“Microsoft Access for the Web”

An end-to-end Microsoft No Code solution.

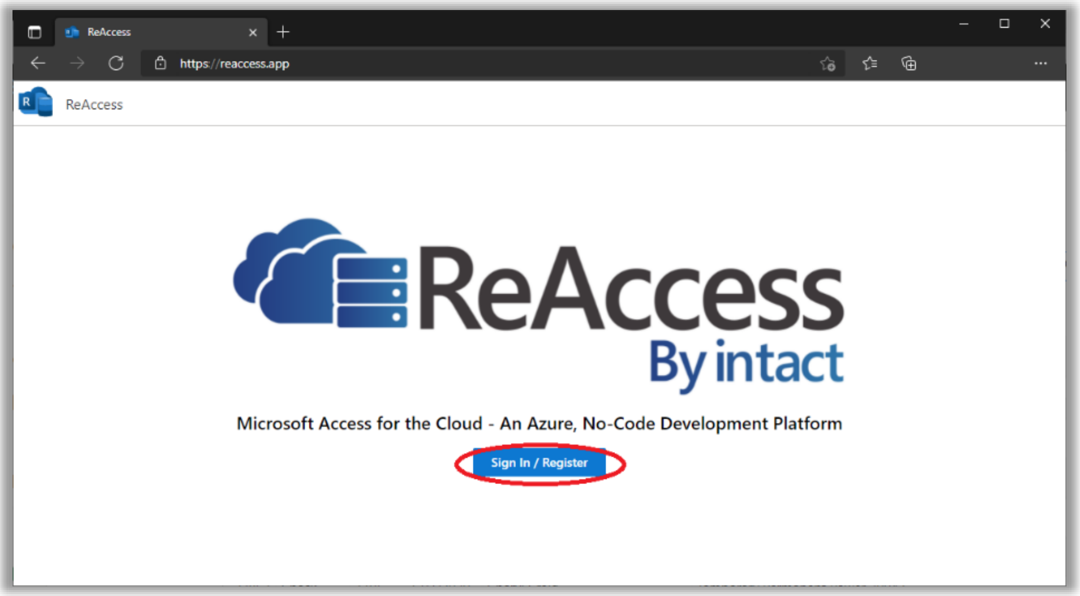
REACCESS WEB EDITION 3.0

Getting Started User Guide

Contents

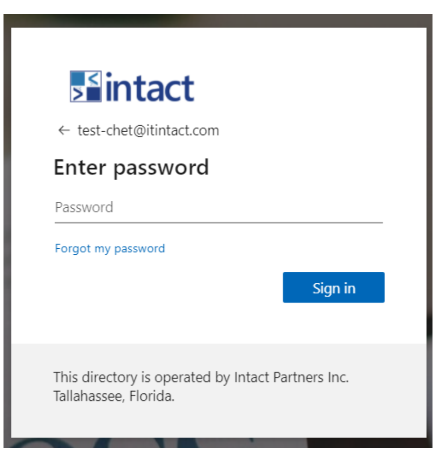
SECTION 1 OVERVIEW

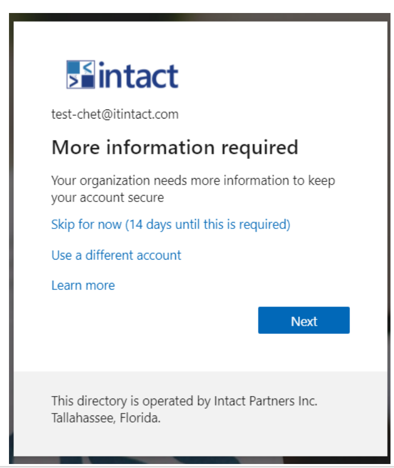
This document provides step-by-step instructions for getting started and using the ReAccess Application and the associated App Builder. ReAccess is a NoCode SaaS solution that powers "citizen developers" to create new cloud-based applications or migrate existing Microsoft Access databases to the cloud using the ReAccess Application solution.

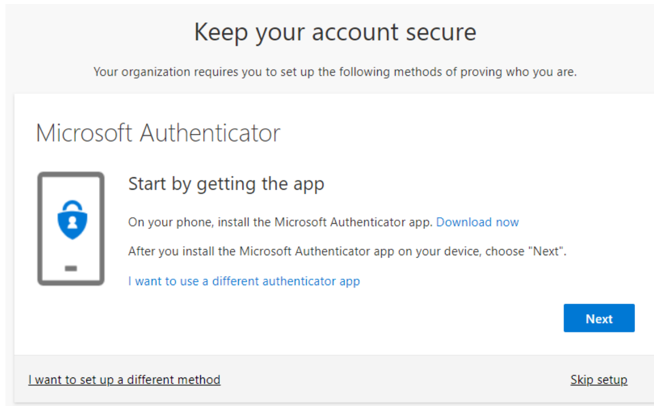


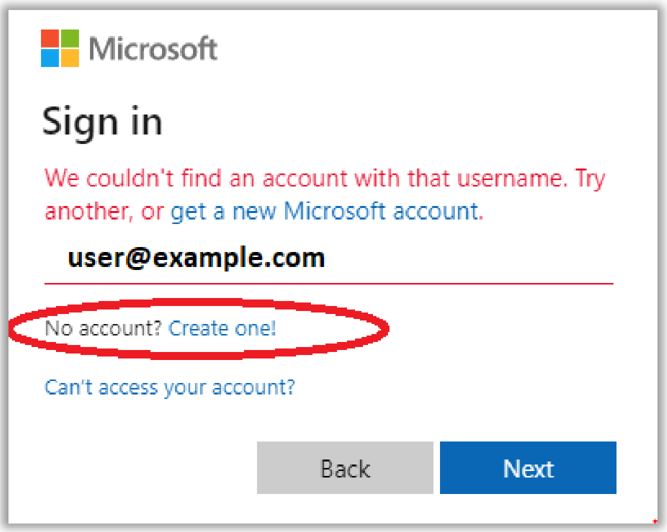
To access the application, open any browser and enter the following URL into the address bar: https://www.reaccess.app/.

Select the 'Sign In/Register' button and enter your email address and password. If you receive an error message as shown below, you will need to register your email in Microsoft's Azure Active Directory by selecting the 'Create one!' link.









1.1 About Intact

Intact is a Gold Microsoft Partner and cloud solution provider, focused on government, healthcare, and education. Intact delivers global-scale, secure solutions with automated No Code Azure cloud services.

SECTION 2 GETTING STARTED

2.1 REQUIREMENTS GATHERING

Requirements gathering is the first step in creating your ReAccess application. Users can either enter their required information directly into the App Builder, or they can begin by conducting a Live Application Design/Development (LAD/D™) session.

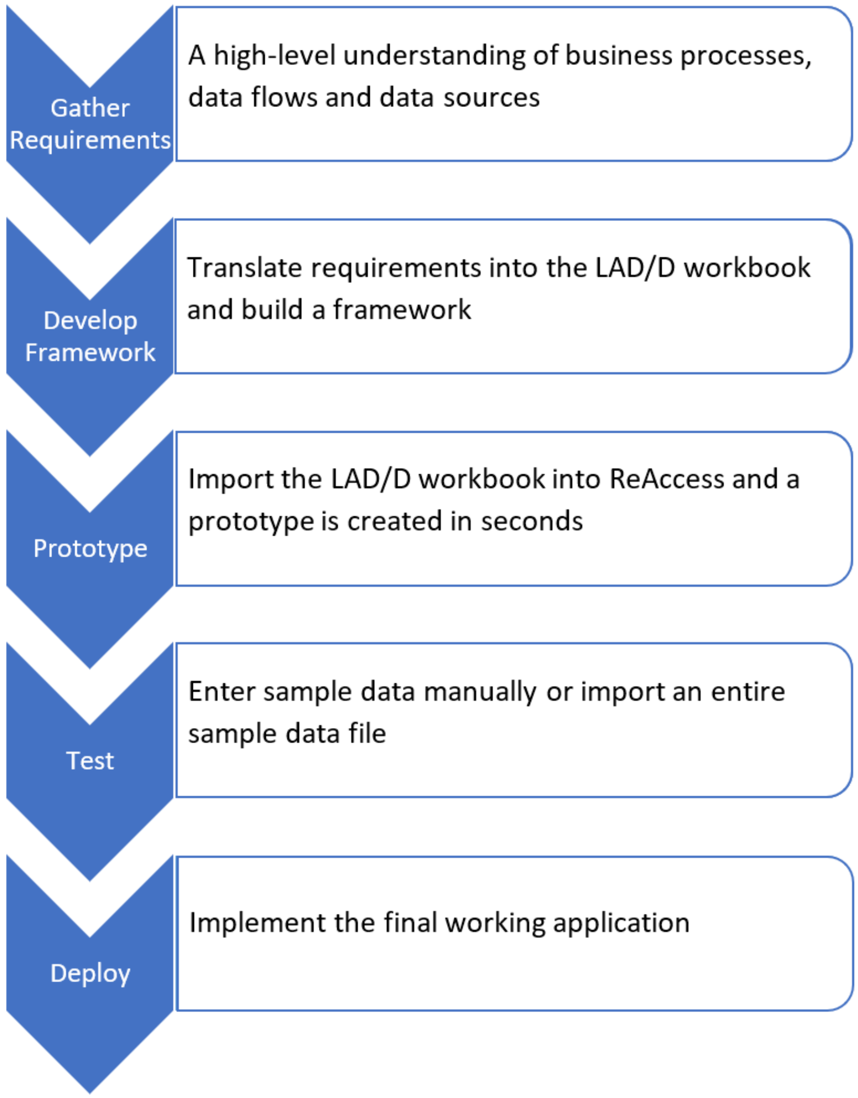


Figure 1 – LAD/D Overview

2.2 Live Application Design/Development (LAD/D™)

Intact's LAD/D™ methodology is a discovery session used to gather the necessary information from the Subject Matter Experts involved in the session. First, the LAD/D™ Canvas shown in **Figure 2** is used as a guide to gain a high-level understanding of a business's infrastructure. Next, the details captured in the canvas are translated into a Requirements Manifest which captures a complete taxonomy of the requirement details.

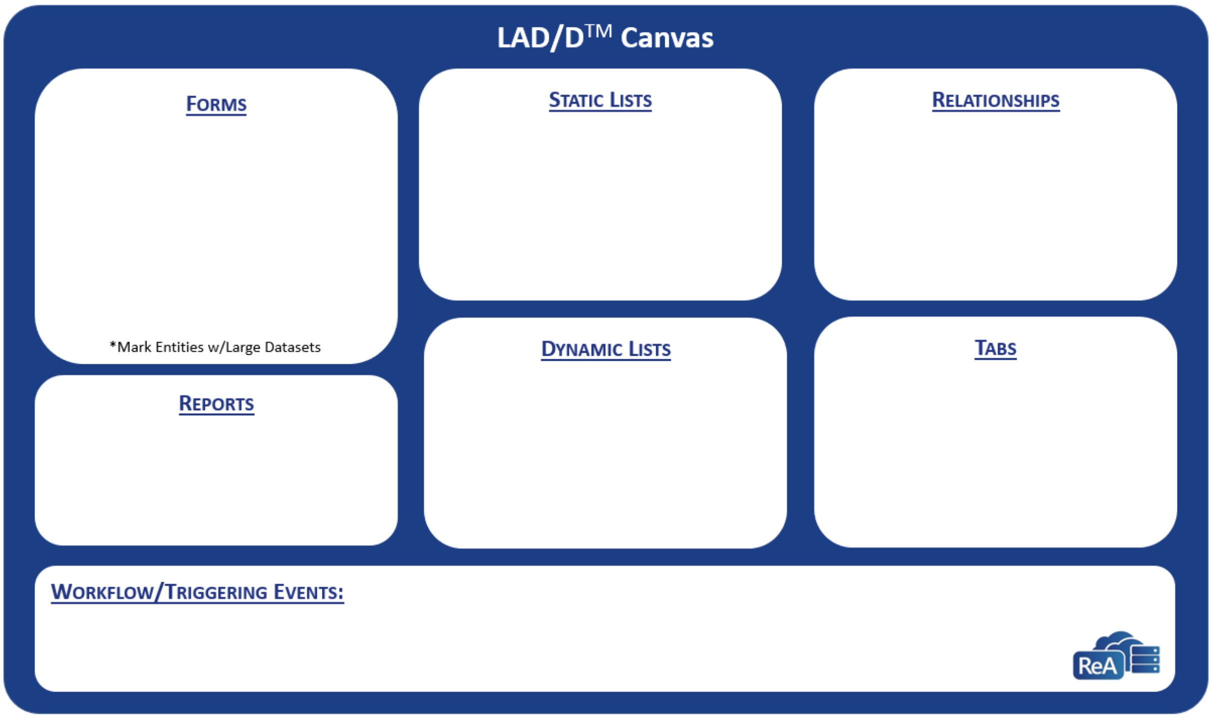


Figure 2 – LAD/D™ Canvas

2.2.1 *Forms*

Forms represent the various input screens for the data stored in the application database. Each form represents a different table in the cloud database. The first step in a LAD/D session is to determine the forms needed for a solution. Data fields are then created for each form.

2.2.2 *Relationships*

It is important to identify how different types of data relate to each other. The 'Relationships' section is a place to list all such connections. These relationships are built with and based upon Drop Down Lists.

2.2.3 *Lists*

Lists are a group of data fields that exist in a graphical drop-down menu. Lists can be static or dynamic.

2.2.4 Tabs

Tabs are sections of a form. There can be sub-headings underneath tabs. These are determined by how information needs to be grouped.

2.2.5 Reports

A list of reports/printable documents the user will need in order to analyze or review the data stored in the application.

2.2.6 Workflow / Triggering Events

A series of steps (automated or manual) that define a business process or triggering event is an opportunity for process automation when a condition is met or set of criteria occur.

2.3 Prefab Manifest

Once the requirements have been outlined on the LAD/D canvas, it is time to translate those requirements by adding more context. All of these details will reside in the Prefab Manifest which is the framework for developing the new application. Note that there are five tabs (see Figure-3 below) representing the main components of the application. These components will be discussed in detail in the next sections.

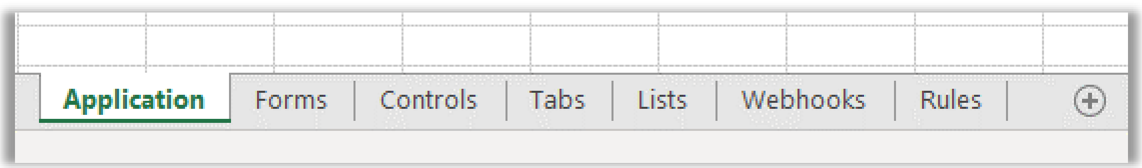
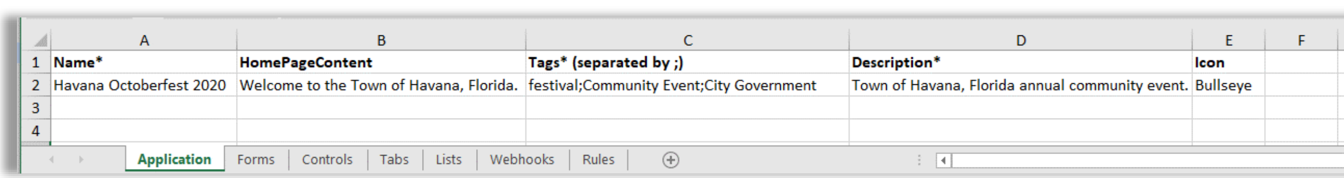


Figure 3 – Tabs in the Prefab Manifest

2.3.1 Application Tab

The primary details about the application. (***NOTE***: *there should only be one row of data under the column headers.*)



	A	B	C	D	E	F
1	**Name***	**HomePageContent**	**Tags* (separated by ;)**	**Description***	**Icon**	
2	Havana Octoberfest 2020	Welcome to the Town of Havana, Florida.	festival;Community Event;City Government	Town of Havana, Florida annual community event.	Bullseye	
3						
4						

Application | Forms | Controls | Tabs | Lists | Webhooks | Rules

Figure 4 – Application Tab

2.3.2 FORMS TAB

Using the LAD/D Canvas, list each form (one per row) and complete the details for each column as it relates to that form.

	A	B	C	D	E	F	G	H	I
1	Name*	Scope*	Tags* (separated by ;)	Description*	Import Data?	Icon*	Header	Footer	Integration Code
2	Vendor	Public	supplier;seller;wholeseller	Vendors at the city event	TRUE	Shop	Event Vendor	copyright 2019 Intact Partners	
3	Kiosk+Booth	Public	October	Octoberfest Kiosk+Booth Form		Flag	Required field *		
4	Volunteer	Public	Volunteer	Octoberfest Volunteer Form	TRUE	People			
5	Event	Public	October	Octoberfest Event Form		Bullseye			
6	Sponsor	Public	October	Sponsor for Octoberfest.		Contact			
7	Booth Fees	Public	Fee schedule	Fee schedule for different sized booths		Bank	Fee schedule		
8									

Application | Forms | Controls | Tabs | Lists | Webhooks | Rules

Figure 5 – Forms Tab

2.3.3 CONTROLS TAB

The Controls [Fields] Tab serves as the master list of every form field in the new application. Every row contains the specs for a single form field, including field name, location, visibility, and format.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Form	Name*	Scope*	Tags* (separated by ;)	Description*	Control Type	Field Type	Data Source Name	Unique	Editable	Tooltip	Entity Tab*	Sub Header	Row*	Column*	Search Visible
5	Vendors	Address 2	Public	Vendors Address 2	Vendors Address 2 Field	Text	TextBox		No	Yes		Profile	Mailing Address	4	1	No
6	Vendors	City	Public	Vendors City	Vendors City Field	Text	TextBox		No	Yes		Profile	Mailing Address	5	1	No
7	Vendors	State	Public	Vendors State	Vendors State Field	Text	TextBox		No	Yes		Profile	Mailing Address	5	2	Yes
8	Vendors	Zip	Public	Vendors Zip	Vendors Zip Field	Text	TextBox		No	Yes		Profile	Mailing Address	5	3	No
9	Vendors	Reference ID	Public	Reference ID	Vendors Reference ID Field	AutoGenerated	GUID		Yes	No		Invoices		1	1	Yes
10	Vendors	Copy of Invoice	Public	Copy of Invoice	Vendors Copy of Invoice Field	Text	UploadSingle		No	No		Invoices		1	2	No
11	Vendors	Outstanding	Public	Outstanding Invoice	Vendors Outstanding Field	Boolean	ToggleSwitch		No	Yes		Invoices		2	1	Yes
12	Vendors	Date Reconciled	Public	Invoice Reconciled Date	Vendors Date Reconciled Fielc	Text	Date		No	Yes	Date for	Invoices		2	2	Yes
13	Kiosk/Booth	Name	Public	Booth Name	Name of the Companuy in the	Text	TextBox		Yes	No		Description		1	3	No
14	Kiosk/Booth	Type	Public	Type	Either a kiosk or a booth	List	Dropdown	Booth Type	No	Yes		Description		2	2	No
15	Kiosk/Booth	Size	Public	Product Department	Size of the kiosk or booth	List	Dropdown	Booth Size	Yes	No	The dep	Description		3	1	Yes
16	Volunteer	First Name	Public	Volunteer First Name	Volunteer First Name Field	Text	TextBox		No	No		Profile		1	1	Yes
17	Volunteer	Last Name	Public	Volunteer Last Name	Volunteer Last Name Field	Text	TextBox		No	No		Profile		1	2	Yes
18	Volunteer	Cell	Public	Volunteer Cell	Volunteer Cell Field	Text	TextBox		Yes	Yes		Profile		3	1	No
19	Volunteer	Email	Public	Volunteer Email	Volunteer Email Field	Text	EmailAddress		Yes	Yes		Profile		3	2	No

Application | Forms | Controls | Tabs | Lists

Figure 6 – Controls Tab

2.3.4 Tabs Tab

Tabs are used to group similar information (or form fields) within each form. (*Note*: Every form is required to have at least one tab).

Form	Name*	SortOrder*
Vendor	Profile	1
Vendor	Staff	2
Kiosk+Booth	Details	1
Volunteer	Profile	1
Event	Details	1
Sponsor	Profile	1
Booth Fees	General Info	1

Application | Forms | Controls | Tabs

Figure 7 – Tabs Tab.

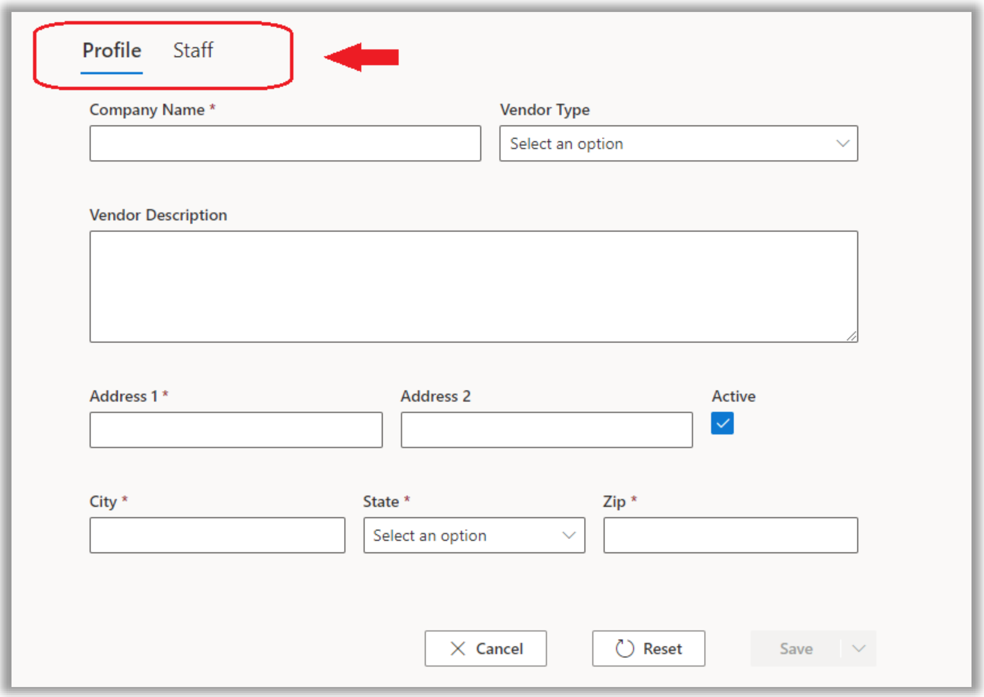


Figure 8 – Tabs displayed in ReAccess

2.3.5 Lists Tab

A List is classified as either 'Static' or 'Dynamic':

Static Lists contain a fixed number of items that are known in advance. An example would be a list of shirt sizes - Small, Medium, Large, X-Large.

Dynamic Lists represents a field on a form. As records are created, the total number of list items will increase. An example would be anytime a record is saved in a customer table, the value entered in the field 'Customer Name' will be appended to a list called Customer Lists.

Form	Name*	Type*	Data (items separated by ;). Form Lists: Field Names must be enclosed with {{ }}, for example {{First Name}}
Vendor	Vendor	Form	{{Company Name}}
Sponsor	Sponsor	Form	{{Name of Sponsor}}
Booth Fee	Fees	Form	{{Price}}
	Kiosk Type	Custom	Retail;Non-Profit;Test
	Size	Custom	Small;Medium;Large
	Hour Block	Custom	AM;PM;All Day;Half day
	Event Type	Custom	Demonstration;Interactive
	Vendor Type	Custom	Non-Profit;Food/Beverage;Arts & Crafts;Political;Retail;Service;Government;Boutique

Application | Forms | Controls | Tabs | Lists | Webhooks | Rules

Figure 9 – Lists Tab

2.3.6 Webhooks Tab

Name*	Tags* (separated by ;)	Description*	URL*	Await Return	Form-Event
New Event	New Event Created	New Event Email Alert	https://pro	FALSE	Event-Insert

Application | Forms | Controls | Tabs | Lists | Webhooks | Rules

2.3.7 Rules Tab

Name*	Tags*	Description*	Expression*	Rule Type*	Error Message*
IsUSPhoneNumber	Phone	formatting for US Phone Number	^\(?([0-9]{3})\)?[-.]?([0-9]{3})[-.]?([0-9]{4})$	ValidationOnly	Invalid US Phone Number
IsEmailAddress	email	valid email address with @	^[^@\r\n\s]+[^.@]@[^.@][^@\r\n\s]+\.(\w){2,}$	ValidationOnly	Invalid Email Address
IsNumeric	Number	numeric values	^[\d]{1,}$	ValidationOnly	Must be a numeric value

Application | Forms | Controls | Tabs | Lists | Webhooks | Rules

SECTION 3 APP BUILDER

ReAccess applications can be created using two different methods. The first method is importing a Prefab Manifest. The components required to use this this method were covered in the previous section. The second method is using the App Builder's graphical interface to build out the same components captured in a Prefab Manifest. This method will be covered later in this section.

3.1 IMPORTING THE PREFAB MANIFEST

Upon completion, the Prefab Manifest will need to be imported into the ReAccess App Builder. Start by logging into ReAccess. Next, select the new application from the dropdown menu and click the Load button.

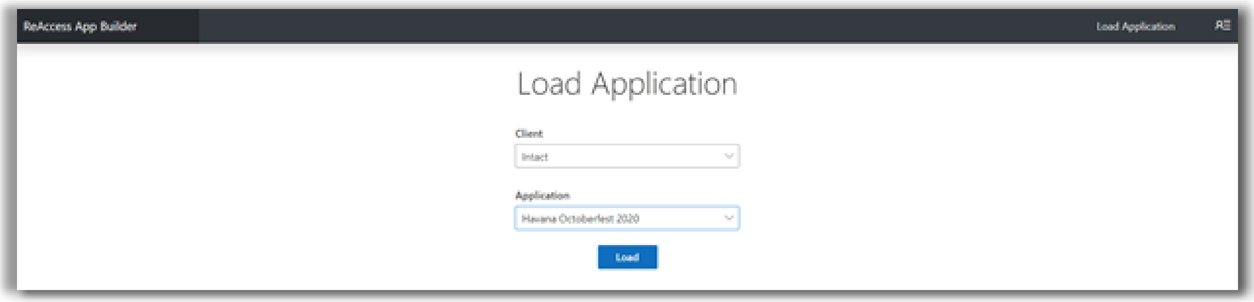


Figure 10 – App Builder Homepage

Once the application has loaded, select the Import Application menu item. From here, drag and drop or use the file browser option to import the Prefab Manifest created in the steps above.

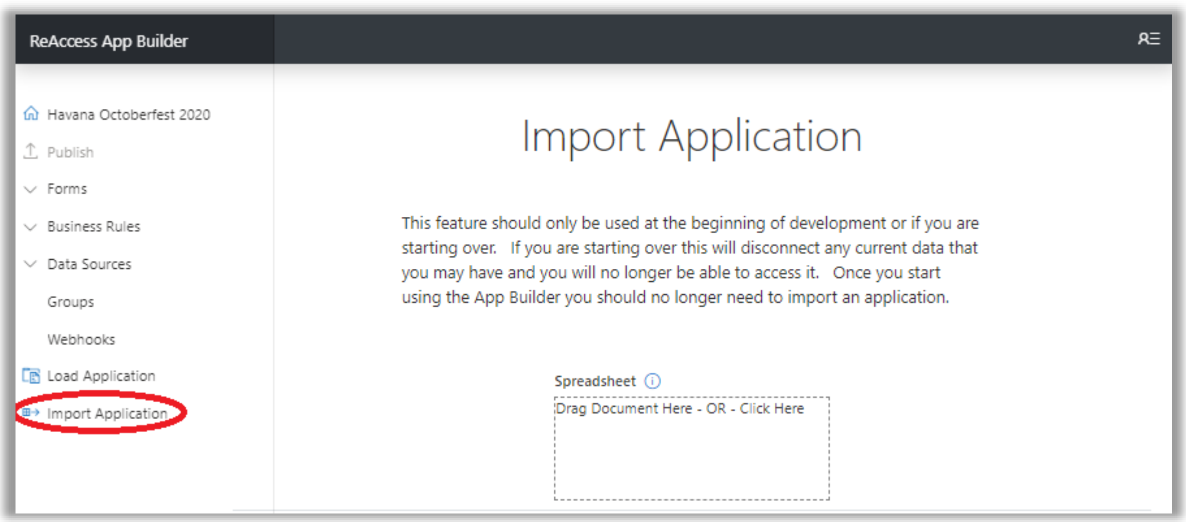


Figure 11 – Import Application Page

Select 'OK' to complete the import process and publish the application. Once the application has been published, users may use the App Builder's interface to make minor modifications. (**Note:** these changes will not be saved back to the Prefab Manifest. Any major changes should be done in the Prefab Manifest and the import process should be repeated).

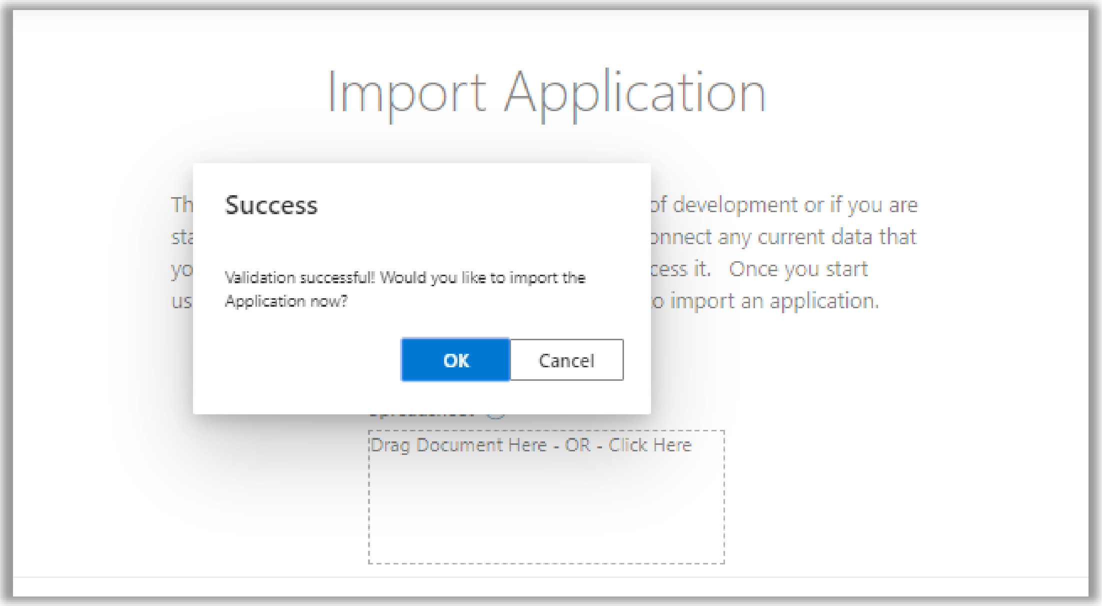


Figure 12 – Publish

3.2 Application Home Page

Instead of importing a Prefab Manifest, the App Builder can be used to create a new instance of the ReAccess application. Each part of the solution is covered, from the Home Page to the data sources and fields.

Upon logging in, you will see the application home page where you can add a logo, Home Page Content, as well as tags and a description. This is also where you will go to add Forms, Rules, and Data Sources.

Figure 13 – Application Home Page

3.3 Create/Edit/Delete a Form

Forms are the front end for all tables and data that will be stored in the application. These forms can be used to search for data, import, or manually enter data.

To add a new form, select the "Add Form" button at the bottom of the page.

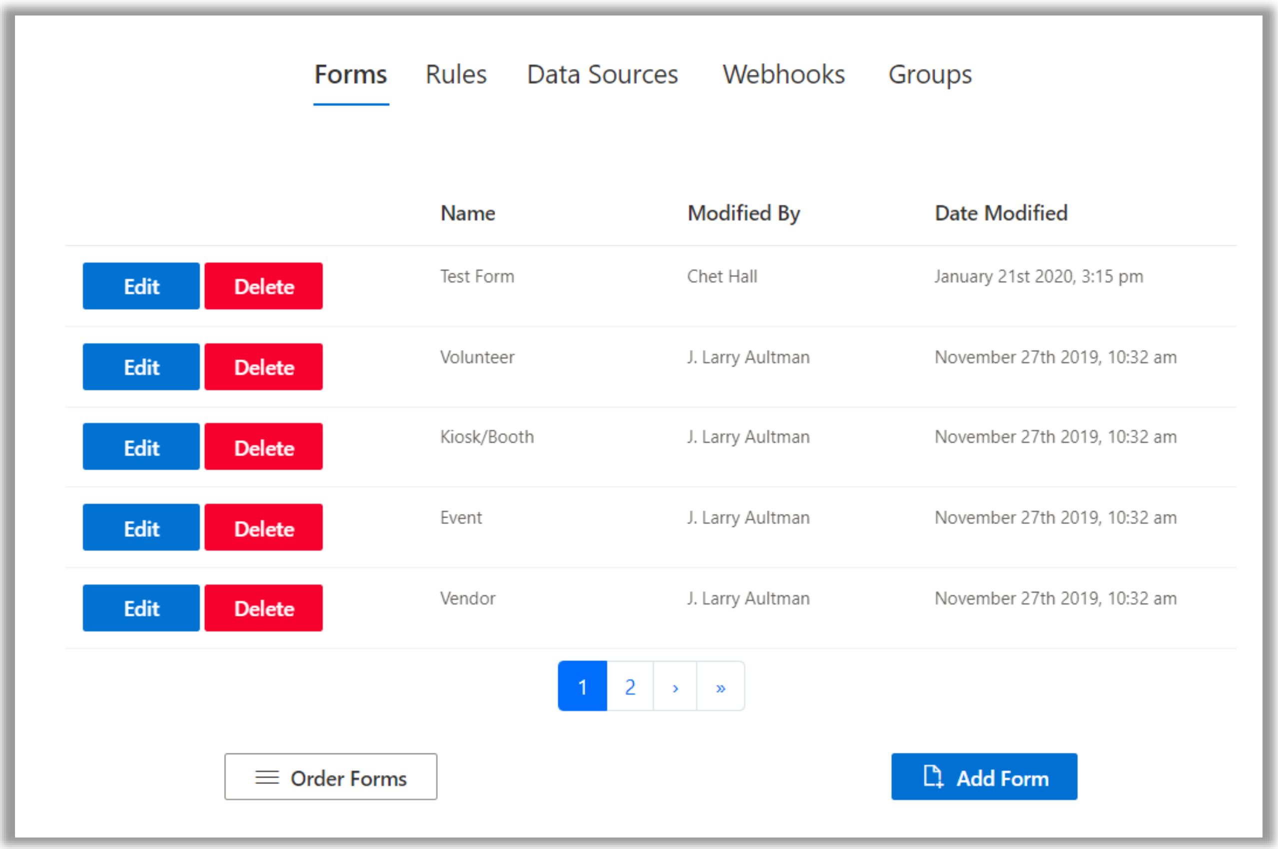


Figure 14 – Forms Table

On the 'Create Form' page, populate all required fields and options. Once you have entered all necessary information click 'Save' to add the form. The Save button will not be available until the required fields (Name, Scope, Tags, and Description) have been populated.

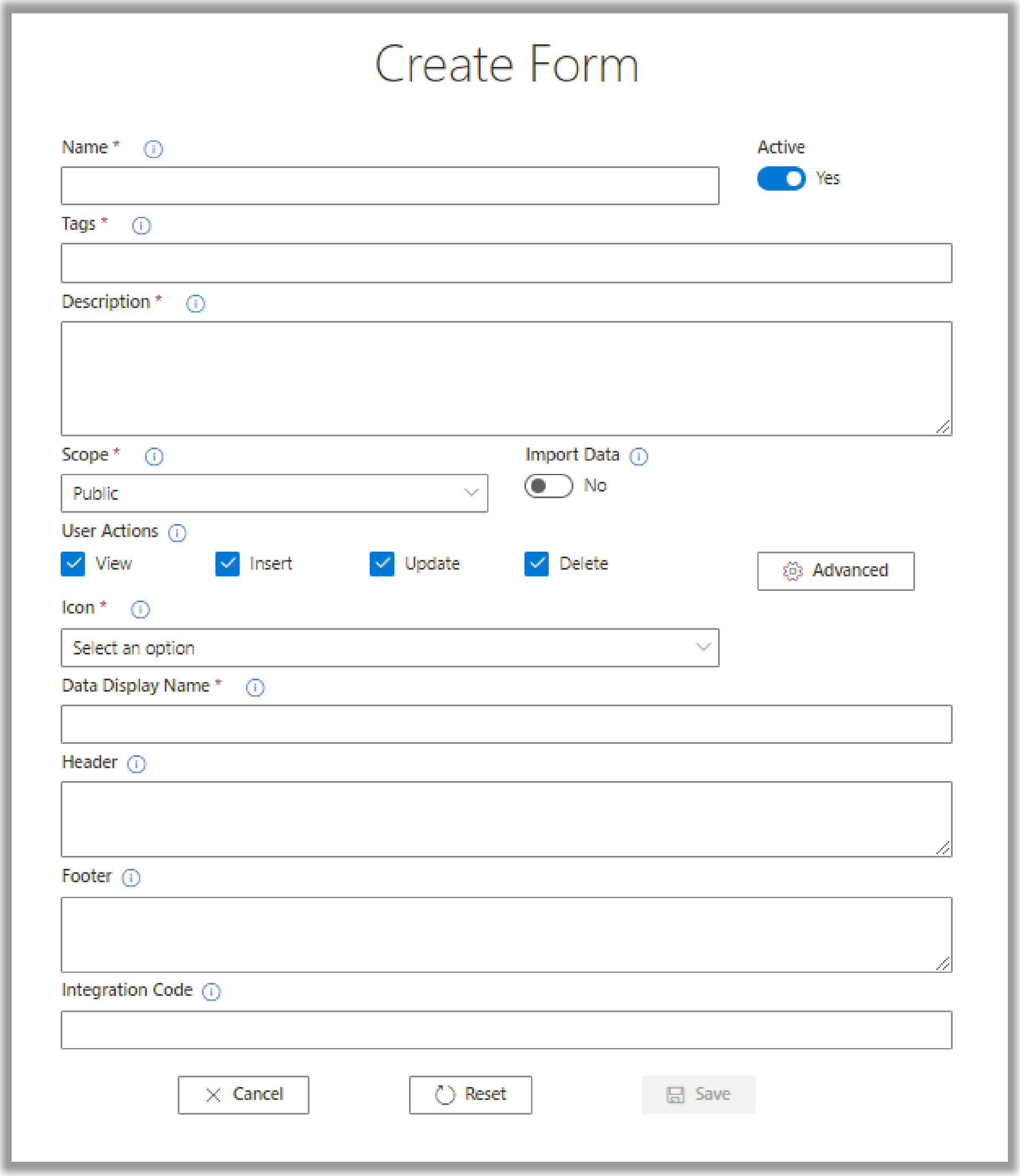


Figure 15 – Create Form Page

3.3.1 *Form Controls*

Name: The name used to represent the form in the ReAccess Menu.

Active: Switch to make the form available (viewable) in the ReAccess application.

Tags: A short description or term (up to 64 characters) that allows you to categorize the form.

Description: Provides an overview for what the form represents.

Scope: Marks the form with metadata and determines how the form should be treated in accordance with public records laws (if app is not subject to public records, use "Exempt"). Options include:

- ***Public:*** A record required by law to be made and kept
- ***Exempt:*** Information which is exempt from public access/disclosure
- ***Non-Exempt:*** Information that must be produced upon request

Import Data: Determines if the form will allow the import of data

User Actions: Individual options for user permissions set at the Form level.

- ***View:*** Allows users to view
- ***Insert:*** Allows users to insert
- ***Update:*** Allows users to update/edit
- ***Delete:*** Allows users to delete

Advanced: A customizable option for setting user permissions for a form

- ***Groups:*** A list of user email addresses allowed to interact with a form

Icon: Allows you to change the form's icon in the navigation menu.

Data Display Name: This is the value for the form that is stored in the database. This value is auto-populated as a copy of the form name.

Header: Allows you to customize the header of the new, edit and details pages related to this form.

Footer: Allows you to customize the footer of the new, edit and details pages related to this form

Integration Code: A unique name used to identify and map a form from an external system back to the corresponding form in a ReAccess application. This is extremely helpful when using a webhook to send a form's data to the other system on an actionable event (save, update, delete).

3.4 Create/Edit/Delete a Field

From the selected form, choose the ‘Add Field’ button at the bottom of the page.

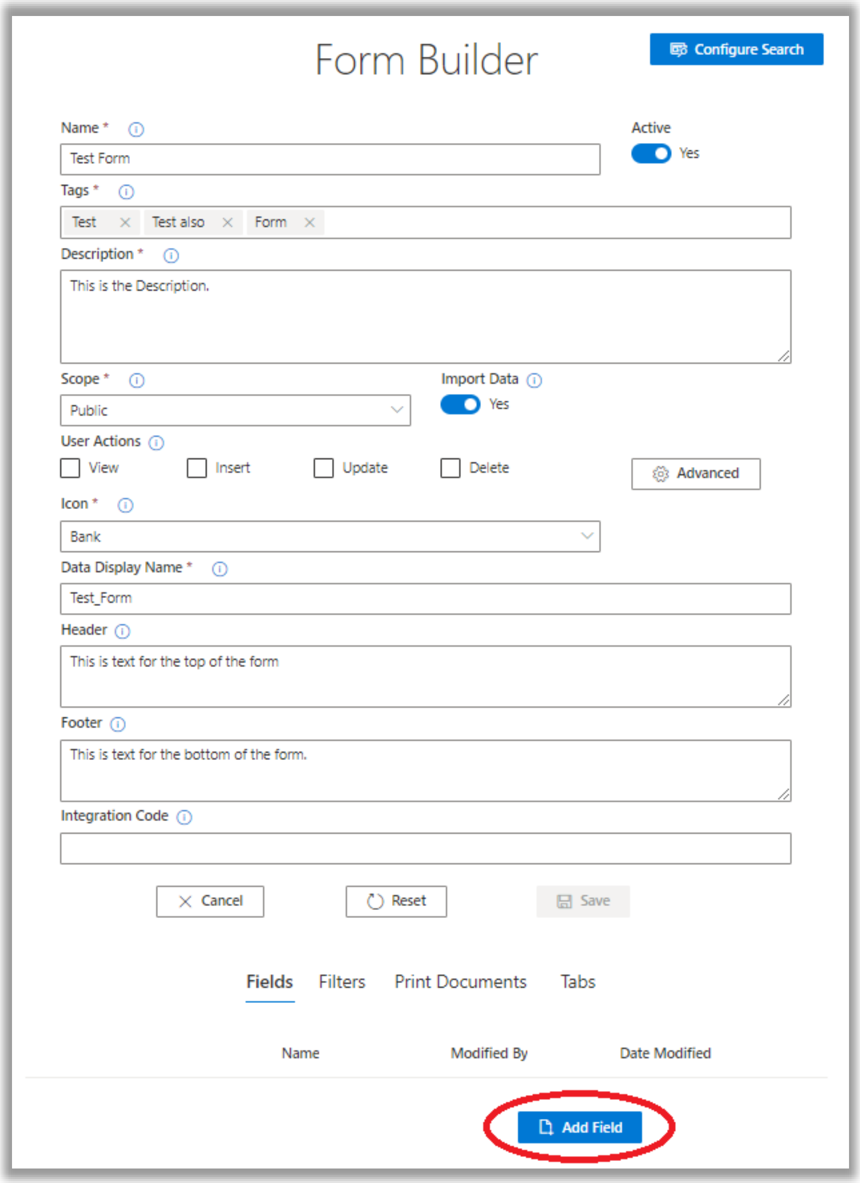


Figure 16 – Field Table

This will take you to the 'Create Field' page. You will then be prompted to enter the field information.

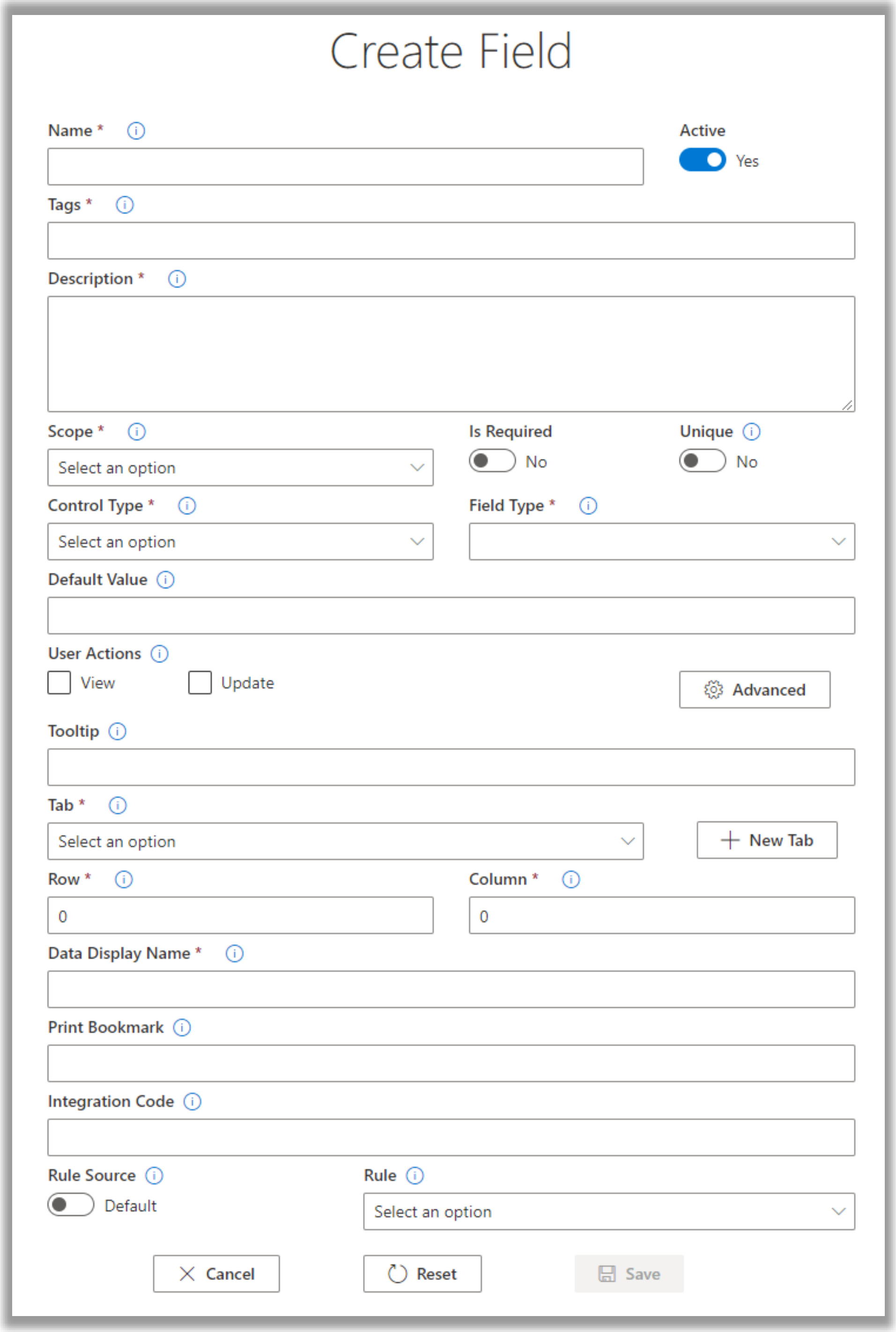


Figure 17 – Create Field Page

3.4.1 *FIELD CONTROLS*

Name: The name used to represent the field.

Active: Switch to make the field available in the form.

Tags: A short description or term (up to 64 characters) that allows you to categorize the control.

Description: Provides an overview for what the control represents in the Form Definitions file.

Scope: Marks the form with metadata and determines how the form should be treated in accordance with public records laws. Options include:

- ***Public:*** A record required by law to be made and kept
- ***Exempt:*** Information which is exempt from public access/disclosure
- ***Non-Exempt:*** Information that must be produced upon request

Is Required: Selection to determine if the field is required to have data in order to save changes. This control is also displayed in the in the Form Definitions file.

Unique: Determines whether the entered value must be unique. This control is also displayed in the in the Form Definitions file.

Control Type and Field Type: Define the type of input control and standard usage.

- ***Text*** – Control requires user input of values. Field type options include:

FIELD TYPES	DEFINITION	EXAMPLE USE
Text Title	Heading for a group of related fields within a Tab and used for display purposes only	Mailing address and Shipping Address
Text Block	A block of text on the page that is used for display purposes only	Instructions for the User
Text Box	A single line box that accepts user input.	First Name
Multi-line Text Box	A multi-line box that accepts user input.	Comments
Date	Month, Day, Year	Date of Birth
Date and Time	Month, Day, Year, Hours, Minutes, AM/PM	Event Start Date and Time
Currency	Expressed in ($)	Total Cost
URL	Web Address	Company Website
Email Address	An email address	Contact Information

- ***List*** – Control Type requiring users to select from a list of values from the associated Form or Custom Data Source. For all fields using a Custom Data Source, the allowable values will be included in the Definitions file; whereas, any field using a Form Data Source will only display the form name from which the value is generated. Field type options include:

FIELD TYPES	**DEFINITION**	**EXAMPLE USE**
Drop-down	Displays items in a list	Form or Custom Data Sources
Type-Ahead	The list items are displayed and filtered by the user's keyboard input	Data sources containing several list items
Type and Search	The application suggests possible list items based on the user's input	Data sources containing several list items
Show Details	*A list feature that references a record from a different form and displays all fields related to that record*	*Form Data Sources only*
Search on Server	*Searches list values on the server instead of pulling all the results into the field first*	*Type and Search Field only*

- ***Boolean*** – Control Type allows user to provide toggle response as in T/F, Yes/No, On/Off. Field type options include:

FIELD TYPES	**DEFINITION**	**EXAMPLE USE**
Check Box	Field that only contains 2 options	Active/Inactive
Toggle Switch	Field that only contains 2 options	True/False

- ***Auto-generated*** – Control Type that is computer generated and does not require user input. Field type options include:

FIELD TYPES	**DEFINITION**	**EXAMPLE USE**
Incremental	Series of sequential values	Invoice Number
GUID	Globally Unique Identifier	Primary Key
Random	Series of random Alpha Numeric values	Password generator

- ***File*** – Control allowing users to attach one or several files. Field type options include:

FIELD TYPES	**DEFINITION**	**EXAMPLE USE**
Upload Single	Uploading a single file	A signed agreement
Upload Multiple	Uploading more than one file	Invoices related to a project
Photo	Uploading a picture	Profile Picture

- ***Web*** – Control Type allowing users to embed web-based content from an external source. Field type options include:

FIELD TYPES	DEFINITION	EXAMPLE USE
iFrame	A static window used to load an external website or HTML document	Embedding a YouTube video

Default Value: Adds a default value to the field that the user can change

User Actions: Individual options for user permissions set at the Field level.

- ***View:*** Allows users to view a field
- ***Update:*** Allows users to update a field.

Advanced: A customizable option for setting user permissions for a field.

- ***Groups:*** A list of user email addresses allowed to interact with a field.

Tooltip: Provides helpful info to the user on what data is needed for the field.

Tab: The name of the individual tabs within the form that this field is included in.

Row: The row position in which you want the field to appear.

Column: The column position in which you want the field to appear.

Data Display Name: A required, and unique name used to represent fields in data related artifacts like reports and data import files. The allowable characters for this value are alphanumeric and underscores. Must begin with a letter and shall not exceed 80 characters.

Print Bookmark: An optional and unique token used as a place holder in a Word document template for Print Documents, it will be replaced by the field's value when printing a document. Must begin with a letter and shall not exceed 80 characters.

Integration Code: A unique name used to identify and map a field from an external system back to the corresponding field in a ReAccess application

Rule Source: Determines if the rule will be default or custom

Rule: Determines the rule that will be applied to the field (numeric only, email address, etc.)

Note: Once you have populated all the necessary fields, click "Save" to add the control/field.

3.5 CONFIGURE SEARCH

Once all the fields have been created, Administrators/Builders need to determine how users will search a given form and what fields will be visible in the search results. Select a form from the navigation menu, scroll to the bottom of the form, and select "Configure Search" button.

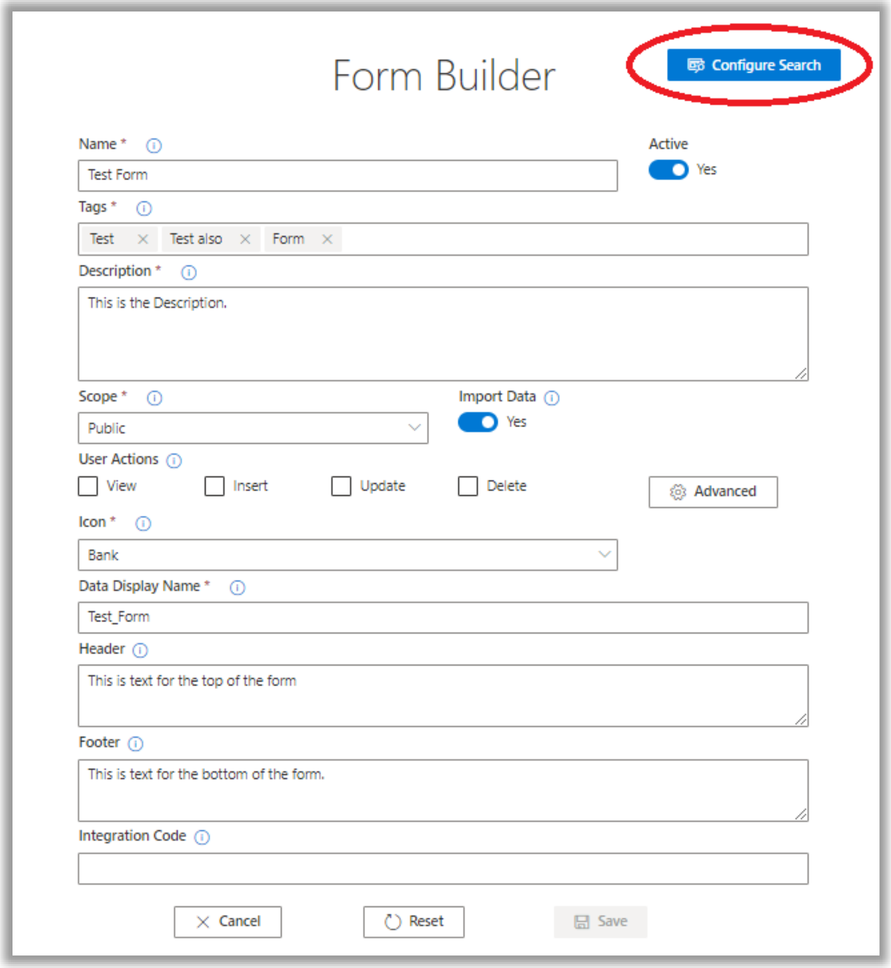


Figure 18 – Configure Search

3.5.1 Search Layout

Use the "Edit" button to add/remove columns or rows to create the layout of the Search Screen. Take note that all fields on a given form will be listed above.

Continue by simply dragging and dropping each field to the desired location. To remove a field, click on the "x" in the top-left. Select Save when the desired layout is complete.

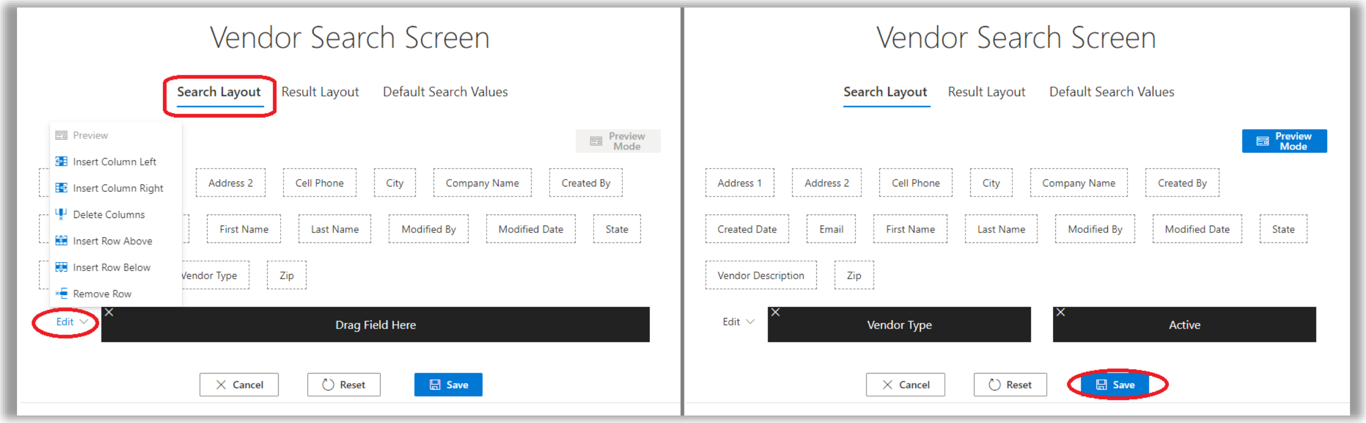


Figure 19 – Search Layout

3.5.2 *Result Layout*

After determining which fields will be search visible, we must determine what fields will be displayed in the results. Begin by selecting the "Result Layout" tab at the top of the screen. Use the "Edit" button to add/remove columns to the layout.

Note: search results can only have one record per row but may have several columns to display information about that record.

Continue by simply dragging and dropping each field to the desired column. To remove a field, click on the "x" in the top-left. Select Save when the desired layout is complete, and then Publish the application.

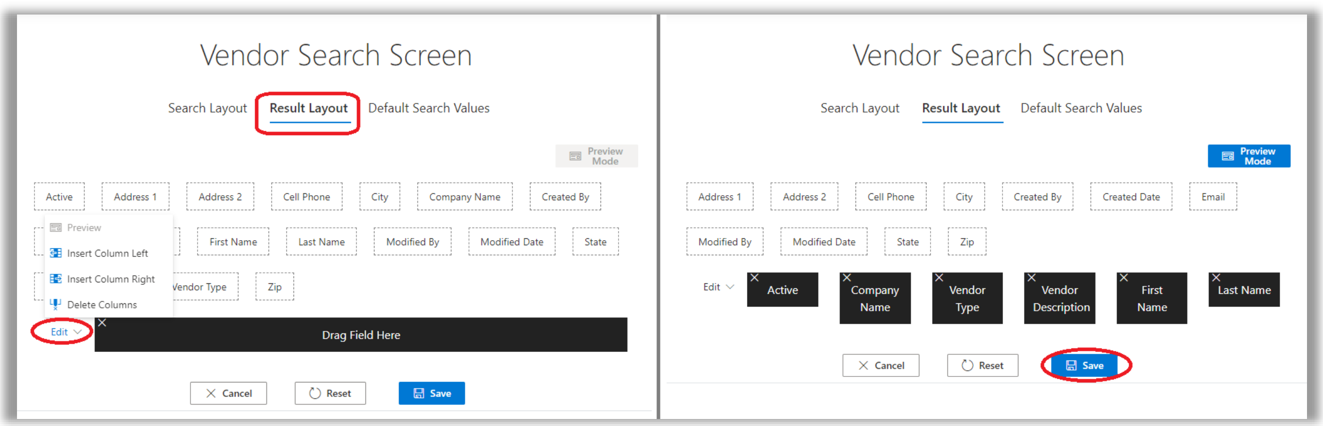


Figure 20 – Result Layout

3.5.3 *Default Search Values*

To optimize workflow, default search values may be set for each of the fields on the Search Layout tab. Additionally, there is a built-in option to automatically execute a search using the parameters anytime a form is selected in ReAccess. Finally, click Save and publish the application

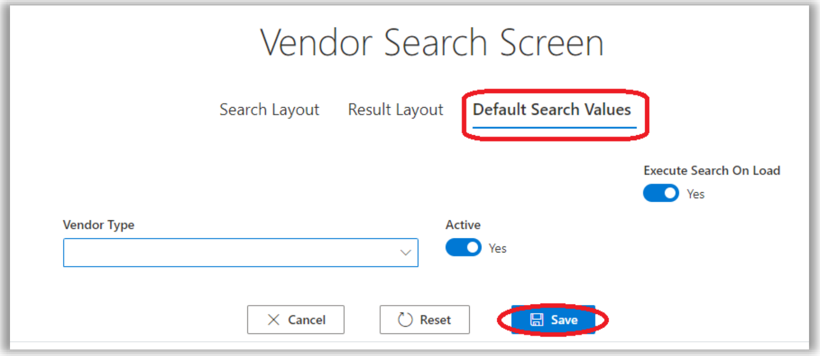


Figure 21 – Default Search Values

3.6 Creating/Editing/Deleting a Data Source

The Data Sources tab displays all current Lists (Drop-Down Lists) within an application. Data sources may be updated or de-activated from this section. To create a new List, click the Add Data Source button on the bottom of the screen.

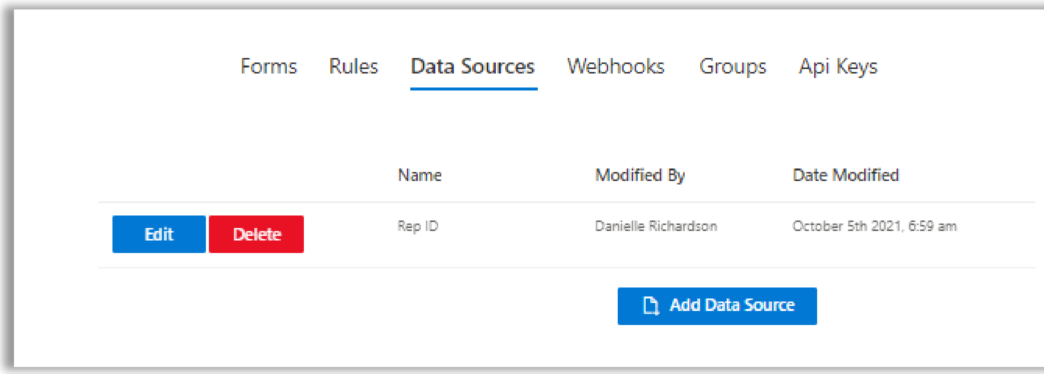


Figure 22 – Data Source Table

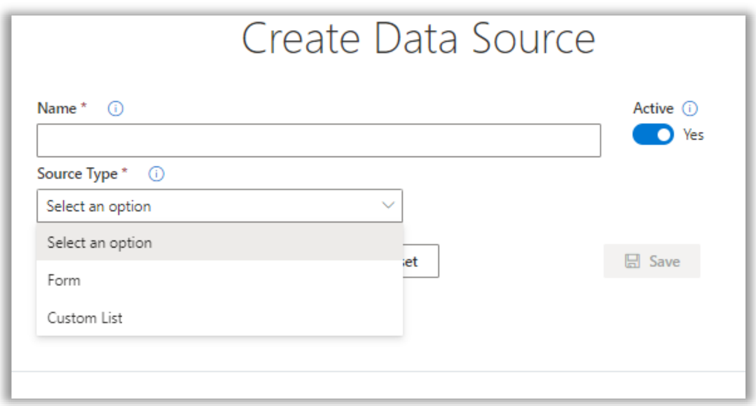


Figure 23 – Create Data Source Page

3.6.1 DYNAMIC LISTS

Form Lists are generated dynamically from an existing form and field. Select a form from the drop-down menu. Under 'Display Format', enter the name of the field (that resides on the selected form) that you wish to create your dynamic list from.

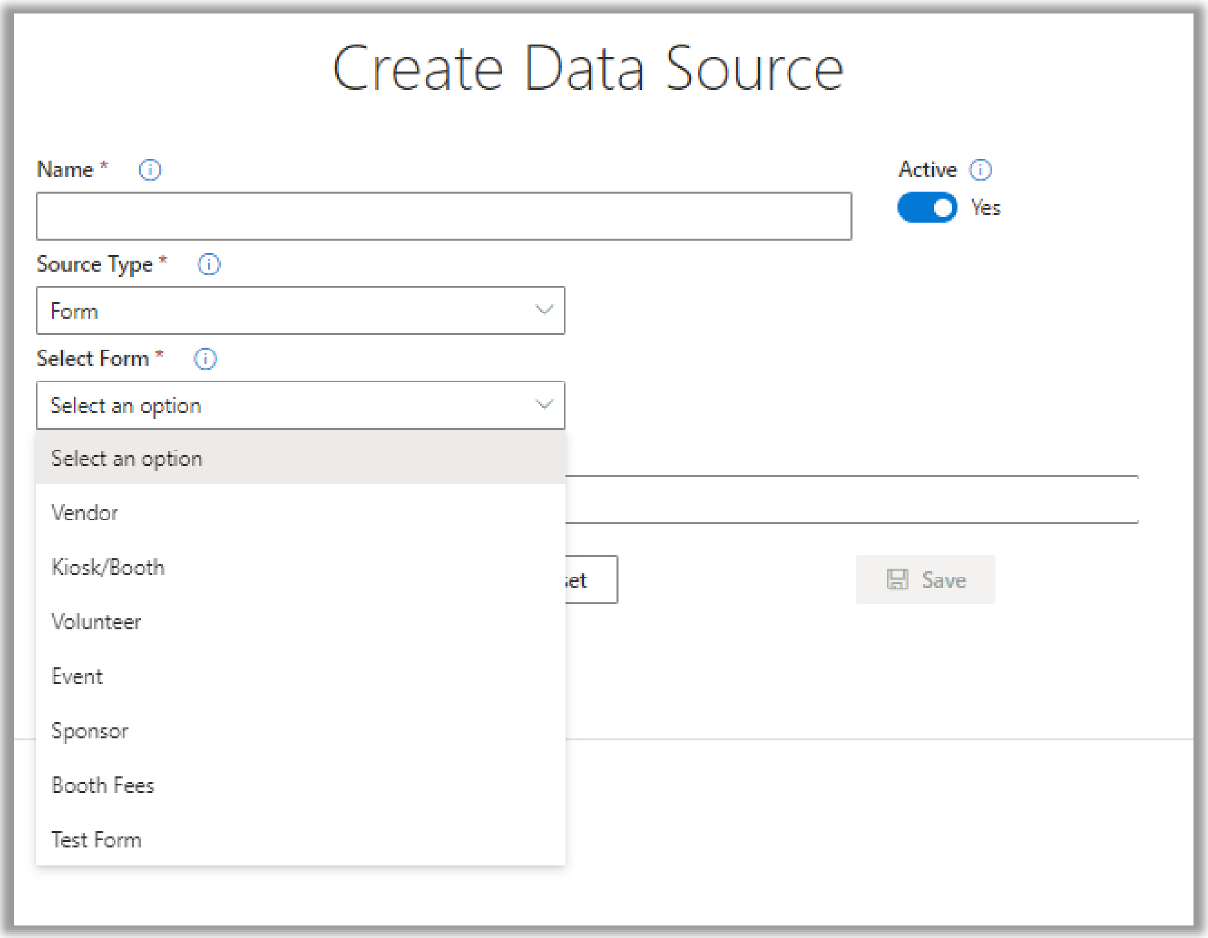


Figure 24 – Form Selection Drop-Down

3.6.2 Static Lists

Custom Lists are best used for lists containing a finite set of values (i.e. States names). A Custom List requires a key and individual values (Alabama, Alaska, etc.).

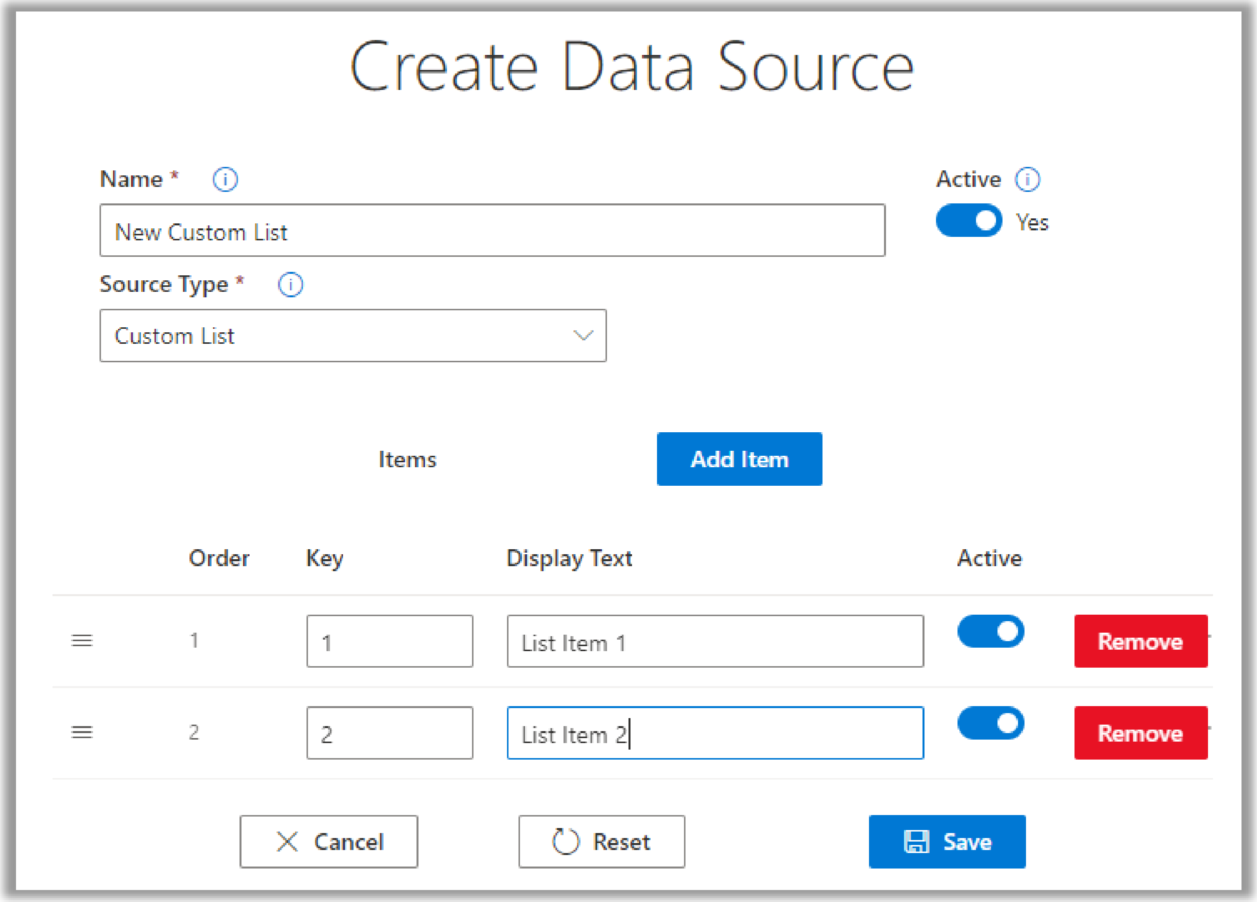


Figure 25 – Custom Data Source

3.7 Rules

All ReAccess applications have access to common business rules used for data validation. Some examples of these common rules include entering a valid email address, formatting for a United States phone number, as well as allowing numerical values only. Multiple rules can be used in an application as needed for consistent data entry.

3.7.1 *Default Rules*

The default rules drop-down in the App Builder can be located from the edit/create field page and records information about specific data entry validation rules used throughout the forms in the application. If data is entered incorrectly, a message will appear noting that the data must be corrected.

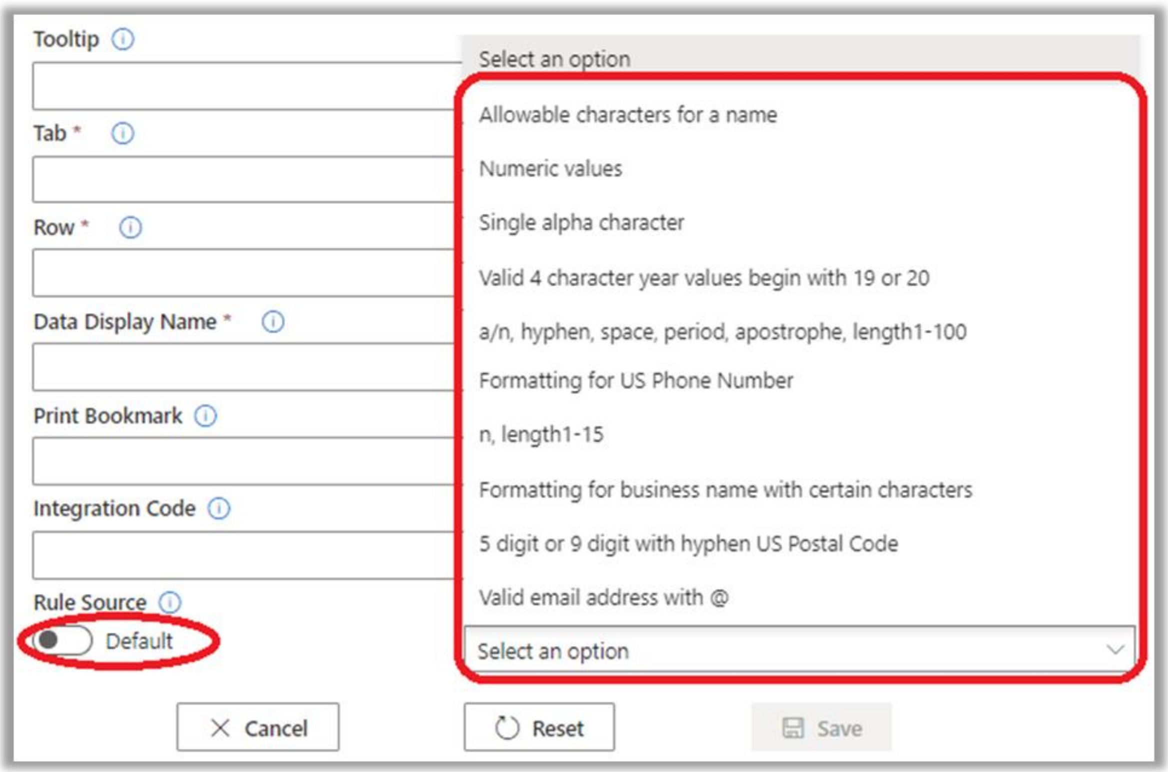


Figure 26 – Rules Drop-Down

Note: There are built-in rules in PowerLine which are not displayed in the Rules section. Some of the built-in rules include valid email address; Date/Time; Currency; etc.

3.7.2 *Custom Rules*

Custom rules may be created using the App Builder and referencing the Regular Expression Library at [https://regexlib.com.](https://regexlib.com) This functionality allows organizations from any industry to create their own rules for data validation. An example of the regular expression and error message used in the default rule for validating a US phone number is shown in **Figure 27**.

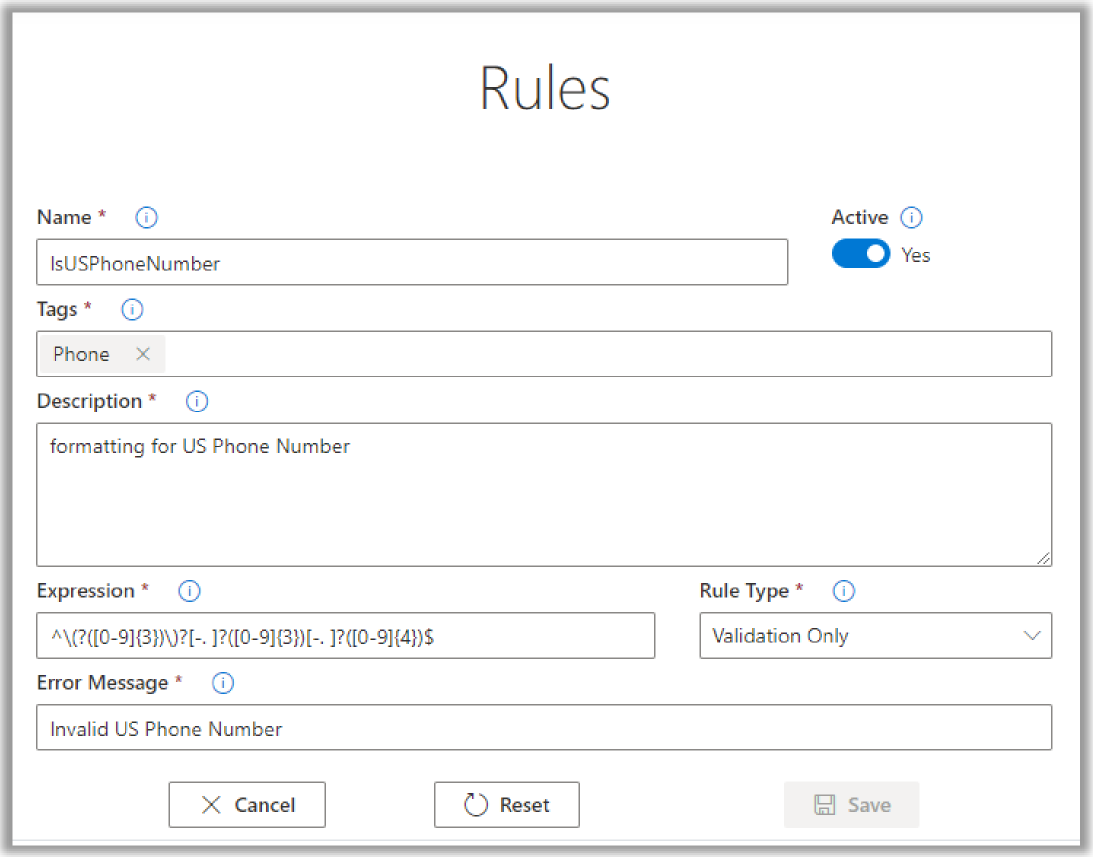


Figure 27 – Sample Custom Rule

To create a new rule, select the *Rules* tab from the bottom of the home page and then click the *Add Rule* button as shown in **Figure 28**.

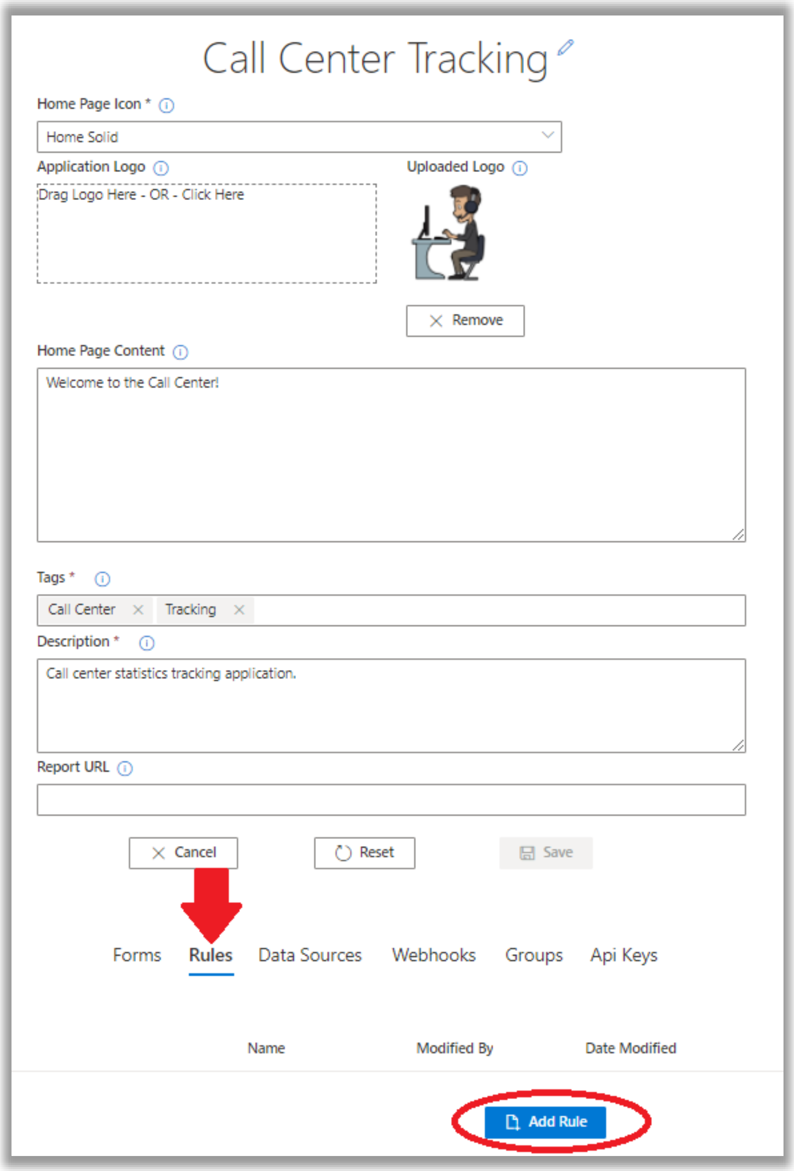
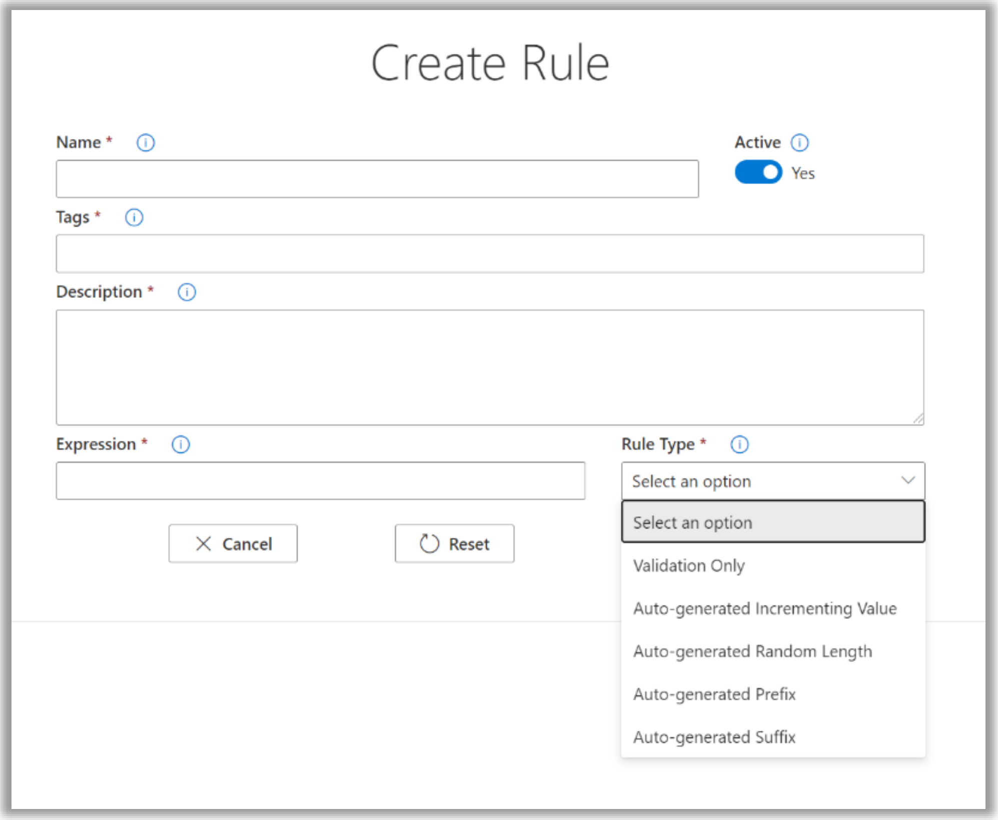


Figure 28 – Creating a Custom Rule

Continue by adding a Name, Tags, and Description of the rule. Next, determine if the rule will be used for data validation or if it will control an attribute related to an auto-generate field. The table below defines the available rule types, the fields they may be applied to, and a sample usage of each type.



RULE TYPE	APPLIES TO	SAMPLE EXPRESSION	RESULT
Validation Only	All fields except auto-generated	(TRUE) | (True) | (true)	Validates a Boolean field to be true
Auto-generated Incrementing Value	Auto-generated Incrementing fields	2	Increments the value for each record by 2
Auto-generated Random Length	Auto-generated Random fields	4	Generates 4 characters only
Auto-generated Prefix	Auto-generated fields only	ID#	Adds the prefix *ID#* to all entries
Auto-generated Suffix	Auto-generated fields only	_2020	Adds the suffix *_2020* to all entries

To apply a custom rule to one or more fields, select the field from the navigation pane. Scroll to the bottom of the Field Builder screen and click on the *Rule Source* toggle switch. This will change the value from *Default* to *Custom*. Next, use the Rule drop-down to select the desired custom rule and then save your changes.

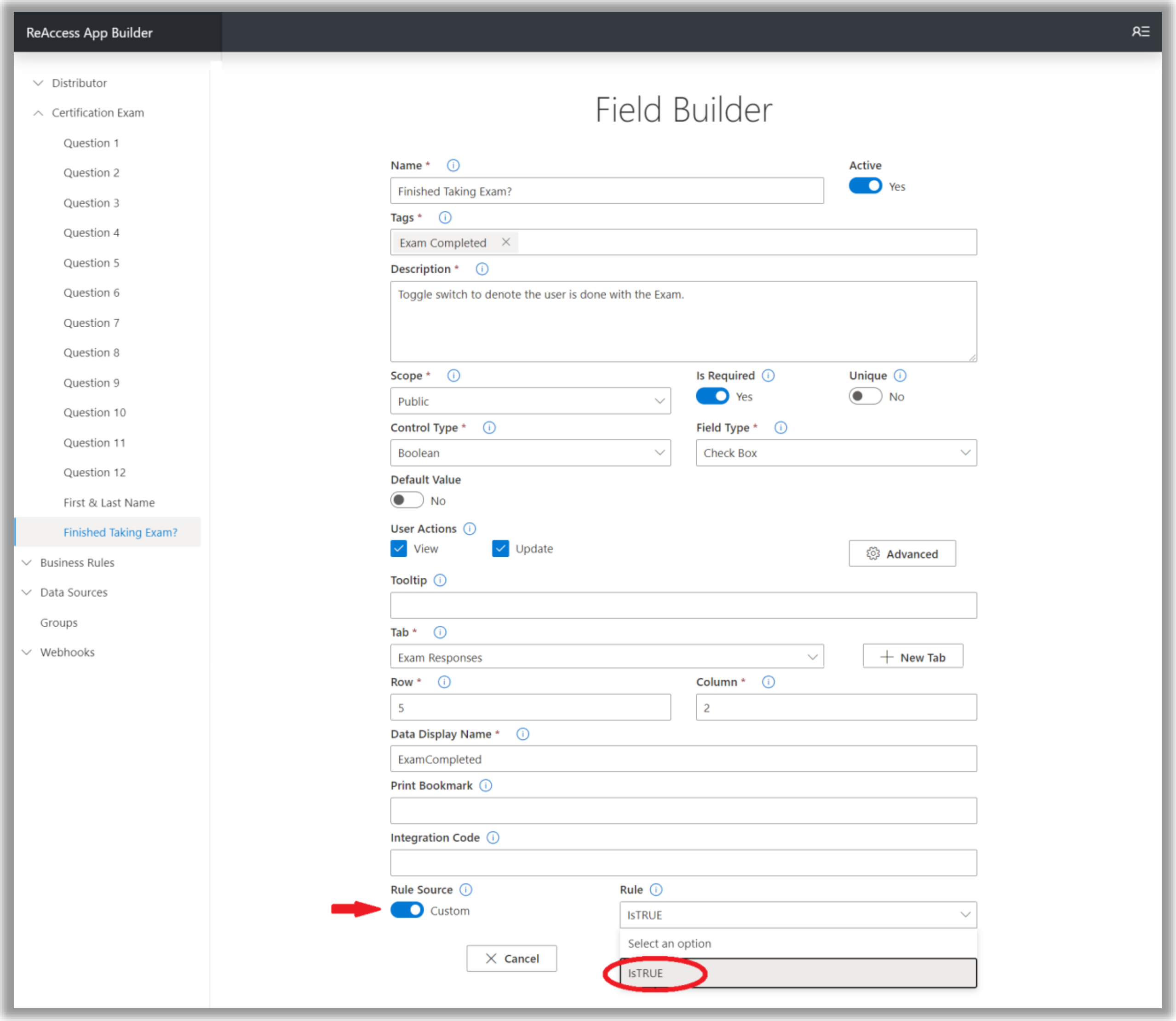


Figure 29 – Applying a Custom Rule

3.8 Webhooks

A webhook is a method of augmenting or altering the behavior of a web page, or web application, with custom callbacks. From the home page, select the Webhooks tab to view existing webhooks or to create a new one.

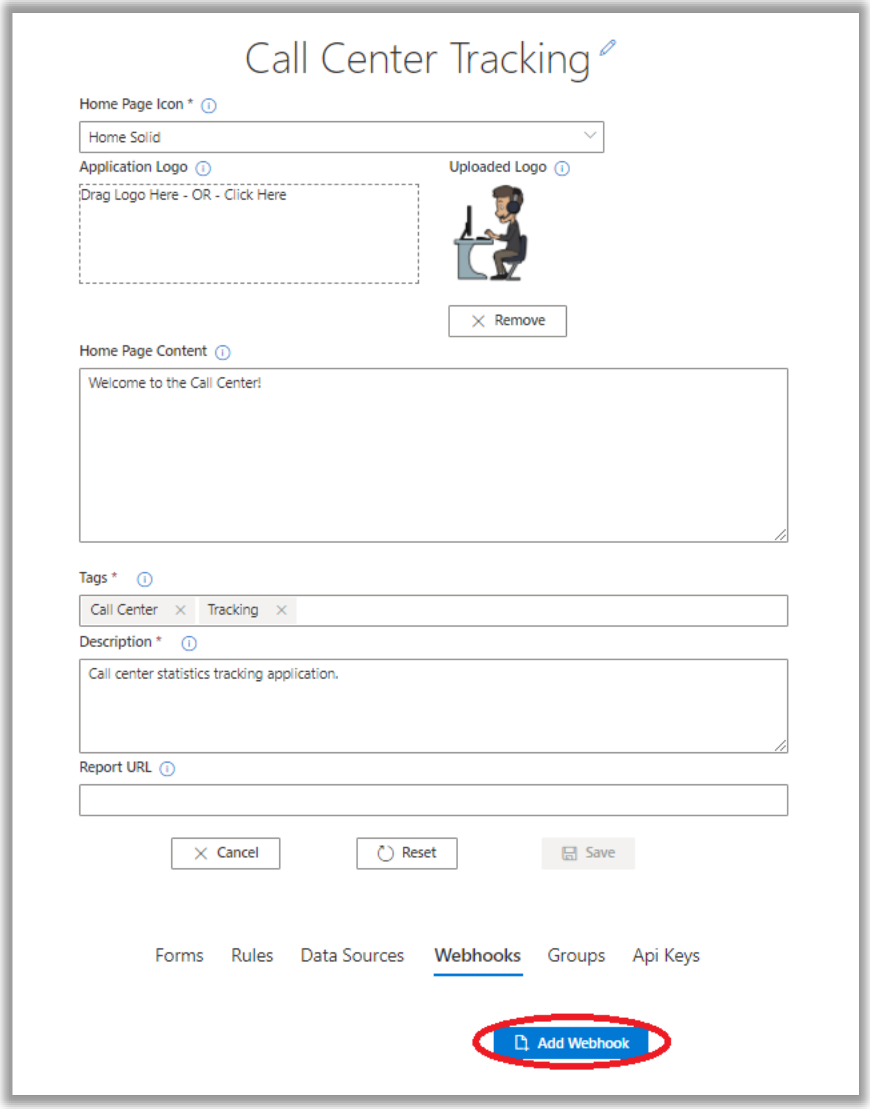


Figure 30 – Webhooks Tab

Complete all the required fields in order to add your webhook. These include Name, Tags, Description, and URL. Once you have entered all the required data select "Add Webhook". A new section will appear that will allow you to the form you want your webhook to appear on as well as the "Event" which is the action that sends the form data to the given URL". Once you have added these selections click "Save" to continue.

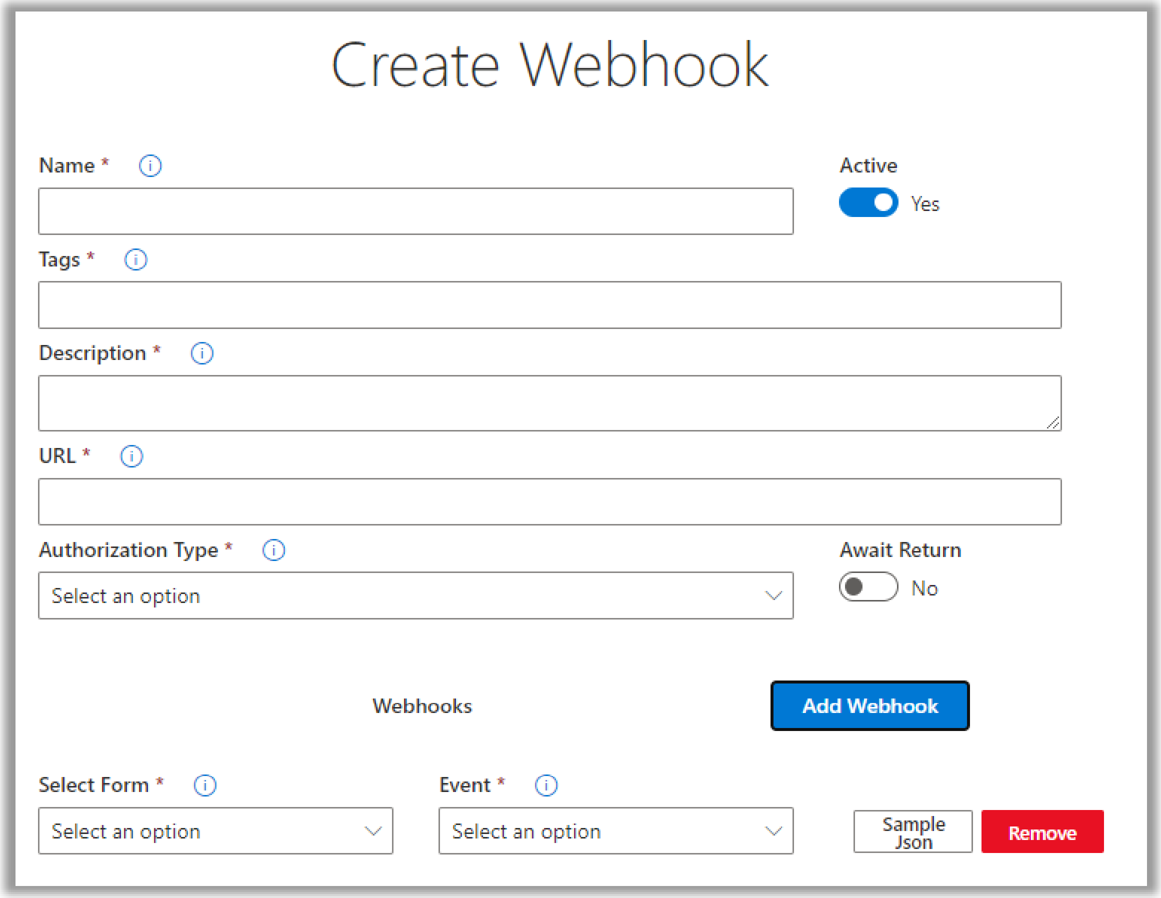


Figure 31 – Create Webhook Page

3.8.1 *WEBHOOK CONTROLS*

Name: The Name assigned to this webhook.

Active: Determines if this webhook is currently active within the ReAccess Application.

Tags: A term (up to 64 characters) that allows you to categorize the webhook.

Description: A description of what this webhook does or how it interacts with a given form.

URL: A unique web address to the calling function.

Authorization Types:

- ***No Auth:*** No authentication needed or will be used as part of the request.
- ***API Key:*** Adds a key, value pair to the request, can be configured as a query string or in the request header.
- ***Basic Auth:*** Adds the username and password as a Base64 encoded string for Basic authorization, to the Authorization request header.

Await Return: An option on the webhook configuration allows you accept the same form back with changes which are then saved back to the database. The "Await Return" switch causes ReAccess to wait for your webhook to provide a return payload with a schema equivalent to the one posted.

Select Form: The name of the form this webhook is augmenting or altering.

Event Type: The user action that initiates the webhook. Options include:

- ***Insert:*** When a new record is created
- ***Update:*** When an existing record is updated/edited
- ***Delete:*** When a record is deleted
- ***View Details:*** When a record is opened for viewing

Sample JSON: Similar to a header file, the JSON (JavaScript Object Notation) payload outlines the variables (fields) used to create a new record from the selected form.

Figure 32 – Sample JSON Payload

3.9 Groups

Creating a "Group" is another way to assign user permissions. This method authorizes users based on his/her email address.

From the home page, scroll down, select the "Groups" tab, and click the "Add Group" button.

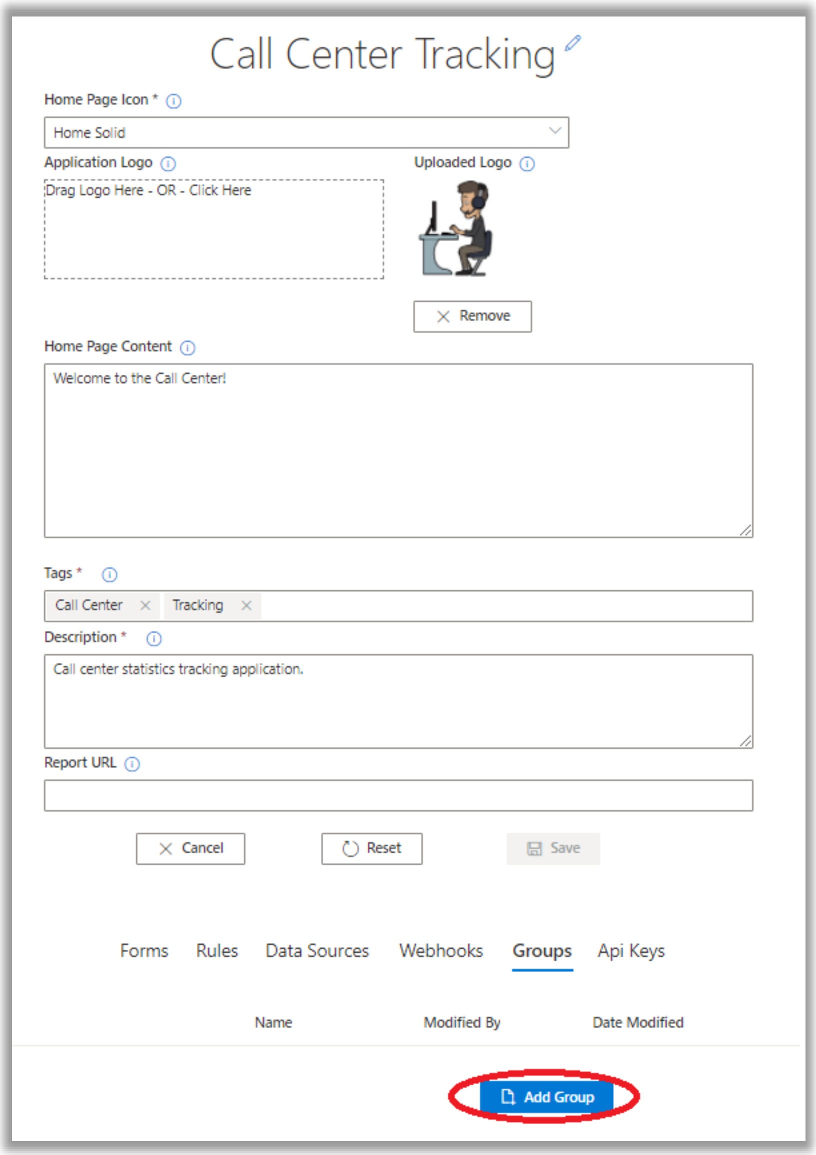


Figure 33 – Adding a Group

Continue by completing the required fields. Next, select the "Add" button at the bottom-right of the screen. Enter a valid email address in the dialogue box and click save. Repeat this process for all users in this group. Finally, click the save button located on the Create Group page and publish the application.

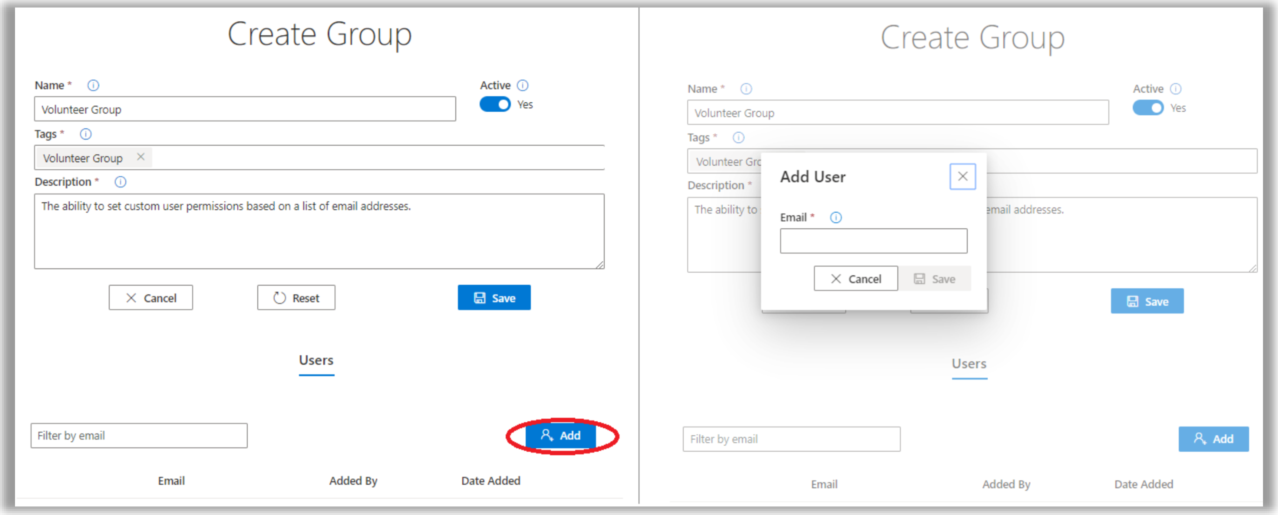


Figure 34 – Adding Users to a Group

Once a Group has been created, they can be given custom permissions (view, update, insert, and/or delete) to an entire form or individual form fields. To assign custom permissions to a form or field, click on the advanced button and select a group from the drop-down menu.

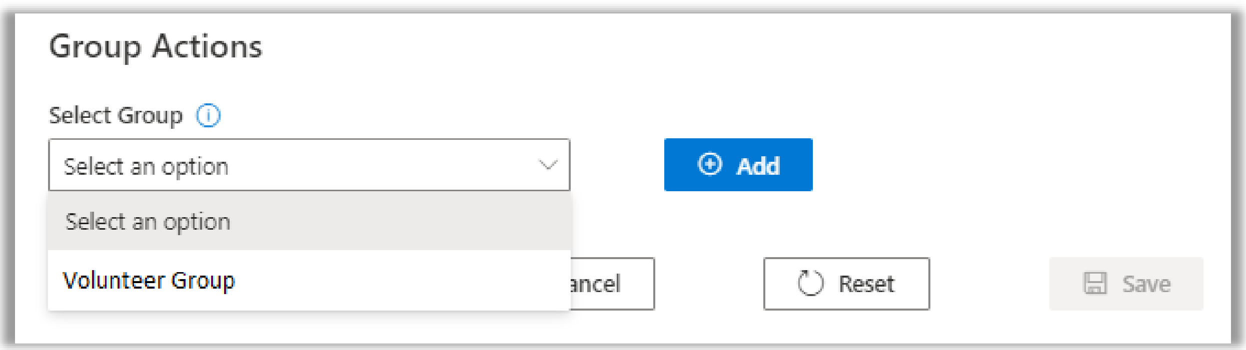


Figure 35 – Assigning a Group to a Form or Field

3.10 Print Documents

ReAccess also allows for users to create templates that can be loaded into the App Builder which will then print data stored in the application. Multiple templates may also be stored within each form.

3.10.1 *Adding Print Bookmarks*

To extract data from the application, Print Bookmarks will need to be created for the fields that need to be pulled. To do so go to the App Builder and select the field you want to add to your template. Add a print bookmark (a unique word/phrase that is 80 characters or less). Once you have added and saved print bookmarks to all necessary fields, publish your application.

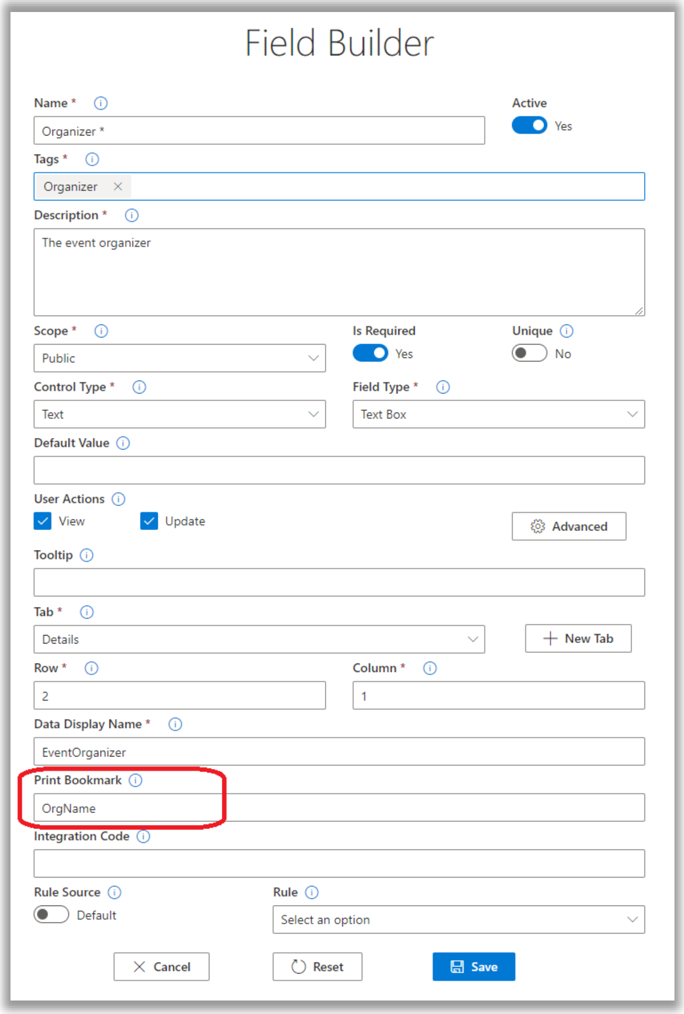


Figure 36 – Print Bookmark

3.10.2 Creating a Template

Open Microsoft word and create a template to meet your needs. Once you have created the layout, add a placeholder for each field you wish to populate. Next, click the “insert” tab in Word. Highlight the first placeholder in the template and select “Bookmark” from the Links drop down menu *(as shown below)*.

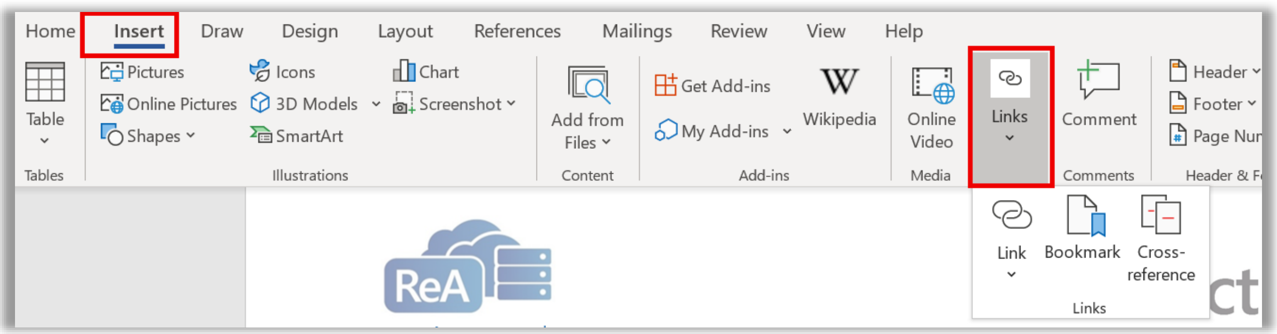


Figure 37 – Bookmark

Enter the same case-sensitive name that was assigned in the App Builder and click “Add”. Repeat this process for every field in the template and then save the template.

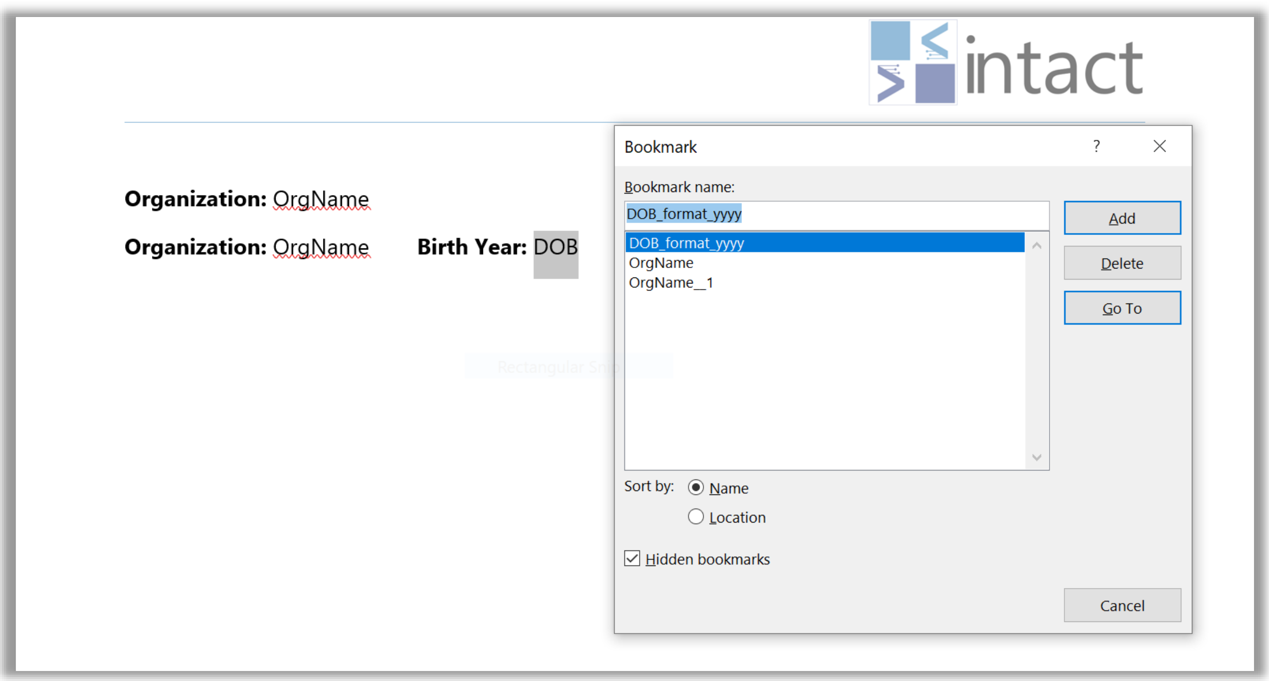


Figure 38 – Adding a Bookmark

3.10.3 *Additional Formatting*

If the template requires a field to be printed more than once, add two underscores and a number to the end of the Bookmark name (OrgName__1… OrgName__3). Custom formatting can also be applied to Date fields. To extract the year from a Date of Birth field, add one underscore, the word “format”, one underscore, and “yyyy” to the end of the Bookmark name (DOB_format_yyyy).

3.10.4 *Uploading a Template into App Builder*

Once the template is complete with proper formatting and all necessary bookmarks, you can upload your template into the App Builder. To do so load your application and select the form you want to print from and select the “Print Documents” tab at the bottom of the page, then select “Add Print Document”.

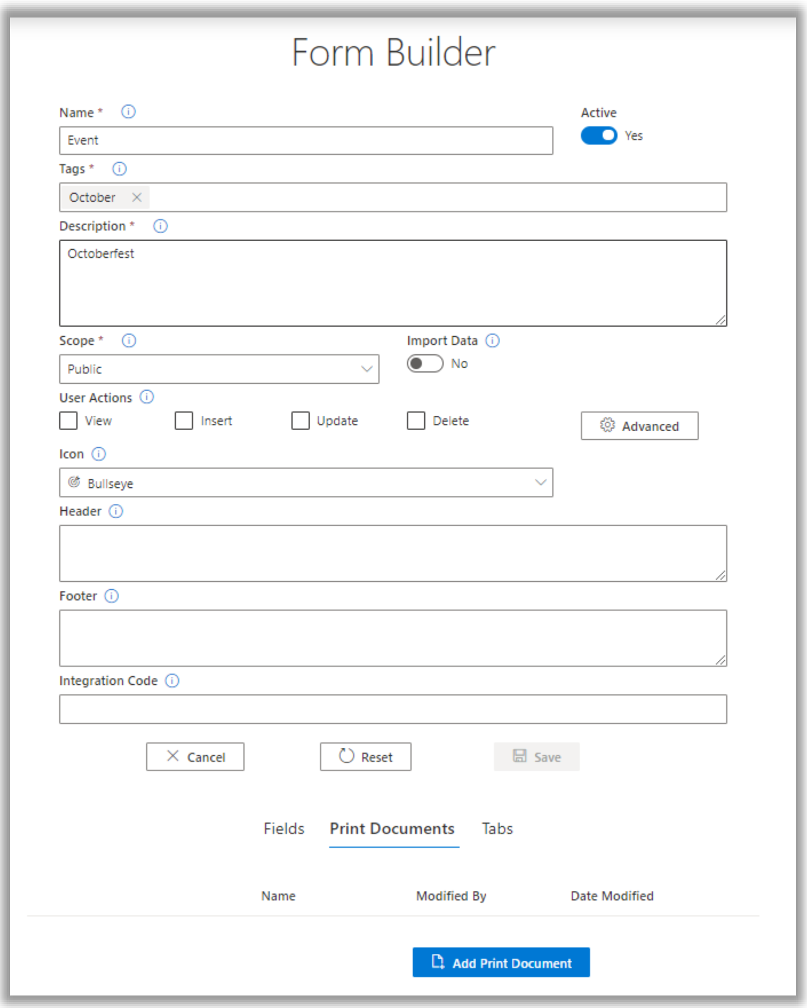


Figure 39 – Print Documents Tab

Next, complete the required fields, upload your document by either dragging and dropping from its file location or by selecting in the "Print Document" box, then select "Save". Now publish your changes.

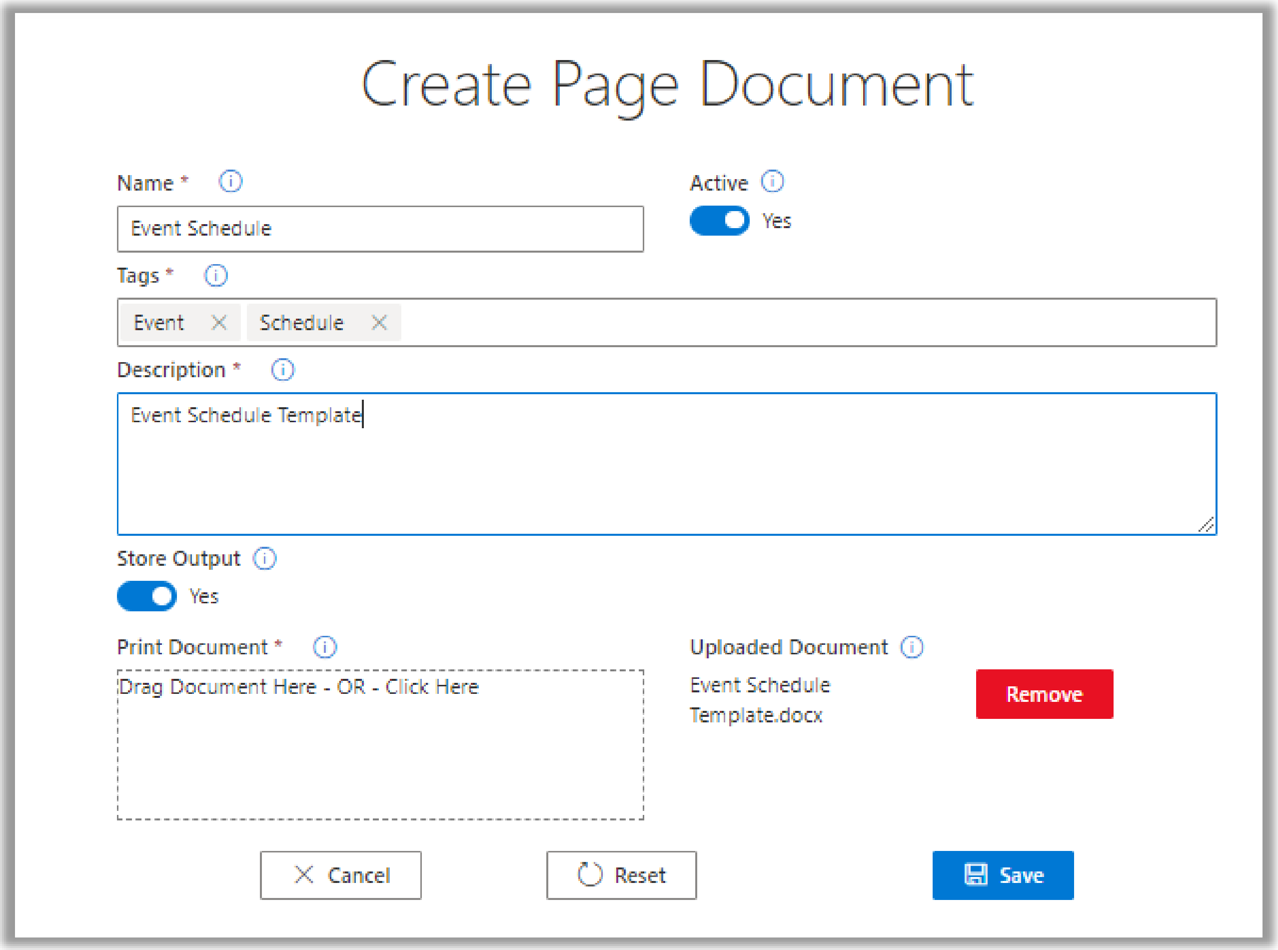


Figure 40 – Create Page Document

3.11 Exporting an Application

The App Builder can also export any ReAccess application. When the export utility is used, a copy of the application is deconstructed back to a Prefab Manifest. This feature is especially useful for cloning an application, creating a slightly modified version of an application, or even developing a requirements document.

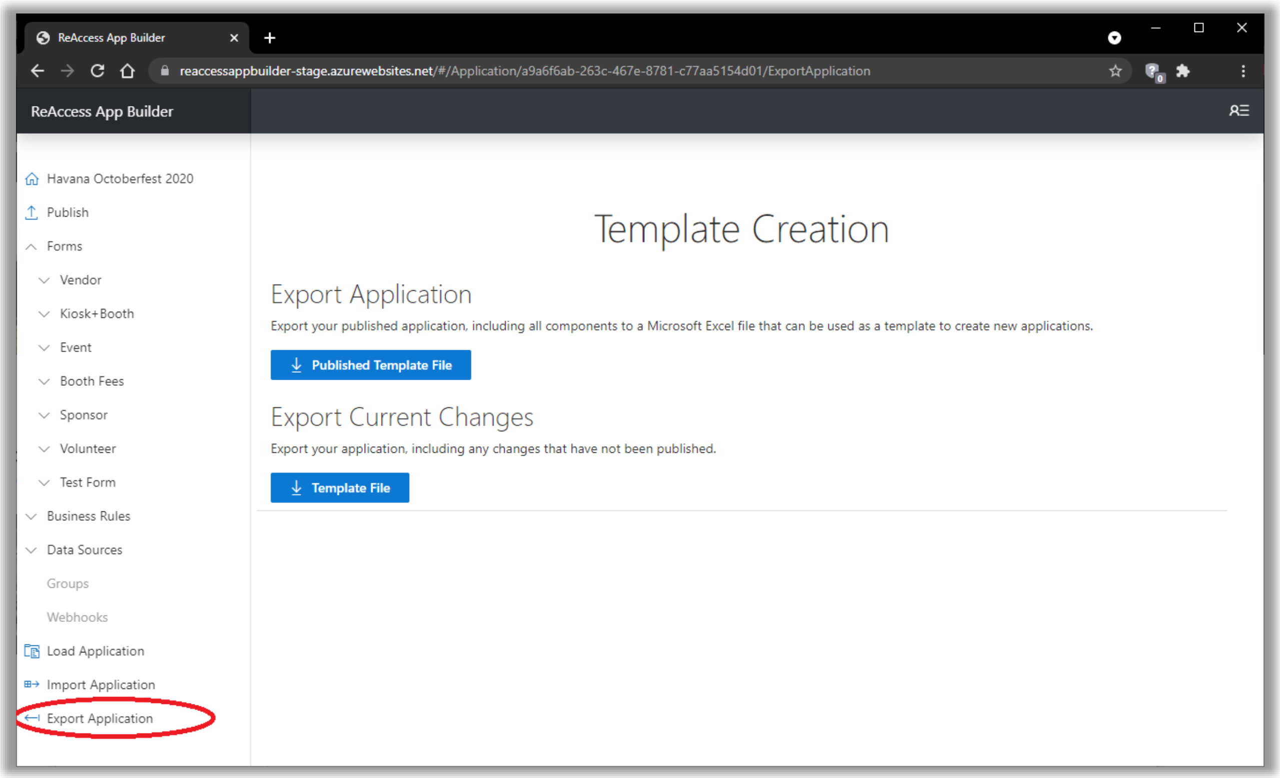


Figure 41 – Export Application

Select the Export Application option from the navigation pane as shown in Figure 41. From this screen, users have the option to download a zip file of the published version of the application. The other option allows users to modify the application and then export so that the changes do not affect the live/production version of the application.

SECTION 4 REACCESS WEB

4.1 APPLICATION HOME PAGE

Upon logging into ReAccess, users will see the home page. All the forms are accessible from the navigation menu on the left side of the screen. Select a form from the menu to search for an existing record, or to add a new record. Adding new data may done manually (one at a time) or through the ReAccess data import feature.

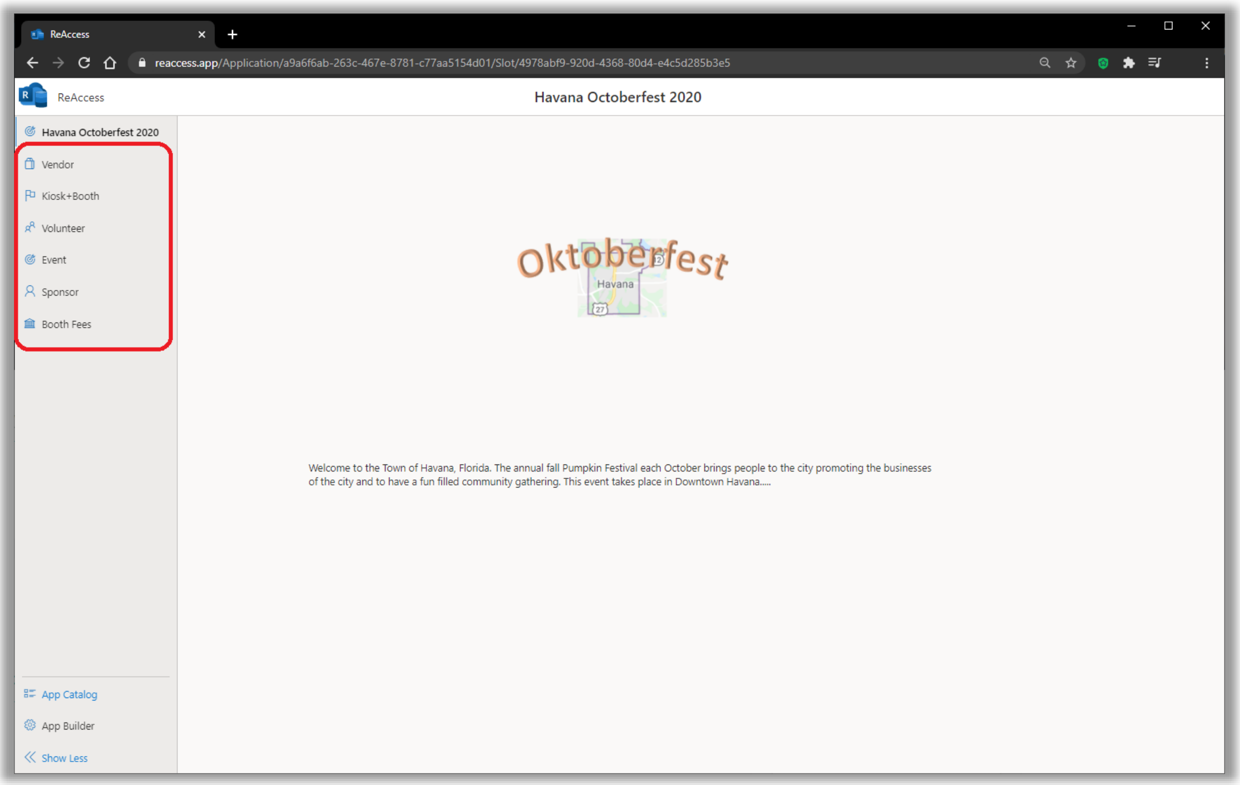


Figure 42 – Select a Form

4.2 Entering a Single Record

To add a record manually, select the "New +" button and complete all the required fields (denoted with an asterisk*) within each of the form's tabs. Once the information has been entered, click "Save" or "Save & Add New" to enter another record.

Note: information will be lost if the record is not saved prior to navigating to another form.

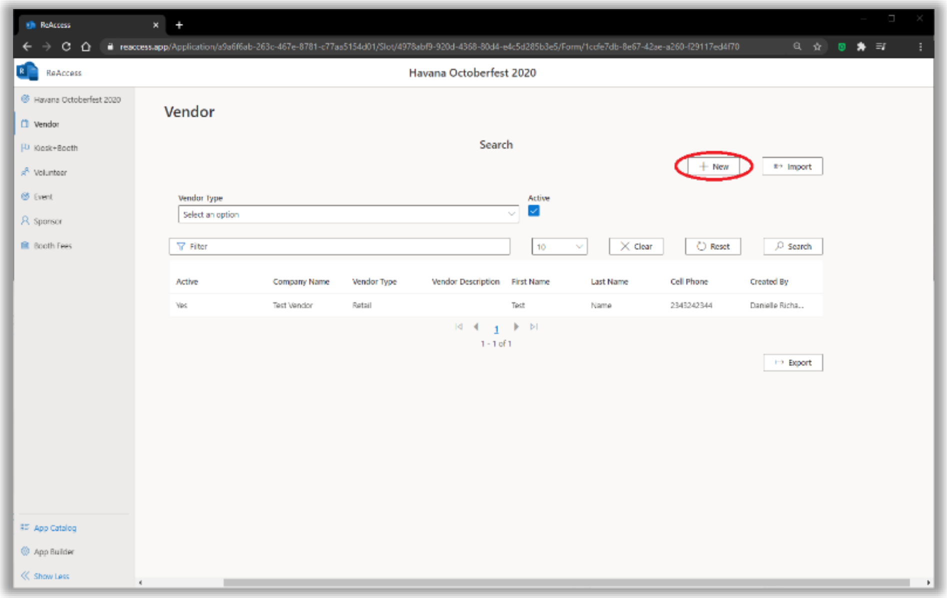


Figure 43 – Enter New Record or Import

4.3 Importing Multiple Records

To migrate several records at once, select the "Import" option. Continue by downloading the Definitions and Form Headers from the Import Data screen.

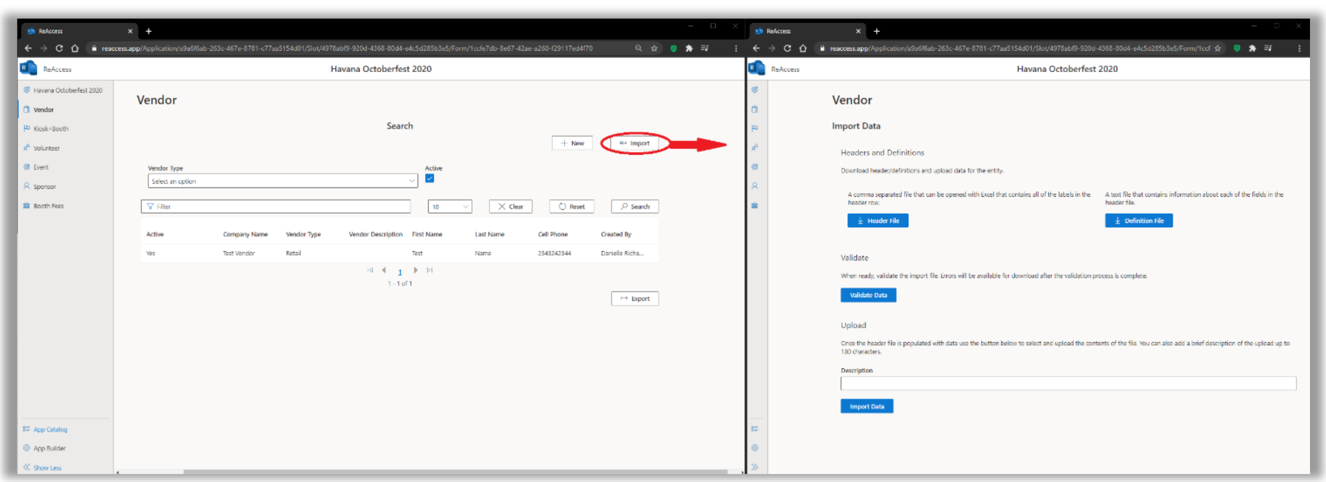
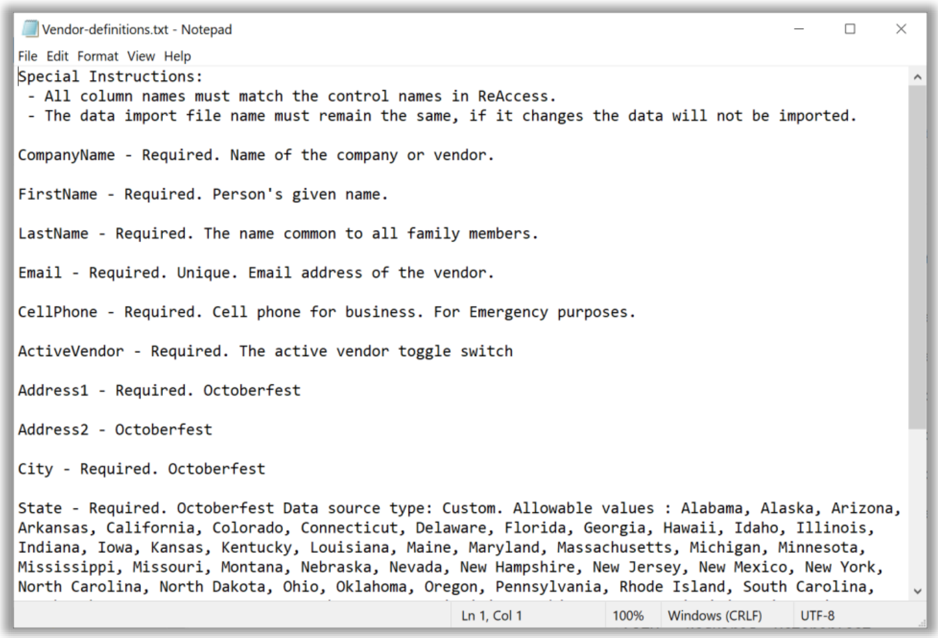


Figure 44 – Download Definitions and Headers

4.3.1 Downloading Form Definitions and Form Headers

When importing data, it is imperative that the data corresponds to what the application is expecting. Start by downloading the form definitions. This text file outlines the required form fields as well as any form filed using a custom List. The Form Headers file is a .csv file containing the data fields outlined in the definitions file. Be sure to enter all the required fields as outlined in the form definitions.



```
Special Instructions:
 - All column names must match the control names in ReAccess.
 - The data import file name must remain the same, if it changes the data will not be imported.

CompanyName - Required. Name of the company or vendor.

FirstName - Required. Person's given name.

LastName - Required. The name common to all family members.

Email - Required. Unique. Email address of the vendor.

CellPhone - Required. Cell phone for business. For Emergency purposes.

ActiveVendor - Required. The active vendor toggle switch

Address1 - Required. Octoberfest

Address2 - Octoberfest

City - Required. Octoberfest

State - Required. Octoberfest Data source type: Custom. Allowable values : Alabama, Alaska, Arizona,
Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois,
Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota,
Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York,
North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina,
```

Figure 45 – Sample Form Definitions File (.txt)

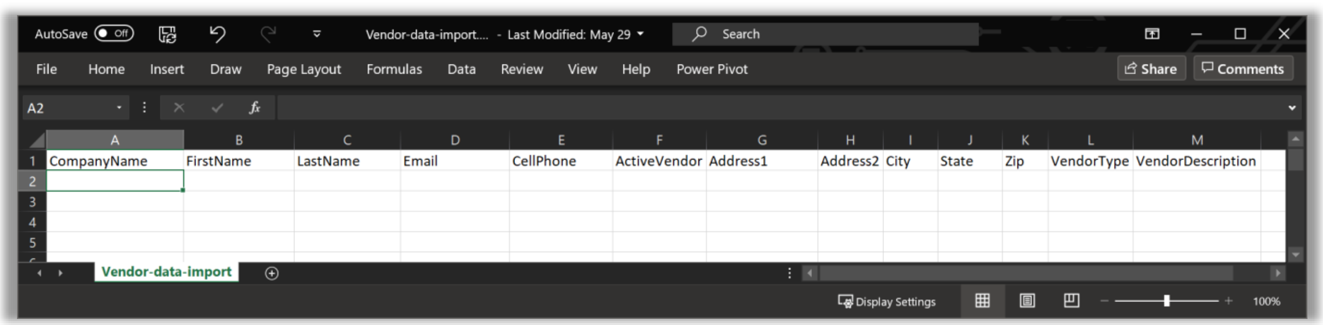


Figure 46 – Sample Form Header File (.csv)

4.3.2 VALIDATE & IMPORT THE HEADER FILE

Once the data has been entered, save a local copy of the file. Return to the Import Screen, click the Validate Data button, and the select the file to begin the validation process.

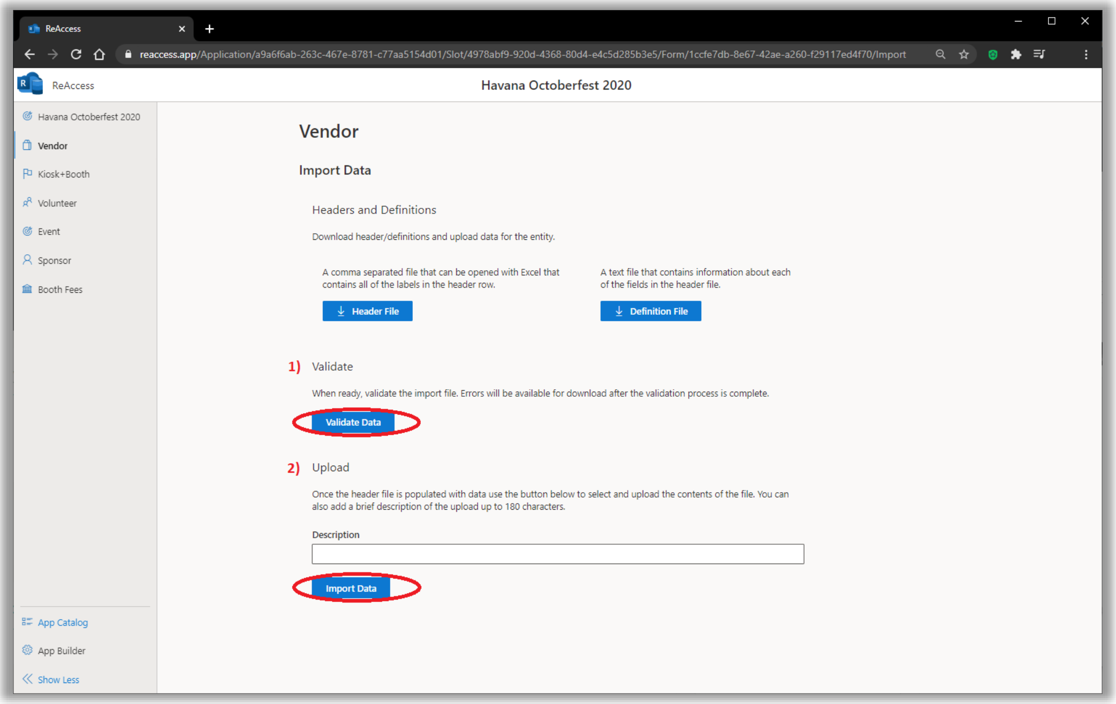
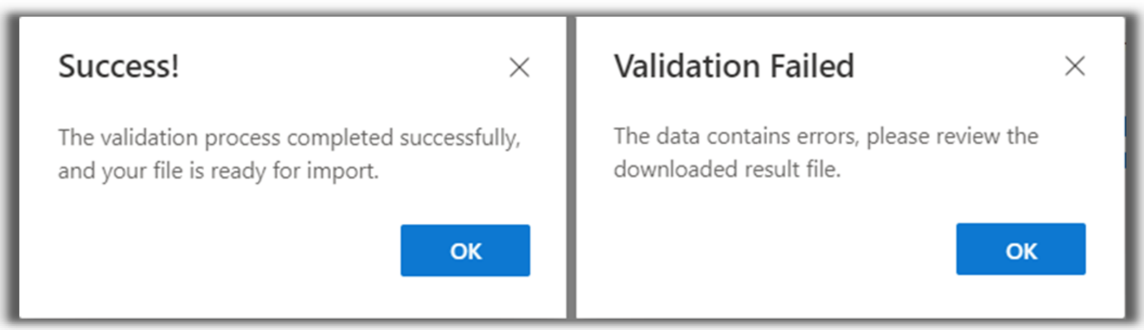


Figure 47 – Import process

If all business rules are met, a "Success!" message will display. If the validation failed, a text file containing the invalid data will begin to download. Correct the errors and resubmit the file for validation.



4.4 Searching for Data

To search for data, choose a form from the left menu. The search page will open. Instead of using the buttons to create a new record or import records, enter search criteria in the appropriate search boxes. Depending on the form fields, some search boxes will be text only, and others will be drop-down lists.

After entering the search criteria, click the 'Search' button. Select the 'Reset' button to perform a new search or select 'Export' to generate a CSV file (covered in the next section).

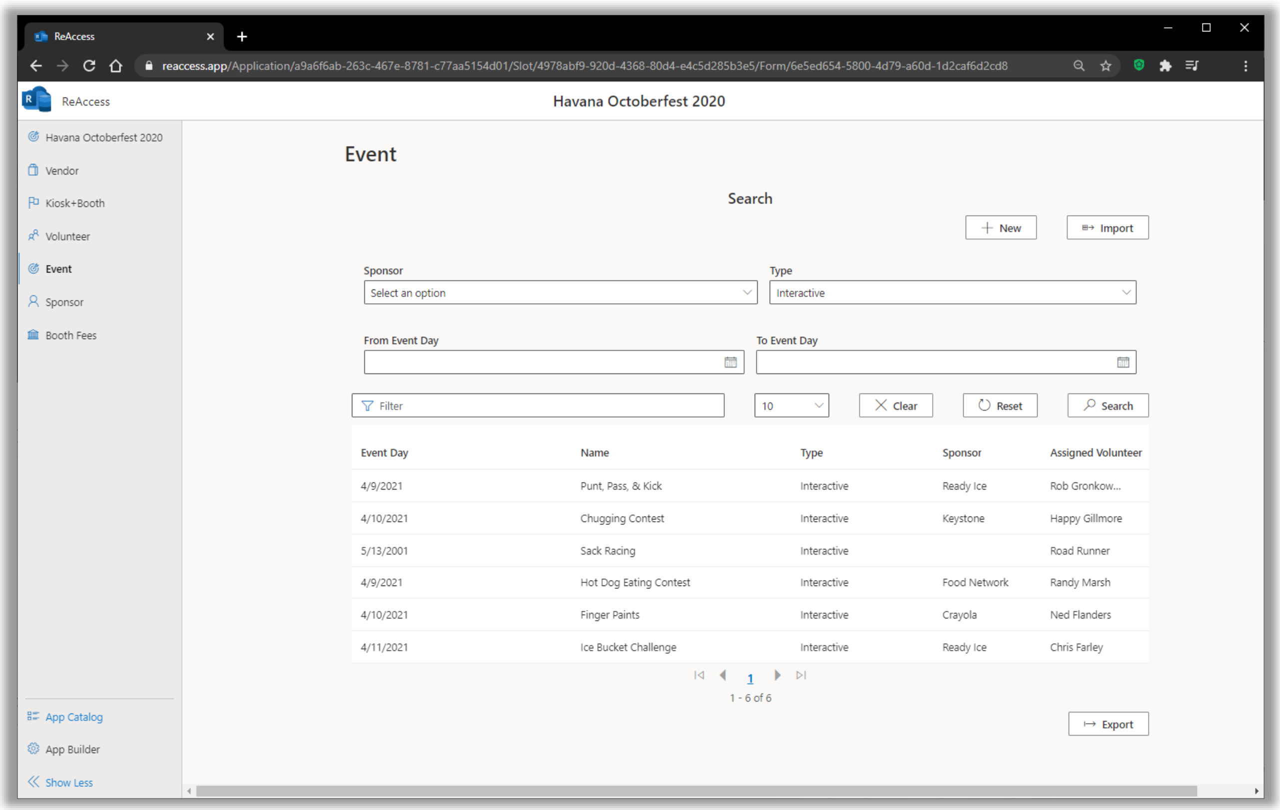
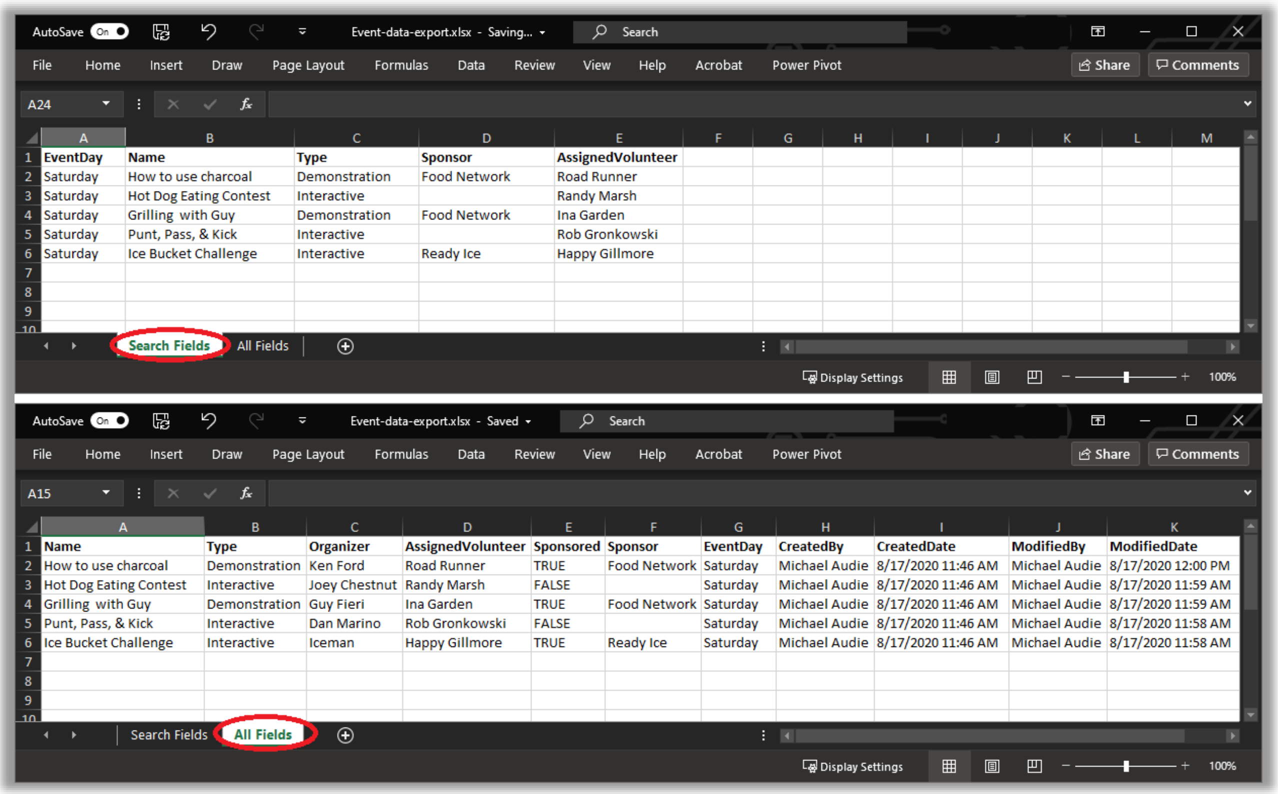


Figure 48 – Sample search

4.4.1 *Exporting Search Results*

ReAccess offers the ability to Export data after conducting a search within a form. It is important to note all records that meet the search criteria will be included in the export file. Upon completing the search function, select the Export button to generate a CSV file.

The file consists of two worksheets – "Search Fields" and "All Fields". This Search Fields worksheet displays the data as it is seen in the ReAccess Search Results. The All Fields worksheet displays the data for every form field related to that record.



EventDay	Name	Type	Sponsor	AssignedVolunteer
Saturday	How to use charcoal	Demonstration	Food Network	Road Runner
Saturday	Hot Dog Eating Contest	Interactive		Randy Marsh
Saturday	Grilling with Guy	Demonstration	Food Network	Ina Garden
Saturday	Punt, Pass, & Kick	Interactive		Rob Gronkowski
Saturday	Ice Bucket Challenge	Interactive	Ready Ice	Happy Gillmore

Name	Type	Organizer	AssignedVolunteer	Sponsored	Sponsor	EventDay	CreatedBy	CreatedDate	ModifiedBy	ModifiedDate
How to use charcoal	Demonstration	Ken Ford	Road Runner	TRUE	Food Network	Saturday	Michael Audie	8/17/2020 11:46 AM	Michael Audie	8/17/2020 12:00 PM
Hot Dog Eating Contest	Interactive	Joey Chestnut	Randy Marsh	FALSE		Saturday	Michael Audie	8/17/2020 11:46 AM	Michael Audie	8/17/2020 11:59 AM
Grilling with Guy	Demonstration	Guy Fieri	Ina Garden	TRUE	Food Network	Saturday	Michael Audie	8/17/2020 11:46 AM	Michael Audie	8/17/2020 11:59 AM
Punt, Pass, & Kick	Interactive	Dan Marino	Rob Gronkowski	FALSE		Saturday	Michael Audie	8/17/2020 11:46 AM	Michael Audie	8/17/2020 11:58 AM
Ice Bucket Challenge	Interactive	Iceman	Happy Gillmore	TRUE	Ready Ice	Saturday	Michael Audie	8/17/2020 11:46 AM	Michael Audie	8/17/2020 11:58 AM

Figure 49 – Sample Export File

4.5 Viewing, Editing and Printing a Record

Double-click on a search result to open the details view of the record. From this screen, users with the appropriate permissions may view, edit, delete or print the data from a given form. If there are multiple print templates available, users may select the desired template by using the drop-down menu as shown below.

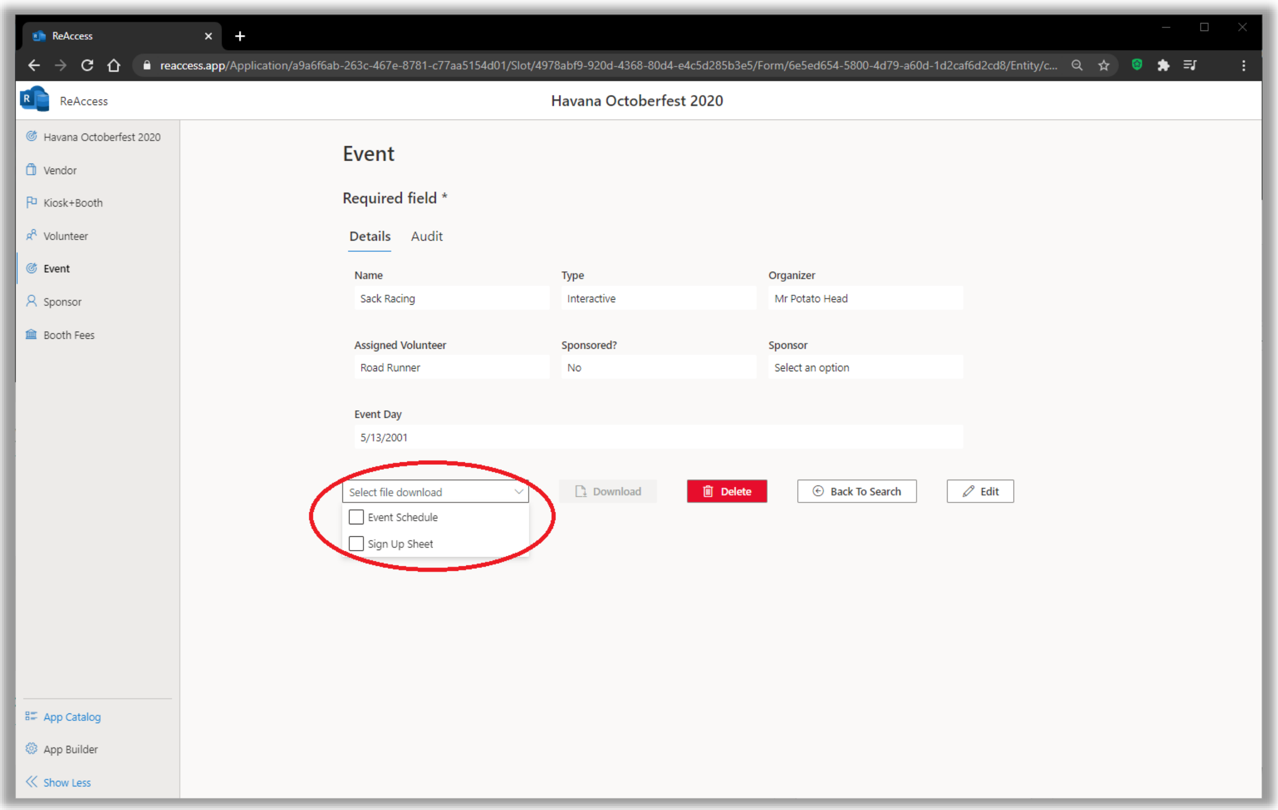


Figure 50 – Editing and printing a record

4.5.1 *Auditing a Record*

ReAccess has a built in Audit tab for every record. This gives users the ability to see who and when a record was created or modified.

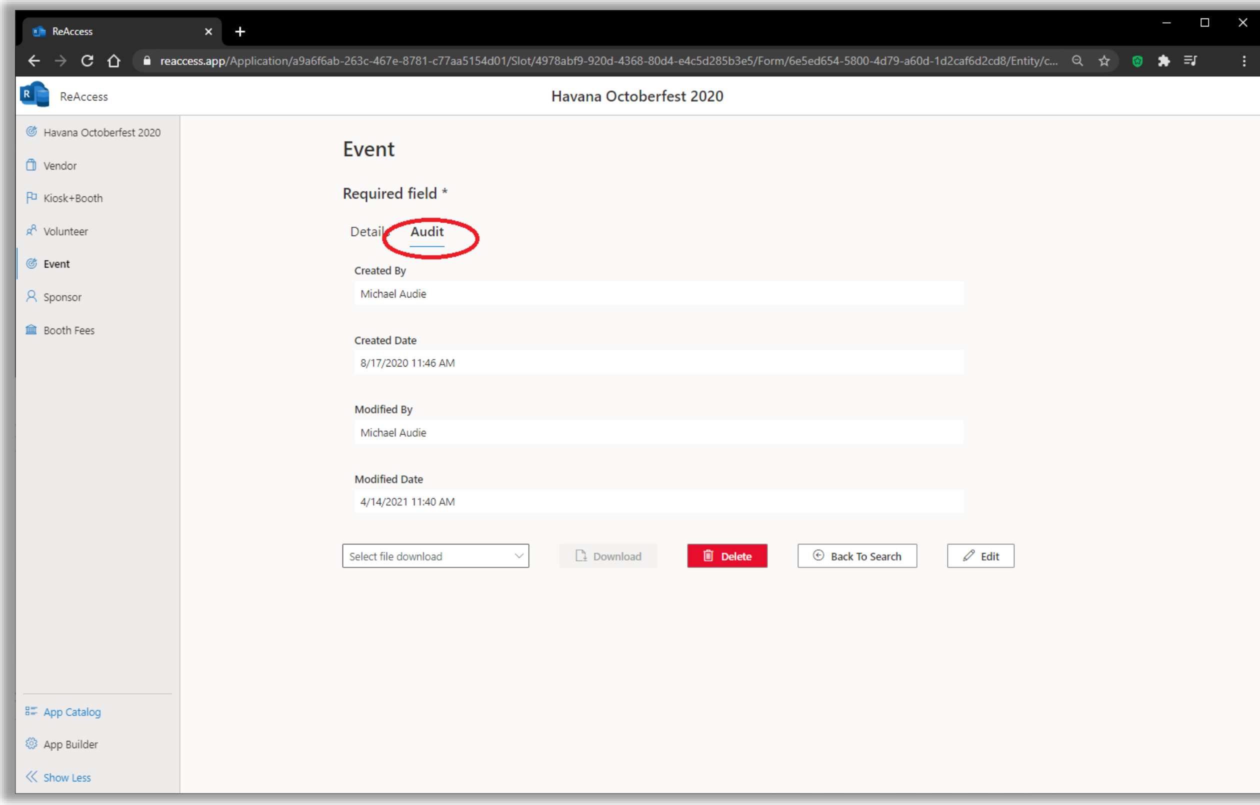


Figure 51 – Sample Audit tab

SECTION 5 FIND US

Email: **support@itintact.com**

We would love to hear from you. Contact us for product support or other inquiries related to our products and services.

ReAccess Portal: **MyReAccess.com**

For additional support you can connect to the ReAccess Community Portal for suggestions, templates, tips and tricks on ReAccess, App Builder, Decoder, Power Bi, and LAD/D.

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