

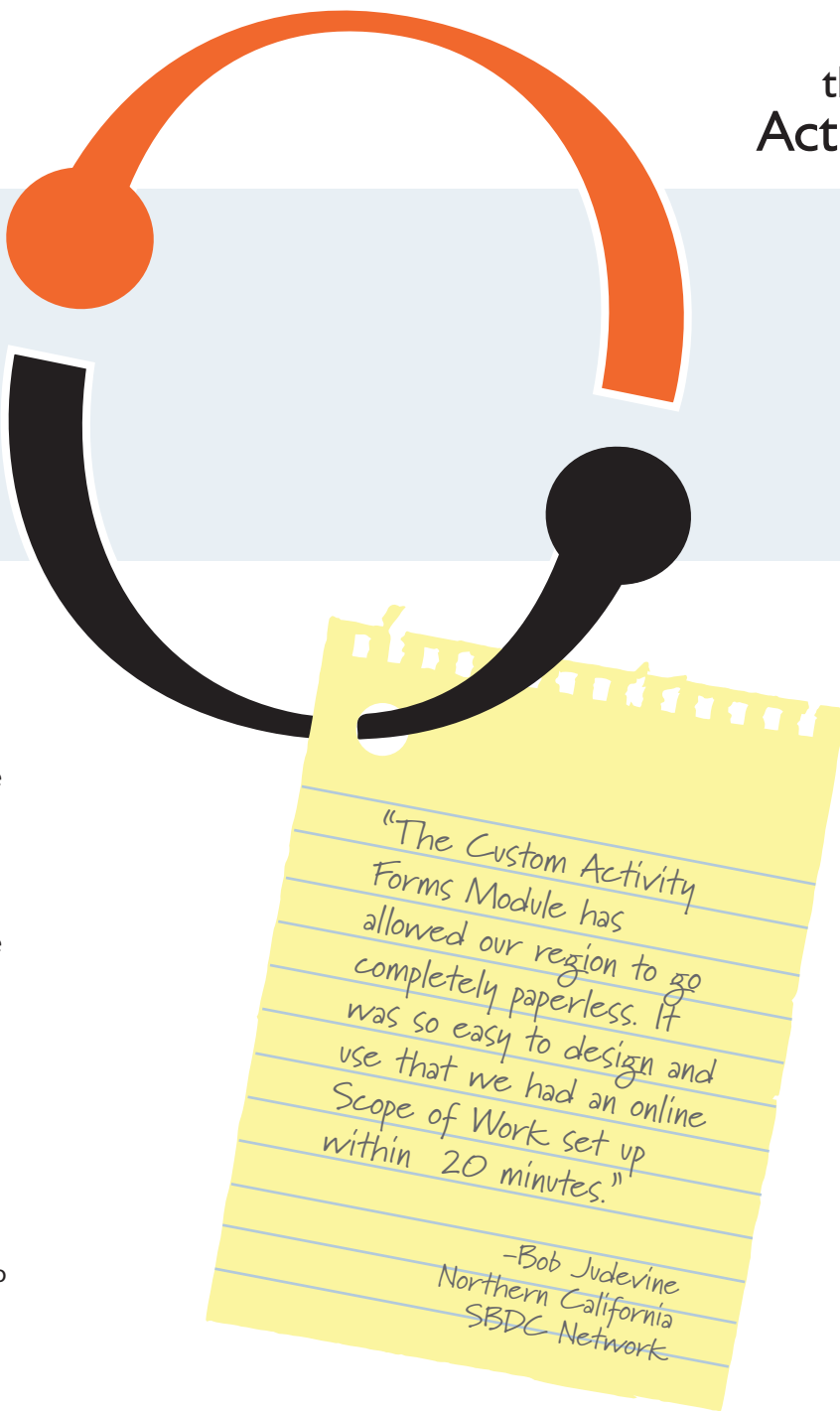
# the Custom Activity Forms Module

## 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, eight standard fields are placed in every new custom form you create. The three that are bolded are required for database integrity and cannot be removed, but the remaining five are optional.

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

Fields can easily be reordered by dragging them into new positions.

The screenshot shows a configuration interface for a custom form titled "SBIR Award". At the top, it says "Configuration / Custom Forms / SBIR Award" and "New". Below this is a list of fields to be dragged and dropped into a form. The fields are: Client [Single-line Text] (0 records), Date [Single-line Text] (0 records), Center [Single-line Text] (0 records), Counselor [Single-line Text] (0 records), Funding Source [Single-line Text] (0 records), Sub-funding Source [Single-line Text] (0 records), Is Reportable? [Single-line Text] (0 records), Notes [Single-line Text] (0 records), Technical Contact [Single-line Text] (0 records), Technical Phone/Email [Single-line Text] (0 records), Agency [Picklist] (0 records), Solicitation Number [Single-line Text] (0 records), Solicitation Title [Single-line Text] (0 records), SBIR Phase [Picklist] (0 records), SBIR Contract Amount [Currency] (0 records), Has SBIR Resulted in Patent? [Yes/No] (0 records), Technology Used [Single-line Text] (0 records), and Proposed Duration [Picklist] (0 records). The first three fields (Client, Date, Center) are bolded. A "Field Properties" dialog box is open over the "Proposed Duration" field. The dialog shows: Name: Proposed Duration, Abbreviated: Duration, Mandatory: , Confidential:  (only visible to users with edit permissions), Type: Picklist, Default Value: One year, and Choices: Less than one year, One year, Two years, More than two years. There are "Cancel" and "Save" buttons at the bottom of the dialog.

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.

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.

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.

# 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**

- eCenter Client Sign-ups
- Clients/Pre-clients
- Contacts
- Inquiries
- Counseling Sessions
- Awards
- Milestones
- Investments
- SBIR Awards**
- Narratives
- Conferences
- eCenter Conference Sign-ups
- Survey Definitions
- Counselors
- Centers

**Add**

- Scorecards**
- EDMIS**
- Useful Links**
- Manage**
- Resources**

Help:

**New SBIR Award**

\*Company: ABC Construction (SFT9549)

\*Date: 1/22/2013

\*Center: Malibu Small Business Center

Counselor: Clark, Rachael M.

Funding Source: (Undefined)

Sub-funding Source: (Undefined)

Reportable?

Notes:

Technical Contact (single-line text): Gerald Higgins

Technical Phone/Email (single-line text): gerald\_higgins@gmail.com

\*Agency: Air Force

Solicitation Number (single-line text): AF007-98102

Solicitation Title (single-line text): Compact Diode Laser-Based Manometer

SBIR Phase: Phase 1

SBIR Contract Amount (currency): 97000.00

Has SBIR Resulted in Patent?  Yes  No  (Undefined)

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

Proposed Duration: One year

# 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 1/25/2013 to 3/25/2013, Reportable Only

Start Date: 1/25/2013 End Date: 3/25/2013

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
3/25/2013	SFT0132	Vector Laser Products	Navy	Phase I	Compact Diode Laser-based Magnetometer
3/5/2013	SFT0179	Ziegler and Sons	NIH	Phase I	Population Research: Contraception and Reproductive Health
3/1/2013	SFT0268	The Briggs Company	Navy	Phase I	Material Degradation Detection of Metal Components
2/4/2013	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.