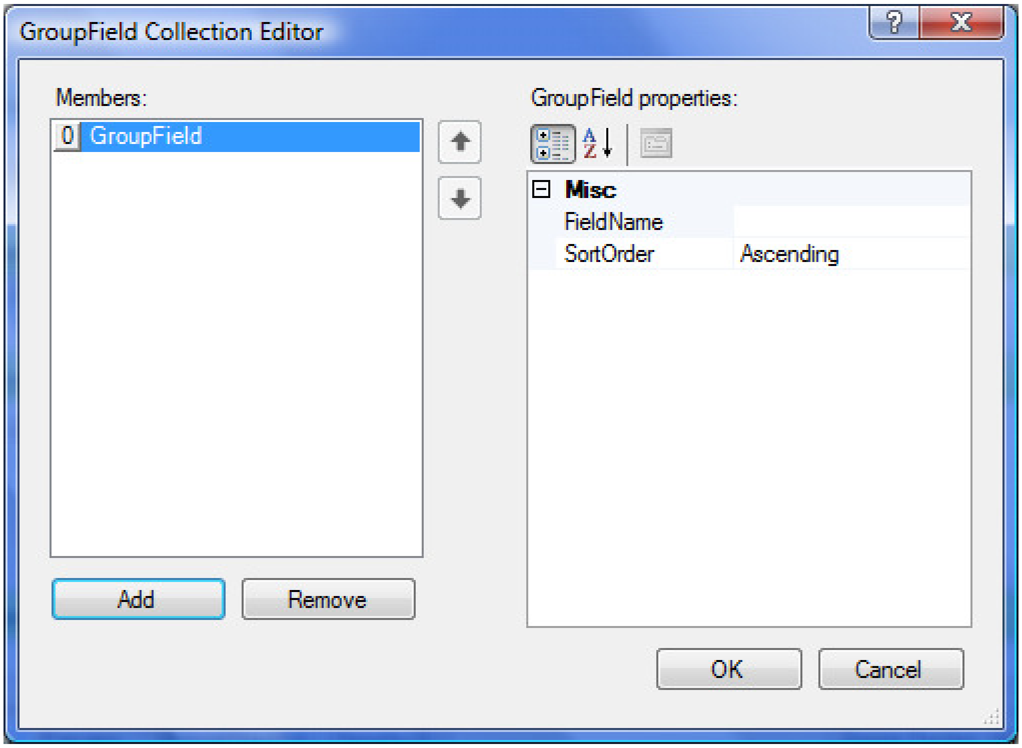
4 Click the arrow. A band properties box will appear:



5 Click the ellipsis next to the Group Fields field. The Group Fields Collection Editor will open:



6 Click the Add button. A new group field will appear in the Members section of the screen and properties for the group field will appear in the Group Field Properties section:



7 Click in the FieldName field to access a drop down list of the fields in your display.

8 Select the field on which you would like to group the report from the list. For example, if you are creating a productivity report for your sales force that you want grouped by sales associate, you would select the field that contains the sales associates' names.

9 In the SortOrder field, select whether you would like the group to appear on the report in Ascending (A to Z, smallest to largest, oldest to newest) or Descending (Z to A, largest to smallest, newest to oldest) order.

Note

This selection overrides any sort order set on the display; however, data within the group will respect the sort order. For example, if you have a display that tracks sales, you might group on sales region and sort on sale date. In this case, the data will appear on the report in order by region with all sales within a region sorted by date.

10 If you would like to further refine your group using a second field, click Add again and repeat steps 7 through 9. For example, if you have first and last name stored in separate fields, you would need to select both fields to group on the full name.

11 If you have added more than one group field, you can adjust the order in which they appear in the report using the arrow buttons next to the Members list. Data will appear in the report in ascending or descending order by the first value, then sub-sorted by subsequent values. (Using the above example, if you select last name as the first field, groups will appear in alphabetical order by last name, then first name.)

12 When you are satisfied with your selections, click OK.

You have the option of including a group footer band in the report. This allows you to include summary information such as group totals for each group.

ADDING A GROUP FOOTER TO A REPORT

1 Right click anywhere on the report surface and select Insert Band. A menu opens with the band options.

2 Select GroupFooter. A group footer band will be added below the detail band. Refer to the *Adding Summary Information to Custom Reports* heading later in this chapter for details on including repot totals.

3 If you are using multiple group headers, you may repeat steps 1 and 2 to include additional group footers. A GroupFooter2 band will be added to the report.

Sub-Groupings

In some cases, you may want to use sub groupings in your report. For example, you may want records grouped by state, then sub-grouped by the cities in each state. This will allow you to create summary totals for all records in the state, plus a separate set of totals for each city to further refine your data analysis.

ADDING A SUB-GROUP TO A REPORT

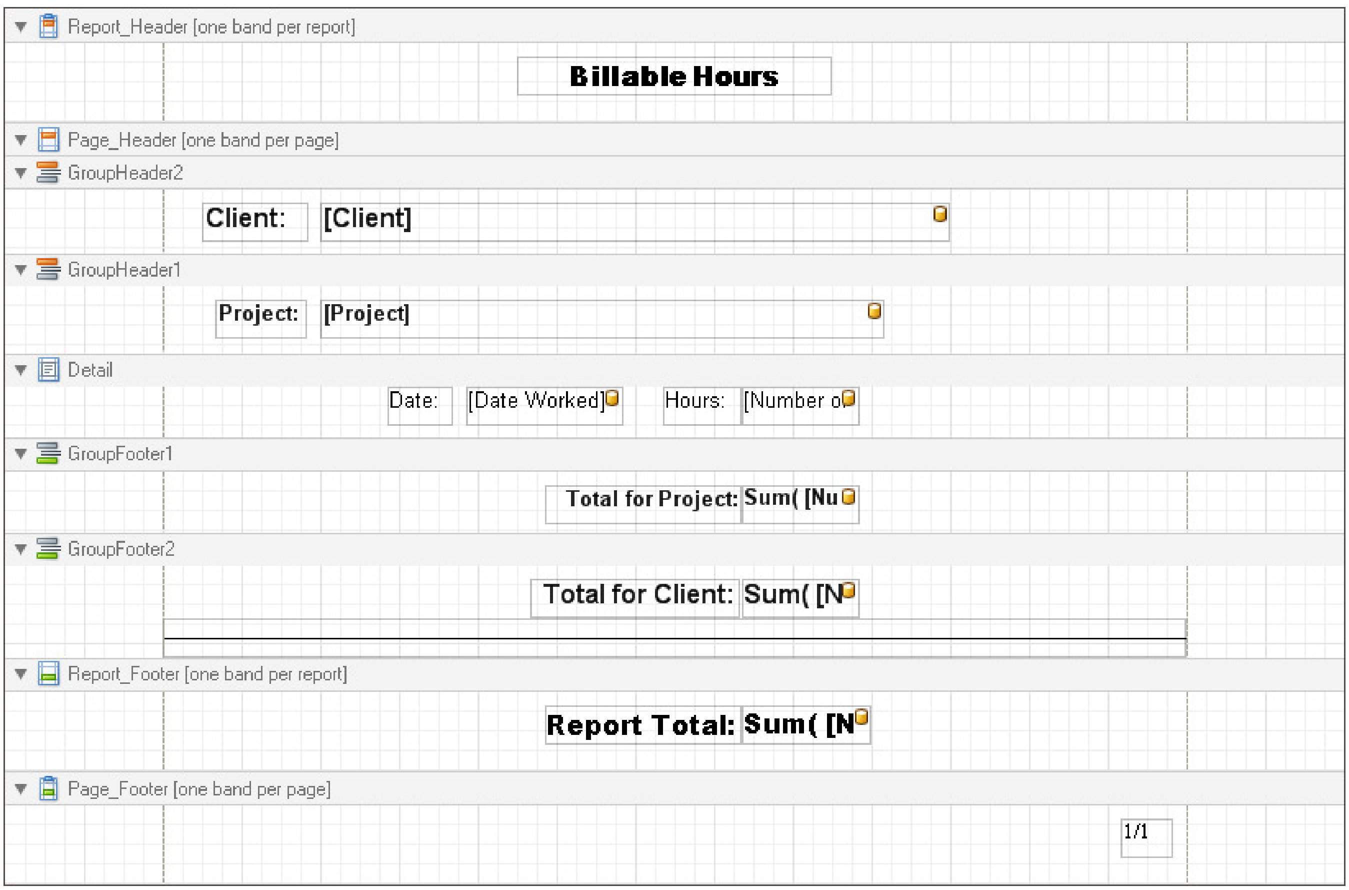
1 Right click anywhere on the report surface and select Insert Band. A menu opens with the band options.

2 Add the group header and footer bands following the instructions under *Adding a Group Header to a Report* and *Adding a Group Footer to a Report*, above. The second group bands will be named GroupHeader2 and GroupFooter2.

> **Note**
>
> GroupFooter1 does not necessarily correspond to GroupHeader1. The group header band closest to the page header will correspond to the group footer band closest to the page footer.

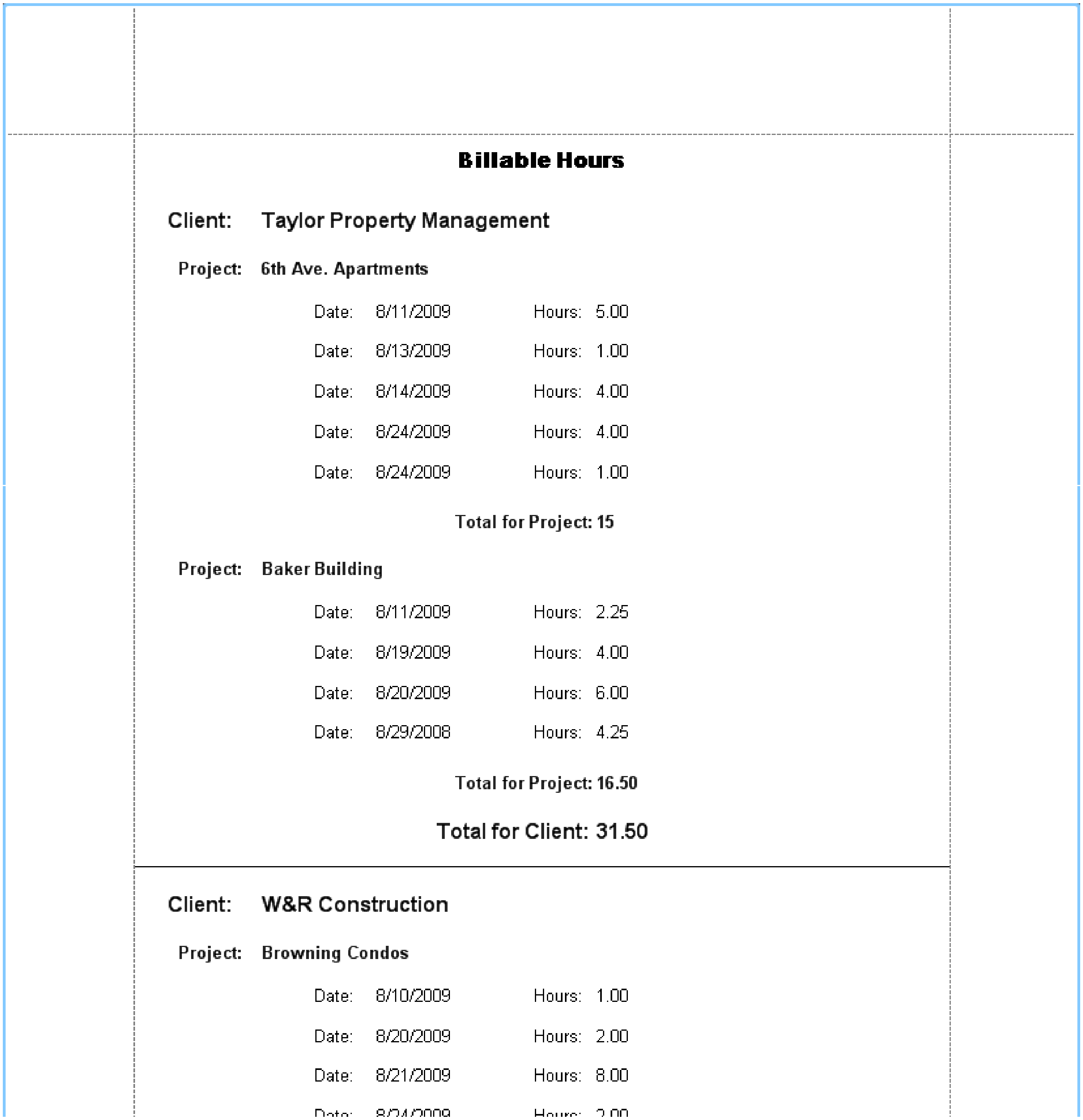
3 Repeat these steps for each sub level you would like to include in your report.

When you have finished adding your group header and footer bands, your report may look similar to this:



In the above example, there is a major grouping on Client with a secondary grouping on Project. The group footer bands also provide the total hours worked on each project and a grand total for each client.

When run, the report will look something like this:



Billable Hours

Client: **Taylor Property Management**

Project: **6th Ave. Apartments**

Date:	8/11/2009	Hours:	5.00
Date:	8/13/2009	Hours:	1.00
Date:	8/14/2009	Hours:	4.00
Date:	8/24/2009	Hours:	4.00
Date:	8/24/2009	Hours:	1.00

Total for Project: 15

Project: **Baker Building**

Date:	8/11/2009	Hours:	2.25
Date:	8/19/2009	Hours:	4.00
Date:	8/20/2009	Hours:	6.00
Date:	8/29/2008	Hours:	4.25

Total for Project: 16.50

Total for Client: 31.50

Client: **W&R Construction**

Project: **Browning Condos**

Date:	8/10/2009	Hours:	1.00
Date:	8/20/2009	Hours:	2.00
Date:	8/21/2009	Hours:	8.00
Date:	8/24/2009	Hours:	2.00

Child Data in Reports

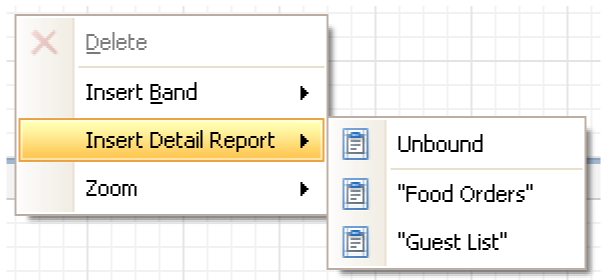
If you are working in a display with one or more child levels, you can use Detail Reports to include information from other levels in your report. This adds a sub-report tied to the child level.

Detail reports are similar to group bands, except that they are tied to a child display and allow you to include data from more than one level in your report.

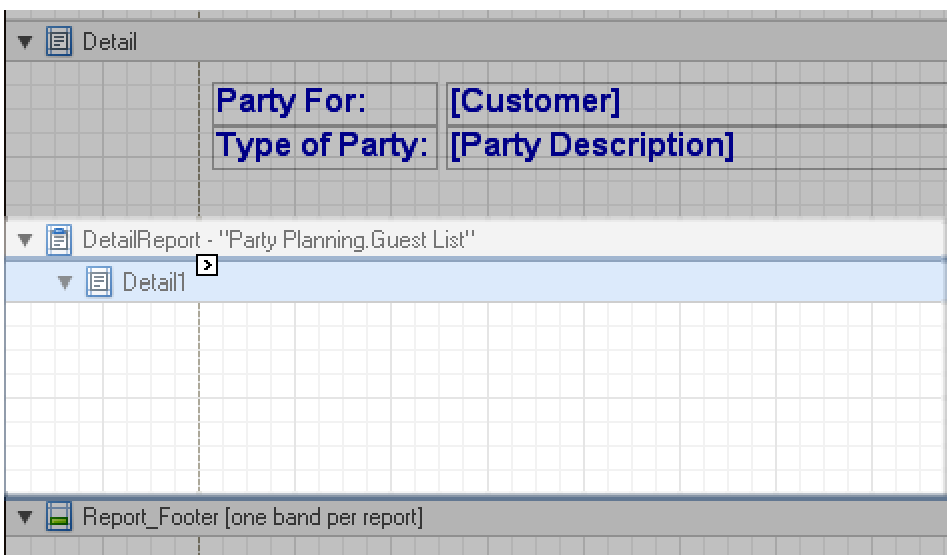
ADDING A DETAIL REPORT

1 Add or edit a report at the parent level.

2 Right click on the report and select Insert Detail Report. This will bring up a sub-menu with the child displays for this parent:

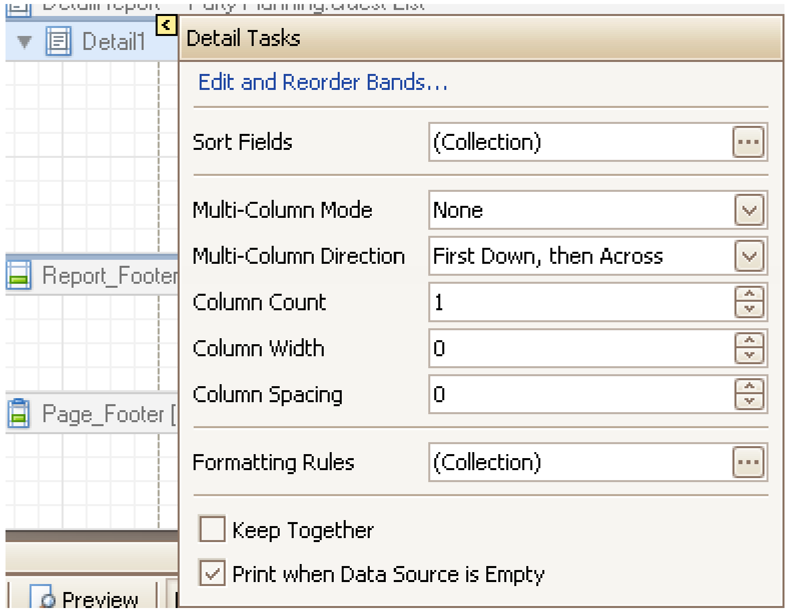


3 Select the appropriate child display from the list. A second detail band will be added to your report:



4 Click on the Detail1 band to select it. A small arrow will appear next to the band name.

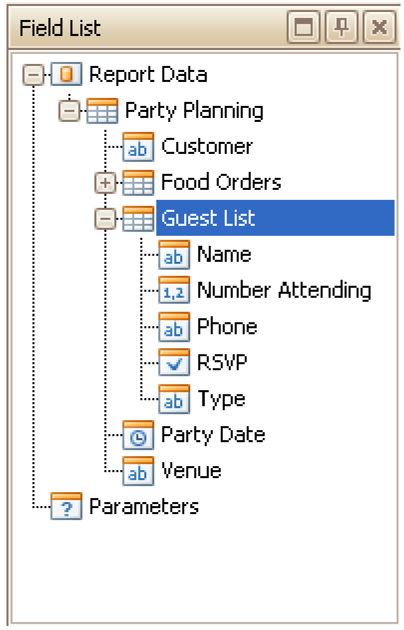
5 Click the arrow. A band properties box will appear:



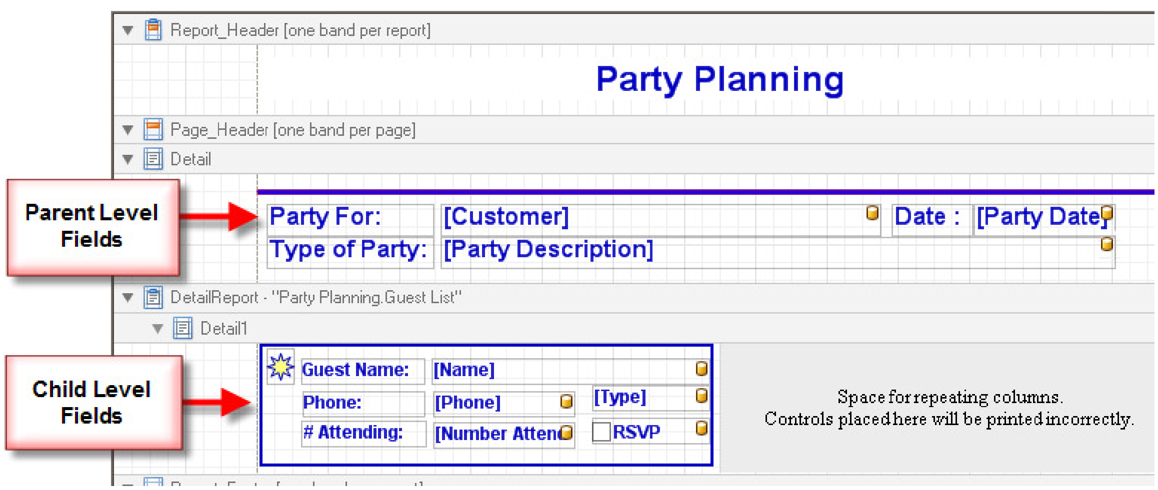
6 Repeat these steps for any additional child displays you would like to include in the report.

7 Any child displays you have created will appear in the field list with a plus mark (+) next to them:

8 Click on the plus mark to expand the list of fields:



9 Create your report following the instructions in the *Adding Items to Your Report* sections below. Fields from the parent level should be added to the main Detail band. To add fields from the child level, select them from the display you chose in step 3 and place them in the Detail1 section under the DetailReport band heading:



10 When you preview your report, child records will be grouped under their parents:

Adding Items to Your Report

You build your report by adding fields and standard controls to the report bands.

Adding Fields to Custom Reports

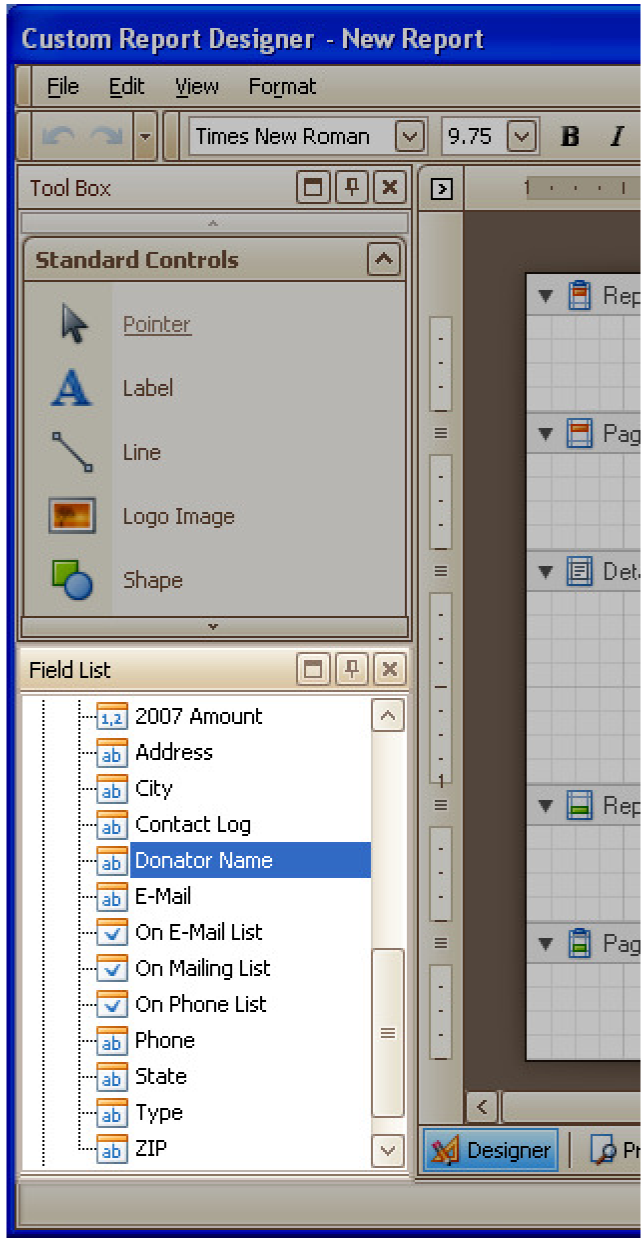
Fields are added to the detail band of the report. When the report is printed, the fields in the detail band will be populated with the data from your display and repeated for each included record.

ADDING FIELDS TO A REPORT

1 Open the report designer. The Field List box on the left side of the screen will contain the fields in your display.

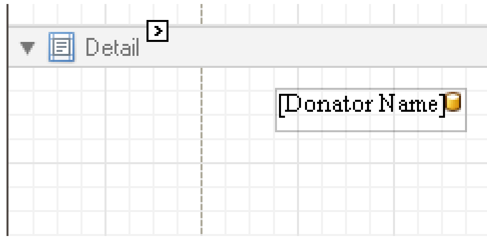
Note
Prior to version 3.0, when a picture was selected in a picture field, Database Oasis created a link to the graphic file on your computer rather than storing the picture in the database. Picture fields added to displays after version 3.0 embed the graphic file in the database. Only embedded picture fields are available in reports.

2 Click on the field you would like to add:

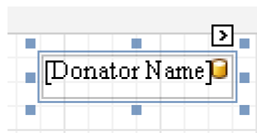


3 Hold down the left mouse button and drag the field into the detail band on the report.

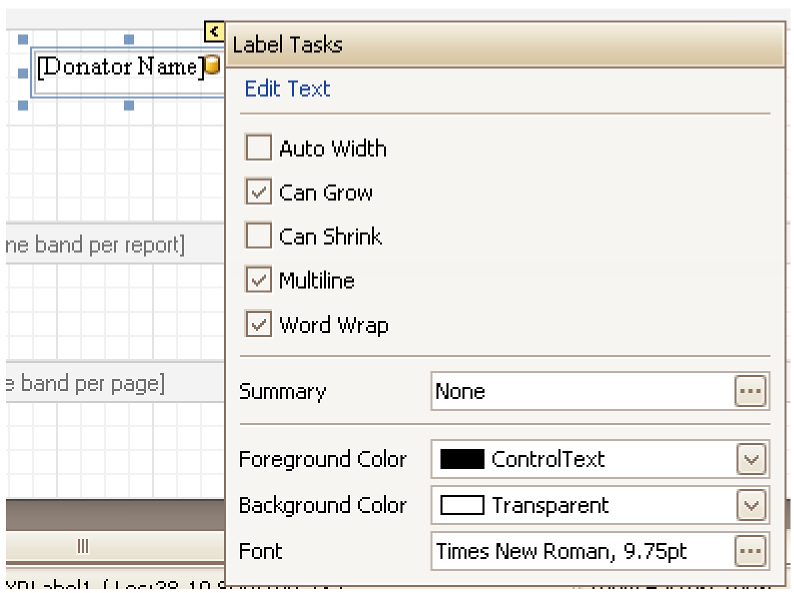
4 Release the left mouse button. The field will appear on the report:



5 Click on the field to select it. A small arrow will appear in the upper right corner of the field:



6 Click on the arrow. A properties box will appear:



7 The Auto Width check box determines whether the field should size horizontally to fit the data in the field. If Auto Width is selected, the field will increase or decrease to fit the text.

Note

The Word Wrap option takes precedence if it is also selected so text will wrap rather than expand horizontally.

> **Note**
>
> This option does not change the position of any objects placed to the right of the field.

8 The Can Grow check box works in conjunction with the Word Wrap option to determine whether to print the entire contents of the field or limit what prints to a specific amount of space. If this is selected, data in the field will wrap to multiple lines and the band will expand to accommodate the entire field. Items below the field in the report will be shifted down.

> **Note**
>
> Selecting Can Grow is especially useful with notes fields.

If you wish to limit the size the field can expand, but still want the text to wrap to multiple lines, leave Word Wrap marked, but unmark Can Grow. The text will wrap to multiple lines and fill the frame, but will not expand beyond the space allotted. If text exceeds what can fit in the box, it will be truncated. This is useful if you are printing on a form with a fixed amount of available space, or want to limit your report to a single page.

If neither Can Grow nor Word Wrap is marked, the text will fill a single line.

9 The Can Shrink option controls whether the field's height can shrink if there is less data than the space allotted. For example, if you have a notes field on your report, and size the field to accommodate multiple lines, the detail band will move up for any records where the notes field is empty. Leave this check box unmarked if you would like the same amount of space to be allotted to the field, even if the data doesn't fill it.

10 Click on the arrow next to the Fore Color field to open a color picker where you can select a color for the text.

11 Click on the arrow next to the Back Color field to open a color picker where you can select a color for the background of the field.

12 Click on the ellipsis next to the Font field to open the Windows Font dialog where you can select a font for the field.

13 Click off the properties to save your changes.

14 See *Working with Objects on the Report*, later in this section, for instructions on sizing, positioning, and configuring the field.

Hint

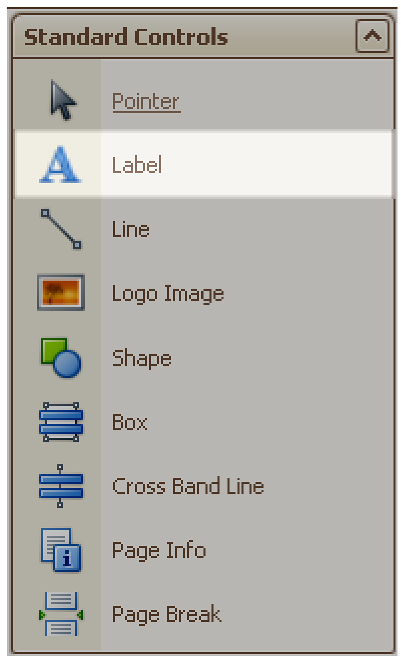
Fields are added to the report without the field name. It is recommended that you add a label and enter the field name to help identify this data on the report.

Adding Text to Custom Reports

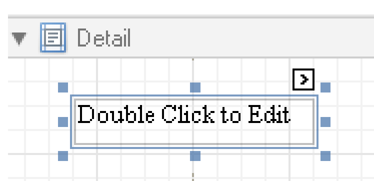
In addition to fields, you can add other elements to your report using the Standard Controls list. The Text option allows you to add field labels and other information to your report.

ADDING TEXT TO A REPORT

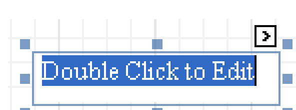
1 From the Standard Controls list, click on Label:



2 Hold down the left mouse button and drag the label into the desired band on the report:



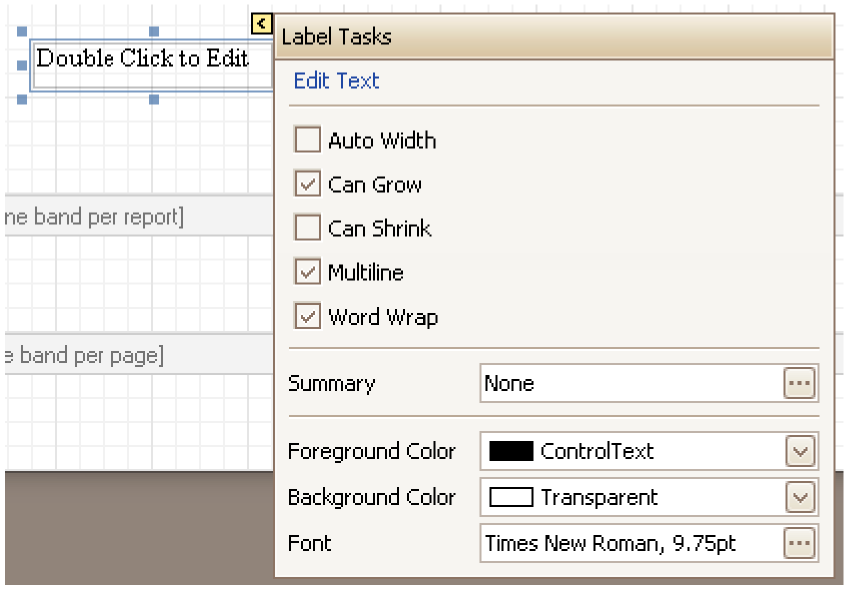
3 The label will be added with the text *Double Click to Edit*. Double click on the label. The label text will be highlighted:



4 Start typing to enter your label text. Click off the field to save.

5 To set properties for the text, click on it to select it. An arrow appears in the upper right corner of the field.

6 Click on the arrow to open a properties box:



Note

Labels use the same properties box as fields. Not all options are applicable to text items.

7 Click on the arrow next to the Fore Color field to open a color picker where you can select a color for the text.

8 Click on the arrow next to the Back Color field to open a color picker where you can select a color for the background of the field.

9 Click on the ellipsis next to the Font field to open the Windows Font dialog where you can select a font for the field.

10 Click off the properties to save your changes.

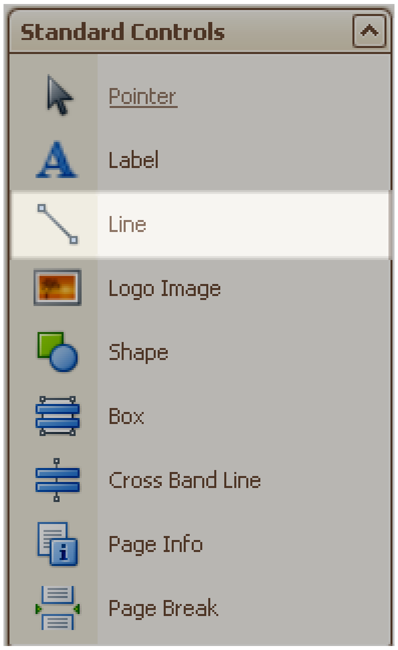
11 See *Working with Objects on the Report*, later in this section, for instructions on positioning and configuring the label.

Lines in Custom Reports

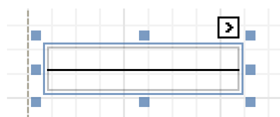
You will often find that reports are much easier to read if you include lines between the sections. You may even want to include a line between each record to help clarify where one ends and the next begins. Consider adding a line to the bottom of the header band to separate the header from the main body of the report, or to the bottom of the detail band to include a line between each record.

ADDING A LINE TO A REPORT

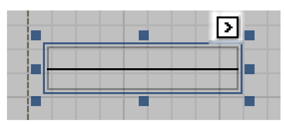
1 From the Standard Controls list, click on Line.



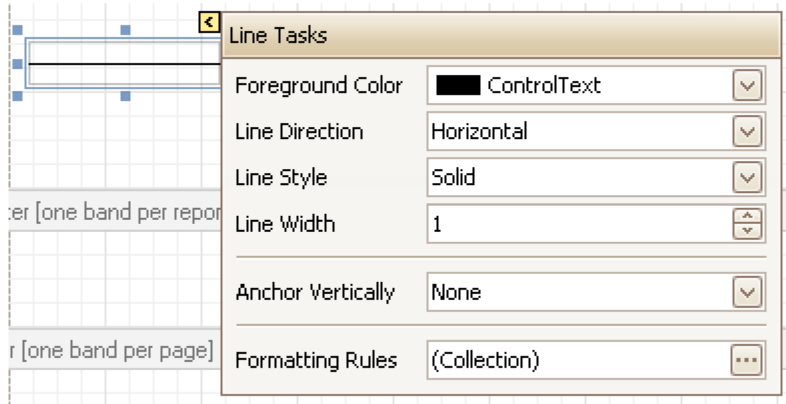
2 Hold down the left mouse button and drag the line into the desired band on the report. A horizontal line will be added in the default size:



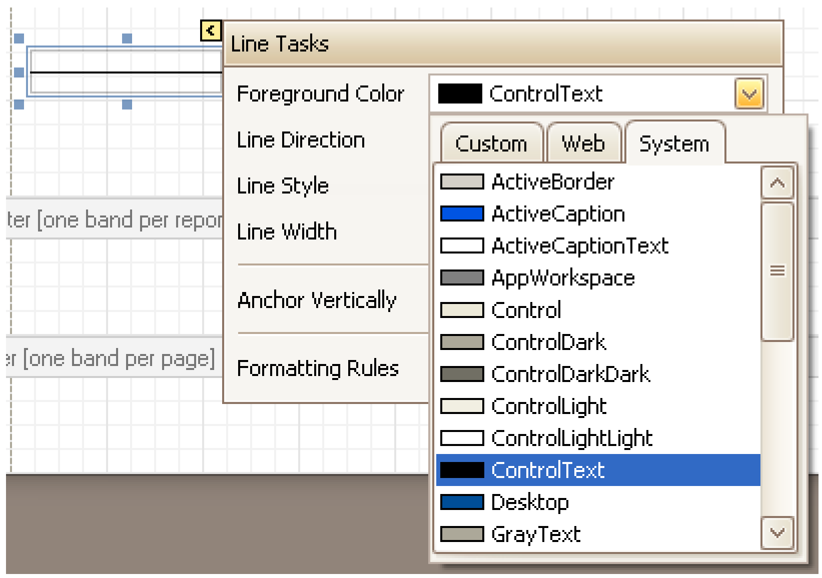
3 When the line is selected, it will have a small arrow in the upper right corner:



4 Click on the arrow. Line properties will open next to the field:



5 The Foreground Color option allows you to set the color of the line. Click the drop down list to open a color picker:



6 Select the color you would like to use for the line from the options on any of the three tabs.

7 The Line Direction field controls whether it is a horizontal, vertical, or diagonal line. Select:

- Slant to have the line go at a diagonal from the bottom left of the frame to the top right of the frame;
- Back Slant to have it go from the top left to the bottom right;
- Horizontal to have the line go from the left to the right; or
- Vertical to have the line go from the top to the bottom of the frame.

8 The Line Style setting allows you to control the type of line to use. Options include Solid, Dash, Dot, DashDot, DashDotDot, or Custom.

9 The Line Width allows you to set how thick you would like the line. The higher the number, the heaver the line. Type a number in the field or use the spinner arrows to increment the number up or down.

10 The Anchor Vertical controls how the line is anchored if the band is resized. Select:

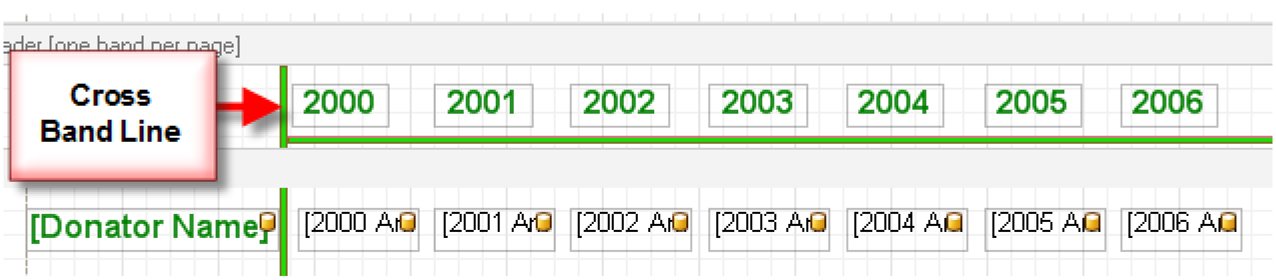
- None if you do not want to anchor the line.
- Top if you want the line to keep its position relative to the top of the band. If you resize the band, the space between the line and the bottom of the band will increase or decrease.
- Bottom if you want the line to keep its position relative to the bottom of the band. If you resize the band, the space between the line and the top of the band will increase or decrease.
- Both if you want the line to grow or shrink with the band. This is used with vertical lines.

11 When you are satisfied with your settings, click off the properties box to save.

12 See *Working with Objects on the Report*, later in this section, for instructions on positioning the line.

Cross Band Lines in Custom Reports

Cross band lines are vertical lines that can extend over more than one band. For example, you may want to display data in tabular format with the field labels in the page header. In this case, you may want a line that extends from the header into the detail band:



The printed report will look like this:

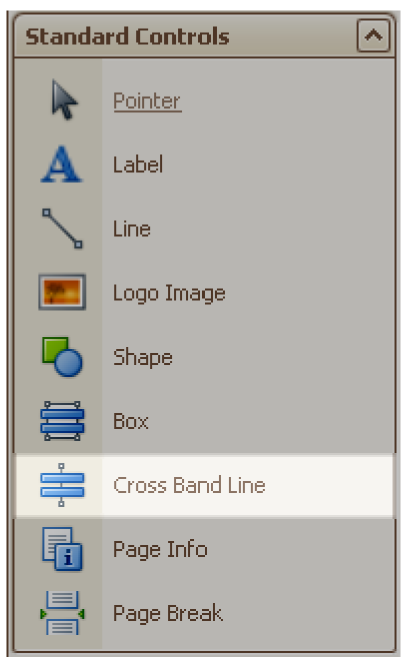
	2000	2001	2002	2003	2004	2005	2006	2007
George Pierce	$100.00	$0.00	$100.00	$300.00	$0.00	$50.00	$0.00	$150.00
Mable Swan	$0.00	$30.00	$0.00	$50.00	$20.00	$0.00	$75.00	$0.00
National Bank of Farmingtom	$1000.00	$2000.00	$1000.00	$1500.00	$1000.00	$1000.00	$2000.00	$1000.00

Hint

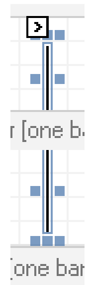
Standard lines default to horizontal. Rather than going into line properties to make a line vertical, you can use a cross band line.

Adding a Cross Band Line to a Report

1 From the Standard Controls list, click on Cross Band Line.



2 Hold down the left mouse button and drag the line vertically across the desired bands on the report. As you drag, adjust the thickness of the box you draw. A vertical line will be added in the height and width of your box:



Hint

To avoid having a break in the line after each record in the detail band, extend the line into the divider for the footer band.

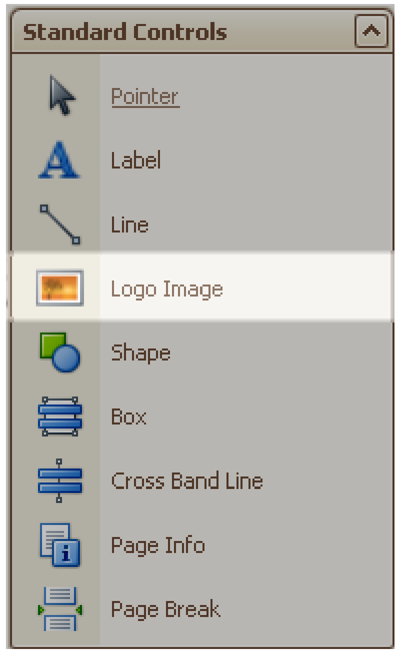
3 When the line is selected, it will have a small arrow in the upper right corner. If necessary, adjust the line properties using the guidelines under *Adding a Line to a Report*, above.

Adding Logo Images to Custom Reports

Logo Images let you include your logo, a background image, or other static graphics to your repots.

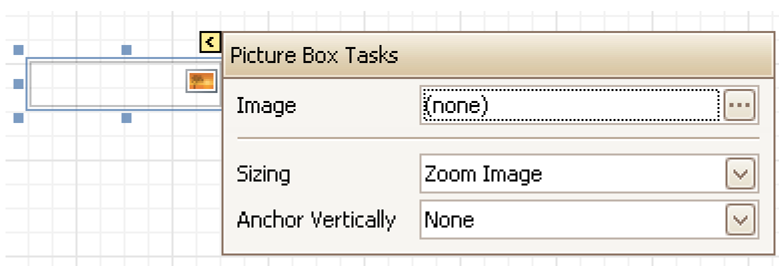
ADDING A LOGO TO A REPORT

1 From the Standard Controls list, click on Logo Image.



2 Hold down the left mouse button and drag boundary of the picture. The picture frame will be added, and automatically selected. When the picture frame is selected, a small arrow will appear in the upper right corner.

3 Click the arrow to open picture box properties:



4 Click on the ellipsis button next to the Image field to open a Windows Open dialog.

5 Navigate to the picture field you would like to add to the report and click Open.

6 In the Sizing field, select from the following options:

- The Normal option places the graphic in the frame without modifying it in any way. If the graphic is larger than the frame, it will be trimmed along the bottom and right edges. You can resize the frame to fit the graphic.

- The Stretch Image option will fit the picture to the frame. If the picture is larger than the frame, it will be shrunk to fit. If the picture is smaller than the frame, it will be stretched to fit. If the dimensions of the picture are not proportional to the frame, the picture could be distorted when resized.

- The Auto-Size option will adjust the size of the frame to fit the graphic file.

- The Center Image option is similar to Normal, except that the picture will be centered within the frame and trimmed on all four edges.

- The Zoom option will resize the picture to fit the frame, while using padding to maintain the height to width ratio of the image so it does not distort the picture. The edge (horizontal or vertical) of the picture that is proportionally the largest in comparison to the frame will be stretched or shrunk to fit within the frame. The proportionally smaller edge will be padded.

7 Anchor Vertically allows you to anchor your picture to the top or bottom of the band to prevent it from moving when the band height changes.

- Select Top to anchor the picture to the top of the band. If the height of the band changes, the picture will not move. This is the default position.

- Select Bottom to anchor the picture to the bottom of the band. If the height of the band changes, the picture will shift down to maintain its distance from the bottom of the band while padding at the top.

- Select Both to anchor the picture to the top and bottom of the band. If the height of the band changes, the height of the picture frame will also be increased.

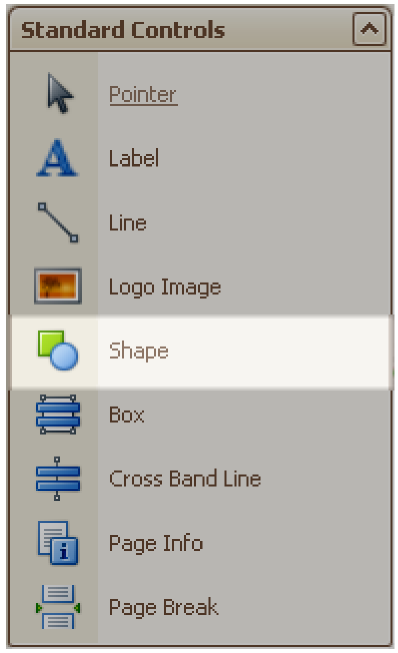
8 See *Working with Objects on the Report*, later in this section, for instructions on positioning the logo.

Adding Shapes to Custom Reports

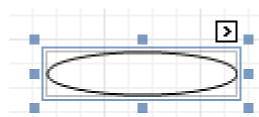
The shape tool lets you draw a variety of shapes on your report, such as circles, arrows, stars, and more.

Adding a Shape to a Report

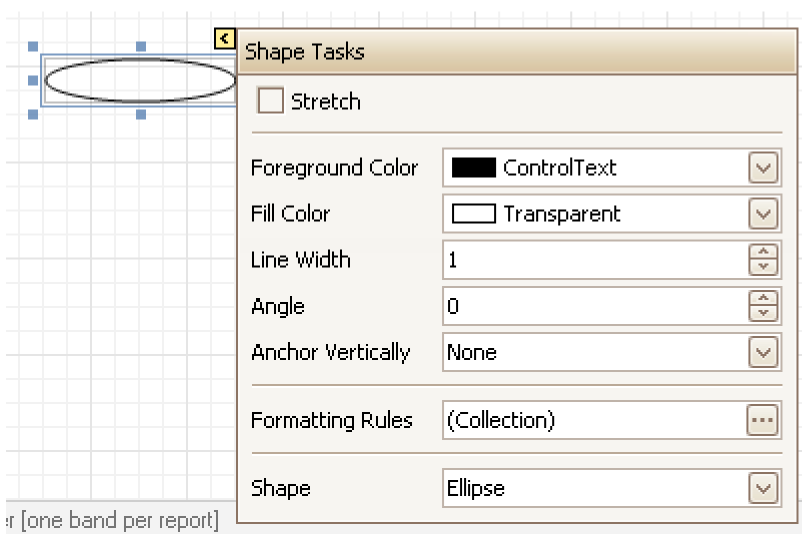
1 From the Standard Controls list, click on Shape.



2 Hold down the left mouse button and drag the shape into the desired band on the report. A circle will be added in the default size:



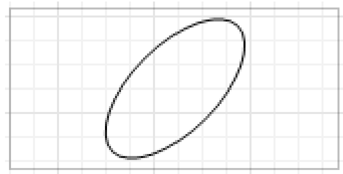
3 Click on the arrow to open shape properties:



4 Set the Foreground Color, Line Width, and Anchor Vertically settings following the guidelines under *Adding a Line to a Report*, above.

5 If your shape will have a center area (i.e., anything other than a line, bracket, or brace), set the color you would like for the center fill from the Fill Color field.

6 If you would like your shape to appear at an angle, enter an angle between 0 and 359 in the Angle field. For example, an oval set to a 45° angle would appear like this:



7 Select the shape you would like to use from the Shape list.

8 A Fillet option will appear if you select Rectangle, any of the Arrow options, any of the Polygon options, any of the Star options, Brace, or Cross. This allows you to round the corners on your shape. (If you select Brace, this applies to the curve of the horizontal line.) Enter how much rounding you would like on a scale from 1 to 100.

9 Arrow Height and Arrow Width fields will appear if you select Arrow. Arrow Height controls the height of the arrow head in relation to the base. A higher number will result in a taller arrow head; a lower number will result in a longer base. Arrow Width controls how wide the base of the arrow is. A higher number results in a fatter base; a lower number results in a narrower base.

10 If you select Triangle, Square, Pentagon, Hexagon, or Octagon, the selection will be replaced in the list with Polygon (i.e., many sided). A Number of Sides field appears where you can change the number of sides on your shape. Enter a number of three or more in the field.

11 A Count of Star Points field appears if you select any of the Star options. Enter a number of three or more in the field.

12 A Concavity field appears if you select any of the Star options. This controls the angle between the center of the star and the tip of the points. A higher number will result in a sharper angle; a lower number will result in a softer angle with a larger center area.

13 Horizontal Line Width and Vertical Line Width options appear if you select Cross. These control the width of the horizontal and vertical lines. Enter a number between 0 and 100 in each field.

14 A Tips Length field appears if you select the Bracket or Brace options. This controls the length of the horizontal tip at the top and bottom of the shape. Enter a number between 1 and 100. The higher the number, the longer the tip.

15 A Tail Length field appears if you select Brace. This controls the length of the horizontal line in the center of the brace. Enter a number between 1 and 100. A higher number will result in a longer tail.

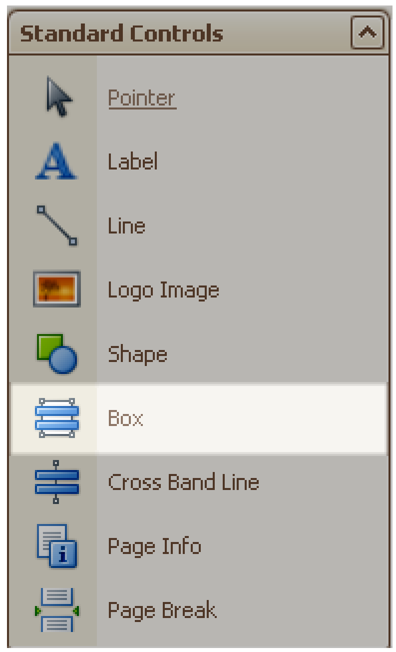
16 See *Working with Objects on the Report*, later in this section, for instructions on positioning the shape.

Adding Boxes to Custom Reports

Boxes let you draw a frame around objects in the report. The box tool can extend across multiple bands, if desired.

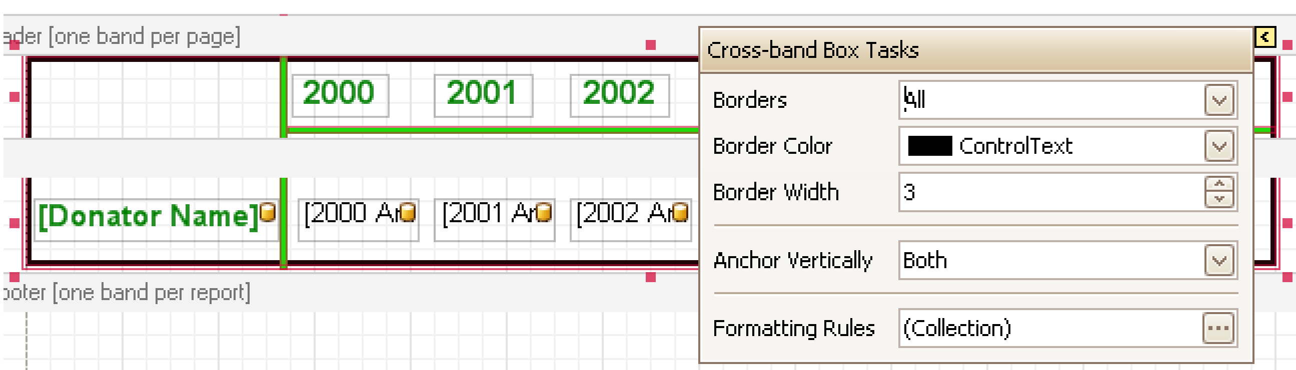
Adding a Box to a Report

1 From the Standard Controls list, click on Box.

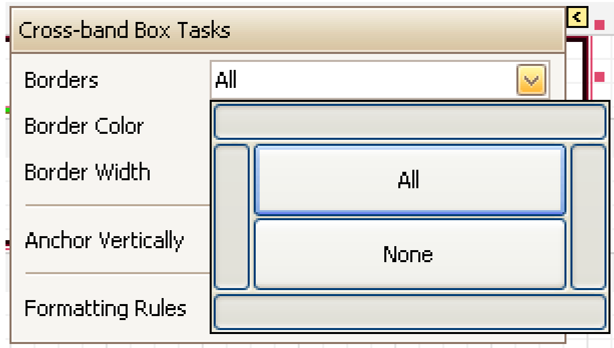


2 Hold down the left mouse button and drag boundary of the box. The box will be added, and automatically selected. When the box is selected, a small arrow will appear in the upper right corner.

3 Click the arrow to open box properties:



4 Click on the Borders list to control which edges of the box display:



5 A window will open with four thin boxes around the edges, depicting the borders of the box, and larger boxes in the center for All or None.

6 By default, All is selected, which displays all four borders. If you would like to limit the borders, click on the box(es) on the edges corresponding to the lines you would like to turn off.

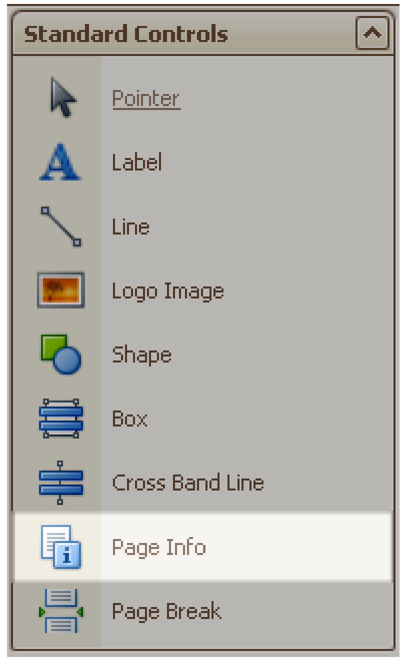
7 Set the Border Color, Border Width, and Anchor Vertically settings following the guidelines under Foreground Color, Line Width, and Anchor Vertically, respectively, in *Adding a Line to a Report*, above.

Adding Page Information to a Custom Report

The Page Info option allows you to include information that will be gathered at the time the report is printed. For example, you can put a page number on each page of the report, or include the date and time that the report is printed. Page information is generally placed in the page header or page footer band.

ADDING PAGE INFO TO A REPORT

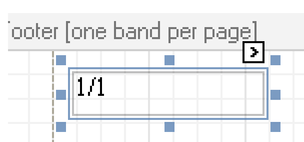
1 From the Standard Controls list, click on Page Info.



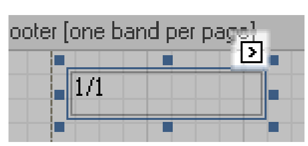
2 Hold down the left mouse button and drag the line into the desired band on the report.

Hint
Unless you want the page information to print with every record, it is recommended that you put it in the header or footer of the report.

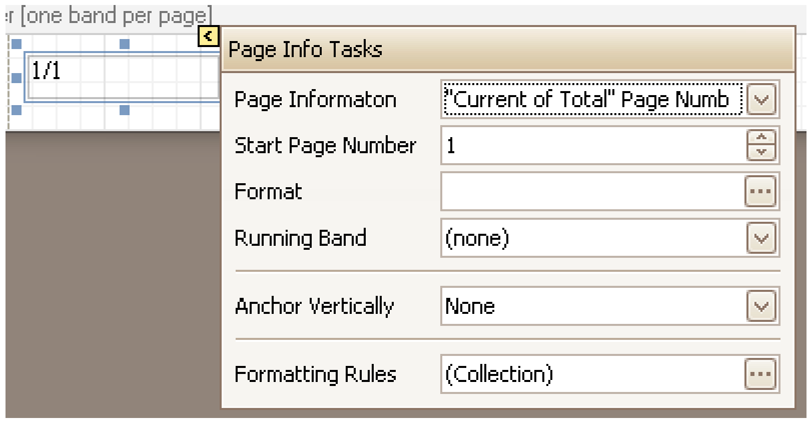
3 The Number of Total value will be added to the report:



4 When the page info is selected, it will have a small arrow in the upper right corner:



5 Click on the arrow. Page Info properties will open next to the field:

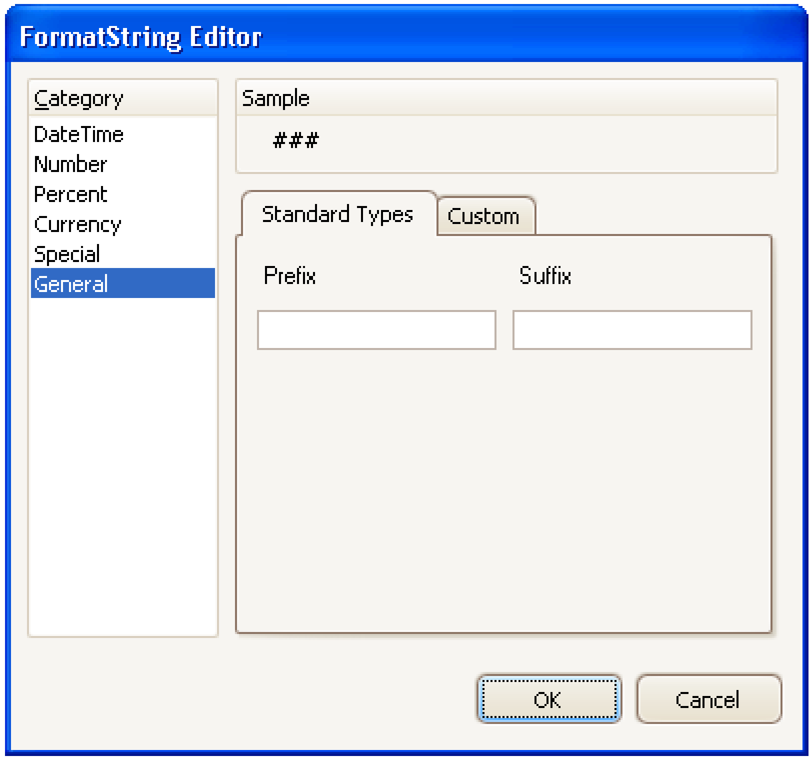


6 The Page Info list provides the available information that can be included in the report. Options include:

- Number – The page number.
- Number of Total – The current page number next to the total pages in the report (e.g., page 2 of five would appear as 1/5.)
- RomLowNum – The current page number in lowercase Roman numerals.
- RomHiNum – The current page number in uppercase Roman numerals.
- DateTime – The date and time the report is printed.
- UserName – The name of the user printing the report. The user name is taken from the user's Windows login.

7 Enter the page number where you would like the information to start in the Start Page Number field. For example, if you do not want to print the page number on the first page of the report, enter *2* in the field.

8 Click on the ellipsis next to the Format field to open the FormatString Editor.



9 This screen lets you control how your data will be formatted. If you have selected to print the date and time when the report is run, select the DateTime option and select the date format from the options that appear in the Standard Types list.

10 Click OK to save your changes. You will be returned to the properties box.

11 If you would like to anchor the page information so that it keeps is position relative to the top or bottom of the band if the band is resized, select Top or Bottom from the Anchor Vertical list.

12 When you are satisfied with your settings, click off the properties box to save.

13 See *Working with Objects on the Report*, later in this section, for instructions on positioning the page info.

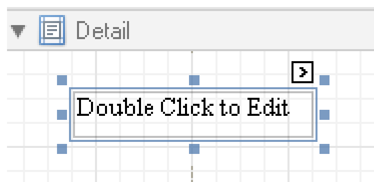
Adding Summary Information to Custom Reports

Summary information allows you to include totals in your report. They are generally added to the report footer band so that they will provide a summary of a selected field for all records in the report. Optionally, they may be added to the page footer to provide subtotals on each page.

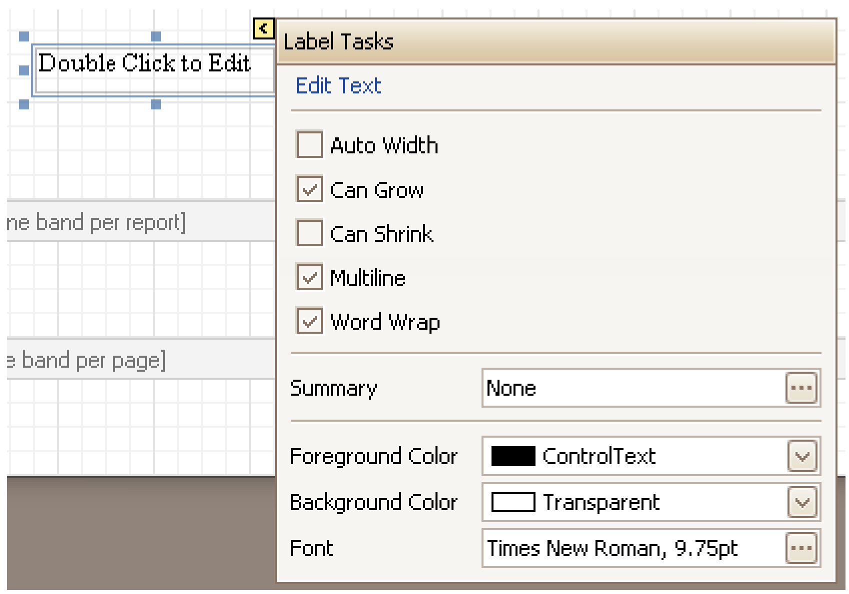
ADDING A SUMMARY TO YOUR REPORT

1 Add a label to your report following the instructions under *Adding Text to Your Report.*

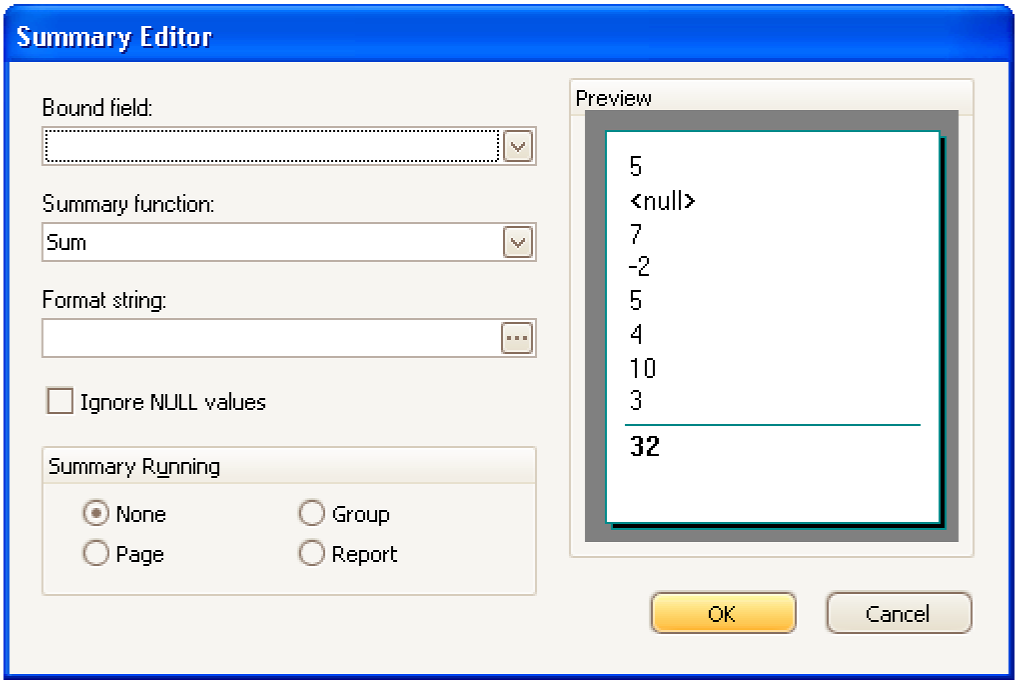
2 Click once on the label. A small arrow will appear in the upper right corner of the label:



3 Click on the arrow. A properties box will open:



4 Click the ellipsis next to the Summary field. The Summary Editor will open:

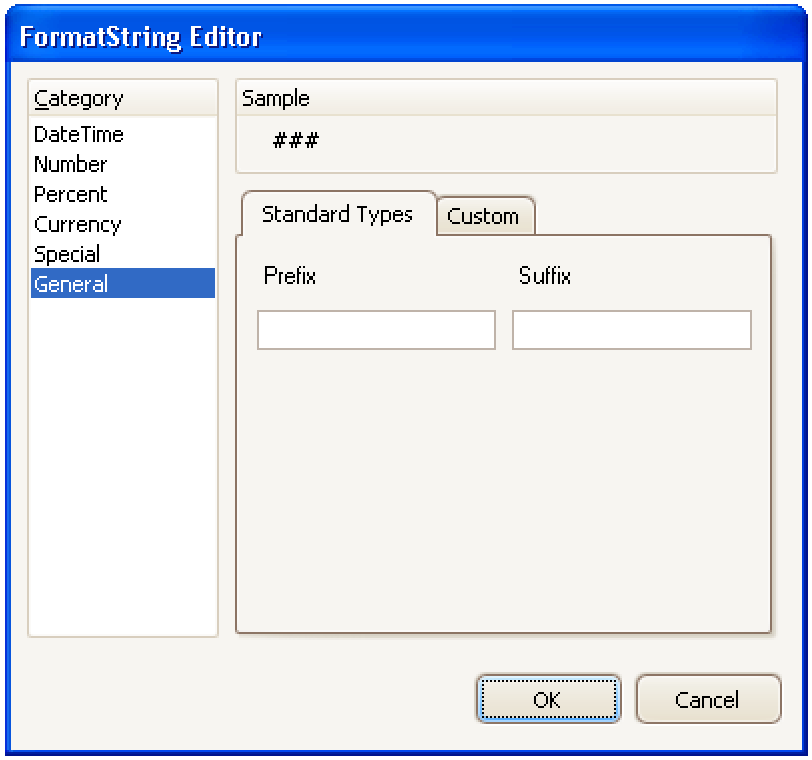


5 Click on the arrow next to the Bound field field. A list of the fields in your display will open. For example, if you are creating a report on the Donations display, you may want to sum the Total fields for all records.

6 Click on the arrow next to the Summary function field. A list of available mathematical functions that can be performed on the selected field from your display will open.

7 Select the desired mathematical function. For example, to sum the Total fields for all records, select *Sum*.

8 If desired, click the ellipsis next to Format string to open the FormatString Editor:



9 The FormatString Editor allows you to control how your data is printed. Select the type of data from the Category list. For example, if you are summing total donations, you would select Currency. The Standard Types section will update with formatting options that applicable to the selected category. Select the desired option from the list.

10 Click OK to return to the Summary Editor. The Preview will update to display your selections.

11 If you are performing a calculation on a numeric field, mark the Ignore Null Values check box.

12 From the Summary Running radio buttons, select from the following options:

- Select Page to have a running summary for each page of the report. When selected, the total will include all records on the current page. For best results, when selecting this option, the summary field should be in the page header or page footer band of the report.

- If you are using a group band in your report, select Group to calculate the summary each time the group changes. For best results, when selecting this option, the summary field should be in the group header or group footer band of the report.

- Select Report to include all records in the report in the summary. For best results, when selecting this option, the summary field should be in the report header or report footer band of the report.

13 Click OK to return to the properties box.

14 Click off the properties box to save your changes.

Working with Objects on the Report

Once you have added your fields and standard controls to the report, you can adjust their properties and fine tune the size and placement of the objects.

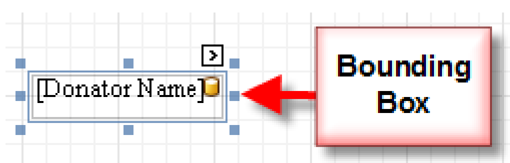
Sizing and Moving Objects in the Report Designer

Sizing and moving objects in the custom report designer is very similar to sizing and moving objects in the display designer. You select the objects by clicking on them with your mouse, then drag to resize or move the object.

There are also options on the Format menu to move and size objects in relation to each other.

Sizing and Moving Objects with the Mouse

1 If you would like to change the size of an object, click on it to select it. Bounding boxes will appear around the edges of the field:

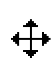


2 Hover your mouse over the box. It will change to a two headed arrow.

3 Click and drag to resize the object.

4 If you would like to move the object, click on the object to select it.

5 Hover your mouse anywhere over the object other than the bounding box. The mouse will change to a four headed arrow:



6 Click and drag the object to the desired position.

Sizing and Moving Objects from the Menu

1 If you would like to align the edges of multiple objects in the report, select the objects and select Align from the Format menu. Select the desired option following the guidelines under *Menu* in the *Exploring the Screen,* earlier in this chapter.

2 If you would like to resize objects in relation to other objects (for example, make all of your fields the same width), select the objects and select Make Same Size from the Format menu. Select the desired option following the guidelines under *Menu* in the *Exploring the Screen,* earlier in this chapter.

3 If you would like to adjust the spacing of objects so they are either closer together or further apart, select the objects and select either Adjust Horizontal Spacing or Adjust Vertical Spacing from the Format menu. Select the desired option following the guidelines under *Menu* in the *Exploring the Screen,* earlier in this chapter.

4 If you would like to center an object in the report, select the object and select Center in Form from the Format menu. Select the desired option following the guidelines under *Menu* in the *Exploring the Screen,* earlier in this chapter.

Changing the Appearance of Objects in the Report

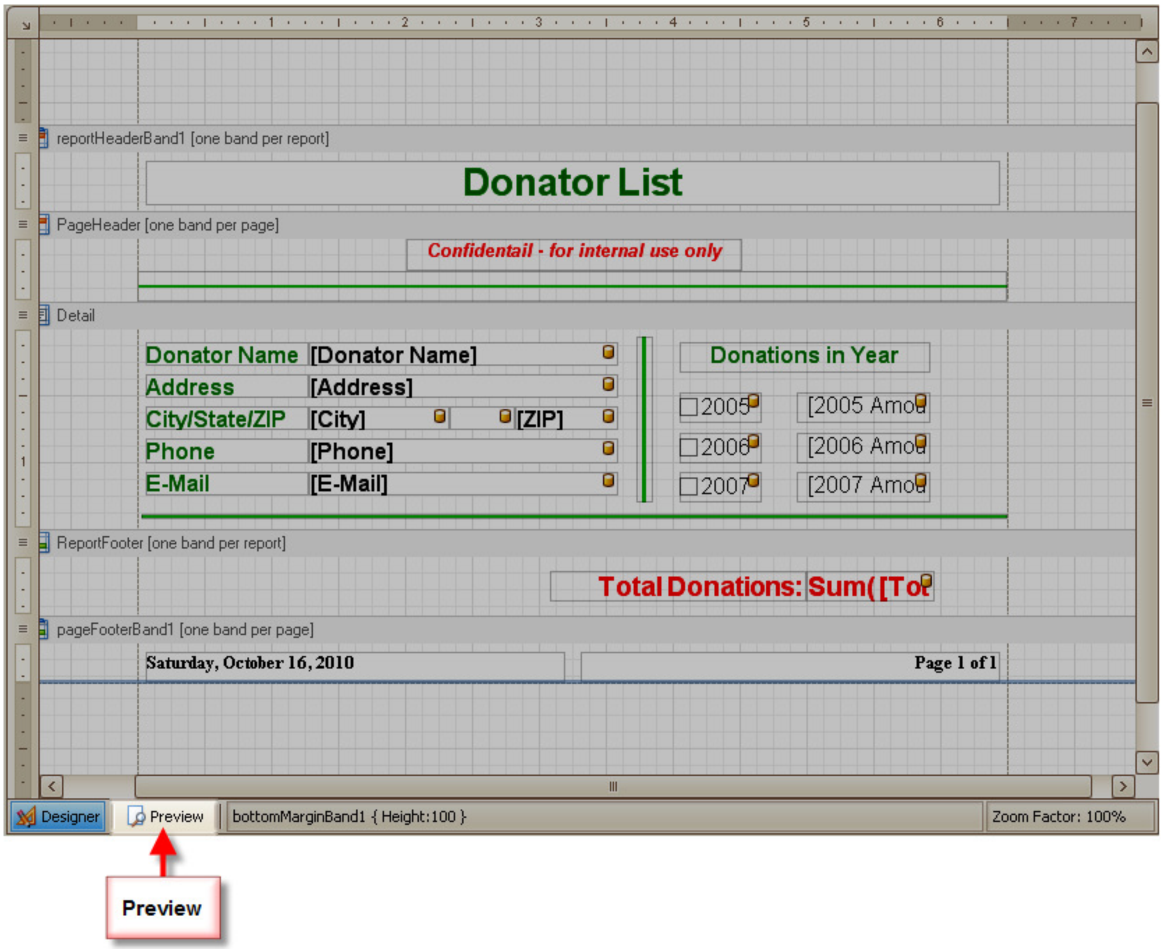
The menu and toolbar give you options for changing the appearance of objects on your report. You can select the font, fore ground and background color, and alignment of text from the menu or toolbar. Refer to the *Exploring the Screen* section, earlier in this chapter, for details on the available options.

Previewing Reports in the Designer

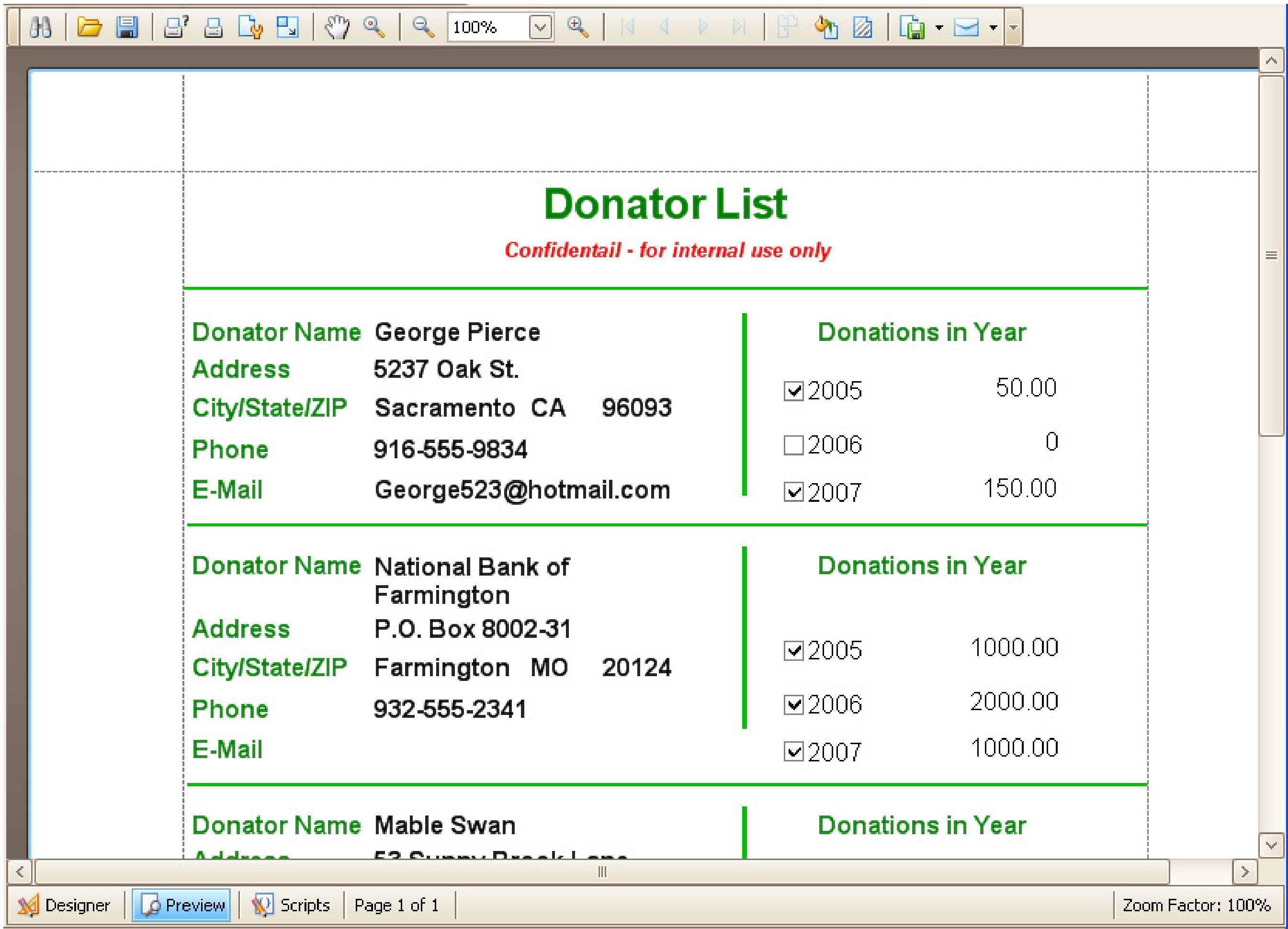
As you work with the objects in your report, you can preview the report to verify that the report is easy to read and that the settings are having the desired effect.

PREVIEWING A REPORT

1 In the report designer, click on the Preview button below the bands:



2 The preview page will open:



3 This will display the report exactly as it would print.

4 To return to design mode, click the Designer button next to the Preview button.

Saving and Exiting Your Report

You should periodically save your report while working in it. You also have the option to save or cancel the report when you exit.

Saving a Report while you work

1 From the File menu within the report designer, click Save. The first time you save the report, a Save Report screen will open:

2 Enter a unique name for the report and click OK. You will be returned to the designer where you can continue working on the report.

Saving and Exiting a Report

1 From the File menu within the report designer, click Exit.

2 You will be asked if you would like to save your report. Click Yes to save the changes or No to exit and cancel all changes.

3 If you have clicked Yes to save the report and you have not yet named your report, the Save Report screen will open.

4 Enter a unique name for the report and click OK. You will be returned to your display.

Working with Existing Reports

Once you have created your report, you can edit, delete, or print the report from the Reporting menu.

Editing and Deleting Reports

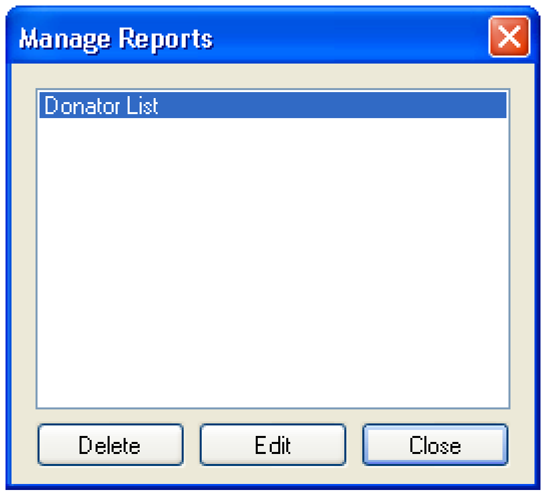
You can use the Manage Reports option on the Reporting menu to edit or delete an existing report.

EDITING REPORTS

1 Open the display that contains the report you would like to manage.

2 From the Reporting menu, select Manage Reports.

3 The Manage Reports screen will open with a list of all existing reports:



4 Highlight the report you would like to modify and click Edit. The report designer will open to the selected report.

SAVING A COPY OF A REPORT

1 Open the report you would like to copy.

2 From the File menu, select Save As. The Save Report screen will open with the current report name.

3 Enter a unique name for the copied report.

DELETING A REPORT

1 Open the display that contains the report you would like to manage.

2 From the Reporting menu, select Manage Reports. The Manage Reports screen will open.

3 Highlight the report you would like to delete and click Delete.

4 You will be asked to confirm your decision to delete the report.

5 Click Yes. The report will be deleted.

6 Click Close to exit the Manage Reports list.

Printing Reports

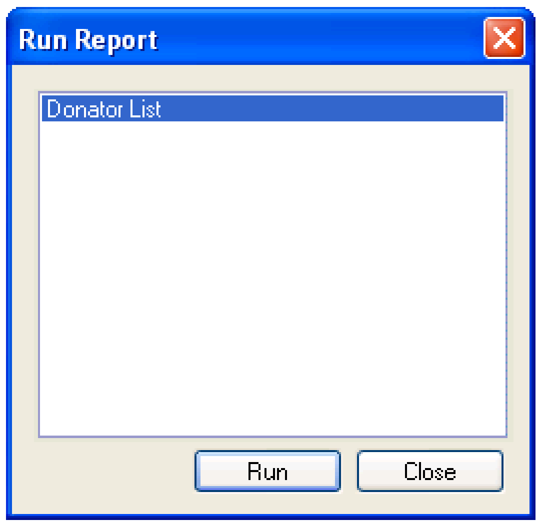
Once you have created your custom report, it can be printed from the Reporting menu.

PRINTING A REPORT

1 Open the display containing the report you would like to print.

2 From the Reporting menu, select Run Report.

3 The Run Report screen will open with a list of reports for this display:



4 Select the report you would like to print and click Run.

5 Print Preview will open for the selected report. Follow the guidelines under *Printing Records* in the previous chapter for help with printing from print preview.

CHAPTER 9
SYSTEM MAINTENANCE

Backing up Your Data

It is very important that you schedule and perform regular backups of your data. This will allow you to restore your installation of Database Oasis in the event something happens to your computer or your software. Backups can be thought of a little bit like accident insurance. Chances are you will never have to use it, but in the event of a problem, you'll be very happy you have it. The backup process is extremely easy and takes only a few seconds.

Following are some suggestions on when to make backups:

- You should make a backup if you are having any problems with your computer. The most common cause of data loss is a hard drive crash. If your computer begins to respond differently than usual or is making any unusual noises, you should immediately make a backup and copy it to an external medium, such as a CD or another computer.
- Make a backup as you add data to your system. As you work in Database Oasis, think about the last time a backup was made and then think about the impact if something were to happen and you lost the work you've done since then. Many people choose to make daily backups. If you don't make changes to your data every day, you may want to perform a backup weekly, or even less frequently. On occasions where you are adding a large volume of records or making a lot of changes, you may even want to make more than one backup in a single day.

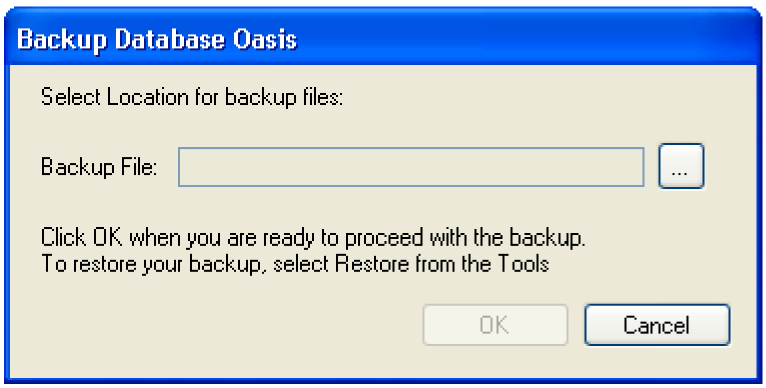
- You should make a backup prior to making major design changes to a display. In the event that you do not like the changes you have made, you can simply restore from backup to return to the previous version.

Note
PRO If you are using Database Oasis - Professional Edition, make sure that all other users are logged out of Database Oasis before proceeding.

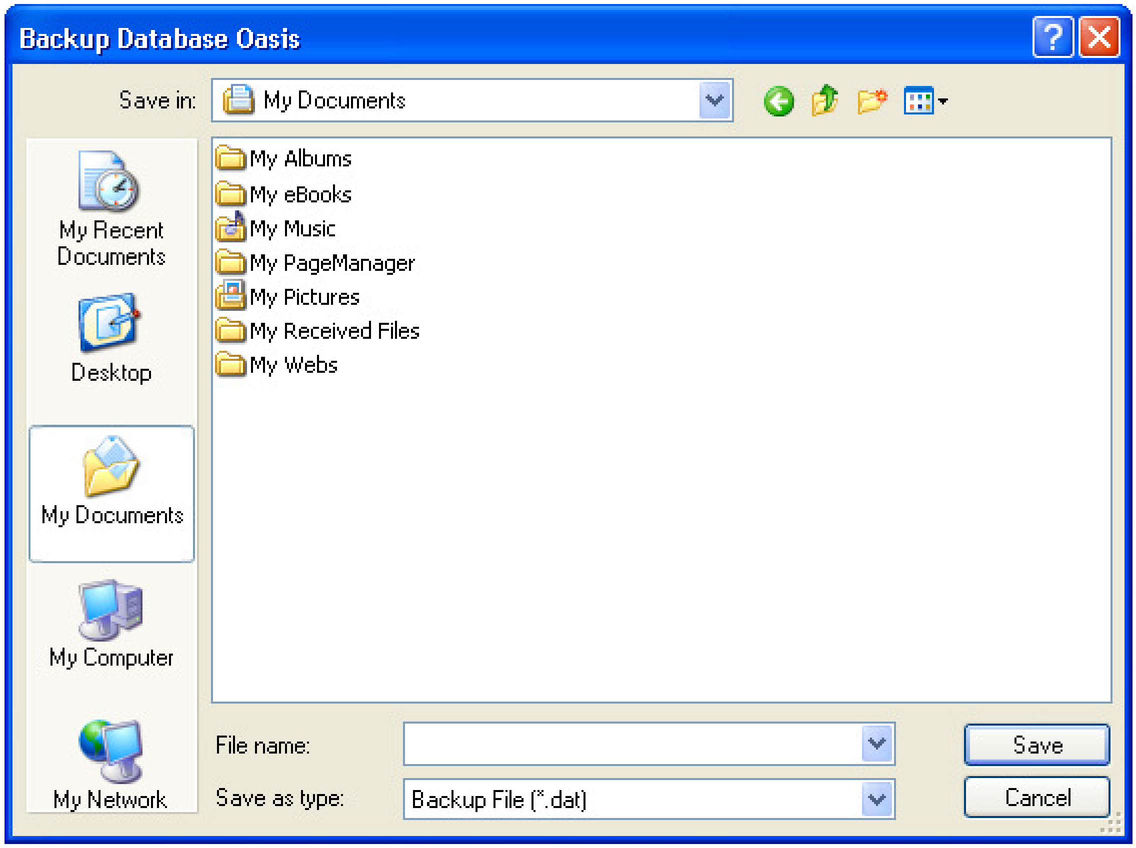
BACKING UP YOUR DATA

1 Close out of the designer and any open displays in Database Oasis.

2 From the Tools menu, select Backup. The Backup Database Oasis screen will open:



3 Click the button next to the Backup File: field to open a Windows Save dialog:



4 Navigate to the location where you would like to store the backup.

5 In the File name: field, enter a name for your backup. This should be something that will enable you to identify the backup file in the event you need to locate it again. For example, if you would like to keep archives of past backups, you may include the date in the name. If you prefer to only keep the latest backup, you may simply name it Backup and overwrite it each time.

6 Click Save. You will return to the Backup Database Oasis screen with your file name and path in the Backup File field.

7 Click okay to run the backup. A file with the name you specified and the extension .dat will be created in the selected location.

Hint

Consider keeping a copy of the backup file in an external location. This will protect you in the event of a hard drive crash.

Restoring from Backup

Once you have created a backup, you can restore that backup file to return your installation of Database Oasis to the state it was in when the backup was made.

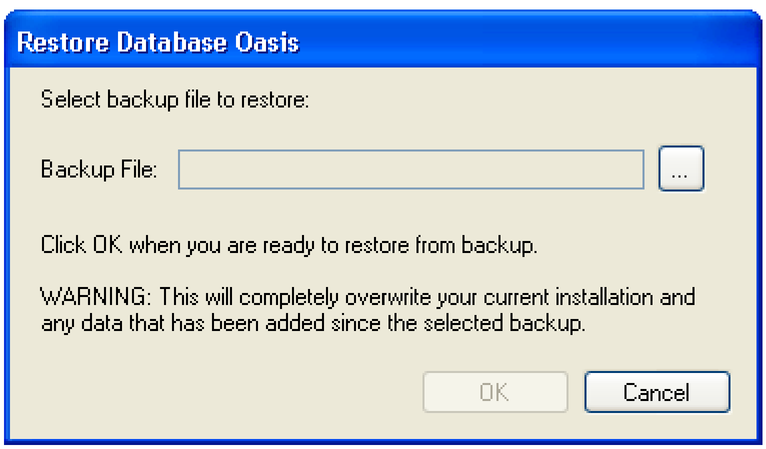
Warning!
Restoring from backup will overwrite the entire installation. If you have made any changes to displays or data since the backup was made, they will be lost.

Note
PRO If you are using Database Oasis - Professional Edition, all other users must be logged out of Database Oasis before proceeding.

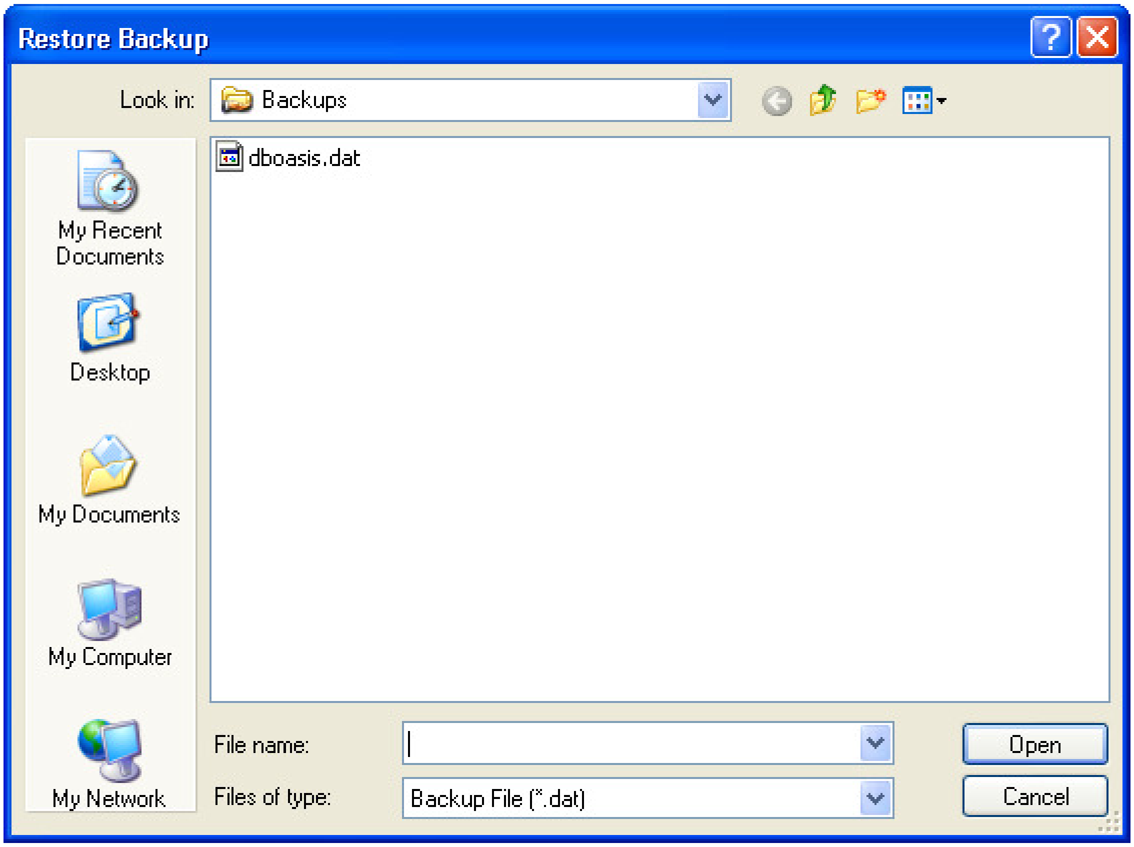
Restoring a Backup

1 Close out of the designer and any open displays in Database Oasis.

2 From the Tools menu, select Restore. The Restore Database Oasis screen will open:



3 Click the button next to the Backup File: field to open a Windows Open dialog:



This will default to the location where you stored the last backup file you created.

4 If you have moved the backup file, or you wish to select a different backup, navigate to the location of the backup file.

5 Double-click on the backup file in the box. The file name will appear in the File name: field.

6 Click Open. You will return to the Restore Database Oasis screen with your file name and path in the Backup File field.

7 Click okay to restore the backup. Depending on how many displays and how much data you have, this may take several minutes.

8 When it is done restoring from your backup, a message will appear informing you that the restore from backup was completed successfully. Click OK to close the message.

Moving a Data File

In some circumstances, you may need to change the location of your Database Oasis data file. For example, you may run out of space on a particular drive and need to move data to a secondary drive.

When relocating data files, you must first move the data, then update Database Oasis' internal reference to the data location.

MOVING A DATA FILE

1 Locate the Database Oasis data file. Database Oasis data is stored in the file dbmkSystem.vdb4. When Database Oasis is installed, a default data path is created. For operating systems prior to Windows Vista, the data is located in the path C:\Documents and Settings\All Users\Application Data\DBOData. In Windows Vista and Windows 7, the data is located in the path C:\ProgramData\DBOData\.

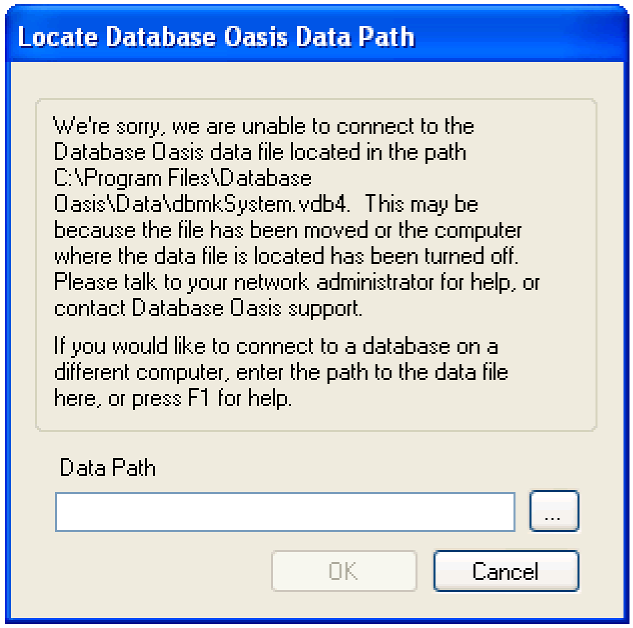
Note

If you don't see this folder, it is usually because it is hidden in Windows. To unhide the folder, right click on your Windows Start button and select Explore from the menu to open Windows File Explorer. Select Folder Options from the Tools menu, then select the View tab. Make sure that the "Show hidden files and folders" option is selected.

Database Oasis data is stored in the file dbmkSystem.vdb4.

1 To move the data, simply copy the data file to the new location in Windows.

2 The first time users log into Database Oasis after the file has been moved, the Locate Database Oasis Data Path screen will appear:



3 Click the button next to the Data Path field to open the Windows Open dialog box where you can navigate to the folder where the data is now stored.

4 Click OK.

5 Database Oasis will check to make sure there is a valid data file in the specified path. If there is, you will receive a message that the connection is successful. You must close and reopen the software to complete the connection.

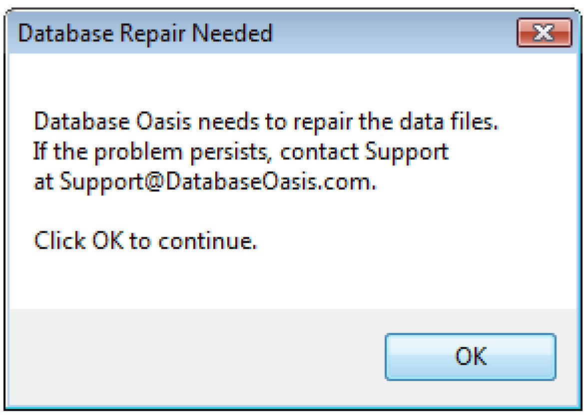
Note
If you are using Database Oasis Professional Edition, make sure that the client computers are able to access the new path.

Rebuild

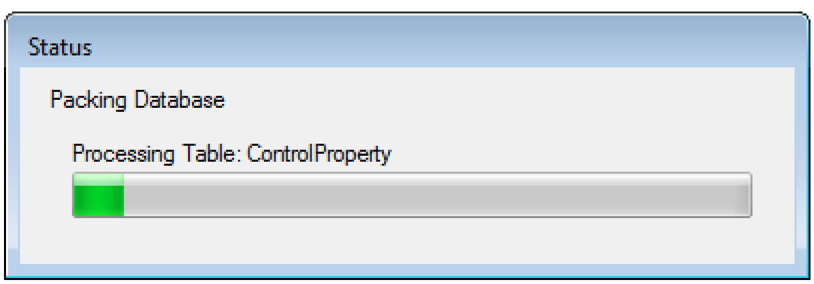
The rebuild process automatically corrects any problems that may be found in your database. You do not need to manually launch a rebuild. When Database Oasis opens, it scans the database for issues and automatically launches a rebuild in the following circumstances:

- If the version of the software you are using is newer than the database version. In this case, rebuild will automatically upgrade the database.
- If the system was not shut down properly.
- If Database Oasis detects any other problem with your data file.

If a rebuild is necessary, you will receive the following prompt:



When you click OK, the rebuild commences. A progress bar displays as the system rebuilds each of the tables in the database.



Once the rebuild is complete, you should be able to resume work with your installation.

If you encounter an error that the rebuild was not able to repair, the Database Repair Needed screen will appear again the next time you launch the software. In this case, locate your dbmkSystem.vdb4 file as described under *Moving a Data File*, above, and attach it to an e-mail to Support@DatabaseOasis.com so the Database Oasis support technicians may troubleshoot the issue.

GLOSSARY

Active Widow: In Windows, the screen that currently has focus. Any work that you perform will impact the active window.

Align: To line up two or more objects. In Database Oasis, the alignment options are used to line up objects in the designer.

Application: A term used to refer to a software product.

Backup: (*noun*) A copy of all information in your software that allows you to restore the application to the state it was in at the time the backup was made. (*verb*) The act of creating a backup file. (*See also Restore*)

Box: In Database Oasis, an object type that allows you to draw a square around other objects for the purpose of grouping and organizing your display.

Buttons: Windows form elements that perform an action when clicked.

Calculated Field: An advanced type of field that displays the results of a preconfigured calculation. For example, a calculated field may be configured to show the sum of a selection of other fields. You cannot type directly in a calculated field.

Check Box: A field used to provide a simple true/false flag. It appears as a small square on the form. A mark in the box indicates a true condition. No mark indicates a false condition.

Child Level: A sub-display that may be added in Professional Edition. The child level allows you to have multiple child records linked to a single parent record. Common data may be entered once at the parent level instead of on each child record.

Client Server: A software term describing a system where multiple installations (clients) daccess data stored in a central location (the server).

Database: A file that stores related information. (*See also Field and Record*)

Delimiter: A character that you have specified to denote the end of one field and the start of the next in an export.

Design Element: In Database Oasis, the objects that can be added to a display that do not contain data. These include boxes, labels, and logos.

Design Mode: In Database Oasis, the mode of the software when you are in the designer, creating and modifying your displays. (*See also Designer and Working Mode*)

Design Template: A file that contains a description of the design of a display. This can be used to create a new display with the same design.

Designer: In Database Oasis, the area of the software where you can create and modify your displays.

Displays: A screen that has been created in Database Oasis to contain and display data.

Double Click: In Windows, the act of clicking your mouse button twice in rapid succession to perform an action. (*See also Mouse*)

Drag and Drop: A method of selecting something with your mouse and moving it to another location.

Drop-Down Lists: A type of field that offers a preconfigured list of options. You can populate the field by selecting from the list.

Export: The process of copying data out of one software application into a file that can be read by another software application.

Field: A container for a piece of data. For example, in an address, the city, state, and ZIP code information would each be stored in a separate field. (*See also Record.*)

Filter: A method defining a criterion records must meet in order to be viewable. This is used to limit the data you are working with to a defined subset.

Focus: In Windows, the currently active object or form. Interaction with the software with affect the item that has focus.

Form: In windows, a page that contains options that you interact with. For example, Properties screens are forms, as are each of your displays. Forms are also sometimes referred to as screens or windows.

Horizontal Center: The center of an object that is the midpoint between the top and bottom edges. This can be visualized as a horizontal line drawn through the middle of the object.

Hot Key: On a menu or object, the underlined letter in the name that is used to perform the action using the keyboard. Pressing the hot key while holding down the ALT key on your keyboard will activate the option.

Hover: The act of placing your mouse over an object and leaving it there until something occurs. For example, hovering over the edge of many objects in the designer will cause the mouse to change to a double headed arrow, allowing you to change the size of the object.

Label: A piece of text that can be added to a display to provide instructions or additional information.

Landscape: A page orientation that prints with the longer edge of the paper at the top. For example, with standard paper that is 8½ by 11 inches, landscape mode would print a page that is 11 inches wide by 8½ inches tall. (*See also Portrait*)

Layering: A method of controlling which object appears in front when two or more objects overlap.

List View: In Database Oasis, a view of your data that presents all of the records in a grid. Each column in the grid is a field, each row is a record.

Logo: In Database Oasis, a design element that allows you to add pictures to the background of your displays.

Login: The process of entering a user name and (typically) a password to access software.

Maximize Button: On the title bar, the button that looks like this: . Clicking this will return the application to a maximized state. (*See also Maximized, Restore Button, and Title Bar*)

Maximized: In Windows, when a window is at the maximum size, usually filling your monitor. The Database Oasis window cannot be moved or sized when maximized.

Menu: A list of options that can be performed by clicking on them. For example, the Tools menu provides access to the Backup and Restore features.

Minimize Button: The button on the title bar that looks like this: . In Database Oasis, this button can be found on the main window's title bar. Clicking this will remove Database Oasis from view. It can be accessed again from your Window taskbar. (*See also Title Bar*)

Mouse: In Windows a tool that allows you to manipulate a pointer:  on the screen in order to interact with visual elements on the screen.

Navigation Pane: In Database Oasis, a bar that appears on the left side of your screen in working mode. It is used to provide quick access to commonly used features.

Numeric Field: A type of field that can only contain numbers.

Parent Level: A display that may be added in Professional Edition that has one or more child levels. Data from records at the parent level is shared with any linked child records.

Picture Field: A type of field that allows you to have record-specific pictures.

Pointer: In Windows, a visual representation of the mouse that is used to interact with software.

Portrait: When printing, the standard page orientation that prints with the shorter edge of the paper at the top. For example, with standard paper that is 8½ by 11 inches, portrait mode would print a page that is 8½ inches wide by 11 inches tall. (*See also Landscape*)

Properties: Settings that allow you to control the look or behavior of an object or area of the software.

Radio Buttons: A set of options represented by small circles. A mark in a circle indicates it is selected. Only one radio button can be selected at a time.

Record: A collection of related fields. In Database Oasis, each page of a display represents one record. (*See also Fields*)

Relational Databases: A database that links tables together by a common value. This is used when multiple records share common information. The common data is stored in what is known as a "Parent" record and shared across one or more related "Child" records.

Restore Button: This button will appear on the title bar when a window is maximized: . Clicking it will enable you to move and size the window. (*See also Title Bar, Maximize Button, and Maximize*)

Restore: The act of overwriting an installation with a previously backed up copy of the data. (*See also Backup*)

Screen: *See Form*

Server: The installation of Database Oasis where the data is installed.

Size: (*noun*) The dimensions of an object. (*verb*) The act of changing the size of an object by clicking and dragging.

Sort: An option to define the order in which records should be presented.

Tab Order: The order in which your cursor will move through objects when you press the Tab button on your keyboard. In displays, the default tab order is left to right, top to bottom unless otherwise specified in the designer.

Taskbar: In Windows, the bar at the bottom of the screen that contains the Start button and buttons for any software applications that are currently open.

Template: *See Design Template*

Text Field: The most common type of field. Text fields can contain any type of data. (*See also Field*)

Tiled: An object that is repeated within a particular space. For example, a graphic used as wallpaper in Database Oasis will repeat to fill the display.

Title Bar: The band at the very top of a form. This contains the name of the form and gives you options for sizing, moving, and closing the form. (*See also Maximize Button, Minimize Button, and Restore Button*)

Tools Pane: In the Designer, the pane at the left side of the screen that gives you quick access to the most commonly used functionality.

Tooltips: In Windows, text that appears when you hover your mouse over an object providing additional information about the option. (*See also Hover and Mouse*)

Vertical Center: The center of an object that is the midpoint between the left and right edges. This can be visualized as a vertical line drawn through the middle of the object.

Wallpaper: In Database Oasis, a tiled picture that appears as the background of a display. (*See also Tiled*)

Window: *See Form*

Windows®: The Microsoft operating system that provides a graphical interface for working with your software.

Working Mode: In Database Oasis, the mode of the software where you interact with the data in your displays. This includes all areas of the application with the exception of the designer. (*See also Design Mode*)

INDEX

D

E

F

G

H

I

K

L

M

N

O

P

Q

R

W