2008

CyQuest

CyQuest is an essential tool for any business that is currently trying to manage client information, documentation and resources on a limited budget.
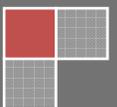
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What is CyQuest

CyQuest is an essential tool for any business trying to manage client information and documentation on a limited budget. The application allows the user to create databases and forms without any knowledge of programming or database management. It also allows the user to manage meeting and telephone notes as well as documentation in a single database complete with version control.

Definitions

Attachment – Any type of electronic file that is to be uploaded into the database.

Cell - The intersection of a row and a column where individual pieces of data reside.

Database - Collection of text and numerical data stored in a list created and managed by an application called a Database Manager or DBM.

Field - A variable used to hold a record.

Rows - A horizontal group of cells on a spreadsheet identified by numbers.

Table - The way a list is presented.

A Quick Overview of a Database

The most commonly used tool for managing critical data is the database. A Database is a collection of text and numerical data stored in a list created and managed by an application called a Data Base Management System or DBMS. The list is presented as a table that can be broken down into columns and rows. A column is the vertical grouping of entities, while the horizontal grouping is known as a row. When one or more columns are used in a table to identify a specific row, then that group of columns is called a key. All the information entered into a database is called a record. This information composes a variable called a field.

Installation of the Application

To install the application, double-click "Setup Application" located on the distribution disk. The "Setup Application" will guide you through the installation process. In most cases, the default installation setting will work fine. If the default installation does not work for your particular computer settings, then the "Setup Application" will allow you to customize the installation settings.

Starting the Application for the First Time

After the application has been installed and before you can start using the application for the first time, it will be necessary to log in to the application as the administrator and create a user account. This is accomplished by first starting the application and logging in using the user name "Admin" and the password "admin" (figure 1).
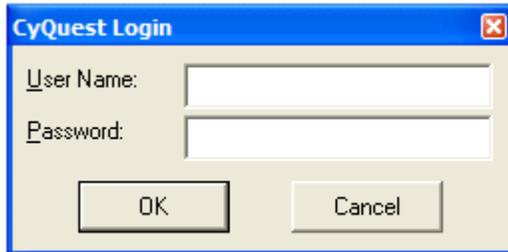

Figure 1 Logging in to the application for the first time

Creating a User Account

Once you are logged in as administrator, a new user account can be created by going to the "File" drop down menu and then selecting "New User" (figure 2). This action launches the new user form. This form is used to capture the user information as well as the user login name and password. Once all the fields have been populated, select "Save" to create the new user account (figure 3). After the user account has been created, the application must be closed and restarted before the user can log in, (figure 4).
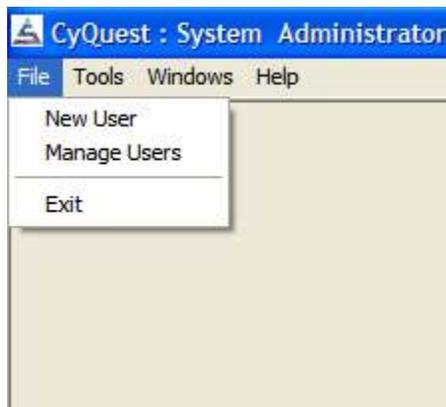

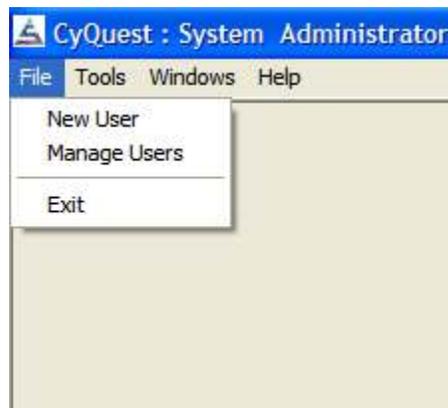Figure 2 Launching the new user form

Figure 3 New user form

Figure 4 Closing the application

Managing Users

User can be managed using the manage user menu option (figure 4). This option allows
an administrator to change user information as well as reset a user's password. When
this option is select, a manage user form is displayed (figure 5). The form is dived into
two main regions. The left hand side of the forms displays the users that can be
changed. The right hand selection of the form displays the attributes that can be edited.

Figure 5 Manage users

Using the Application

CyQuest is a multi-document interface (MDI) application. This means the user can open multiple forms in a single application (also known as a container). When the application is started using a user account, the client explorer is launched by default.

The Client Explorer

The client explorer is used to display an alphabetical listing or the clients currently in the application's database (figure 6 and figure 7). The clients can be sorted for display by either client name (in the case of an individual) of by company. The left side of the window shows how many clients (by last name or company name) are currently stored in the database. The right-hand side of the window is used to display summary information about a group of clients (figure 8 and figure 9). To view/edit detailed information about a client double-click the name of the client shown in the right-hand window (figures 8, figure 9 and 10). See video "Viewing and Editing Client Information.avi".
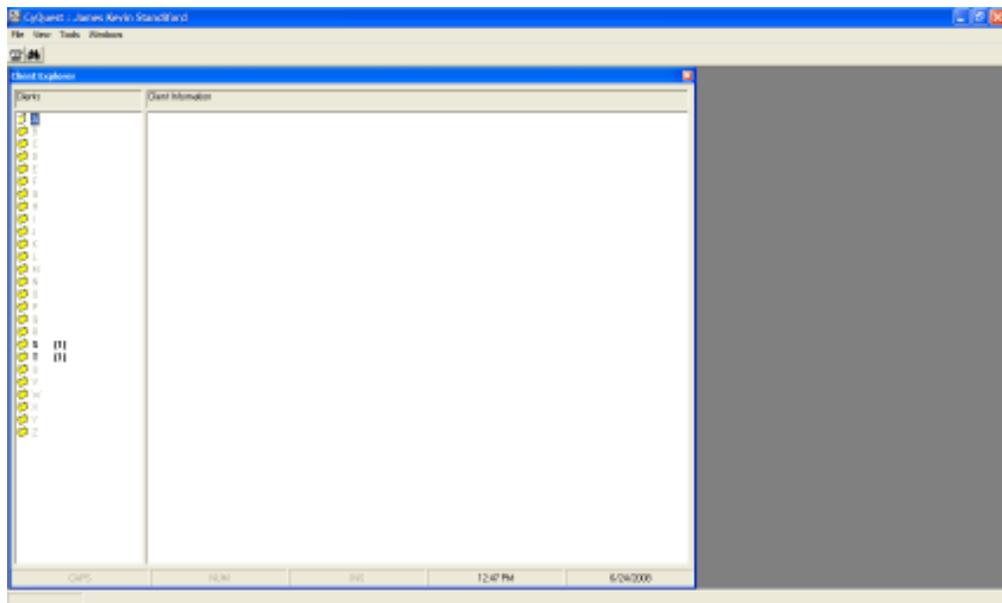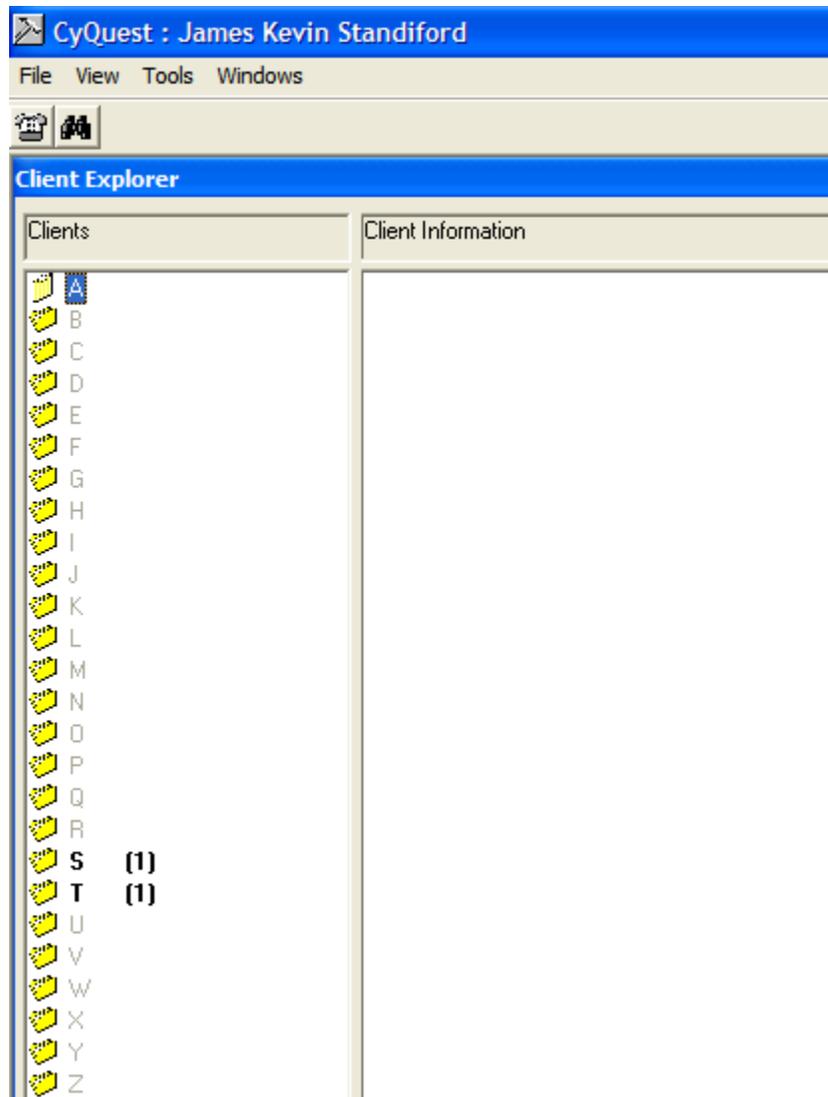

Figure 6 Client explorer
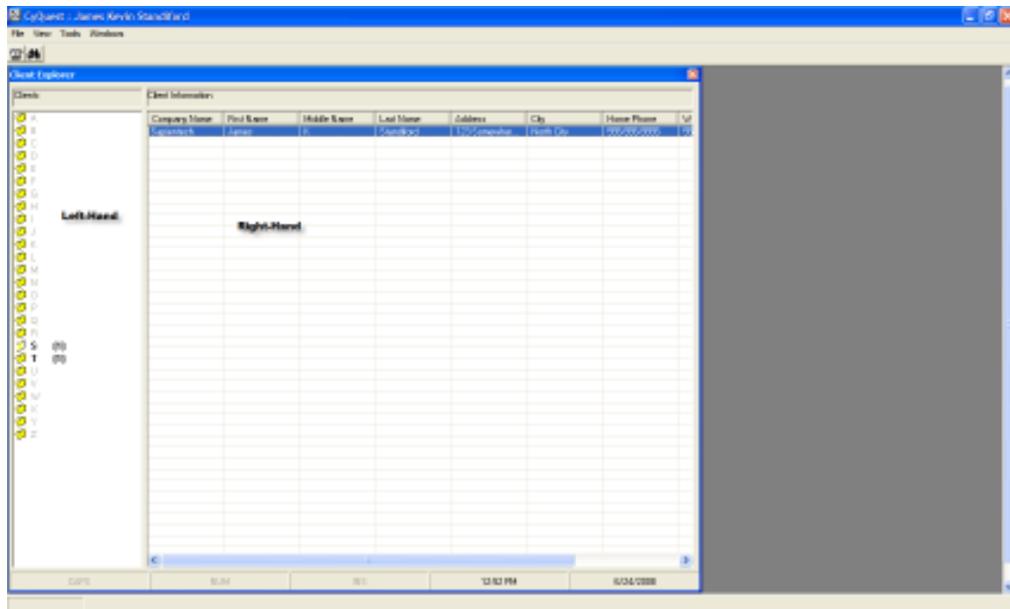
Figure 7 Client explorer enlarged view

Figure 8 Selecting a client
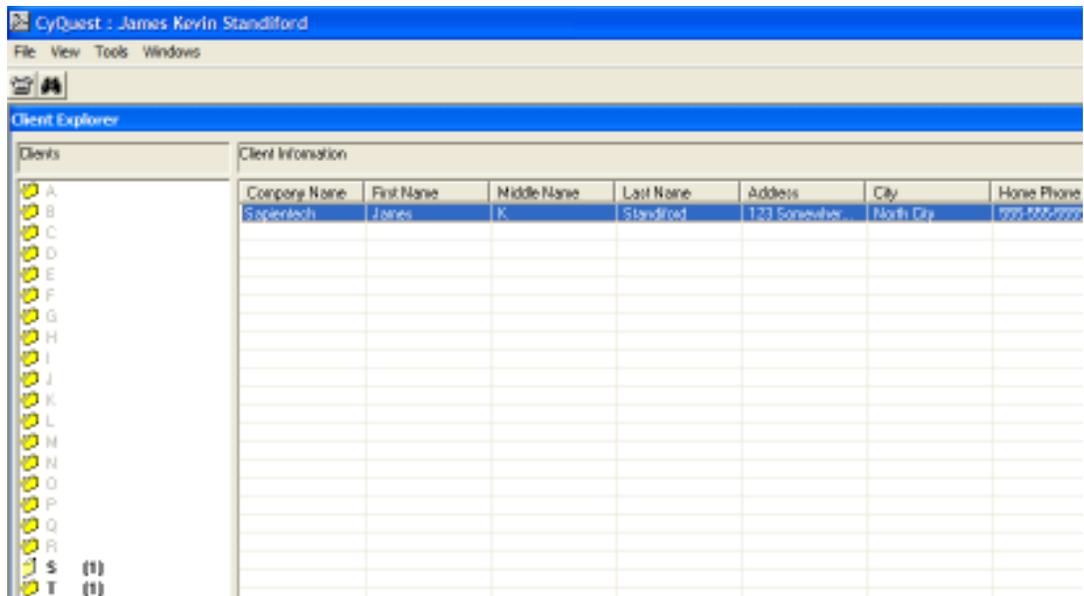
Figure 9 Selecting a client enlarged view

Figure 10 Detailed client information

Editing Client Information

To edit client information double click the client to be edited from the client explorer (figure 9). This action will display the detailed client information (figure 11). By default, the client information is locked. This keeps client information from accidently being changed. To edit the client information, click the "Edit" button at the bottom of the form (figure 11). This action unlocks the client information so that it can be edited. Once all the changes are complete click the "Save" button located at the bottom of the form (figure 12).

Figure 11 Editing client information

Figure 12 Saving client information after it has been edited

Attachments

One of the primary functions of CyQuest is to provide document control by allowing document(s) to be uploaded into the application's database. Once a document has been uploaded, any additional copies of the same document are automatically given the next version number (figure 13).

Figure 13 document control function of CyQuest

Viewing Current Version

As documents are attached to a particular client the list of attachments associated with that client grows (figure 14). To limit the number of attachments display at one time the application has a toggle located at the bottom that when selected, will display only the latest version of the documents loaded for that client (figure 15).
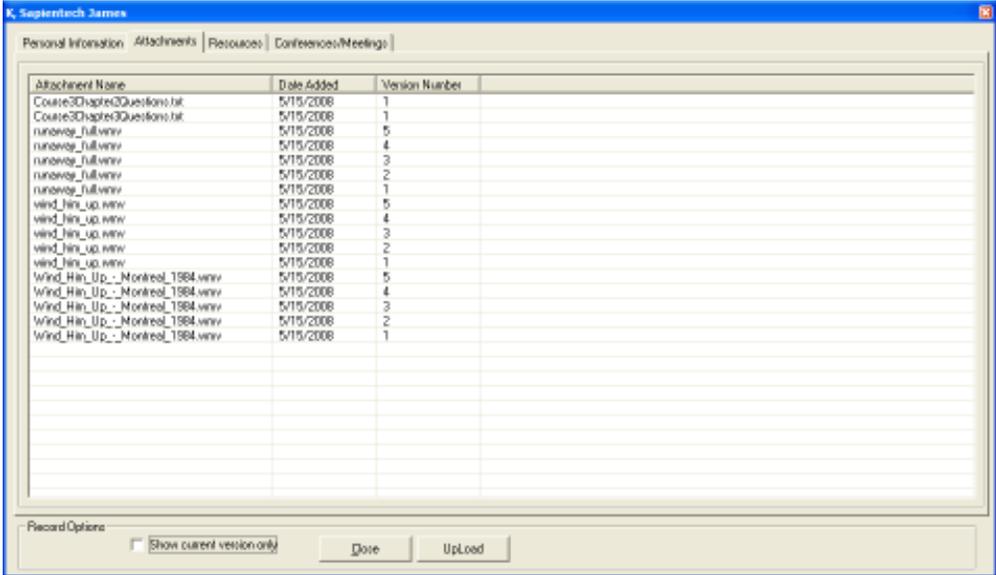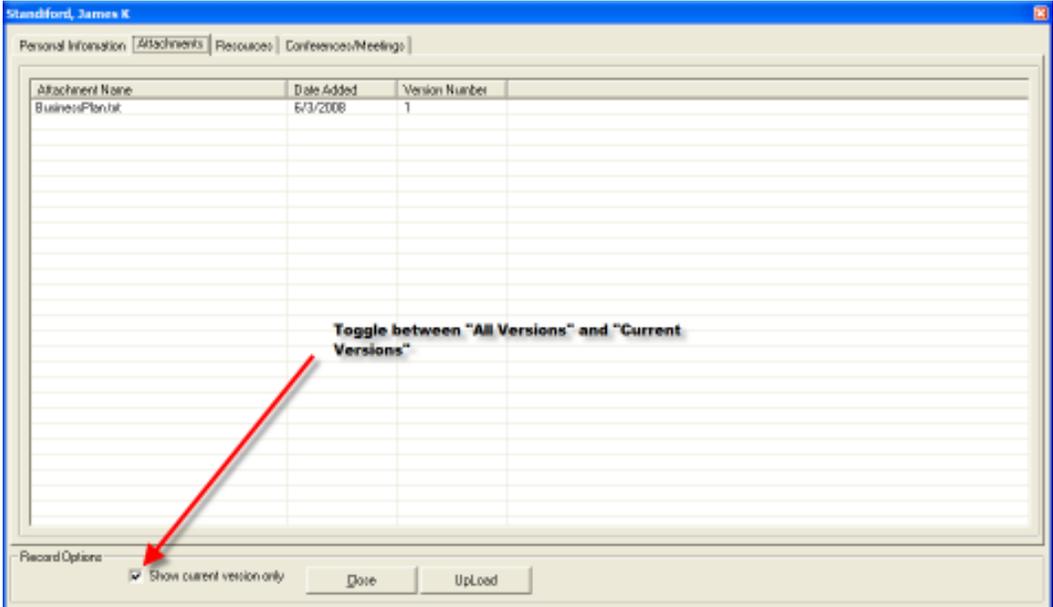

Figure 14 Viewing attachment

Figure 15 Viewing only the current version

Uploading Attachments

Attachment can be uploaded into the system using one of two methods. Either by selecting the "Upload" button located at the bottom of the client detail information form (figure 16) or by drag-and-drop. See video "Uploading Attachments.avi".

Uploading Attachments Using the "Upload" Button

To upload a document into the application using the "Upload" button, select the client in which to associate the document with; then select the attachments tab followed by the upload button (figure 16). Once this option has been selected a select file dialog box is displayed (figure 17). After the file has been selected the document is uploaded into the applications database.
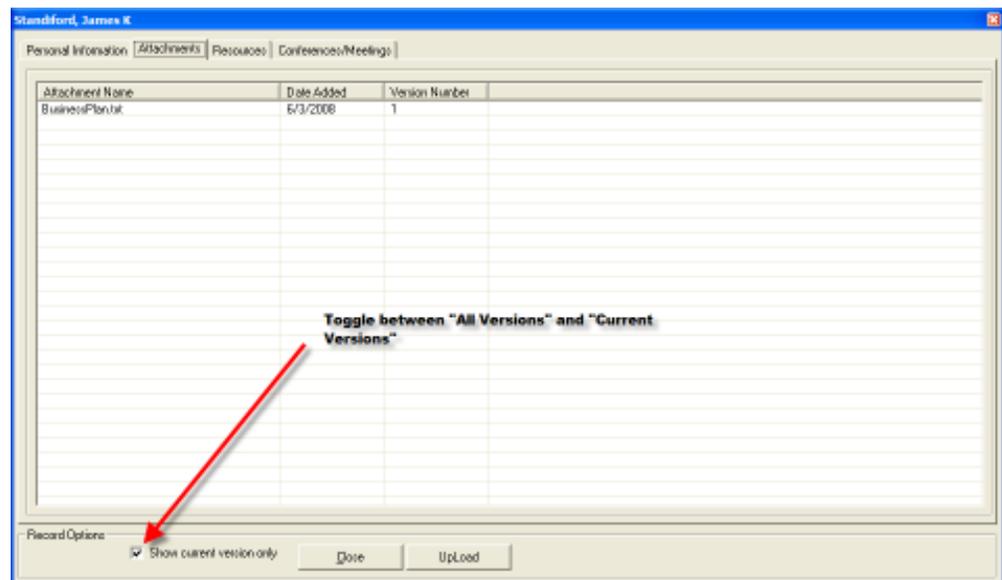

Figure 16 selecting the upload option

Figure 17 File select dialog

Uploading Attachments Using Drag and Drop

To upload a document using drag and drop, select the client to associate the document with. Next select the attachments tab. Finally using windows explorer, navigate to the location in which the document(s) reside and select the file(s) using the left mouse button and drag and drop them into CyQuest (figure 18).

Figure 18 Drag and Drop

Retrieving and Viewing Attachments

Once an attachment has been uploaded into the database it can be retrieved by selecting the document and performing a right mouse click (figure 19). This action displays a popup menu (figure 19). If the "SaveAs" option is selected a dialog box is presented and the user allowed to select the location in which a copy of the attachment is to be saved (figure 20). If the "View" option is selected then the applications automatically downloads a copy of the document to a temporary directory and the file is viewed in its native application. At this point the document can then be edited, saved and reloaded into the system (as a new version).
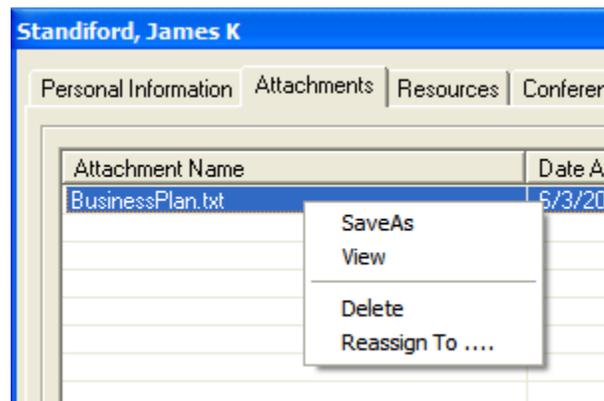
Figure 19 SaveAs and View Menu options

contact management test.txt - Notepad

File Edit Format View Help

Upload Test #2

This is a test of the new application for contact management
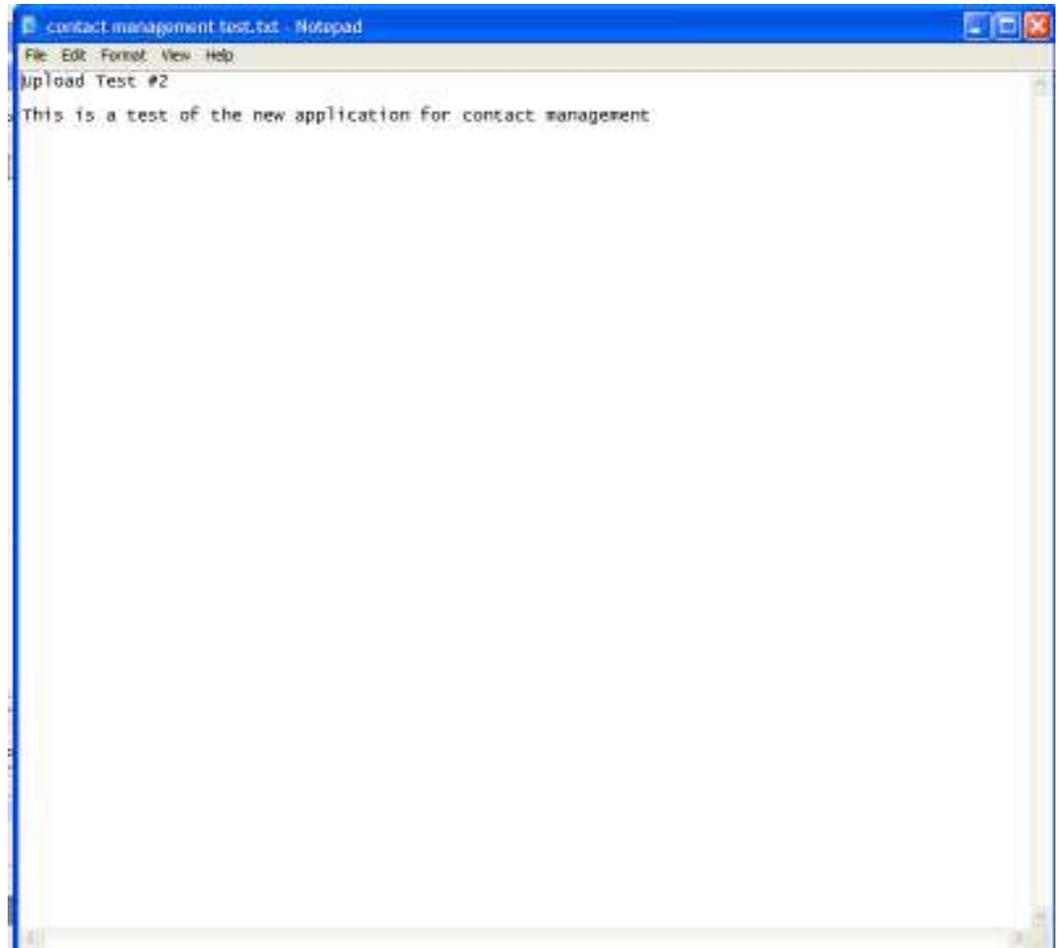
Figure 20 Viewing a files that has been uploading into CyQuest

Meeting and Phone Conference Notes

Another feature of the CyQuest application is its ability to generate and store meeting and telephone notes (figure 21). See video "Adding Phone Notes.avi".

Figure 21 Meeting/Phone notes

Viewing Phone and Meeting Notes

To view a meeting/phone note select the client in which the note is associated with, followed by selecting the "Conferences/Meetings" tab (figure 22). Next double clicks the note to be viewed from the available notes listed (figure 23).

Figure 22 Selecting the Conferences/Meetings tabs

Figure 23 Viewing a Meeting/Phone note

Adding Meeting and Phone Notes

To add a note to a client select the phone icon (figure 24). Once selected this option the application displays the meeting/phone form (figure 25). The start

time for the meeting is automatically populated based on the time in which the meeting note form was opened. Even though the start time for the note is automatically generated it can be altered. Once the meeting has been concluded select the save button located at the bottom of the meeting notes form (figure 26). When selected, the applications presents a dialog box listing all clients currently listed in the database, to associate the notes with (figures 26 and 27).
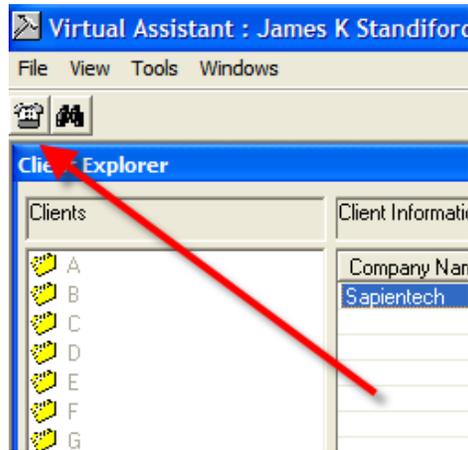
Figure 24 Launching the Meeting/Phone notes option

Figure 25 Meeting/Phone form
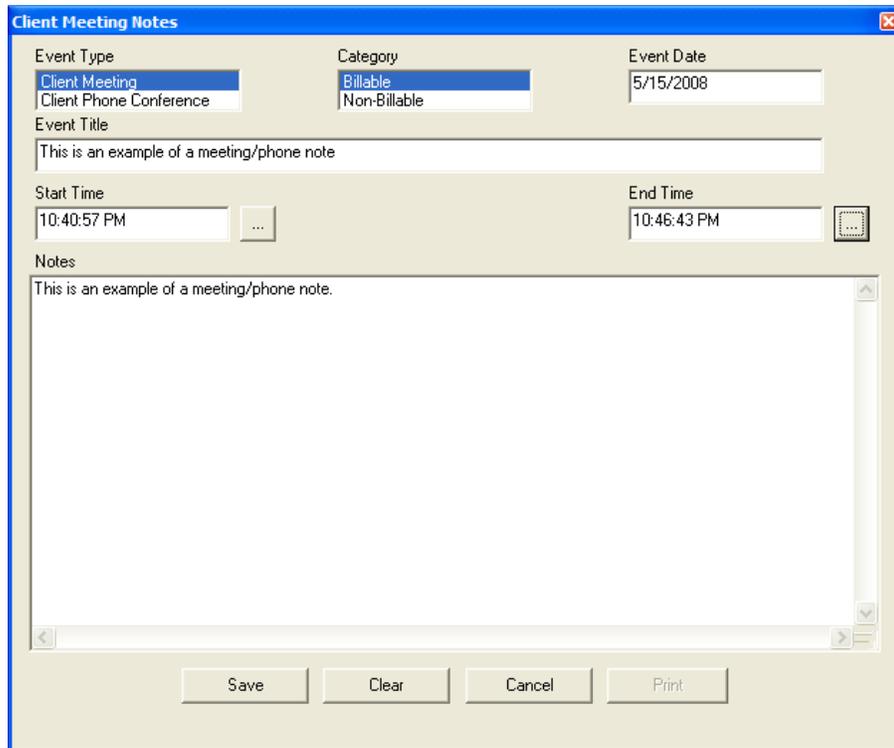
Figure 26 Saving meeting notes
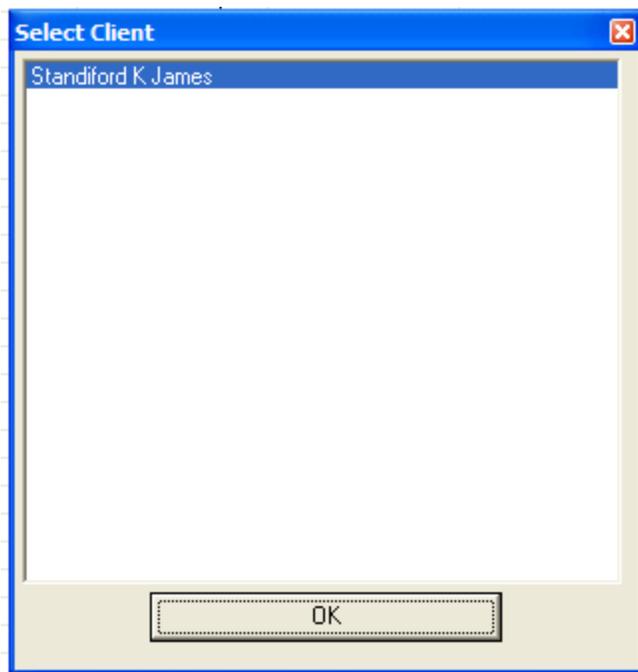
Figure 27 Associating notes to a client

Printing Meeting/Phone Notes

Meeting/Phone notes can be printed by navigating to a client, selecting the Meeting/phone tab, selecting the meeting/phone note from the list and then selecting the print button located on the bottom of the meeting/phone form (figures 28, 29 and 30).

Figure 28 Selecting a meeting/phone note to print/view
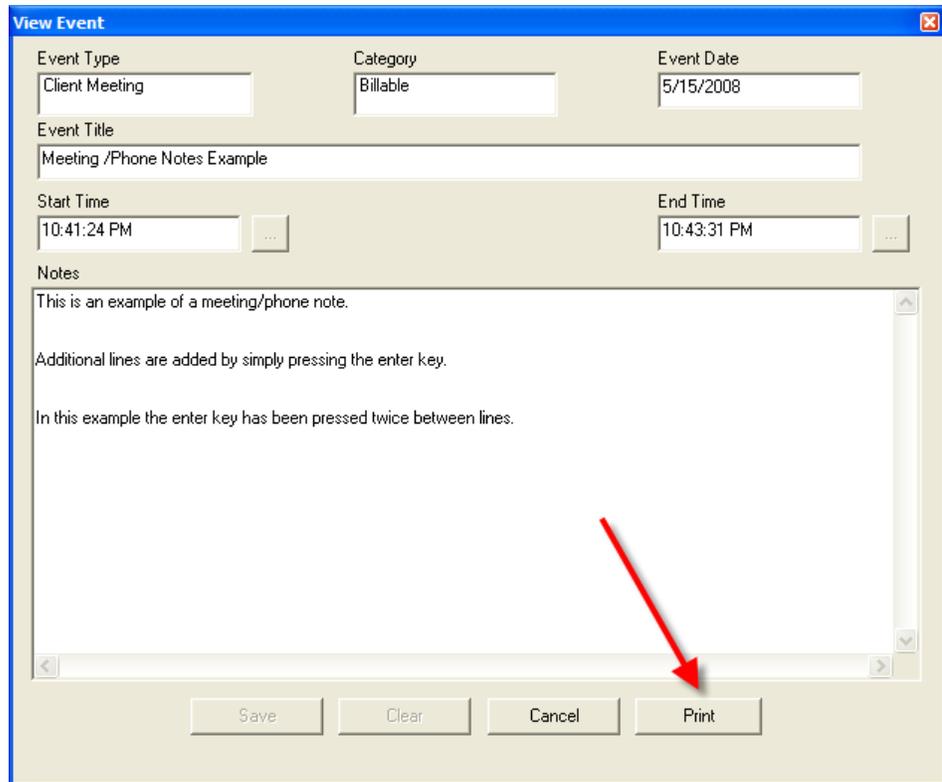
Figure 29 Print a meeting/phone note
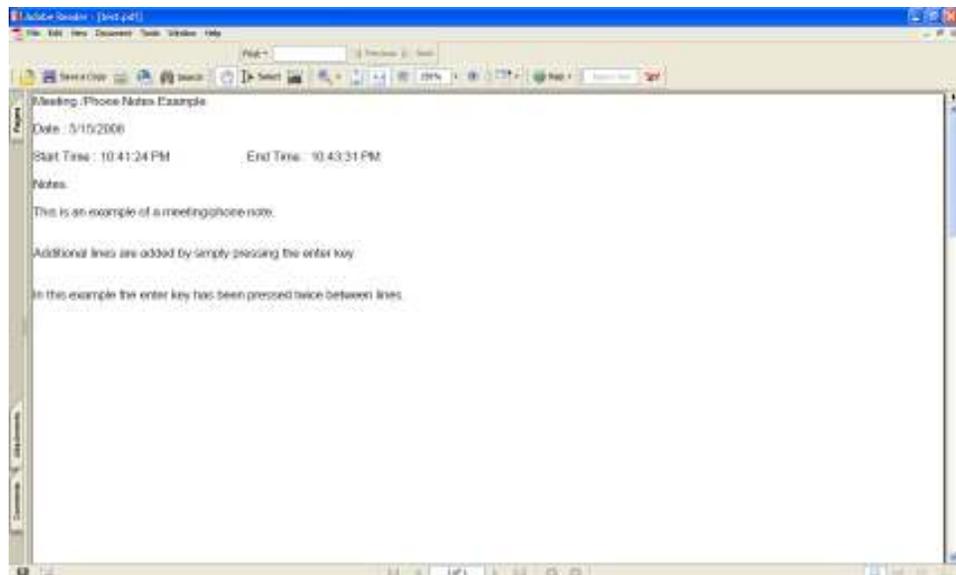
Figure 30 Example of a meeting/phone note printed to a PDF file

Adding Event Types (Classifications) and Category Information

When the application is first installed it has two event types and categories automatically installed. However, additional event types and categories can be

added by selecting the "Tools/Administrative/View Edit Events and Categories" drop down menu option (figures 31, 32 and 33).
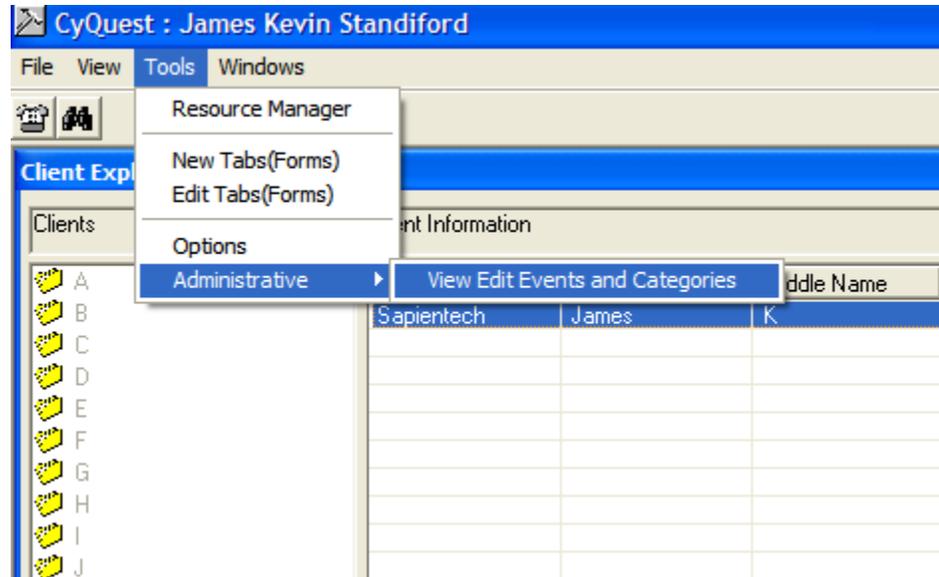
Figure 31 Navigating the drop down menu
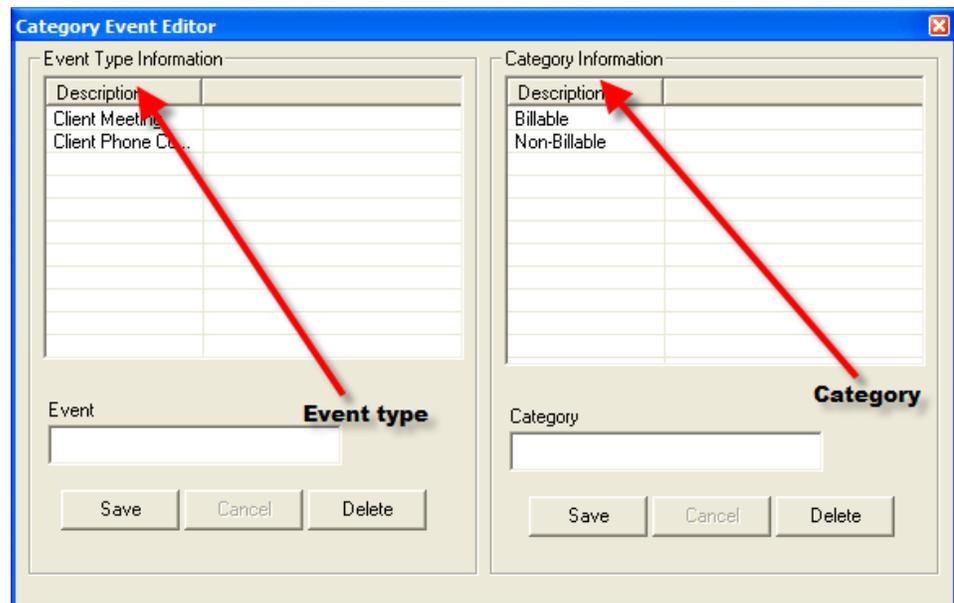
Figure 32 Adding Event Type and Categories
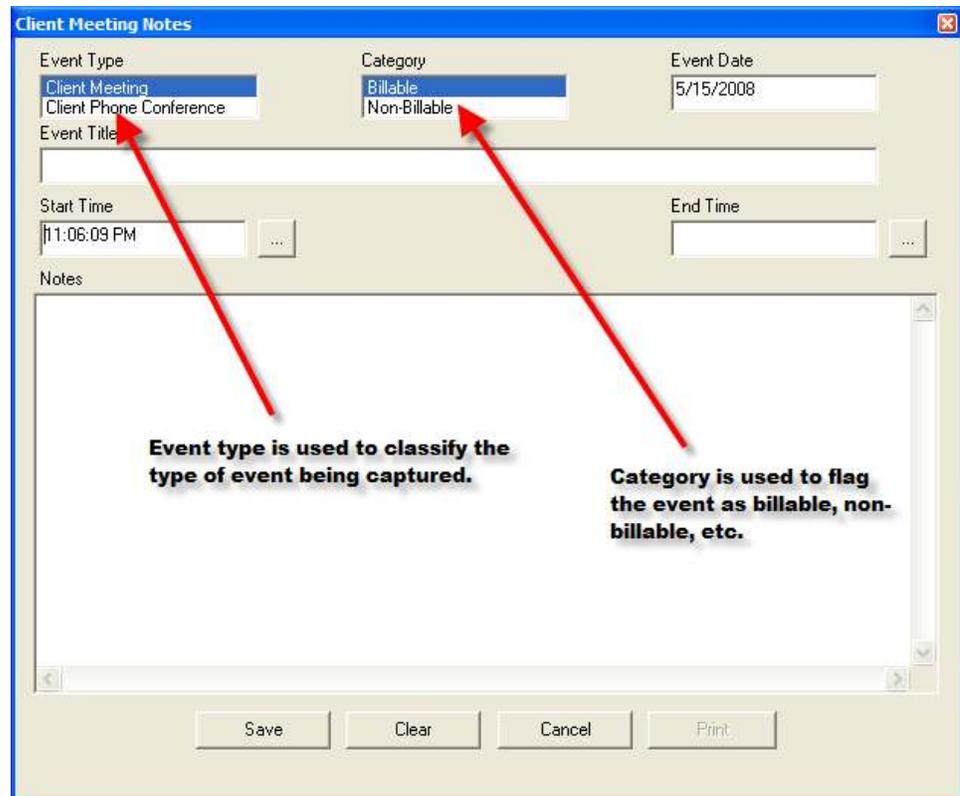
Figure 33 Event Types and Categories

Resource Management

In addition to tracking and storing documents for a particular client, CyQuest has the ability to manage resources. A resource is a document(s) that can be assigned to a single client or a group of clients. It differs from an attachment in that it is loaded into the database only once with all subsequence references to the document(s) are stored as links. Resources are uploaded and managed in the system using the resource manager (figure 34). The resource manager has the ability to create directories that are then used to organize the resources. To create a directory, select the "Add Directory" option (figure 35). Directories can be deleted by selecting the "Remove Directory" option (figure 35). See video "Add a Resource Folder.avi", "Assigning a Resource.avi", "Removing a Resource Folder.avi", "Removing a Resource.avi", "Starting Resource Manager.avi", "Uploading a Resource.avi" and "Viewing a Resource.avi".
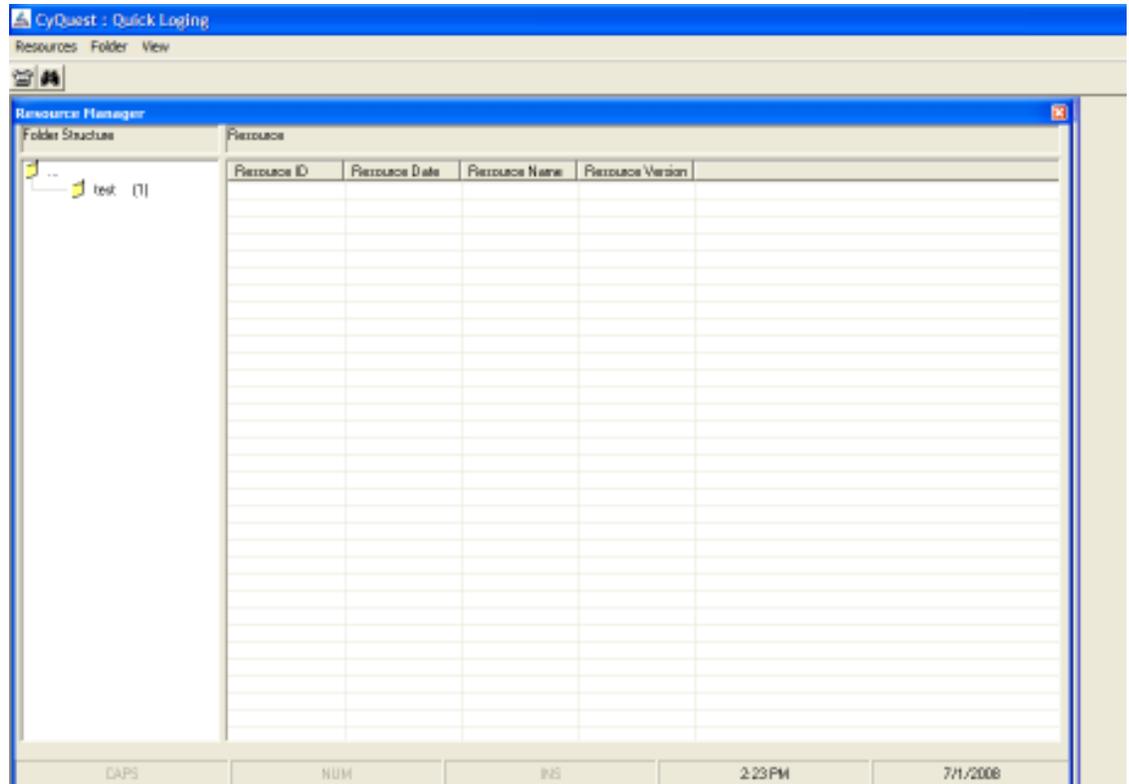
Figure 34 Resource Manager
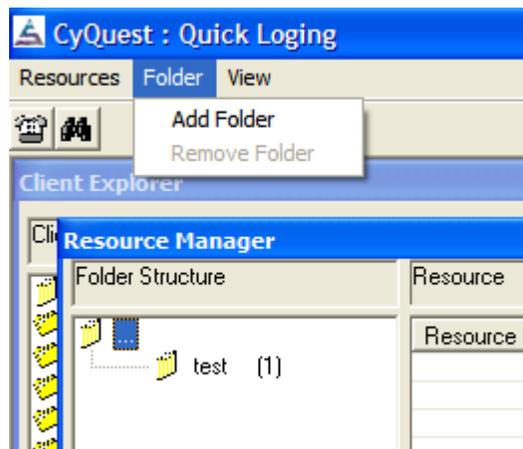
Figure 35 Adding and removing resources.

User Options

CyQuest currently has several options in which available to the user to customize the way in which the application behaves. The quick start option allows the user to bypass the login screen on startup.

Customizing the Database and Forms

One of the major features of CyQuest is its ability to allow the user to generate additional tabs thus capturing additional information for either all clients or a single client. This is done by using the using the database/form editor of the CyQuest application (figure 36).
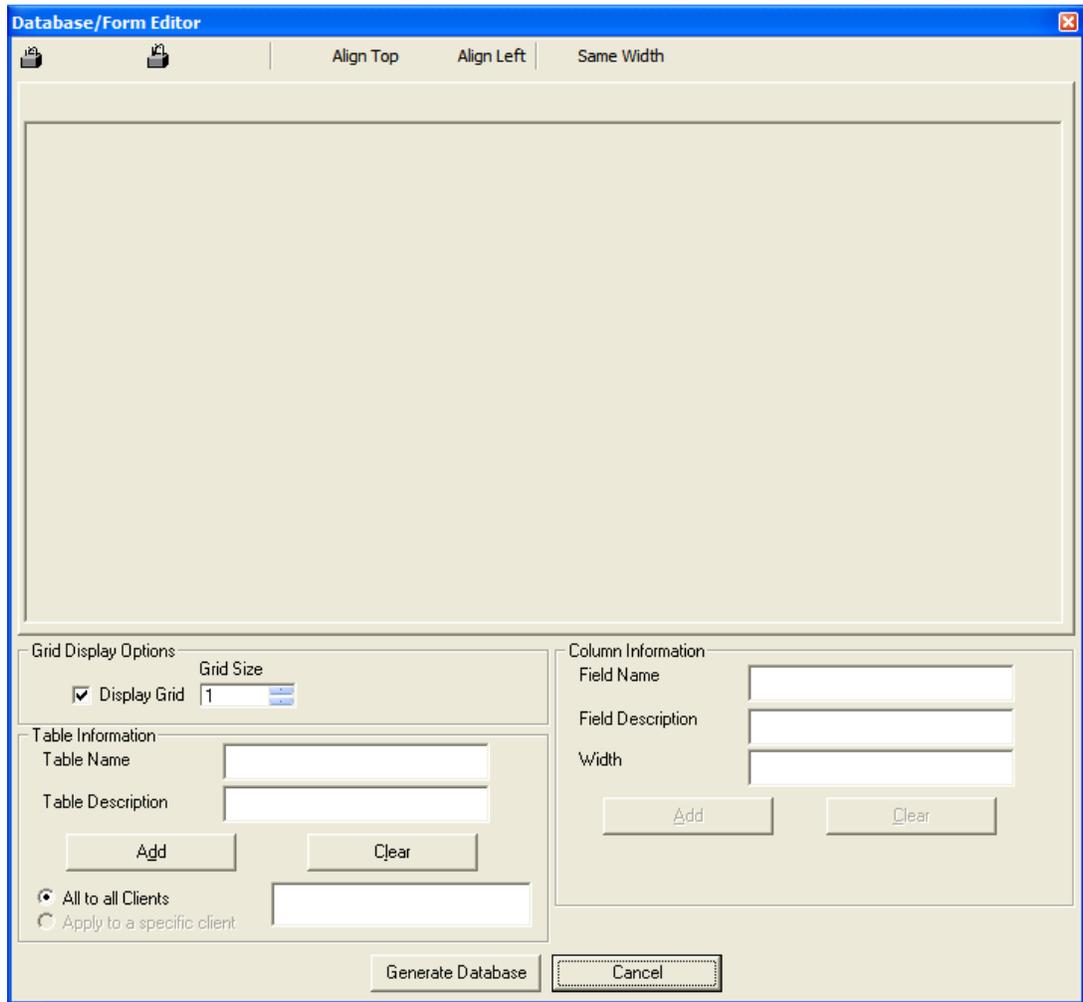
Adding Additional Tabs

Additional information can be saved into the database by adding additional tabs to a client and/or all clients. To add an addition tab to all clients select the all client option before adding the tab (figure 34).   Once the additional tab has been added it will be automatically displayed at the top of the database/form editor (figure 37).
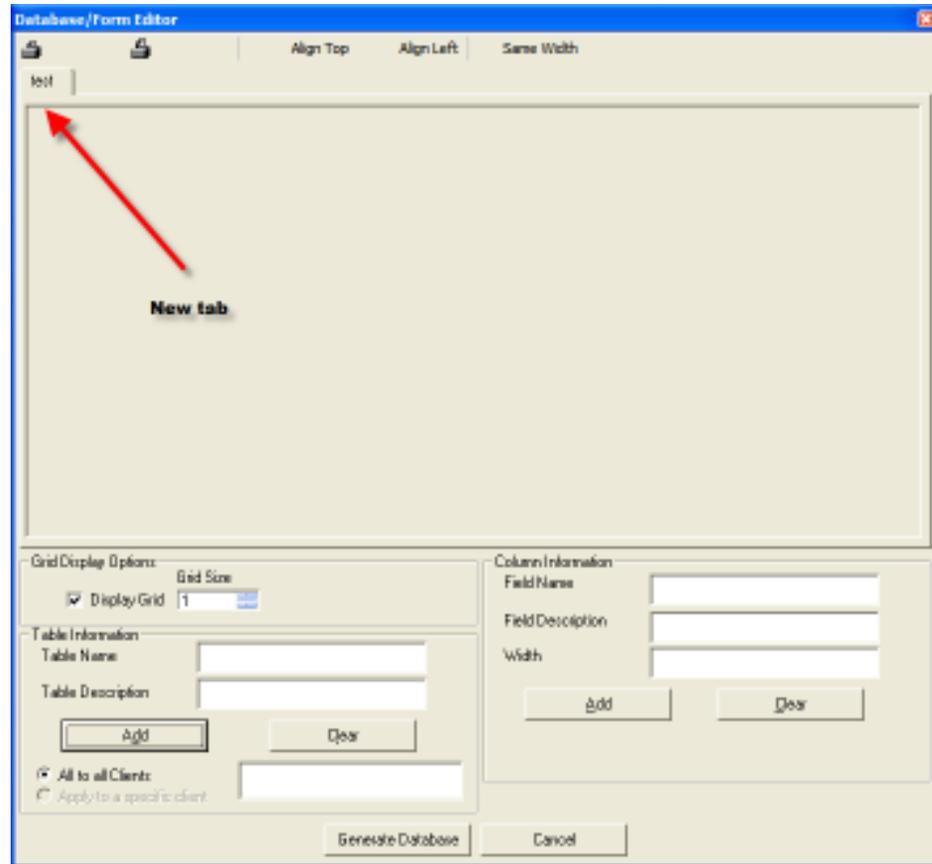
Figure 37 Adding additional tabs

Adding Fields to a Tab

Once a tab has been added, the fields used to capture and store the information
must also be added. This is accomplished by entering the column information
(figure 38).
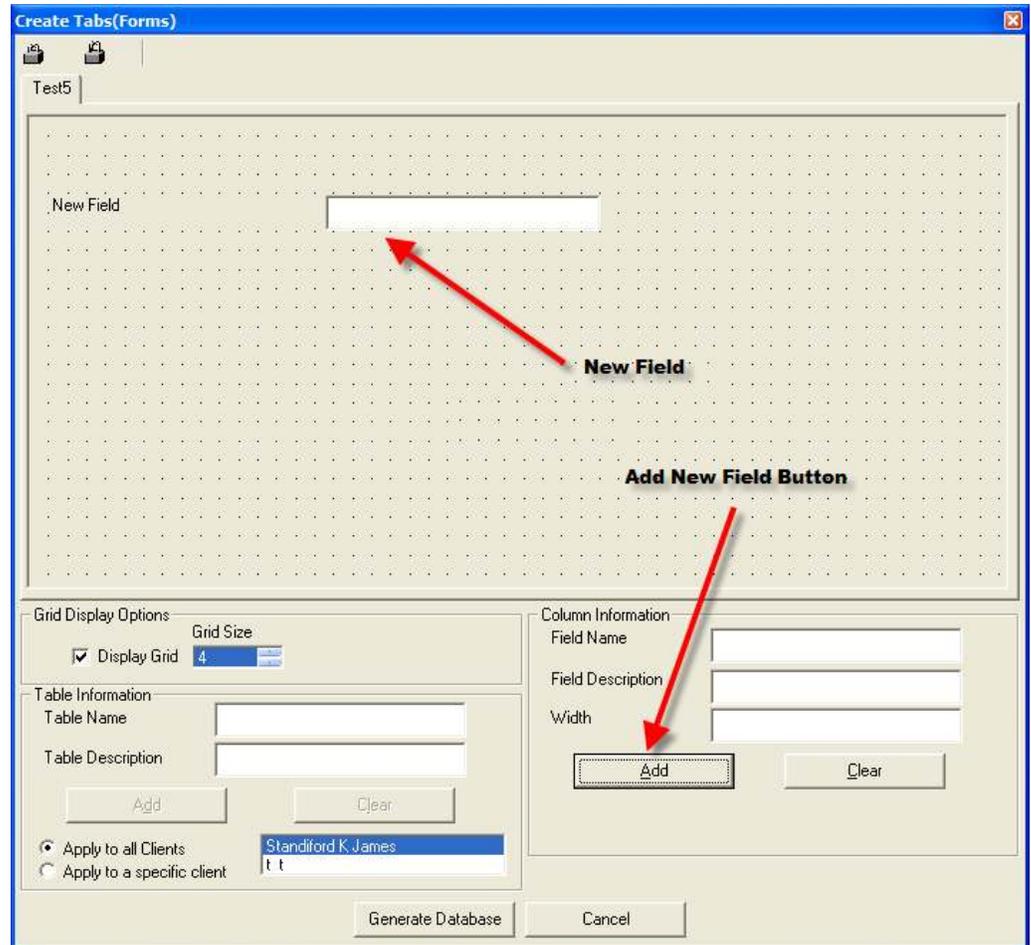
Figure 38 Adding fields to a tab

Generating the Database

Once a tab(s) have been added and the necessary field created, the actual database used to house the information must be generated. This is done by selecting the generate database button (figure 39).

Figure 39 Generate database

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