

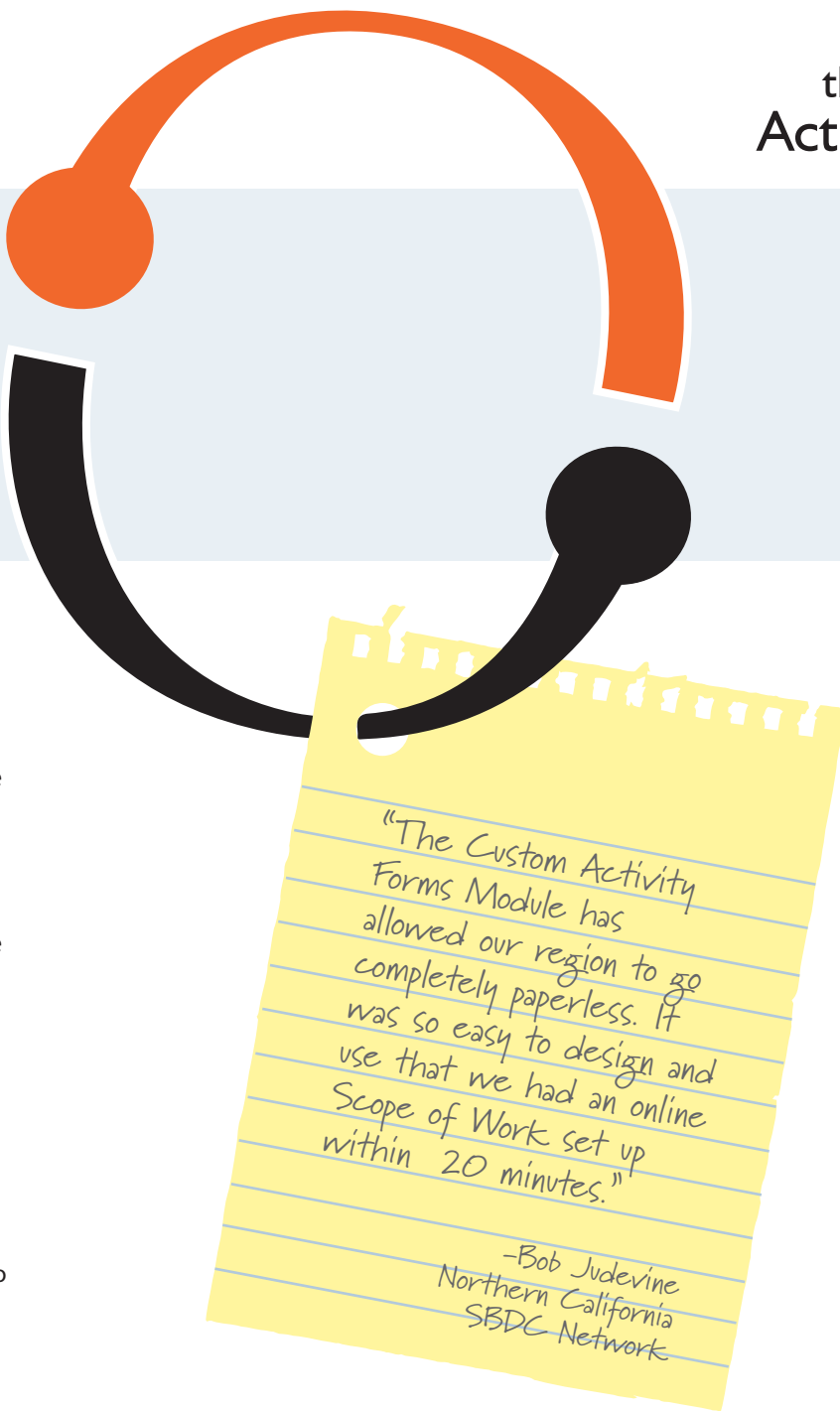
the Custom Activity Forms Module

What Can the Custom Activity Forms Module Do for You?

Business outreach programs have a lot in common. For starters, you all share the same goal: to help businesses become more successful.

But for every one thing your program has in common with its fellow outreach programs, there are likely ten more that you don't have in common. Differing internal operating procedures, activity under special grants or contracts, local government programs, and pet projects all contribute to the need for performance tracking that is unique to your program.

And that's where the Custom Activity Forms Module comes in. This add-on WebCATS component lets you build your own forms to track any type of specialized assistance your program provides to its clients—and the resulting impact of that assistance.



"The Custom Activity Forms Module has allowed our region to go completely paperless. It was so easy to design and use that we had an online Scope of Work set up within 20 minutes."

-Bob Judevine
Northern California
SBDC Network

Flexible Form Design

Form design has to be flexible to account for the myriad of specialized assistance that outreach programs provide. For example, you can design an activity form to track counseling as it relates to environmental issues, or local tourism, or homeland security, or SBIR awards.

Your custom activity form can consist of as many fields as you desire. You decide the data format of these fields, their names, and their order. The only requirements are that the forms must represent client activity (i.e. they must be able to be associated with client records) and must carry a couple of basic data fields necessary for database integrity.

By default, seven standard fields are placed in every new custom form you create. The four marked mandatory are required for database integrity and cannot be removed, but the remaining three are optional.

Fields that contain critical data can be made mandatory to ensure that important information is never overlooked.

A field name's abbreviation is used by WebCATS when there is not enough space to display the full field name, which is often the case in columnar reports.

Name	Abbrev	Mand?	Type	Picklist Choices	Default	Order	Visible?
Client/Company	-	<input checked="" type="checkbox"/>	Text			100	<input checked="" type="checkbox"/>
Date	-	<input checked="" type="checkbox"/>	Date			150	<input checked="" type="checkbox"/>
Center	-	<input checked="" type="checkbox"/>	Text			200	<input checked="" type="checkbox"/>
Counselor	-	<input type="checkbox"/>	Text			250	<input checked="" type="checkbox"/>
Is Reportable?	-	<input checked="" type="checkbox"/>	Yes/No	Yes;No	Yes	300	<input checked="" type="checkbox"/>
Funding Source	-	<input type="checkbox"/>	Text			350	<input checked="" type="checkbox"/>
Notes	-	<input type="checkbox"/>	Text			400	<input checked="" type="checkbox"/>
Agency	Agency	<input checked="" type="checkbox"/>	Picklist	Army;Air Force;DHS;DOE;EPA;Navy;NA		450	<input checked="" type="checkbox"/>
Technical Contact	Contact	<input type="checkbox"/>	Text			500	<input checked="" type="checkbox"/>
Technical Phone/Email	Tel/Email	<input type="checkbox"/>	Text			550	<input checked="" type="checkbox"/>
Solicitation Number	SolNum	<input type="checkbox"/>	Text			600	<input checked="" type="checkbox"/>
Solicitation Title	SolTitle	<input type="checkbox"/>	Text			650	<input checked="" type="checkbox"/>
SBIR Phase	Phase	<input type="checkbox"/>	Picklist	Phase I;Phase II;Phase III;Commercial I	Phase I	700	<input checked="" type="checkbox"/>
SBIR Contract Amount	Amount	<input type="checkbox"/>	Currency			750	<input checked="" type="checkbox"/>
Technology Used	Technology	<input type="checkbox"/>	Text			800	<input checked="" type="checkbox"/>
Proposed Duration	Duration	<input type="checkbox"/>	Picklist	Less than one year;One year;Two years	One year	850	<input checked="" type="checkbox"/>
Has SBIR resulted in Patent?	Patent?	<input type="checkbox"/>	Yes/No	Yes;No	No	900	<input checked="" type="checkbox"/>

Resort

OK Cancel

Text
Number
Currency
Date
Yes/No
Picklist

Fields can easily be reordered by changing the order number assigned to them. For example, to switch the order of the *Client/Company* and *Date* fields shown here, you would simply reassign a number lower than 100 to the *Date* field.

Although you can set default values for all field types, they're most commonly used in conjunction with yes/no and picklist fields, where data entry is limited to a pre-defined set of responses.

For every field you define, you select the type of data that can be entered into that field—from free-form text to a drop-down menu with a limited set of responses.

Easy Data Entry

Once you configure your custom activity form, it's immediately available for data entry in WebCATS. Custom activity records are created, edited, and viewed in the same manner as all other record types.

WebCATS

View

- MyWebCATS
- Clients/Pre-clients
- Contacts
- Inquiries
- Counseling Sessions
- Awards
- Milestones
- Investments
- Survey Responses
- SBIR Awards**
- Narratives
- Conferences
- Counselors
- Centers
- Worksheets
- Chrisman Reports

Add

- Client
- Contact
- Conference

EDMIS_{Rx}

Manage

Network Links

Help

New SBIR Award

*Company: Vector Laser Products (SFT0132) **Select**

*Date: 3/25/2009

*Center: Santa Barbara Center **v**

*Counselor: Miller, John C. **v**

Reportable?

*Agency: Navy **v**

Technical Contact (text): Gerald Higgins

Technical Phone/Email (text): gerald_h@navy.mil

Solicitation Number (text): NAVY007-981

Solicitation Title (text): Compact Diode Laser-Based Magnetometer

SBIR Phase: Phase I **v**

SBIR Contract Amount (currency): 97000.00

Technology Used (text): Ultra-sensitive absorption spectroscopy detection techniques

Proposed Duration: One year **v**

Has SBIR resulted in Patent: Yes No (Undefined)

Cancel **Add**

Easy Reporting

Not only are custom activity records created, viewed, and edited in the same manner as other client activity records in WebCATS, they also offer the same endless filtering and reporting capabilities as other client activity records.

Santa Barbara Center (SB) SBIR Awards

SBIR Award Views: All SBIR Awards Report New General Subset

☐ Viewing Data: From 1/25/2009 to 3/25/2009, Reportable Only

Start Date: 1/25/2009 End Date: 3/25/2009

Records: Reportable Only Non-reportable Only All Records

Agency: (all)

SBIR Phase: Phase I

Counselor: (all)

Funding Source(s): All

Save as Default? Requery ?

Date	Client ID	Company	Agency	SBIR Phase	Solicitation Title
3/25/2009	SFT0132	Vector Laser Products	Navy	Phase I	Compact Diode Laser-based Magnetometer
3/5/2009	SFT0179	Ziegler and Sons	NIH	Phase I	Population Research: Contraception and Reproductive Health
3/1/2009	SFT0268	The Briggs Company	Navy	Phase I	Material Degradation Detection of Metal Components
2/4/2009	SFT0115	StreitLine	Air Force	Phase I	Bearing Sensor Data Transmission for Engine Health

4 sbir awards matching criteria (4 distinct clients).

You can report and subset on any combination of fields in your unique client activity records.

You determine the data that displays when the custom activity records are summarized, as well as the data that the records are filtered on.