

reSource DB User's Guide

reSource Ebase V2.0.3 Customization

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Purpose

This document provides guidelines for use of the customizations of ebase V2.0.3 added during the adoption of that database in late summer 2003 and later modifications in spring 2004.

Background

The FileMaker application adopted by reSource in summer 2003 for general information handling is a slightly customized version of ebase V2.0.3. Customizations were made by Larry Bednar (Bednar Consulting, Portland, OR 97212, larry@quimdas.com, 503-493-8542, www.quimdas.com) with detailed review and input by reSource employee J. Born.

Overview

In general, the user will find the reSource database to run in standard fashion expected by a ebase V2.0.3 database.

Differences from a “standard” copy of ebase V2.0.3 include:

- The code system has been reconstructed for the needs of reSource
- The security roles provided in a standard copy of ebase v2.0.3 have been changed to more closely match the details of reSource use
- An additional FileMaker database (“rs_Schools.fp5”) has been added to hold records providing a list of schools that may be associated with a Contact record for a teacher, etc. Editing of this information (additions or deletions from the list, etc.) are not completely integrated with ebase, but are designed to be performed by the database administrator outside of ebase.
- FileMaker layouts used to enter information about a Contact have been modified to provide a mechanism to insert the name of a school listed in the “rs_Schools.fp5” database into the Contacts “organization” field.
- Scripts run at the time changes to a contact address are saved have been slightly modified. If the location is designated as a primary contact location (PCL) and references a school from the rs_Schools.fp5 database, the record ID value identifying that school in the “rs_SchoolID” database is stored in a newly added Contacts.200 field named “_krsPCLSchoolID”.
- Two of the user-defined “Contact profile” fields have been modified to accept information about “business employee count” and “business type”. Value lists have been created to provide a drop-down list of values that might be entered in these fields. Editing of those value list is a function reserved for reSource’s database administrator.
- An additional FileMaker database “rs_Log.fp5” has been added to hold additional fields required to completely describe certain types of Log records required during reSource use of ebase.

- An additional FileMaker database “rs_Activities.fp5” has been added to hold records providing a list of “activity” values that might be assigned to Log records entered to represent “program services” delivered to a Contact, or an “event” attended by a Contact.
- The ebase “Note View” and “Note Edit” layouts were modified to allow entry of information about “program services” delivered to a Contact or an “event” attended by a Contact.
- The Contacts.200 “FindOther” layout has been modified to allow use of related fields from the rs_Schools.fp5 database in “find” operations.
- The Log.200 “Find Note” layout has been modified to allow use of fields added by reSource customizations during “find” operations.

Reasons for Additional Databases

The three additional FileMaker databases were added to accommodate data that seemed inappropriate for storage in standard ebase fields. Ebase recommendations are that additional data of this type should not be placed in “core” ebase databases, since doing so threatens loss of that data if the organization subsequently upgrades to a later revision of ebase. By placing this data in newly added databases, the ability to retain that data through a later ebase upgrade should be greatly enhanced – only relatively minor modifications of core ebase files should be subsequently required. A relatively complete account of the modifications implemented during the customization is included in the “customizations_7.doc” (MS-Word) and “customizations_7.pdf” documents provided with the customized copy of ebase.

Code Construction Approach

The approach used to constructing codes for use in the reSource customization of ebase are outlined here to facilitate later construction of codes that harmonize with the code system developed for reSource use in this database. 13 revisions of the coding system were required to reach the version finally implemented in September 2003.

Most work on code system development was performed by L.Bednar and J.Born using Excel workbooks to outline codes to be used.

The Excel workbook “code_wksht_m.xls” provided with this document is the worksheet used to represent the final coding system finally imported into the ebase CodeGenerator.200 file. (“m” represents the worksheet revision).

A set of standard abbreviations was used in constructing codes. This list of abbreviations is provided in Appendix A. In general, each time a word or phrase is used within a code, any standard abbreviation should be used. Consistency is advisable – either always use an abbreviation, or always spell out the word. Abbreviations were frequently used to ensure that ebase code and code title length limitations were satisfied (ebase limits the number of characters that can be used in a code title, and the number of characters that may be used when all component codes/buckets for a single code are concatenated.)

Each component part of a complete code (called a “bucket” within ebase) was assigned a more or less “standard” use within the code system. A single component code value (like “ES”, “ltr”, “participant”) is typically used within a single column of the code worksheet – corresponding to a single “code bucket” in ebase. For example, the component code “ltr” always is used in bucket 6, the component code “school” is always used in bucket5, etc. These uses and the values that were allowed in each bucket are listed in Appendix B. The uses of these

Appendix C provides an explanation of the “Class” values used as a part of every code in the code set. This presentation may be helpful for database workers who are just learning how to use the code system.

The “Code Title” was constructed to provide a concise representation of all the values assigned to all component “buckets” that are used to define a complete code. Code Titles were always started with an abbreviation indicating the project (or sometimes the subproject) whose activities the code pertains to.

Code Import

To import the custom code set, the following steps were used:

1. The defined codes were cut and pasted from the “code_wkst_m_xls” workbook into the Excel workbook “code_wkst_m_renamed.xls”. This worksheet was designed to rename columns in the worksheet to match the fieldnames used to hold that information within the ebase CodeGenerator.200 file. This facilitates the data import operation used to transfer those values into the Code Generator.200 file.
2. Ebase was opened using the DevLogin.fp5 file with the developer passwords.
3. The CodeGenerator.200 file was opened.
4. The script “rs_ToggleStatus” area was run to display the “status area” part of the layout. (The display of this area is suppressed by default in ebase V2.0.3.
5. The user switches to “layout mode”. In “layout” mode, the user is now free to select any layout from all those defined in the CodeGenerator.200 file for use using the drop down-list displayed in the “status area”.
6. The user selects the “Contents” layout. This layout is intended for display of all fields defined in the database.
7. The user switches to “browse” mode.
8. The user executes a “show all records” command
9. The user executes a “delete all records” command to delete all preexisting records used to define codes.
10. The user begins an “import” operation. When prompted for the file to import data from, the user selects the “code_wkst_m_renamed.xls” file and the “simple codes” worksheet within that workbook.
11. When prompted for the import mapping, the user selects “map by name”. One of the ebase fields (field “_fMemberPayment_UseAsMembershipPayment”) seems to have two names entered where only one should be present. The “_UseAsMembershipPayment” column from the workbook was mapped to this field.
12. The user clicks the “import” button, and when subsequently prompted for whether “auto-enter” functions should be performed, answers “yes”.
13. Review imported records. If blank records from the end of the worksheet were imported, perform these steps to delete them:
 - a. Perform a find for records with blank values in field “Bucket1”. This should result in all blank imported records being placed in the “found set”.

- b. Scroll through the “found set” to verify that all the records selected are blank. None of these records should define codes that are intended for continuing use in ebase.
 - c. If all records in the found set are blank, perform a “delete all records” function to delete them all.
14. Switch to the “Contacts” window, navigate to the Admin/setup codes screen and check the imported codes to verify that the import provided the proper results.

Field Naming Conventions for Newly Added Fields, Relationships, Value Lists, Scripts and Databases

All fields, relationships, value lists and databases added as a part of the reSource customization are named following typical ebase V2 naming conventions, with one exception: Newly created names are always prefixed with “rs_”.

“Database Report” Database

A “database report” database (named “db_rpt_31may2004.fp5”) was created using FileMaker Developer to reflect the current state of the reSource implementation of ebase as of 31May2004. The primary purpose of this report was to document any customizations, together with closely related scripts, etc. Because of this, only the major data-holding databases were included in the report – “utility” databases such as “zar.200”, etc. are not included in the “database report”.

The contents of the database report database list all script steps within scripts, value lists definitions, field definitions, relationship definitions, etc. In general, information that may be found in this database will not be repeated in the present document.

“Contacts.200” Database Customizations

Each record in this database represents an individual or organization.

“EditIndividual” Layout

This layout was customized to provide a button that runs a script to prompt the user for selection of a school already entered into the rs_Schools.fp5 database. Once the user selects a school, the name of the school is automatically entered into the “organization” field.

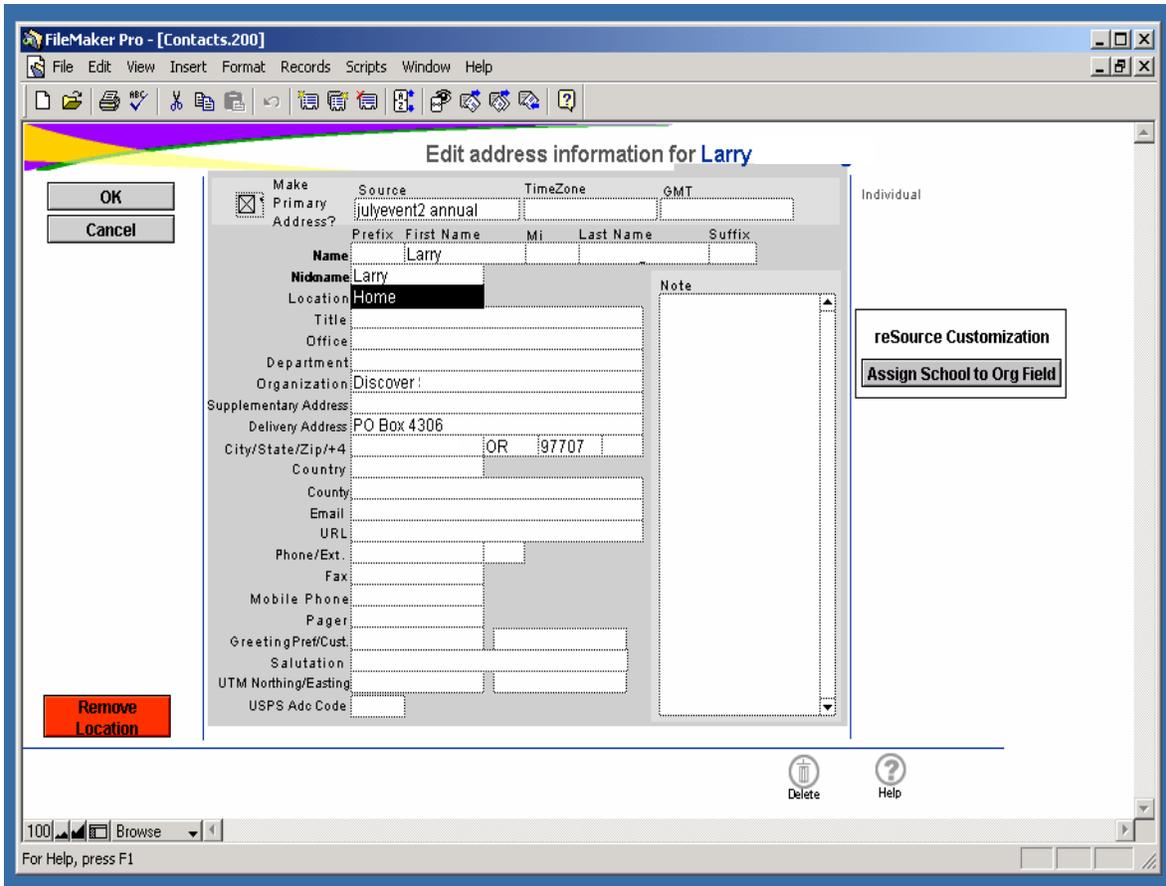


Figure 1. Contacts.200 "EditIndividual" Layout

“FindOther” Layout

Modified 30Mays004 to allow use of fields from external database “rs_Schools.fp5” added as part of reSource customization. This addition allows the execution of “find” operations using “school name”, “school district”, etc.

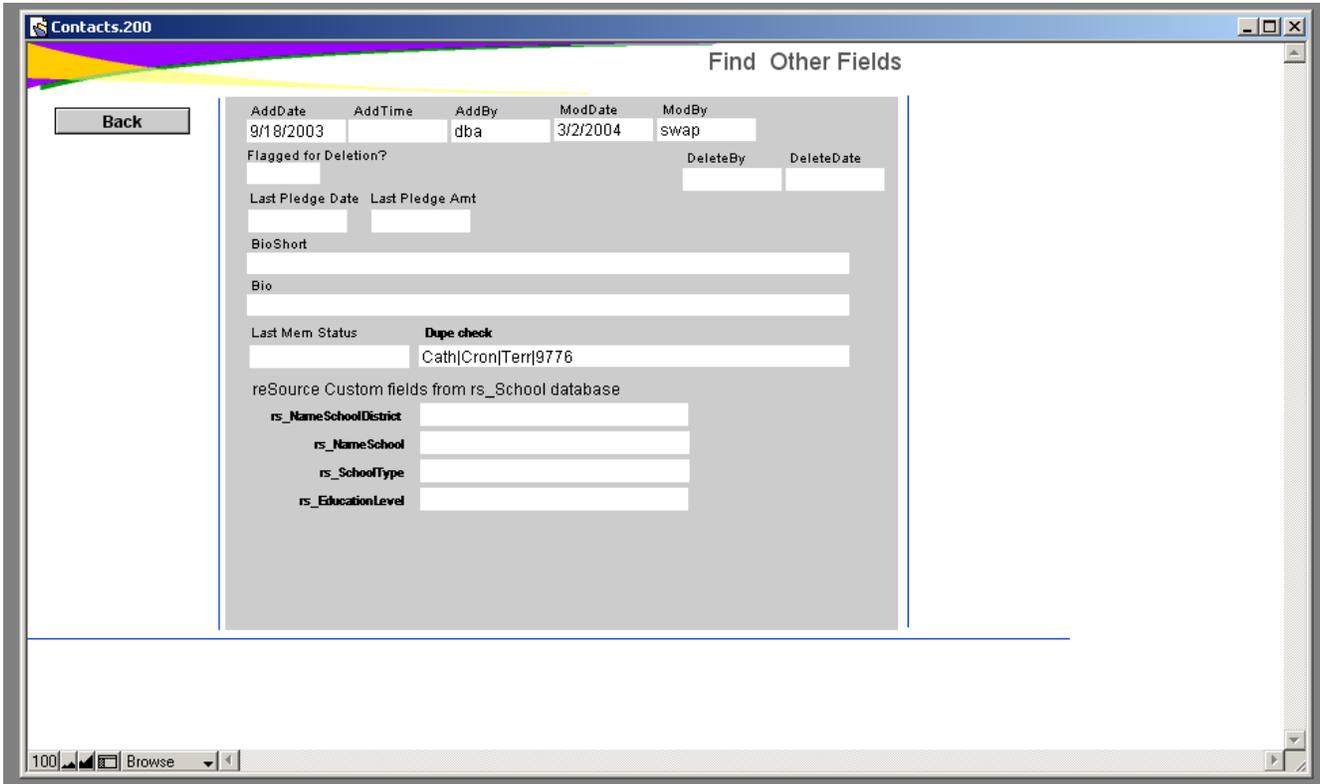


Fig 2. Contacts.200 “FindOther” Layout

“Profile” Layout

Modified to allow two of ebase’s user-definable fields to be used for reSource data items.

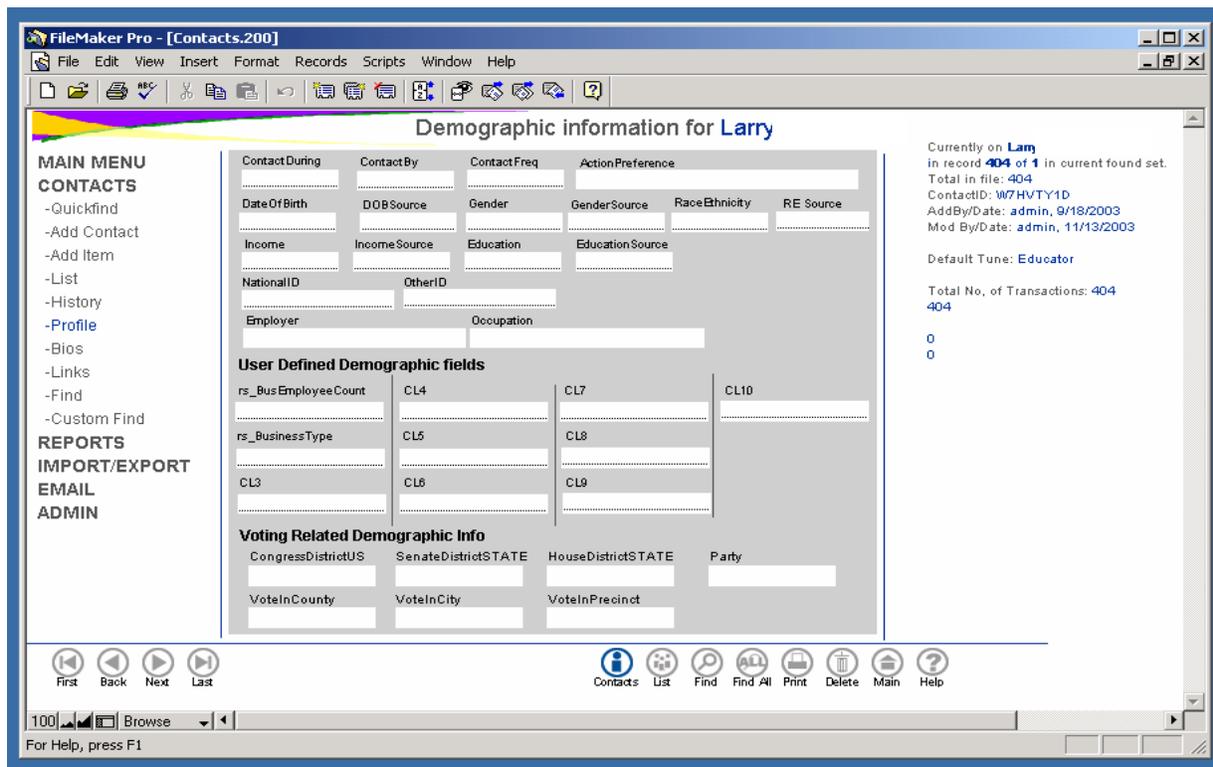


Figure 3. Contacts.200 “Profile” Layout

Rs_BusEmployeeCount – (For a contacts record representing a business) A number indicating the number of employees retained by the business.

Rs_BusinessType – (for a contacts record representing a business) Provides a drop-down list of values which may be selected for this field.

New Fields

A single new field was added. It should be noted that future update to a more recent version of ebase will likely require manual recreation of this field.

_krsPCLSchoolID – For a contact record with primary contact location indicating a school listed in the rs_Schools.fp5 database, this field should hold the value of the _k_rsSchoolID field from that related rs_Schools.fp5 record. Additional detail available in “db_rpt_31may2004.fp5” database.

New Relationships

PCLOrg\SCH_rs_NameSchool– Added to link to rs_Schools.fp5 database through PCL (primary contact location). Additional detail available in “db_rpt_31may2004.fp5” database.

CON_krsPCLSchoolID\SCH_k_rsSchoolID – Added to link Contacts.200 records to rs_Schools.fp5 records referenced in PCL (primary contact location) associated with contact. Additional detail available in “db_rpt_31may2004.fp5” database.

Script Customizations

rs_Assign_krsPCLSchoolID – Newly added to populate the newly added _krsPCLSchoolID field properly for all records in the database. Should never be needed again.

Proc-MakePCL – Modified to include additional steps required to copy values of primary key from rsSchools.fp5 field “_k_rsSchoolsID” to Contacts.200 field “_krsPCLSchoolID”. *These modifications will need to be recreated manually if ebase is updated to a more recent version.*

New Value Lists

Four new value lists were created, all named using the “rs_” prefix. The definitions of these value lists may be reviewed in the “db_rpt_31may2004.fp5” database generated by the FileMaker Developer “database report” tool.

“Log.200” Database Customizations

Each record in this database represents a “characteristic” about an individual or organization represented by an associated “Contacts.200” record. Log records might represent interactions, communications, letters, requests for information, state changes in metadata flags (“on the board”/“off the board”), roles played by an individual, etc.

“Find Note” Layout

The bottom 2/3 of the layout was altered to allow entry of custom data items required by reSource to track involvement in activities and events. All the custom fields displayed here are actually stored in the rs_Log.fp5 database added as a part of the reSource customization. This layout is used to enter new Log records associated with log record codes for events, program services, and roles.

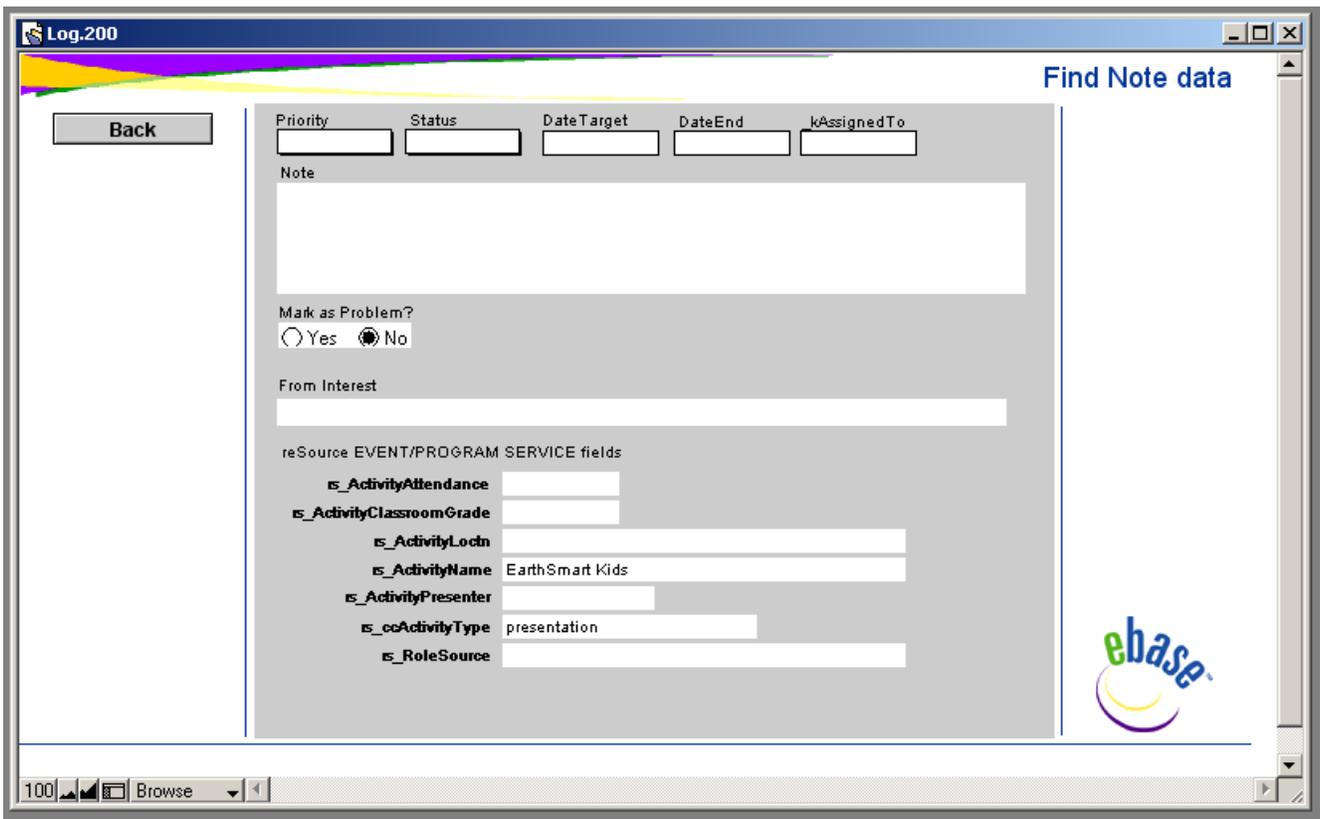


Figure 4. Log.200 “Find Note” Layout

“Note Edit: 9” Layout

The bottom 2/3 of the layout was altered to allow entry of custom data items required by reSource to track involvement in activities and events. All the custom fields displayed here are actually stored in the rs_Log.fp5 database added as a part of the reSource customization. This layout is used to enter new Log records associated with log record codes for events, program services, and roles.

Figure 5. Log.200 “Note Edit; 9” Layout

“_krsActivityID” – Holds the ID value of the record in the rs_Activities.fp5 database identifying the activity represented by the Log record being added. The activity name is displayed in a drop-down list when the user places their cursor in this field – populated using the **rs_ActivitiesIDList** (this value list is populated from the “_k_rsActivityID” and “rs_ActivityName” fields of the rs_Activities.fp5 database.

rs_ActivityName – Lookup field displaying the name of the activity identified by the ID value displayed in the “_krs_ActivityID” field display. Once the activity ID is entered, this field is set to the corresponding activity name.

rs_ActivityLoctn – Free text field designed to allow the user to enter the location at which the activity took place.

rs_ActivityPresenter – Provides a drop-down list that allows the user to indicate who presented the activity.

rs_ActivityContactPerson – Free text field designed to allow the user to enter the name of the contact person for the activity.

rs_ActivityAttendance – Free text entry indicating the number of attendees for the activity

rs_ActivityClassroomGrade – For those activities provided to a classroom, free text entry indicating the grade level(s) of the classroom.

rs_RoleSource – Provides a drop-down list allowing the user to select from a list of values indicating how the individual associated with the newly created Log record is acquainted with reSource.

“Note View: 10” Layout

This layout displays exactly the same fields as the “Note Edit” layout described above, but is set up for “read-only” access to this data. No tools (like drop-down lists, etc.) are provided to assist in data entry and the user is not allowed to place the cursor into any fields to modify data contents.

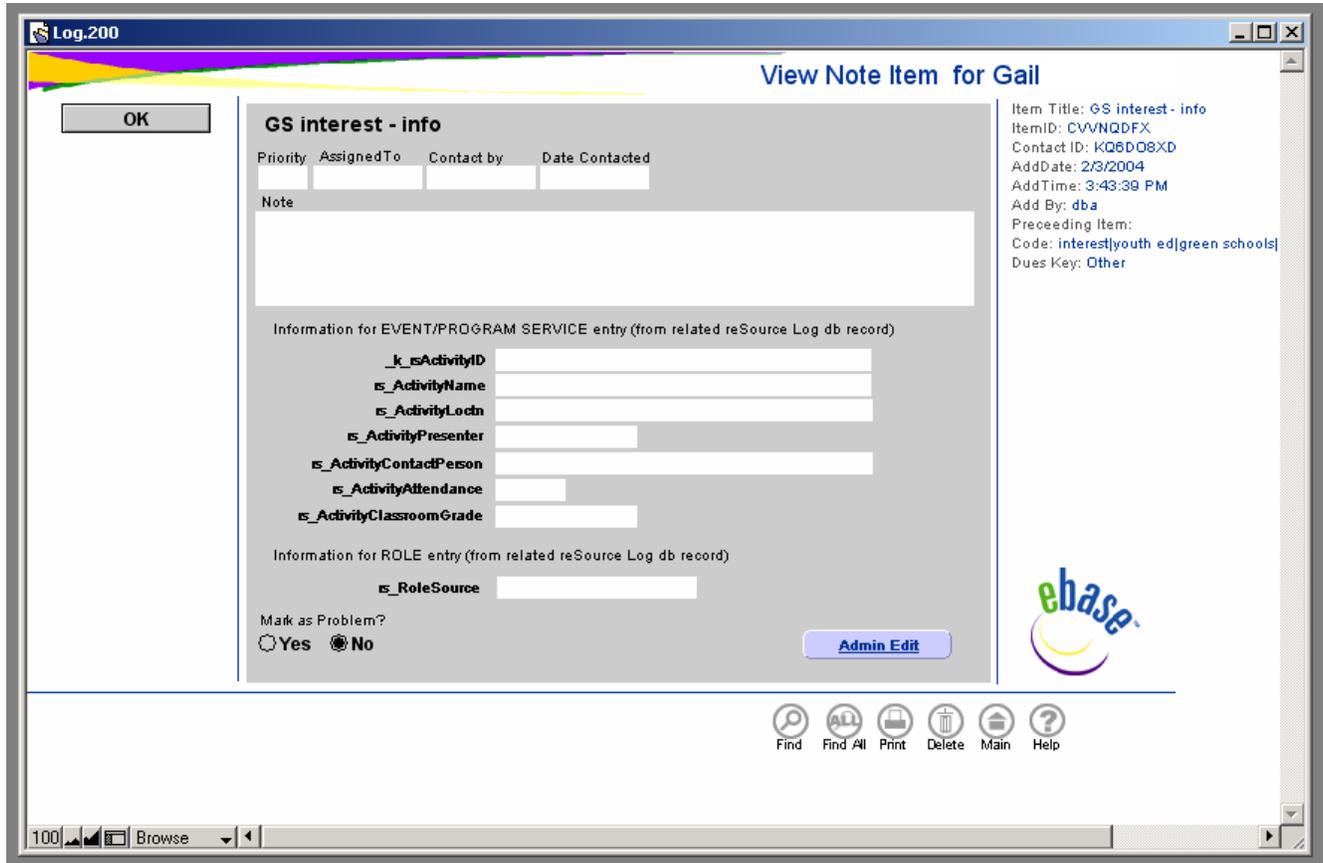


Figure 6. Log.200 “Note View: 10” Layout

“rs_Activities.fp5” Database

This database was added as a part of the ebase customization - it is not a standard ebase database. Each record characterizes an “activity” (event or program service) “type” that might be characterized in a Log.200 record entered into ebase. For instance, records in this database may be used to represent “natural gardening workshop”, “earthsmart presentation”, “worksmart presentation”, etc.

“Contents” layout

This layout is designed to display all fields defined in the database. Typically, this layout is used only by administrators or developers when troubleshooting application problems.

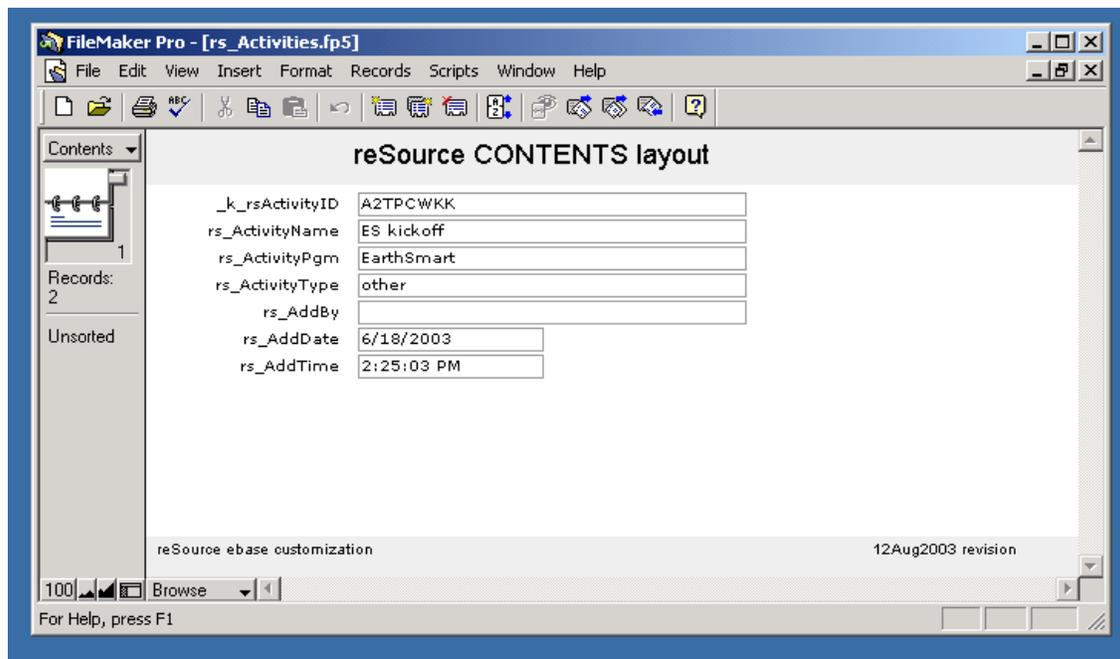


Figure 7. rs_Activities.fp5 “Contents” Layout

Several of the fields on this display are described under “List” layout below. Only those fields that are unique to this layout are described here:

rs_AddBy – The name of the user who created the record. Entered automatically by FileMaker at the time the record is created.

rs_AddDate – Contains the date on which a record was created, automatically entered by FileMaker

rs_AddTime – Contains the time on which a record was created, automatically entered by FileMaker

“List” Layout

This is the layout designed for database administrator use in maintaining data characterizing “activities” that the organization wants to track in ebase Log records. This layout is not designed with sufficient safeguards in place to make it appropriate for use by general users – only administrators or those with similar expertise should make use of this layout.

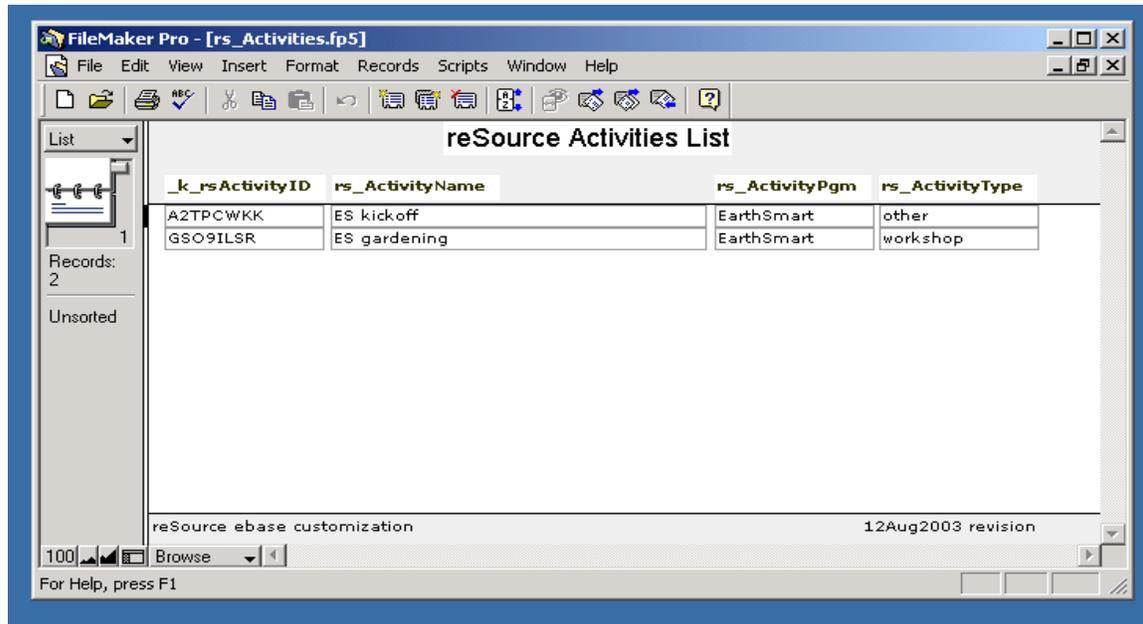


Figure 8. rs_Activities.fp5 “List” Layout

“_krsActivityID” – The primary key for the database – a unique number automatically generated by FileMaker when a record is created. Each record in the database should have a unique value.

rsActivityName – The name of the activity. Free text entry, required to take a unique value on each record of the database – this uniqueness is enforced by FileMaker field option settings.

rs_ActivityPgm – Indicates the reSource “Program” that provides the activity. A drop-down list is provided to guide data entry – populated from the **rs_ActivityPgmList** value list.

rs_ActivityType – Indicates the activity “type”. A drop-down list is provided to guide data entry – populated from the **rs_ActivityTypeList** value list.

“rs_Log.fp5” Database

This database was added as a part of the ebase customization - it is not a standard ebase database. Each record represents custom reSource data items required to completely characterize a Log.200 record.

“Contents” layout

This layout is designed to display all fields defined in the database. Typically, this layout is used only by administrators or developers when troubleshooting application problems.

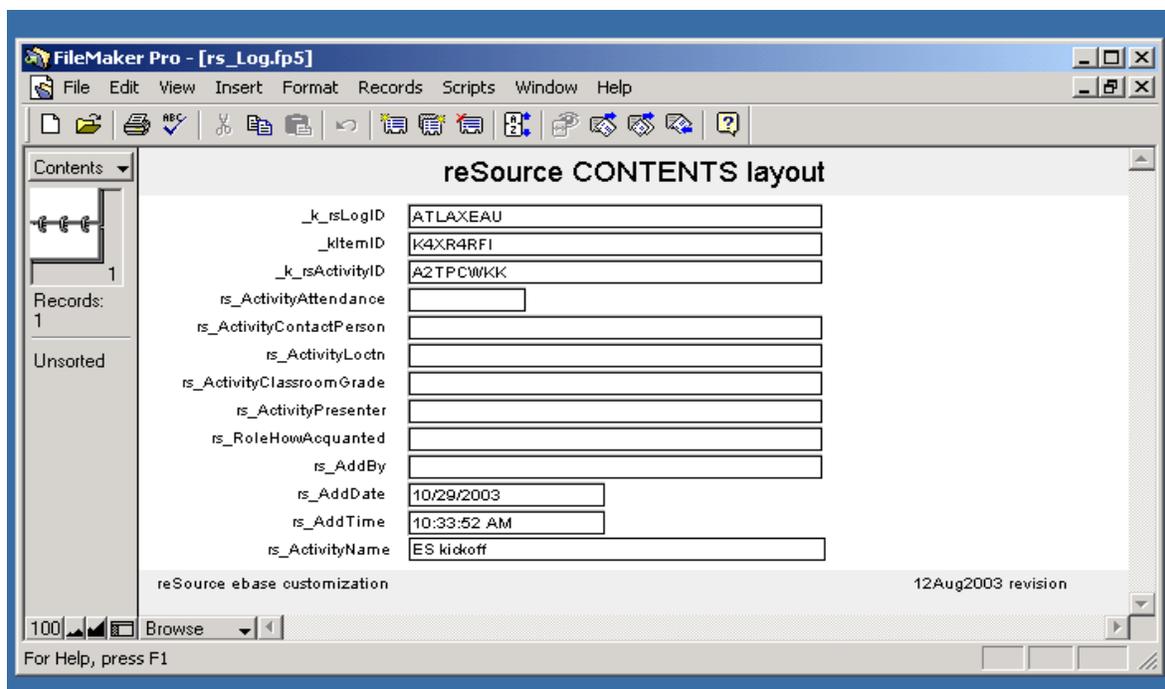


Figure 9. rs_Log.fp5 “Contents” Layout

_krsLogID – The primary key for the database – a unique number automatically generated by FileMaker when a record is created. Each record in the database should have a unique value.

“_kItemID” – A “foreign key” indicating a the ID value of a record in the Log.200 table to which the current rs_Log.fp5 record. All records in the rs_Log.fp5 record should have a value entered in this field associating them with a single Log.200 record.

“_k_rsActivityID” – A “foreign key” holding the ID value of a record in the rs_Activities.fp5 database to which the current rs_Log.fp5 record is linked. Usually, this link indicates that the rs_Log.fp5 record represents an event, program service, or role linked to a contact.

rs_ActivityAttendance – Free text entry indicating the number of attendees for the activity

rs_ActivityClassroomGrade – For those activities provided to a classroom, free text entry indicating the grade level(s) of the classroom.

rs_ActivityContactPerson – Free text field designed to allow the user to enter the name of the contact person for the activity.

rs_ActivityLoctn – Free text field designed to allow the user to enter the location at which the activity took place.

rs_ActivityName - Lookup field displaying the name of the activity identified by the ID value displayed in the “_krs_ActivityID” field display. Once the activity ID is entered, this field is set to the corresponding activity name.

rs_ActivityPresenter –

rs_AddBy – The name of the user who created the record. Entered automatically by FileMaker at the time the record is created.

rs_AddDate – Contains the date on which a record was created, automatically entered by FileMaker

rs_AddTime – Contains the time on which a record was created, automatically entered by FileMaker

rs_RoleHowAcquainted –

“List” Layout

This layout is designed primarily for use by developers and database administrators during troubleshooting of application problems. Other users should probably never expect to see it. If they do, it is suggested that they immediately notify the database administrator and make to effort to use this layout. Although some drop-down lists and other data usage aids are provided, this layout requires expert knowledge for safe use.

The fields displayed here are a subset of the fields displayed on the “Contents” layout for this database.

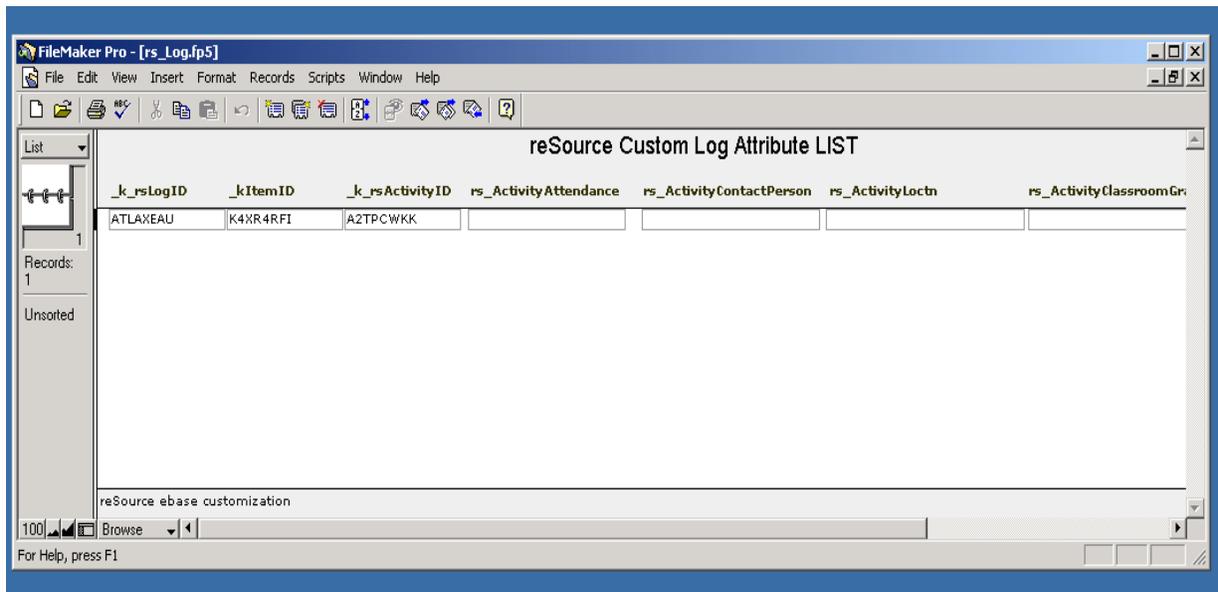


Figure 10.. rs_Log.fp5 “List” Layout

The fields displayed here have already been described for the “Contents” layout above. In a few cases, drop-down lists and similar tools are provided on field displays here. Nonetheless, this layout is really only designed for database administrators or those with similar expertise and understanding of ebase and FileMaker.

“rs_Schools.fp5” Database

This database was added as a part of the ebase customization , and is not a standard ebase database. Each record of this database describes a school that is served by reSource, to facilitate data entry and possibly reporting functions developed at a later time.

NOTE: It is recommended that only the database administrator be allowed to access and modify data contained in this database.

“AssignSchoolNameToCOL_gOrg” layout

This layout is designed prompt the user for selection of a school from among those already entered into the rs_Schools.fp5 database. The layout is displayed to prompt for user input during execution of scripts designed to assist the user in entering a school name into the “organization” field of a “contacts.200” record. Once the user makes a selection and indicates “done”, a script in the rs_Schools.fp5 database enters the school name in the Contacts.200 database “organization” field and returns the user to the Contacts.200 database “EditIndividual” layout (described above).

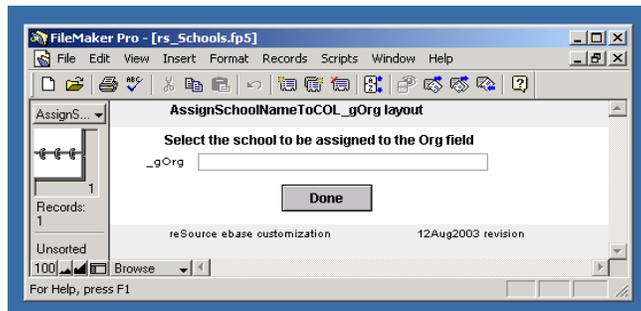


Figure 11.. rs_Schools.fp5 “AssignSchoolNameToCOL_gOrg” Layout

The field display labeled **_gOrg** actually represents a global field in a remote database that is set by the user’s value selection on this layout.

“Contents” layout

This layout is designed to display all fields defined in the database. Typically, this layout is used only by administrators or developers when troubleshooting application problems.

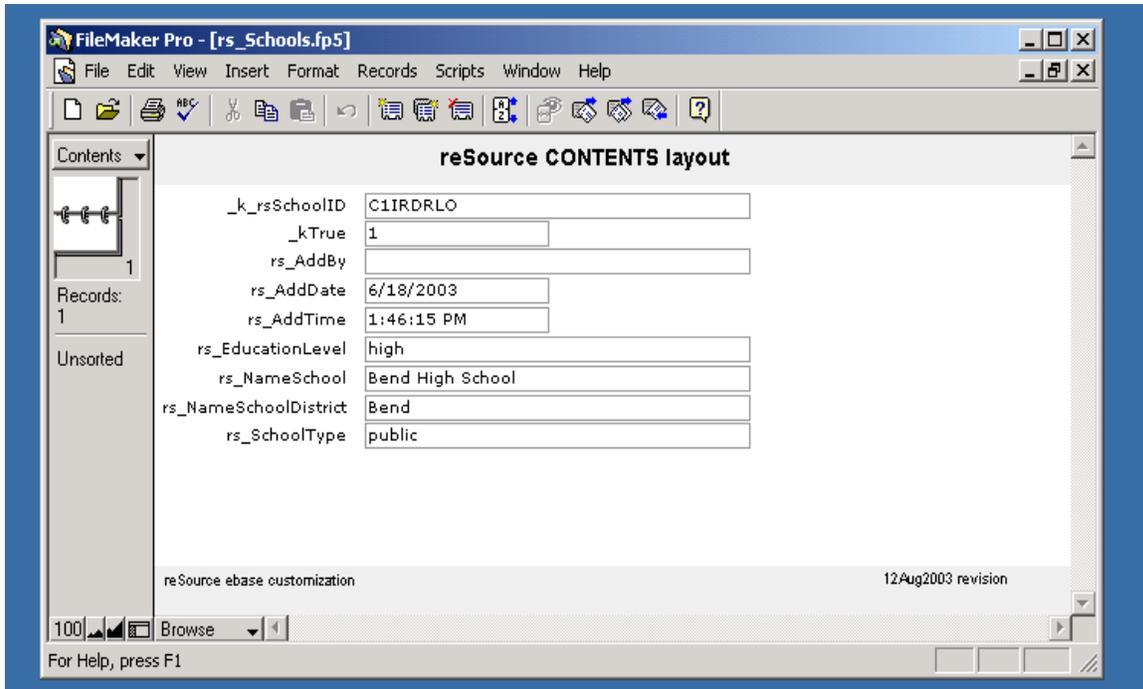


Figure 12. rs_Schools.fp5 “Contents” Layout

Most fields in the database (and this layout) are explained under “List” Layout” below. Only the fields that are not described there are outlined here:

_kTrue – This field, set to a constant value, is used to implement certain types of joins to other FileMaker databases in the application that have a similar field. This field is used by scripts to link to other database when setting global fields in those databases.

rs_AddDate – Contains the date on which a record was created, automatically entered by FileMaker

rs_AddTime – Contains the time on which a record was created, automatically entered by FileMaker

“List” Layout

This layout is the layout designed for the database administrator’s use in entering and modifying data stored in this database.

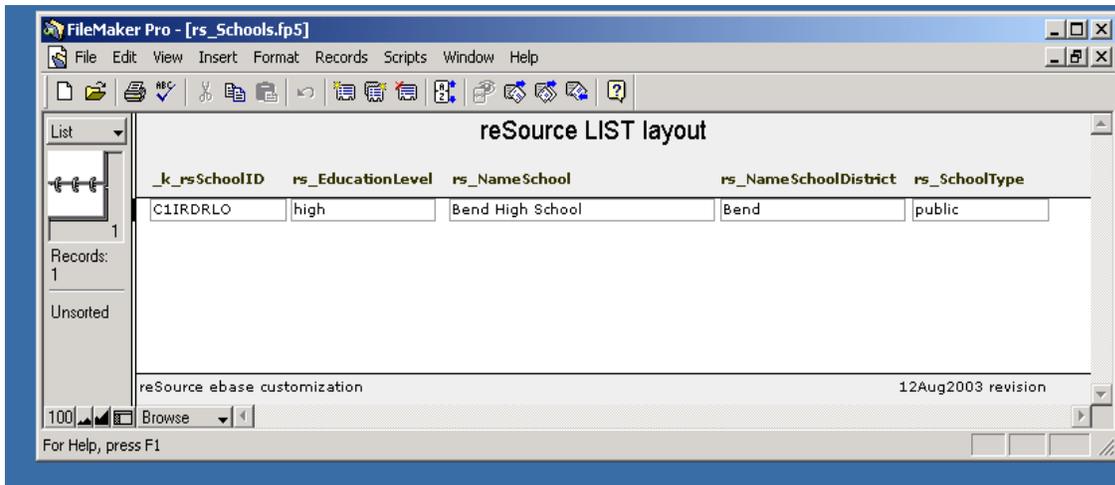


Figure 13. rs_Schools.fp5 “List” Layout

“_krsSchoolID” – Primary key for records in this database, automatically generated when a new record is created. Should uniquely identify each record in the database.

rs_EducationLevel – Provides a drop-down list with appropriate values for the user to select (“college”, “elementary”, “high”, etc.)

rs_NameSchool – Free text field, required to be unique among all rows in this database (entry of a duplicate value will result in a warning message).

rs_NameSchoolDistrict – Provides a drop-down list with appropriate values for the user to select (“bend”, “crook”, “jeffereson”, etc.)

rs_SchoolType – Provides a drop-down list with appropriate value for the user to select (“public”, “private”, etc.)

Appendix A - Standard Abbreviations Used in Codes

1. The following abbreviations were applied:

- a. “admin” for “administrative”
- b. “assmnt” for “assessment”
- c. “bus” for “business”
- d. “comm.” for “communication”, meaning a communication sent to a constituent by the organization
- e. “contrib” for “contributor”
- f. “coord” for “coordinator”
- g. “dvmt” for “development”
- h. “elem” for “elementary”
- i. “ES” for “Earth Smart” (in code title only)
- j. “GS” for “Green Schools Project” (in code title only)
- k. “implementn” for “implementation”
- l. “ind” for “industry”
- m. “info” for “information”
- n. “ltr” for “letter”
- o. “mbr” for “member”
- p. “mgr” for “manager”
- q. “newsltr” for “newsletter”
- r. “org” for “organization”
- s. “pgm” for “program”
- t. “pmt” for “payment”
- u. “recs” for “recommendations”
- v. “rpt” for “report”
- w. “solicit” for “solicitation”
- x. “thx” for “thank you”
- y. “wkshp” for “workshop”
- z. “WS” for “WorkSmart Project” (in code title only)

Appendix B

Code Bucket Uses in reSource Code System

Bucket1 – “Class”

A very broad classification of “Log” records. Several of the values used are strictly required by ebase.

Values:

- Award
- Communication
- Event
- Interest
- Payment
- Prospect
- Role
- Service
- Solicitation

Bucket 2 – “Owner”

The program or division of the organization that the code related to.

Values:

- Admin
- Community ed
- Dvmt
- Swap
- Worksmart
- Youth ed

Bucket 3 – “Project”

Typically, a project is aligned with one and only one owner.

Values:

- All
- Board
- Contracts
- earthsmart
- Events
- Fundraising
- gardening

Green power
Green schools
Swap
Worksmart

Bucket 4 – “Subproject”

Typically, a project is aligned with one and only one owner, although the same code may be used to indicate a similar subproject associated with another project. (For example more than one project may have a newsletter, represented by “nwsltr”.

Values:

Annual rptAssmnt findings
Certification
Class presentatn
Contrib thx
Direct mail
Implemntn form
Info
kids
Kids signup
Launch 02
measurements
Newsltr
Pgm outreach
Recs
recognition
Recycling tour
Summit
Usage info
wkshp
Wrap award

Bucket 5 – “Role”

Typically describes the role an individual plays within the subproject or project)

Values:

Bucket 6 – “Method”

Typically indicates a technique used in the interaction represented by a log record)

Values:

Appendix C

CLASSES OF CODES

reSource code set explanation for staff

5/22/03

Award: items related to giving people awards for specific programs

Communication: general communications with constituents or groups of constituents related to all programs

Event: items related to events—fundraising, workshops, seminars

Interest: requests for information, interest in programs

Payment: payments made to program or organization

Pledge: pledges to organization

Program Services: items related to specific program services, for specific constituents

Prospect: prospective participant in a program, fundraising or board development

Role: role in a particular program or organization

Skill: volunteers, marketing, people with special skills

Solicitation: solicitation for programs, events, fundraising, outreach, etc.

Survey: all survey response participants