

Quick Start Up

Welcome to SpeedBase Online Help

SpeedBase is a customizable database software with a userfriendly interface designed for information management.

Learning how to use SpeedBase is fast and does not require special technical skills.

Before moving into details, we highly recommend you to watch the [training videos](#) first.

The recommended path to follow for an easy and quick start up is given below:

1st STEP: Do Some Training (Without being worried about hurting actual data)

On first startup after installation, SpeedBase will automatically create a new, empty database for you. Use this database for training only as you may create a new one for entering actual information.

- Install any number of the [application templates](#) you wish to experiment.
- Have a look at the [Term Map](#) to quickly get some idea about the terminology and windows and their roles used in SpeedBase.
- Experiment anything you wish, e.g. how to [create](#), modify, [delete](#) and [search](#) records

2nd STEP: Create a New Database For Entering Actual Data

Note that, you may skip most of the steps below if you are already happy with the current design of your database.

- [Install new database](#).
- Install the [application template](#) you wish to use or skip this step if you prefer to start from scratch.
- Create (more) [CATALOGS](#) as needed. Create the [FIELDS](#) you wish under them.
- Use [Form Designer](#) to make the fields visible on record window.
- Create your first records in [Record Details Window](#).
- Create [VIEWS](#) as needed to customize the appearance of Record List Window.

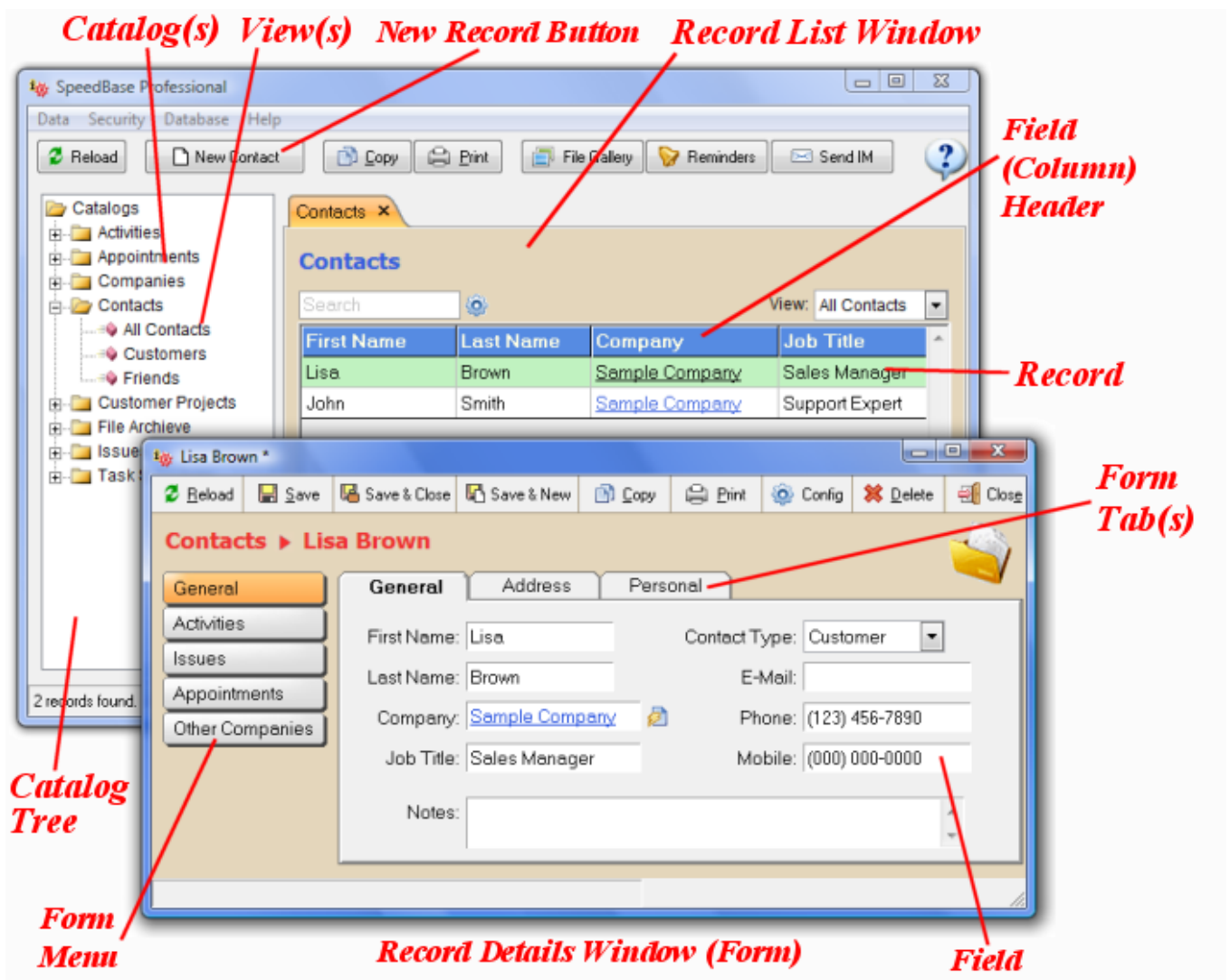
3rd STEP: Adding More Power

- Create your first [FILTER](#) to determine which records should be listed
- Create your first [RELATIONSHIP](#)
- Create your first [FORM MENU](#)

For Teamwork Edition Users: You may find further documentation for extended features like [messenger](#) or [user management](#) under the related help menu titles.

The Basics & Terms

Term Map



Next Topic: [Important Definitions](#)

Definition of Terms Used Throughout This Help Document

Remember Context Sensitive Menus

There are many places where you can access the list of available actions by pointing your mouse on an item and right clicking. These items are:

- Catalogs folder (the very top folder on catalog tree)
- Catalog folders
- View items under each catalog folders
- Any window where you see a record list (right on any record row)
- File or image fields on record forms

Catalog

A **CATALOG** is the major structural item of a database where you store certain type of information. This may be anything you can imagine: Inventory, Address Book, Books, Companies, Document Library, Flowers... etc. are all different catalogs.

You may create any number of catalogs in your database.

When viewed in tabular (spreadsheet style) form, a **catalog** corresponds to a whole **TABLE** with rows and columns.

Field

A **FIELD** is the second level structural item of a database. Every catalog contains several fields to store information. For example, an "Address Book" catalog may contain fields like name, phone number, birthdate etc. to store information for each person.

When viewed in tabular (spreadsheet style) form; each **field** corresponds to a **COLUMN** and **field name** to **column header** in a table.

Record

A **RECORD** is a set of information you have typed into the fields of a catalog. So it is NOT a part of the structural information of a database. You may create, update or delete records as needed. You may have any number of records in a catalog.

When viewed in tabular (spreadsheet style) form; each **record** corresponds to a **ROW** in a table.

View

When you are viewing the records of a catalog in tabular style, you may need some customizations about how the records are displayed. Views determine which fields are displayed, how records are sorted and filtered out.

Every catalog may have any number of views (or none) under it. Views are displayed under each catalog folder they belong in the catalog tree.

See [Understanding Views](#) for details.

Filter

A filter is a group of rules which is applied to a certain view when displaying a record list. Every view can have its own attached filter. Filters are saved in your database with the view it belongs to.

Example: If you sometimes need to quickly access the list of contacts who are customers and ones who are friends at other times, it is best to have two views with appropriate filters.

Record Details Window (or shortly Form)

A form simply consists of boxes where you type in information to create or update a single record. A form window (or [record details window](#)) is opened whenever you click the "new record" button from toolbar or doubleclick a row of record. You may arrange the locations of each field according to your preference using [Form Designer](#). Every catalog has a single associated form with it.

Form Menu

Form menus are the menu buttons displayed on the left side of a form. If a record has some relationship with a group of other records from another catalog, you may access that list of related records by clicking a menu button. For example, if there is a relationship between companies and people catalogs, you may easily display the list of workers while you are viewing a company record.

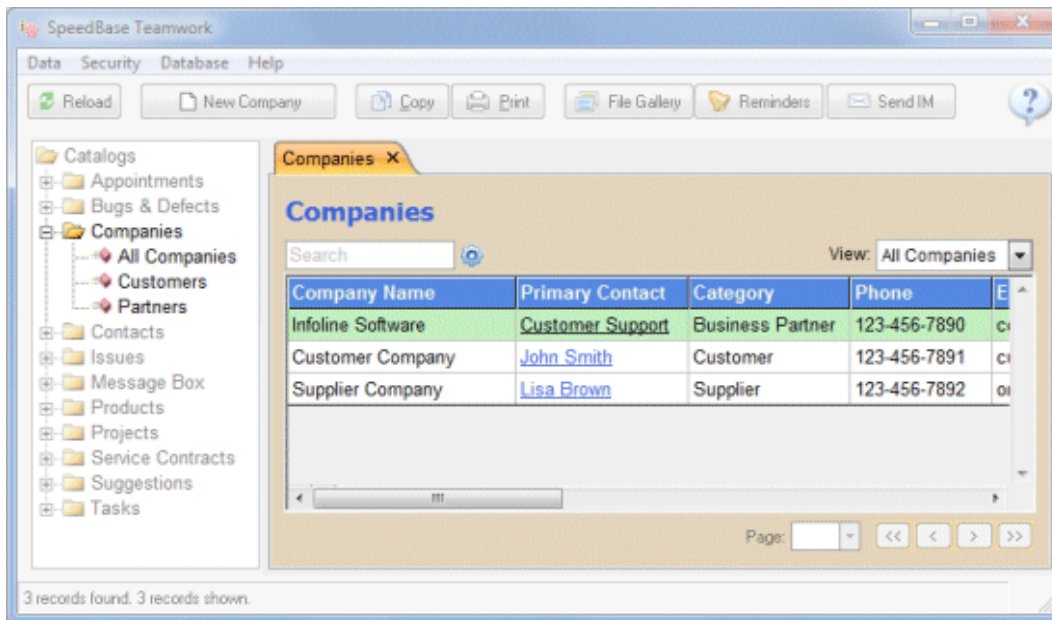
See [Creating Relationship](#) and [Creating Form Menus](#) for more info.

Relationship

A relationship is defined between two catalogs. It helps to easily access the related information stored in the second catalog while you are viewing a record details of the first catalog. Creating relationships (whenever possible) greatly enhances the performance and ease of information management in your working environment.

See [Creating Relationships](#) for more info.

Record List Window



If you click one of the existing catalogs from [catalog tree](#), SpeedBase will open a new tab and display the list of the records existing in that catalog in tabular format.

Double-Clicking a Non-Underlined Cell

If you double click on any cell which is NOT underlined on a record line, a new tab will be opened to display the details of current record.
(Beware that clicking an underlined cell will not open current record, it will open the "related" record)

Single-Clicking an Underlined Cell

If you see a cell (field) content underlined, that means that the record of current row has a connection (relationship) to another record which belongs to another catalog.
Example: If you have opened the record list of companies catalog, you may see the name-surname field in underlined style representing the "primary contact" column. Clicking on this link will open the related record detail from people catalog.

Selecting Records

Click anywhere NOT underlined on a record row to select it. You may also select multiple adjacent record rows by dragging your mouse in the up or down direction (or pressing arrow keys while shift is hold down). Selected rows are displayed in green color.

Creating/Erasing Records

To add a new record to the current catalog, click the "New" button from toolbar.
To delete a record permanently from your database, select the record row(s) you wish to delete. Right click your mouse and click "Delete Permanently" from the menu.

Warning!

Deleting a record will permanently remove the data existing on that record. This action is irreversible. You may consider deactivating records instead of erasing them.

Adding/Removing Records To/From a List

If you are displaying a "related" record list from within a record details window, "new" button will become unavailable. You should right click your mouse to show the context menu to create new, insert existing or remove selected record to / from the current list in that case. Note that, "inserting" an existing record will not create new record, it only relates the target record with the main record. In the same manner, removing from the list never deletes an existing record, it only removes the relation between the target and main record.

Browsing Records

SpeedBase displays 100 records per page by default, which can be increased from system preferences. You may move between pages by clicking the navigation buttons at the bottom of record list window.

Right-Clicking Anywhere On Record List

This will open a context sensitive menu depending on current selection of records. Remember that if you see a record list window anywhere, this menu is always available .

Changing How Records Are Displayed

If you click on column headers (cells on top row with blue color) SpeedBase will sort the records according to that column alphabetically. Clicking the second time to the same header reverses the order.

You may drag and drop the border line between two adjacent column headers to adjust a column width according to your preference. Doubleclicking the border resizes the column width automatically. The changes you make in this way are temporary and they will be lost once you close the current tab. To make the changes permanent, you should either adjust the current view settings or create a new view.

Changing Views

Views are saved information for record list windows about how the column headers are arranged, how the records are sorted and whether a filter is applied. You may change current view from the view selection box located on top right of the record list.

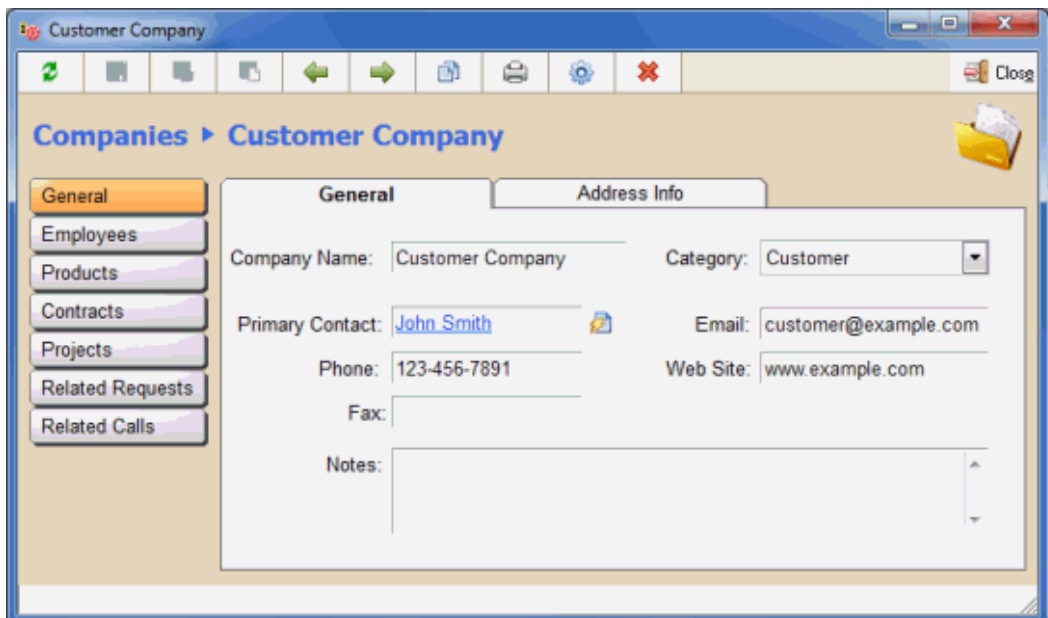
[Click here](#) for more information about creating and modifying views.

Searching Records

There is a search box on top of the record list. It is sufficient to type the search phrase and press enter to force SpeedBase to filter out the records according to your search keyword. SpeedBase searches on all fields by default. Click the search settings button to show advanced search options. You may choose there a single field for the search or modify the search mode.

Next Topic: [Record Details Window](#)

Record Details Window (Form)



If you double click any record row or single click any underlined cell while you are viewing a [record list window](#) anywhere, SpeedBase will open a new window and display the details of the related record. This is the form window where you can view, create or modify record information in the catalog you are working.

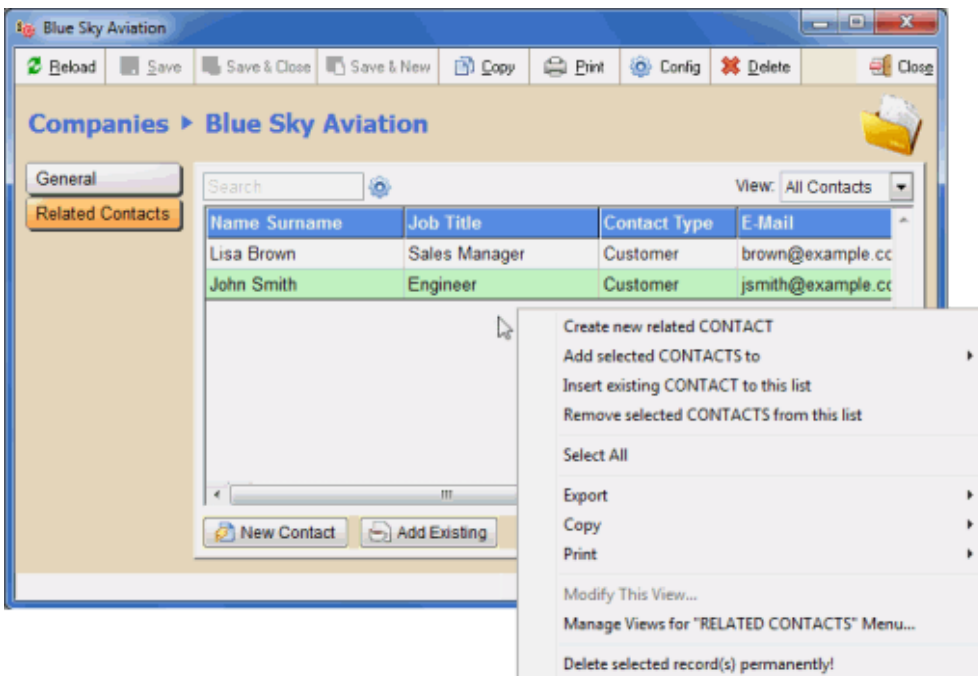
Accessing Related Records

A record detail window may have its own menu on left side which allows you to access "related records" from other catalogs easily. Every menu button represents a relationship with current catalog with another catalog. If you do not see any menu item, this means that you either haven't created a relationship with another catalog or didn't create a menu button. See [Creating Relationships](#) for detailed information.

Updating Records

You can save the changes you have made on current record by clicking the save button on toolbar. If the save button or data fields are disabled, the possible causes are:

- You haven't made any change on the record yet,
- You made some changes but then, removed the changes so there is no actual changes to save.
- (Teamwork Edition) Your access rights are restricted from security settings, so you do not have write permission to update the record.
- The record is deactivated (You will see a snow icon on right top of the record window). You should reactivate it if you wish to modify it.
- The record is protected (locked) or discarded (you will see a padlock icon on right top of the record window). You should remove the protection first, if you wish to modify it.

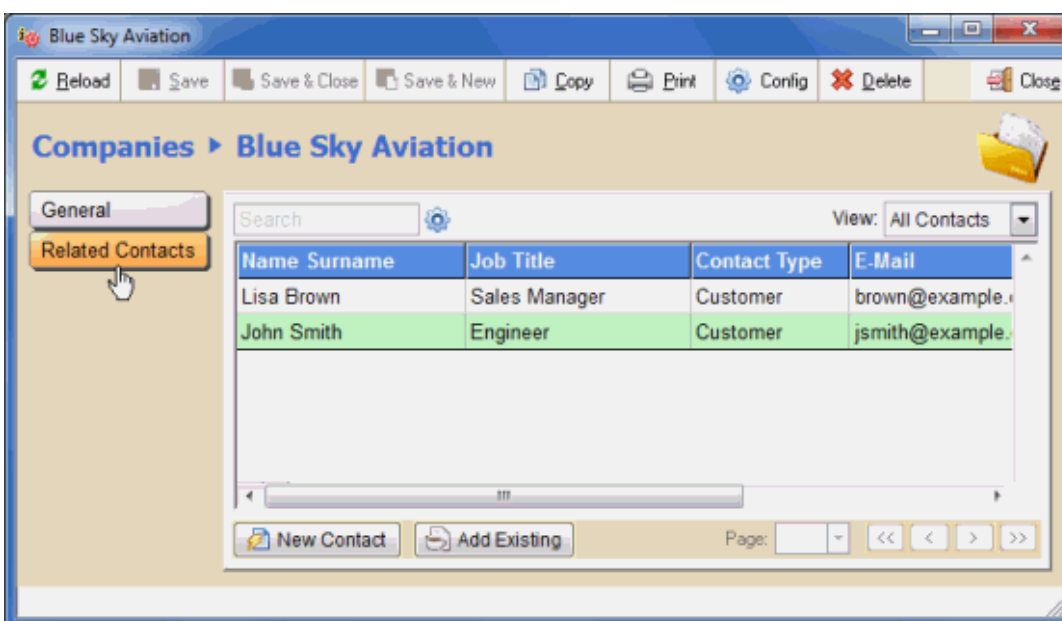


Adding/Removing Records To/From a Record List

Clicking a side menu button will display a related record list. You may right click your mouse to show the context menu to create new, insert existing or remove selected record to / from the current list in that case. Note that, "inserting" an existing record will not create new record, it only relates the target record with the main record. In the same manner, removing from the list never deletes an existing record, it only removes the relation between the target and main record.

Next Topic: [Displaying Related Records](#)

Displaying List of Related Records



If you open a [record details window](#) and click one of the menu buttons on left side (see picture above), SpeedBase will display a **RELATED RECORD LIST**, i.e. the list of records which have a relationship with

the main record. (in the example picture above, the related records are people who are working for 'Blue Sky Hosting' company)

Next Topic: [Toolbar Buttons](#)

Toolbar Buttons

Reload: Reloads current window. If you are displaying a record list, the list is refreshed from database. If you are displaying a record details window, the record details are reloaded from database to show the last saved state of it. If you click this button while there are unsaved changes on the record, changes will be lost.

New Record: Opens a new blank record details window to create a new record in the current catalog.

Save: Saves the changes you have made on current record to the database.

Save & Close: Saves and closes current record window.

Save & New: Saves changes, closes the record and opens a new blank record window.

Previous Record: Loads the record which comes before the currently displayed record.

Next Record: Loads the record which comes after the currently displayed record.

Copy: On a record list window, copies all of the displayed records to the clipboard. On a record details window, copies all of the field values of current record. You may then paste the data to any other application in plain text format.

Print: Opens print setup window to print currently displayed record(s).

File Gallery: Opens file/image gallery window.

Reminders: Opens the reminder window where you may review the list of active reminders and create a new one.

Send IM (Instant Message): (Teamwork edition) Sends an instant message to the selected SpeedBase user(s). See "[Instant Messenger](#)" for more info.

Deactivate: Deactivates the current record. See "[Deactivating Records](#)" for more info.

Lock: Protects the current record to prevent accidental modifications. See "[Protecting Records](#)" for more info.

Config: Allows you to change the fields and the design of current record window.

Delete: Deletes the currently displayed record permanently. There is no undo for this action.

Help Button: Displays quick help tip or opens online help documentation depending on current window.

Next Topic: [Main Menu](#)

Main (Top) Menu

Records Menu

New: Opens a new blank record details window to create a new record in the current catalog. Available only for record list window.

Save: Saves the changes you have made on current record to the database. Available only for record details window.

Deactivate: Deactivates the current record to hide it from all listings. Available only for record details window.

Protect: Locks the current record to prevent accidental modifications. Available only for record details window.

Remove Protection: Unlocks the current record and allows the users to modify it. Available only for record details window.

Import: Imports record information from a file into the current catalog. Available only for record list window.

Export: Exports selected records to a file from the current catalog. Available only for record list window.

Exit: Closes all open tabs and exits SpeedBase application.

Security Menu

Most of the features available under this menu are utilized on a multiuser environment (Network edition).

Users: Opens the users window which allows you to manage SpeedBase users and their access rights.

User Groups: Opens the usergroups window which allows you to manage multiple user groups (security roles) for easier management of access rights.

Access Rights: Opens "Advanced Access Rights" window which is used to apply security exceptions to have extended control above access control.

Change Login Password: Allows SpeedBase users to change their login password they are using when starting SpeedBase.

Database Menu

Catalogs: Opens "Catalog Configuration" window which is the starting point to build the database structure (catalogs, information fields, data input forms, relationships etc.)

Connection Settings: Allows you to define the connection parameters in order to connect to the selected database.

System Preferences: Allows you to modify various system wide settings effective for all SpeedBase users.

My Preferences: Allows SpeedBase users to modify several options dedicated to their own user profile.

Install Application: Introduces a list of available application templates from which you can choose to install in your database.

Import Application Template: Import database design data from file.

Export Application Template: Export current design of your database to file.

Backup & Restore: Allows you to create database backups and restore when needed.

Create New Database: Opens the "create database" window where you can drop current database and create a new, empty database. **Use with caution!**

Help Menu

About SpeedBase: Displays about window with version and registrant information.

Online Help: Opens online help documentation in your default web browser.

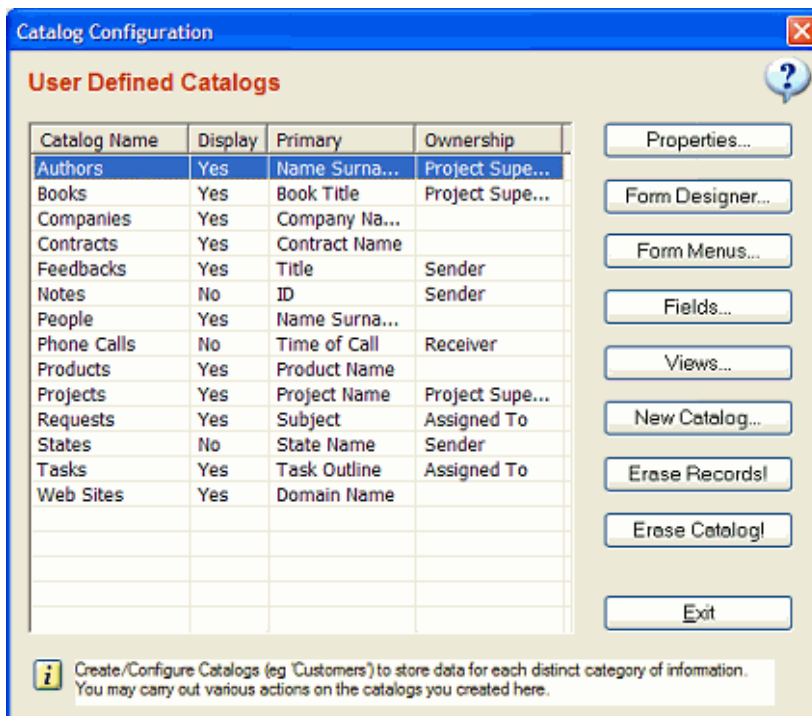
Register: Displays registration window to convert your trial version to registered full version. Visit [product information](#) page to get your license to get rid of trial edition limitations.

Upgrade: Opens InfoLine Software web site to guide you for upgrading your current software edition.

Building Database

Catalogs

Catalog Configuration



Click "Database" from main menu, click "Catalogs".

This window is the starting point to build all of your database structure. You may carry out various actions for the selected catalog from the list.

Catalogs, Fields & Records

A **CATALOG** (also called as "table") is the major item where you store certain type of information. This may be anything you can imagine: Inventory, People, Products, Books, Companies... etc.

Every catalog consists of several **FIELDS** to store information. For example, you may create a new catalog and name it as "People" to store name, phone number, birthdate etc. for each distinct person. In this case, every distinct person represents a record of the "people" catalog.

Note that, when viewed in tabular (spreadsheet style) form;

catalogs correspond to **tables**,
fields correspond to **columns** and
records correspond to **rows**.

Creating New Catalogs

You may create any number of catalogs by clicking the "New Catalog" button on this window. SpeedBase will ask you for the singular and plural forms of the catalog name in order to display the most suitable name depending on different places of the application.

See [Modifying Catalogs](#) for information about catalog properties.

Actions You May Apply to Catalogs

Form Designer: Opens a window to design the "Record Details Window" for the selected catalog.

Form Menus: Opens a window to create side menus on "Record Details Window" for the selected catalog.

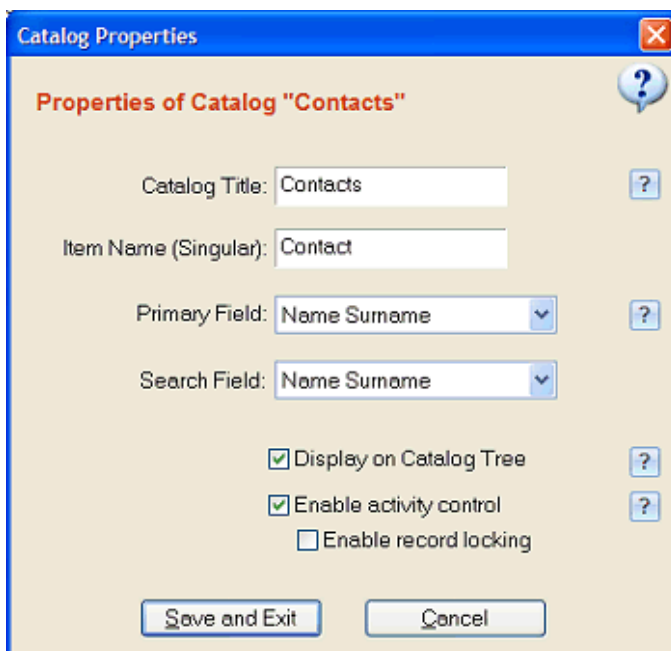
Fields: Opens a window to display a list of existing fields for the selected catalog. You can create, modify or delete information fields there.

Views: Opens a window to display a list of existing shared (public) views for the selected catalog.

Erase Records: Deletes all of the records in selected catalog permanently. This action is irreversible. **Use with caution.**

Views: Opens a window to display a list of existing shared (public) views for the selected catalog.

Modifying Properties of Catalogs



The screenshot shows a dialog box titled "Catalog Properties" for the catalog "Contacts". It contains the following fields and options:

- Catalog Title: Contacts
- Item Name (Singular): Contact
- Primary Field: Name Surname
- Search Field: Name Surname
- Display on Catalog Tree
- Enable activity control
- Enable record locking

Buttons: Save and Exit, Cancel

Click "Database" from main menu, click "Catalogs", select the catalog you wish to modify from the list, click "Properties" button.

Displays a window to modify various properties of the selected catalog.

Catalog Title: Type the catalog name, examples: Companies, Address Book, Photo Collection

Item Singular Name: Type the name of the items stored in this catalog in singular form, examples: Company, Contact, Photo.

Primary Field: Select the field that is most descriptive for each record (e.g. Name Surname for "People" catalog). You may change this setting anytime you wish. Data on this field is used as the record title where needed.

Search Field: Select the field which should be used as default whenever a search is made. In most cases selecting "All Fields" gives the most convenient result.

Displayed On Catalog Tree: By default, SpeedBase display folder icon for each catalog on catalog tree. If you uncheck this box, no folder is displayed.

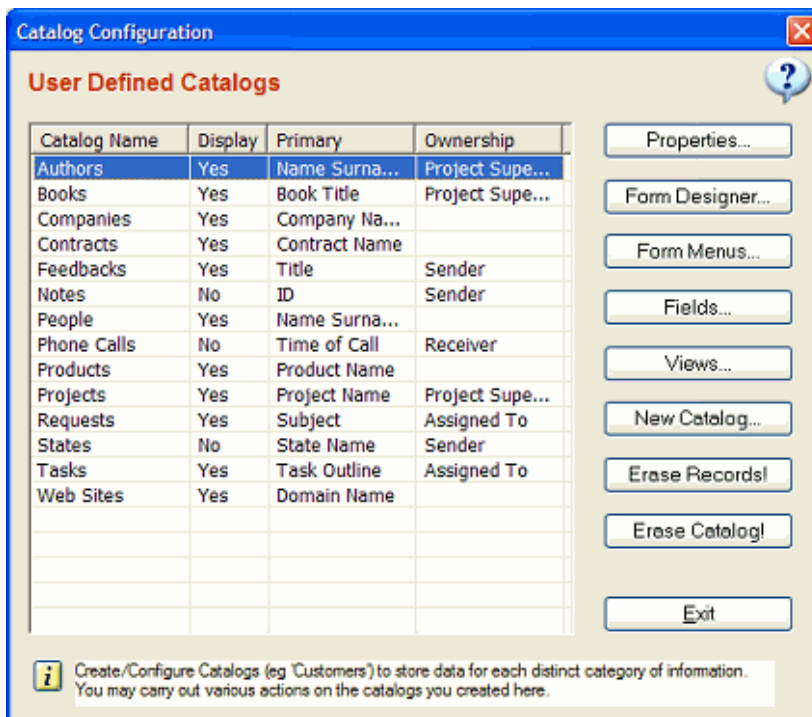
Enable Activity Control: Check this box, if you wish to set the states of records as "active" or "inactive". See [Activating/Deactivating Records](#) for more info.

Enable Record Protection: Check this box, if you wish to enable record protection for this catalog. See [Record Protection](#) for more info.

Note:

If you are about to create a new catalog, some of the properties may not be shown as the catalog is not created yet. You may reopen this window again, after you have created the catalog.

Erasing Catalogs



Click "Database" from main menu, click "Catalogs".

Click "Erase Records" button to delete or records of the catalog permanently.

Click "Erase Catalog" button to delete the catalog including all records and structural information permanently.

How to Erase All Records of a Catalog

Clicking "Erase Records" button deletes all of the records of selected catalog permanently. Only the records will be deleted. The structural properties of the catalog are not effected, so you may continue to enter new records as usual.

Warning! There is no way to undo this action.

How to Erase a Catalog Completely from Database

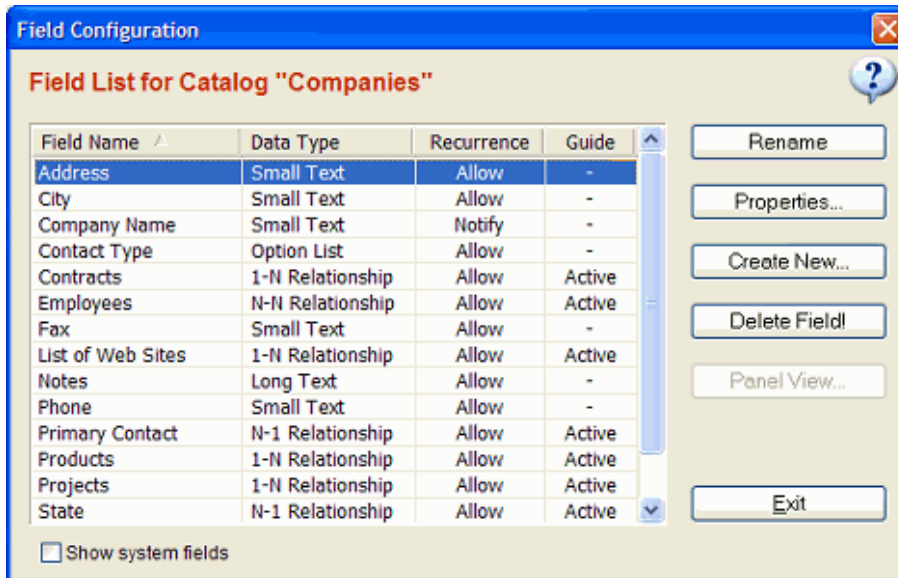
Deletes the catalog with all fields, records, views, filters under it permanently.

Warning! Erasing all fields and eventually the catalog itself results in deleting all records as well as deleting the full structural information like field definitions, views, menus created for this catalog. There is

no way to undo this action.

Fields & Data Types

Creating Fields



Click "Database" from main menu, click "Catalogs". Select the catalog you wish to create fields for, click "Fields" button.

(Double clicking a catalog name also opens fields window)

Creating New Fields

Click "Create New" button to open Create Field Wizard.

Field Name: Type the name of the field into the box. For example, if you are creating fields for "People" catalog, you may wish to create fields like "Name Surname", "E-Mail", "Phone" etc. Field names can be changed later if needed.

Data Type: SpeedBase supports different types of fields depending on what type information is to be stored. This should be selected with care as you cannot change the data type of an existing field later. Available data types are as follows:

Small Text

Stores up to 255 characters of text.

Long Text

Stores up to 8000 characters of text, used to store descriptions or notes where the text may longer than the limit of a small text area. Do not prefer long text unless you need space more than 255 chars.

Integer:

Stores positive or negative integer numbers that do not exceed approx. 2 billion.

Decimal:

Stores decimal numbers having up to 16 digits on left and up to 8 digits on right side of the decimal point.

Computed:

Automatically calculates the associated math expression and displays the result in real time. It can apply various arithmetical operations using the current values saved on other fields. Example: Assume that you have a decimal field for saving price information. A computed field can display the tax value calculated from the tax rate and entered price.

See [Computed Fields](#) for detailed info about the syntax of the expressions and examples.

Date:

Stores date information in one of the three available formats. If you also activate reminder feature, SpeedBase automatically creates a reminder in the background whenever a date is entered into this field of a record.

Time:

Stores time information in hh:mm format.

DateTime:

Stores date and time information in one of the three available formats. If you also activate reminder feature, SpeedBase automatically creates a reminder in the background whenever a date-time info is entered into this field of a record.

Checkbox:

Stores status information with two options only (like yes/no, exists/empty etc.) Fields with this data type are represented as check boxes.

Option List:

Stores property information to select from multiple choices (like colors, sizes etc.). Fields with this data type are represented as a drop down list box. You are allowed to rename, remove or insert new options in a later time.

Tips: Only one choice can be selected in this field when creating a record. If you need to check multiple options at the same time, consider creating either multiple checkboxes or a [Multi to N Relationship](#) with a catalog which contains the options as its records.

System User:

Stores owner of the current record. Available in a multiuser environment (Teamwork Edition) only. Fields with this data type are represented as a drop down list box containing SpeedBase user names as its items. Storing ownership information with records allows you to grant extended rights to record owners.

See [Applying Owner Rights](#) for more info.

Relationship:

See [Creating Relationships](#) for detailed info about relationships.

Fields with this data type are represented either as a drop down list box or a [record list window](#)

File / Image:

Stores file or image data. By default, this field displays the file name as a linked text on the record form. You may check "display as image" if you plan to store image files. This will show the image on the record form instead of file name. (jpg, png, gif, bmp are supported)

See [File & Image Fields](#) for more info.

Default Value: Sets the default value inserted automatically whenever you open the record form to create a new record.

Allow Duplicate: Select whether two distinct records of this catalog may store the same data in this field. If you disallow duplicates, SpeedBase will show a warning and refuse to save create/update a record if duplicates are found.

Text Filter: Select the appropriate value here. This helps SpeedBase to display and handle the information optimally.

Displaying New Fields In Record Forms

A newly created field will not automatically appear on record details window!

You should add the new field into the record form by using "Form Designer". See [Designing Data Forms](#) to read how to do it.

Panel View (Advanced Usage)

This button is available and effective only if you have placed a field of type 1-N relationship (related record list) into the form by using [form designer](#). It allows you to create and customize the view of this record list.

Computed Fields

Tip: See "[Adding Statistics](#)" if you are looking for information about stats boxes.

A computed field is an advanced feature which can calculate complicated arithmetical expressions and display the resulting value. This field is not used for entering information, instead, it is used to create and display new information using the available information on other fields. The expression should be typed into the expression box.

Return Type

The return type specifies the data type used to save and process data for this field. Note that the return type cannot be changed once the computed field is created. If you need to change the type, you should create a new computed field to replace and consider the consequences if there are manually handled values.

Numeric / Text / Date

Make sure to select the right "return type" when creating a new computed field. e.g. If you expect to generate a result containing letters, you should choose "text".

Copy Data From Parent Record

This option is available only if you have created an appropriate relationship with other catalogs.

Example: If you have a relationship between customer and order catalogs, where you assign many orders to each customer, you may add a computed field to the order window to display any data from the parent customer record (e.g. order form may show the customer's email address etc.).

Count Sub Records

This option is available only if you have created an appropriate relationship with other catalogs.

Example: If you have a relationship between customer and order catalogs, where you assign many orders to each customer, you may add a computed field to the customer window to display the total number of orders assigned to that customer.

Get Sum/Average of a Field From Sub Records

This option is available only if you have created an appropriate relationship with other catalogs.

Example: If you have a relationship between customer and order catalogs, where you assign many orders to each customer, you may add a computed field to the customer window to display the sum of payments of all related order records assigned to that customer.

Get Data from Top / Bottom Sub Records

This option is available only if you have created an appropriate relationship with other catalogs.

This function allows you to find out some data from the top/last related historical record.

Between all existing related records, the one which has either the greatest ("top") or smallest ("bottom") value on the "reference field" is retrieved first. Data is then read and returned from the field which you have selected as "data field".

Example-1: Assume that, you have a relationship between customer and order catalogs, where you assign multiple orders to each customer. You may add a computed field to the customer window to display the highest payment ever among all related order records assigned to that customer. Both data and reference fields should be selected as the field which shows payment value in this case.

Example-2: Assume that, you have a relationship between customer and service contract catalogs, where you assign many contracts to each customer. You may add a computed field to the customer window to find out and display the description of the contract which has the latest expiration date among all related contract records assigned to that customer. The "reference field" should be selected as the expiration date field and "data field" should be selected as the description field in this case.

Recalculate Method

Automatic Always: This is the default behavior. The computed field value is recalculated automatically whenever any of the dependent values are changed. Beware that a computed field of an individual record might be automatically recalculated and rewritten to the database, whenever SpeedBase detects a change in any data existing on other records which are referenced on computed field expression. This option should NOT be selected for example when an invoice total is calculated from retrieved values of "current" product prices, as prices may change in the future while totals shown in completed invoices may not. The field value cannot be edited by user in this option.

Auto on Create, Manual on Update: The computed field value is calculated automatically when you create a new record. Once the record is saved and closed / reopened, it will not be recalculated automatically any more however, you will always have the option to trigger the recalculation by clicking the "recalculate" button shown on right side of the field. The field value can be edited only if the "allow editing" box is checked and the record is reopened for update purpose.

Auto on Create, Disabled on Update: The computed field value is calculated automatically when you create a new record. Once the record is saved and closed / reopened, its value becomes permanent and cannot be changed or recalculated any more. The field value cannot be edited by user in this option.

Manuel on Create, Disabled on Update: You may trigger the automatic recalculation only if you click the "recalculate" button shown on right side of the field during creation of a new record. Once the record is saved and closed / reopened, its value becomes permanent and cannot be changed or recalculated any more. The field value can be edited only if the "allow editing" box is checked and the record is just being created as new.

Manuel on both Create and Update: You may trigger the automatic recalculation only if you click the "recalculate" button shown on right side of the field at both creation or update of a record. The field value can be edited at all times if the "allow editing" box is checked.

Computed Field Options

Suppress Calculation Errors: When the calculation of the computed field expression generates an error, an error icon will be displayed near the computed field. In some cases the error is a result of empty, unused fields on some records. You may check this box to prevent that error icon appearing.

Insert Function: Click this button to see and easily insert from a list of available functions.

Recalculate All Records: If you are creating the computed field in a catalog which already contains records, you may click this button to trigger the recalculation of all records according to the expression you entered. Beware that recalculation may take time depending on the number of records.

Important!

- When you need to use decimal marks, you should always type a dot, not comma (independent from your locale).

- If you want to concatenate text, use always **&** character, but not a plus sign.

Available functions and examples are given below. Function names are not case sensitive.

Functions Available by Script Engine

Consult the following document for the full list of functions supported by vbscript engine:

[VBscript Function Reference \(msdn\)](#).

[VBscript Function Reference \(w3schools\)](#).

Built-in Functions by SpeedBase

nField("fieldname")

- Gets the current numeric value of the field whose name is given in quotes.
- If the field data type is checkbox, this function returns 1 for a checked box and 0 otherwise.
- If the field data type is option list, this function gets the numeric value assigned to the selected option. (see field properties window)

Examples:

Assume that you have a decimal type field which is named as "price". The example given below calculates the 20% discounted price

nField("price") * 0.8

or

nField("price") / 100 * 80

Assume that you have two numeric fields one is "price", another is "tax rate" (as percentage). We will create two computed fields, one for "tax value", another for "final price".

This expression will calculate the tax value:

nField("price") * (nField("tax rate") / 100)

This expression will calculate final price (assume that the previous):

nField("price") + nField("tax value")

sField("fieldname")

Gets the current text content of the field whose name is given in quotes.

When used for a checkbox field, this function returns by default "Yes" for a checked box and "No" otherwise (unless you have modified it from preferences window).

Assume that you have a small text field named as "Name" and an option list named as "Colors" including options of "green", "yellow", "red" etc. This expression creates and displays a full sentence from existing like "John likes green color."

sField("Name") + " likes " + sField("Colors") + " color."

dField("fieldname")

Gets the date value of the field whose name is given in quotes. You should use this function to read date data if you want to process the result with other date functions.

XIF(expression, true part, false part)

If the result of the expression is true, evaluates and returns the true part, otherwise evaluates and returns the false part.

Example:

Assume that you have an option list box named "membership" containing the items "standard" and "premium".

Assume also that you wish to apply 20% surcharge to the price when premium is selected.

nField("price") * XIF(sField("membership")="premium", 1.2, 1)

CharCount("fieldname")

Counts the number of characters in a text field.

WordCount("fieldname")

Counts the number of words in a text field.

Limit(Value, MinVal, MaxVal)

Limit("fieldname", MinVal, MaxVal)

Limits the input value to MinVal at minimum and to MaxVal at maximum.

You may use this function to get limited value from a numeric field or select the min. or max. value from two fields.

Examples:

LIMIT ("age", 18) returns the value from the "age" field limiting the returned value with 18 at least.

LIMIT ("age", , 30) returns the value from the "age" field limiting the returned value with 30 at most.

LIMIT ("age", 18 , 30) returns the value from the "age" field limiting the returned value between 18 and 30

LIMIT ("age-1", nField("age-2")) returns the greater one between the fields "age-1" and "age-2"

LIMIT ("age-1", , nField("age-2")) returns the smaller one between the fields "age-1" and "age-2"

RoundUp(Value, Digits) RoundDown(Value, Digits)

RoundUp("fieldname", Digits) RoundDown("fieldname", Digits)

Rounds the input value upwards/downwards to the specified digits. If you omit digit part, it will round to integer.

Remember to use the Round function instead if you want to round the value towards nearest direction.

If digit is negative, the value is rounded to towards next multiple of power of ten.

Example:

Assume that the decimal field "dec1" has value 3.14

Assume that the decimal field "dec2" has value 2.71

Assume that the decimal field "dec3" has value 151

Round("dec1",1) returns 3.1

RoundUp("dec1",1) returns 3.2

RoundDown("dec2") returns 2

RoundUp("dec3", -1) returns 160

MD5(Value)

Calculates the MD5 hash of the value. The hash is represented as 32 chars of hexadecimal.

Examples

Remember to replace all field names given in the sample expressions with the actual field name.

Testing a Checkbox Field

Apply 10% discount to the price if a discount approval checkbox was checked.
Assume the price field named as "Price" and checkbox as "apply discount".

nField("Price") * XIF(nField("apply discount")=1, 0.9 , 1)

Calculate Age From Birth Date

Calculate the current age of a person assuming the date field "dob" is used for saving birthdate.

**YEAR(NOW) - YEAR(DFIELD("dob")) + INT(MONTH(DFIELD("dob"))*100 + DAY(DFIELD("dob"))
> MONTH(NOW)*100 + DAY(NOW))**

Calculate the Birth Day for Current Year

Calculate the birth day for current year by replacing the birth year with current year, assuming the date field "dob" is used for saving birthdate.

DATESERIAL(YEAR(NOW), MONTH(DFIELD("dob")), DAY(DFIELD("dob")))

Calculate Number of Days Between Dates

Calculate the number of days between the date fields "dt1" and "dt2"

Replace "D" with "W", "M" or "Y" to calculate number of weeks, months or years.

DATEDIFF("D", DFIELD("dt2"), DFIELD("dt1"))

Calculate the number of days between the date field "dt1" and today.

DATEDIFF("D", DFIELD("dt1"), NOW)

Find Out If a Predefined Date Exceeded

Mark a contract as "expired" if the date saved to the field "contract end time" is before today

XIF(DATEDIFF("d", DFIELD("contract end time"), NOW) > 0, "Expired", "Valid")

Calculate a Past / Future Date

Add a specified number of e.g. 10 days to the date "dt1"

Replace "D" with "W", "M" or "Y" to add weeks, months or years.

Add a minus sign before the number to calculate a past date.

DATEADD("D", 10, DFIELD("dt1"))

Extract Day / Month / Year from Date

Extract the day from the date "dt1".

Replace the function name "DAY" with "MONTH" or "YEAR" to extract months or years.

DAY(DFIELD("dt1"))

Extract name of the weekday.

WEEKDAYNAME(WEEKDAY(DFIELD("dt1")))

Auto-incrementing Field

SpeedBase automatically creates the system field "ID" with each catalog you create.

This field is read-only and is automatically set to the next number with each record you create.

It starts from 1 but if you need to add some offset number you may use a computed field instead:

NFIELD("ID") + SomeOffsetNumber

If you want to assign a more complex alphanumeric number (e.g. order number) to each new record, you may use MD5 function and preferably use the first n chars. to make it shorter.

LEFT(MD5(NFIELD("ID")), 8)

Beware that this function may return the same result for multiple records if you create large number of records and select a small length of chars.

Count Characters in a Field

Find the number of characters entered into a text field named as "description".

LEN(SFIELD("description"))

Split Text by a Separator Character

Get the text part before the separator character "/" from the field "sampletext"

SPLIT(SFIELD("sampletext"),"/")(0)

Get the text part after the separator character "/" from the field "sampletext"

SPLIT(SFIELD("sampletext"),"/")(1)

Modify Text According to a Selection

Add Mr. or Mrs. at the beginning of the name field "full name" depending on the selection of option list box "gender".

Assuming the option list contains two values: "female" and "male":

XIF(SFIELD("gender")="female", "Mrs. ", "Mr. ") & SFIELD("full name")

Assign Numeric Values to each item of an Option List Box

You may assign a different numeric value to each option item of a drop-down listbox field from the field properties window. You may then use the **nField** function to get the option value:

NFIELD("fieldName")

The following expression is required for older versions (v3.1.4 and before) of SpeedBase:

Assign 1 for "Poor", 2 for "Average" and 3 for "Excellent" displayed in an option list box named as "performance".

XIF(SFIELD("performance")="Poor",1,0) + XIF(SFIELD("performance")="Average",2,0) +

XIF(SFIELD("performance")="Excellent",3,0)

If you are unsure how to build the right expression, request [support](#).

File & Image Fields

This data type is used to attach files and images to each individual records in your database.

You can store a file in this type of field and optionally display an image with other record information.

There are several options available in order to configure a file field. You can change all of these options any time you wish, but it is recommended to decide the best options at the beginning as changing options will not affect the states of older files which are saved previously.

General Properties

Display As Image: Checking this box tells SpeedBase to try to display the saved file as image on the record details form. Supported file extensions are: JPG, PNG, GIF & BMP. If the files you will save will be of a different file type, do not check this box.

When this box is checked, SpeedBase will allow you to draw and allocate an image area on the form when placing the field using [form designer](#). When this box is not checked or the file could not be viewed as image, the field displays the file as a clickable text link.

Add Files to File Gallery: If this box is checked, any file which is attached to a record is also becomes visible in File Gallery. You can later locate the file in File Gallery and attach it to another record. The File Gallery also allows you to browse and search all files in a single place.

When Clicked...

Determines what happens when the file link or image displayed on a record is clicked.

Open File: Executes the file. This has exactly the same effect as double clicking the same file on a windows explorer window.

Show "Save As" Dialog: Opens a "Save As" dialog, so you can determine a location on your computer to download the file. If the file is stored as a "link", this action will copy the file from its original location to the selected folder.

Save & Open: First displays a "Save As" dialog and executes the file after it is saved.

Save Method

There are 2 different options to save a file in your database.

Save As Link:

SpeedBase saves only the original folder location information (i.e. a shortcut) to the database. The file itself is not saved or copied. So, when you click a file from record window, it is executed from its original location. If you prefer to maintain and frequently update a file from its fixed location, this option works best.

Do not consider attaching a file to a record or file gallery using this option as a way to backup the file. It is not.

A file link will stop working under the following conditions:

- For multiuser applications (Teamwork edition): When a user links to a file located in a unshared folder of his/her computer, the file link will NOT work for other SpeedBase users. In order to work, the files should be saved on a shared network folder and the link should also be generated as a network path (i.e. to select the file, you should browse thru "Network", but not your hard drive).
- If you move or delete this file from its original location, or rename any of the folders of file path at a later time, the link becomes broken and the file cannot be opened.
- If the access permissions of the containing folder of the file becomes restricted, the file may not be opened.

Copy to Local Data Folder:

SpeedBase creates a copy of the file in its local data folder. When you click the file from the record window, SpeedBase extracts the file from the data folder and allows you to save or execute a copy of it.

The original file is never used/refered anymore when you click to files saved using this option. The copied version of the file will be opened even if the original file is removed or updated. So this option is more suitable for archival purposes.

If you need to update a file (e.g. a document) from a record window, you should always use the "edit" command from the field menu by clicking the red arrow that will appear near the file field.

Since files saved using this option are saved into your data folder, taking a backup of your local data folder, also means taking backup of your files.

Beware that files saved using this option can only be accessed via SpeedBase interface and its export

function, whereas saving them as link gives you the option to access your files directly from their original location.

Copy to Remote Database:

This option is only available if you are connected to a SQL Server database.

SpeedBase uploads the file to your SQL database. When you click the file from the record window, SpeedBase downloads the file from your SQL Server and allows you to save or execute it.

This option is most preferable when users are connecting to your database from remote locations and they need to share files under the conditions where they do not have access to a shared network location.

If you need to update a file (e.g. a document) from a record window, you should always use the "edit" command from the field menu by clicking the red arrow that will appear near the file field.

Note: In no event will SpeedBase move, modify or delete the original file at the time you save it using any of the methods given above.

It either saves the location information of that file or takes and saves a copy of it.

Modifying Fields

Click "Database" from main menu, click "Catalogs". Select the catalog you wish to modify fields for, click "Fields" button.

Select the field you wish to modify, click "Properties" button.

(Double clicking a field name also opens field properties window)

Once a field is created, the properties that allow to be changed are limited. Changing the data type is not allowed. However you can always change the field name and a few more properties depending on the data type. The properties that do not allow further modifications are displayed as dimmed.

You are allowed to rename/add or insert options of a field of data type option list.

You are allowed to change the lookup fields of a field of data type relationship.

Erasing Fields

Click "Database" from main menu, click "Catalogs". Select the catalog you wish to remove fields from, click "Fields" button.

Select the field you wish to delete permanently, click "Delete Field" button.

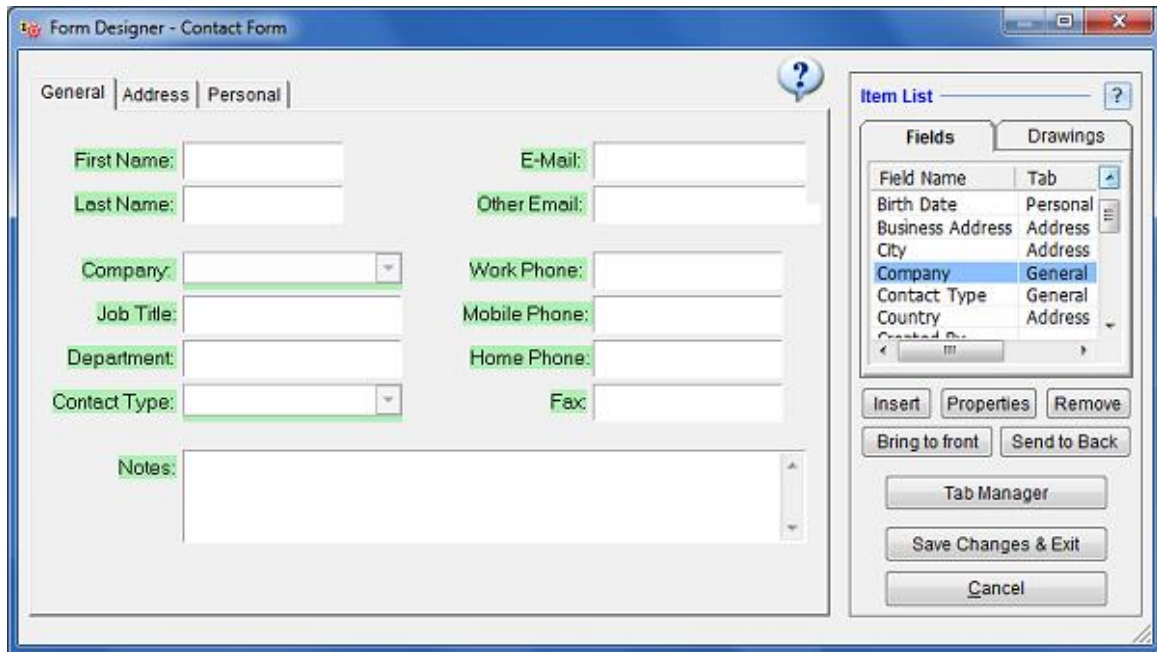
Warning! If you delete a field from a catalog, information stored in in this field for ALL records of the associated catalog are lost permanently. You cannot undo this action.

If you delete a field of data type relationship, beware that the corresponding partner field existing in the second catalog will also be deleted. No actual records are effected from this action, but you won't be able to display related records information which were bound to the deleted field.

Example: Suppose that you have a 1 to N type relationship between COMPANIES and PEOPLE catalogs, where you display list of workers under each company record and a single related company is selected for each person record. If you delete the relationship field, the company lookup field from PEOPLE catalog is removed, similarly the "list of workers" displayed under each company record is also removed.

Designing Windows

Designing Data Input Forms (Form Designer)



Click "Database" from main menu, click "Catalogs". Select the catalog you wish to design data input form, click "Form Designer" button.

If you have created a new field (like "Name Surname") in a catalog, the field will not become visible until you place it to the record form using "form designer".

This window displays the list of all fields existing in current catalog on top right side.

Adding/Removing Fields

Find and select the field you wish to place from the field list box. Click add button to place it into the form. You may also drag and drop the field into the design area. Drag the field by clicking on to the label to change its location. If the design area is not sufficient to fit the field, you may resize the whole window by dragging the right bottom corner of the form designer.

To remove a field, first select it by clicking on its label and click "Remove" button.

It is safe add/remove fields anytime you need, as no actual data is affected when you change the design of data forms.

Changing Field Properties

Select a field from design area and click the "properties" button at the bottom of field list.

Auto Expand to Right / Bottom: Fields with certain data types allow to expand automatically to the right or bottom in order to fill the available space on record forms. It is most usefull for long text fields, as they can be enlarged when the record window is maximized.

Hide Field Label: Check this box to hide the field label from record window. Most usefull when you need to put customized labels in special locations. In this case you may add a drawing object of type label to replace the field label.

Adding Custom Labels & Drawing Objects

You may add labels, lines or other shapes as decorative objects on record forms. Select the drawing tab from item list area and add the drawing object you like. You may adjust various properties of them if you select them on design area and click the "properties" button.

Use the "bring to front" or "send to back" buttons to arrange the overlapping behavior of the objects.

Moving / Resizing Fields

Once you have added a field into the form area, you will need to resize it as well as move it to a location you prefer. To move a field, drag and drop it with your mouse. To resize a field, select it first and drag the black squares.

Tab Management & Navigation Order

Tabs are the pages of a record form which are displayed on top of the form. SpeedBase creates the first page automatically and names it as "General" by default, which you may change later. If there are too many data fields to fit into your screen, you may distribute them into two or more tabs (pages). Click the "tab manager" button for this purpose.

Form Tab Orders: You may here create new tabs, delete unused ones and rename them. Use the up/down arrow buttons to change the order of tabs. This will allow you to move all form items on a form page to another.

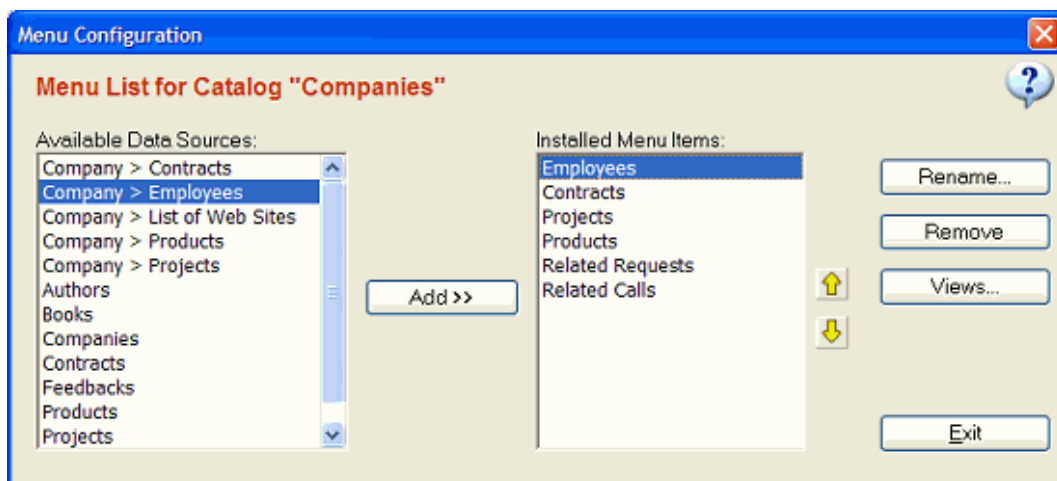
Field Navigation Order: This section allows you to precisely adjust the order of cursor navigation whenever you press the "tab" key while editing a record. This helps users to enter data more efficiently without using the mouse.

Important! If you create a new tab page, but exit form designer without inserting any data or drawing item into this new tab, the tab will automatically be deleted! You should place at least one object into the empty tab if you want to keep it.

Save Changes & Exit: Clicking this button will save all changes to the database and closes the form designer.

Discard Changes & Exit: Clicking this button will cancel all changes you have made and closes the form designer.

Creating Menu Buttons



Click "Database" from main menu, click "Catalogs". Select the catalog you wish to create/modify form menus, click "Form Menus" button.

A [record details window](#) may have its own menu buttons placed on left side of the form, which allows you to access "related records" from other catalogs easily. Every menu item represents a relationship with current catalog with another catalog. If you cannot see any side menu item other than the default "General" button, this means that you either haven't created a [relationship](#) with another catalog, or you haven't created a menu button.

Creating Menu Buttons

The available data sources for which a menu button can be created are listed in a box on left side. If the current catalog you wish to create menu for, has relationships with other catalogs, they are listed on top of this box in a form like "Current Catalog > Related Catalog" (see picture above). You may easily create a menu button by simply selecting a relationship and clicking "ADD" button. Example: Assume that there is already a relationship between "Companies" and "People" catalogs where each company record may be related to any number of selected workers picked from "People" catalog. If you select the line "Companies > Employees" (see picture above) and create a menu button, Clicking that button will immediately display the list of related people (ie workers) of that company.

Removing Menu Buttons

You may remove a menu button easily by selecting it from the installed menu item list and clicking remove button. This action is safe as it does not affect actual records in your database. However, if there are views or filters associated with this menu item, they will also be deleted from database.

Adjusting Order of Menu Buttons

Select the menu item from the installed menu item list, click the up or down arrows repeatedly until the menu item is placed in the desired position.

Creating Views For Menu Buttons

You may create shared views for the record lists a menu button is displaying. Note that creating views for menu buttons is optional as if you do not create views, SpeedBase will automatically use existing views created for the target catalog.

Stats Boxes

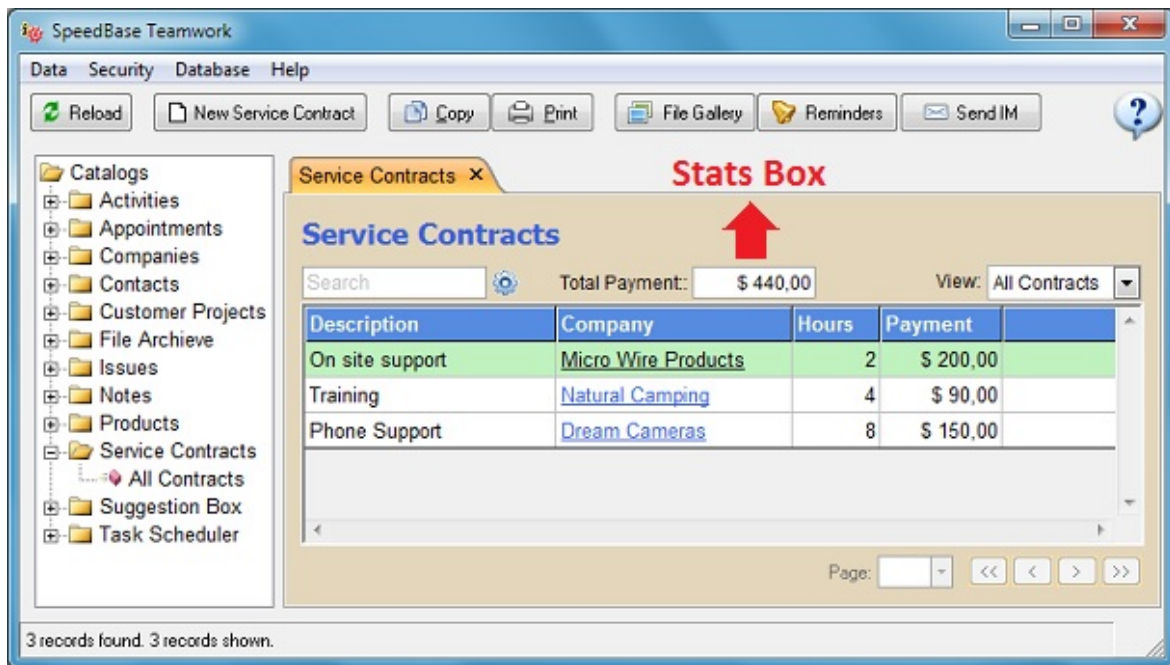
Tip: See "[Computed Fields](#)" if you are looking for information about computed fields.

A "Stats Box" is a different type of computed field which you can place on top of a record list window in order to display some statistical information about all of the currently displayed records. Its configuration is very similar to a [computed field](#) but it uses a different set of built-in math functions.

You can add more than one stats box. However, keep in mind that SpeedBase will automatically hide stats boxes starting from the most right side position if there is not enough horizontal space to fit them all. You may consider to resize / maximize the window in that case.

Note that you should type a dot, not comma, when you need to use decimal marks.

In the example picture below, the sum of all payments of the displayed records is calculated by a stats box with an expression of **fieldSum("payment")**.



Creating / Updating Stats Boxes

- From the catalog tree, right click the catalog name, select "Design Toolbar & Stats" from the popup menu, This will open "Toolbar Designer"
- Click the button "New Stats Box" (or select an existing one if you want to update),
- Enter an expression into the expression box, save and exit
- A new stats box will be displayed now on top of the record list window.

Box Width: Adjust the width of the output box in pixels.

Label: Enter a descriptive name to be displayed with the stats box.

Align: The stats box can optionally be aligned to the right side of the window.

Invisible: Hide the stats box.

Available functions and examples are given below. Function names are not case sensitive.

Special Functions Dedicated to Stats Boxes

RecordCount or RecordCount("ViewName")

Returns the number of records existing in the specified view whose name is given in quotes. You can call it without the view name parameter if you need the number of records in current view.

FieldSum("FieldName") or FieldSum("FieldName", "ViewName")

Returns the numeric sum of the field specified in quotes for all of the records currently listed.

Example:

Assume that you have a "Tasks" catalog and you save the time spent for each task into a numeric field named as "Hours".

This expression will show the total hours spent for all tasks listed in current view.

FieldSum("Hours")

Assume that you have a "Expenses" catalog, where you record all expenses into the field name "cost". Assume also that you have created the view "Expenses in last week" and assigned a filter to it which displays only the records created in last week.

This expression will show the total expense in last week.

FieldSum("cost","Expenses in last week")

FieldAvg("FieldName") or FieldAvg("FieldName","ViewName")

Returns the numeric sum of the field specified in quotes divided by the number of records currently listed.

Used exactly in the same way as FieldSum function.

All other Functions

Consult the following document for the full list of functions supported by vbscript engine:

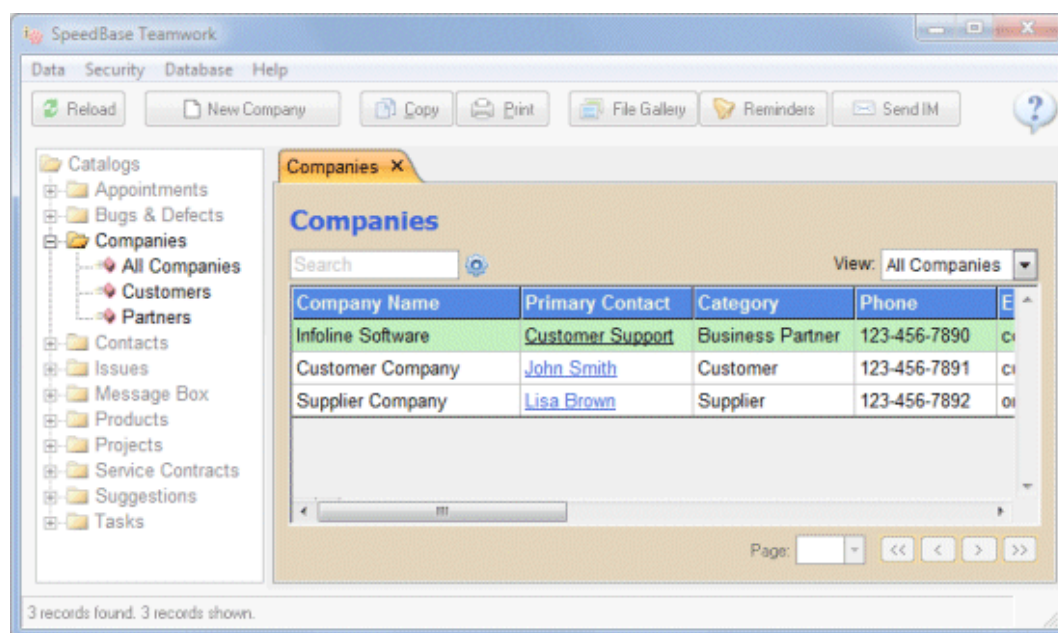
[Function Reference for VBscript](#)

If you are unsure how to build the right expression, request [support](#).

Creating Views

Understanding Views (Column Layouts)

Recommended video: [Creating Views & Filters](#)



A View is the tabular presentation of (optionally filtered and sorted) records.

When you are viewing the records of a catalog in tabular format, you may need some customizations about how data is displayed. Possible ways to customize the view:

- Deciding which columns (fields) to be shown and which should be hidden,
- Deciding the horizontal ordering of column headers,
- Deciding the widths of each column,
- Deciding which colum(s) should be used to sort records,
- Deciding whether a filter should be applied to only display records with certain common properties.

Views allow you to make all of these adjustments once, and save it in your database, so you do not have to repeat them every time you open a record list.

SpeedBase allows you to create and save multiple views. This is especially useful when having views

with different filtering rules. So a view can serve as a saved set of search criterias.

Example: A view can show customers older than 30 years, while another view shows customers that are living in a certain country.

What if I do not create any Views?

Creating views is not mandatory. If there are no views to use, SpeedBase automatically makes some decisions to give you an optimum result.

SpeedBase Teamwork edition allows you to define shared views available to all users and also allows each user to create his/her own private views, so there are two types of views: Public and Private. If you are running SpeedBase Professional as a single user, there is no distinction between views.

Public (Shared) Views

Public views are views which are available to all SpeedBase users when working in a multiuser environment (Teamwork Edition). Typically public views are created and maintained by a SpeedBase user with administrative rights. Other users are not allowed to modify them unless permission is granted.

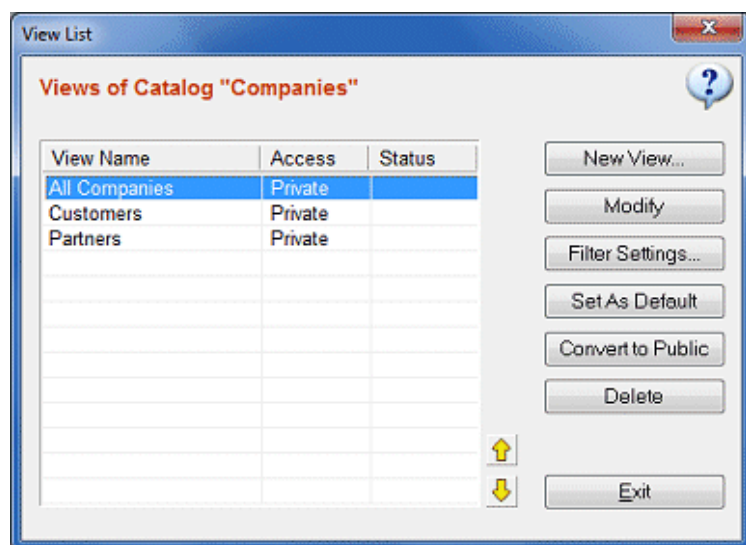
Private (Personal) Views

These views belong only the SpeedBase user who created them. On a multiuser environment, other users cannot see this views when they are logged in. Every user can create/modify or delete the views he/she created.

View List Window

You are recommended to read ["Understanding Views"](#) before this section.

Recommended video: [Creating Views & Filters](#)



Accessing View List of a Catalog

There are two ways to access the list of all views which belong to a certain catalog.

From Catalog Tree: Right click a catalog folder and select "Manage Views" from popup menu.

From Record List: Right click anywhere on the record list window and select "Manage Views for this catalog" from popup menu.

This window allows you to create/modify/delete any number of views for the current catalog.

Creating a New View

There are two ways to create a new view.

From Catalog Tree: Right click a catalog folder and select "Create New View" from popup menu.

From View List Window: Open the view list window as described above and click "New View" button. See [View Settings](#) for more info.

Modifying an existing View

There are three ways to modify a view.

From Catalog Tree: Right click a view item and select "Modify" from popup menu.

From View List Window: Open the view list window as described above and click "Modify" button.

From Record List: Right click anywhere on the record list window and select "Modify this View" from popup menu.

See [View Settings](#) for more info.

Deleting a View

There are two ways to delete a view.

From Catalog Tree: Right click a view item and select "Delete" from popup menu.

From View List Window: Open the view list window as described above and click "Delete" button.

Deleting a view also deletes the attached filter if created.

Deleting a view is safe and does not affect actual data (records) in your database.

Attaching Filters to Views

There are two ways to attach a filter to a view.

From Catalog Tree: Right click a view item and select "Filter Settings" from popup menu.

From View List Window: Open the view list window as described above and click "Filter Settings" button.

This will open filter configuration window.

See [Applying Filters](#) for more info.

Setting a View As Default

The default view is the view which is selected by SpeedBase when you display the record list of catalog for the first time.

There are two ways to set a view as default.

From Catalog Tree: Right click the view item and select "Set as default" from popup menu.

From View List Window: Open the view list window as described above and click "Set as default" button.

View Configuration

You are recommended to read ["Understanding Views"](#) before this section.

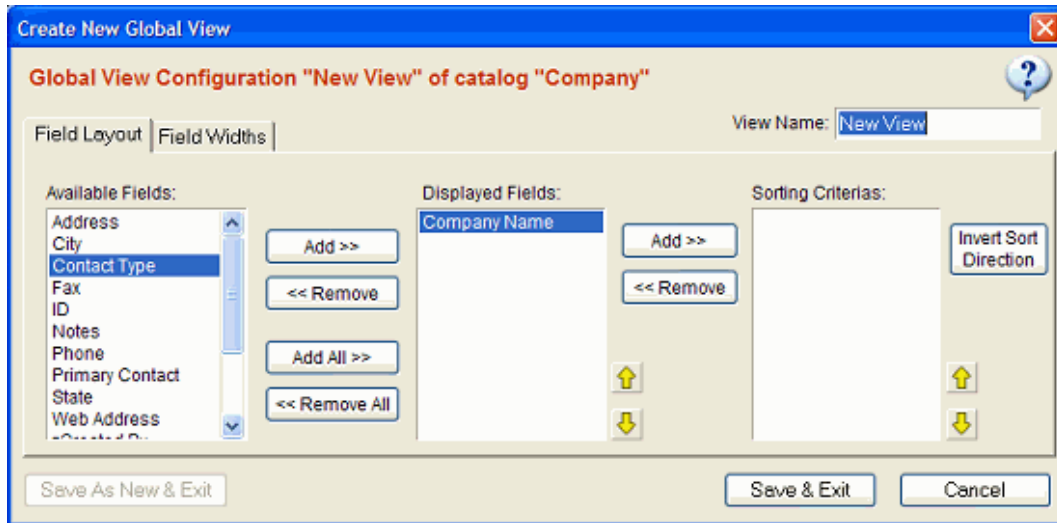
Recommended video: [Creating Views & Filters](#)

How to Open View Settings Window

From Catalog Tree: Right click a view item and select "Modify" from popup menu.

From Record List: Right click anywhere on the record list window and select "Modify this View" from popup menu.

View configuration window allows you to save your displaying preferences of a record list. This window contains 3 boxes. The first box contains all of the available fields for the current catalog. The second box contains the fields you wish to display in record list window. The last box contains the fields which should be used as sort criteria for the records.



Choosing Which Fields Are Shown

Select the field you wish to be displayed from "Available Fields" box, click "Add" button to move it to the "Displayed List Box". You may also determine the horizontal ordering of a displayed field by selecting it and clicking up or down arrows.

Determining How Records Are Sorted

Select the field you wish to use as a sorting criteria from "Displayed Fields" box. Click "Add" button to add it to the "Sorting Criterias" box. You may also reverse the sort order or use multiple fields as sorting criterias (In this case if there are many records which have the same value for the first field to sort, the second field will be used).

Changing Field (Column) Widths

If you find that some columns are too wide or too narrow in record list window, you may adjust them by clicking "Field Widths" tab. You may then drag the column boundaries to make the necessary adjustment.

Using a View as Template for Creating a New View

In some cases you may need to create a new view which is a little different than an existing view. You may then use the existing view as a starting point.

To do this, right click a view item from catalog tree and select "Copy as New View" from popup menu. You may also use this method to create similar views with different filters attached on them.

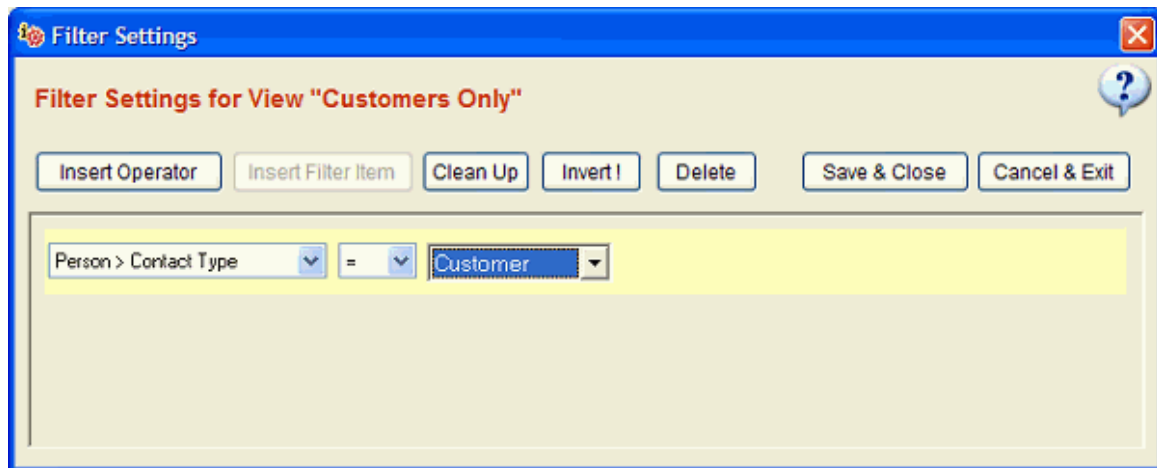
Filter Settings

Recommended video: [Creating Views & Filters](#)

A filter is a predefined set of one or more logical rules which is applied to a certain [view](#) when displaying a record list. Every view can have its own associated filter.

By creating filters ;

- You may get a record list where only records with certain properties are included (people with ages>30, companies that are located in other countries etc.)
- You may have multiple views which display active / inactive / all records.
- (On a multiuser environment) You may restrict SpeedBase users to view (or update) only records which are owned by (or assigned to) him/herself.



How to Open Filter Settings of a View

For Public Views: While you are displaying a record list window; click "Views" from main menu, click "Public Views", select the view you wish to create a filter for, click "Apply Filter".

For User Views: While you are displaying a [record list window](#), select the view you wish to create a filter from view selection box. Click "View" from main menu, move your mouse to "Customize Current View", click "Filter Settings". (If the menu command is not available, you have probably selected a view of public type)

Add New Filter Criteria

Select a field to use as filter criteria from the drop down list box which is highlighted with yellow, Select a logical rule from the next list box.

Type or select a value if applicable in the third box.

Click "Save & Close" button to save and activate the filter. If you reload the view you assigned filter for, your criteria will immediately be applied to the record list and only records which conform to filter rules are displayed.

Note: If you select a field of type relationship, SpeedBase inserts an extra field list box which displays the fields of related catalog.

Selecting Criteria Lines

If you are modifying a filter containing one or more criterias, you may need to select criterias to take some action with it. Click to the empty space on right side of the criteria. This will highlight the criteria with a surrounding yellow rectangle.

Joining Filter Criterias With Logical Operators

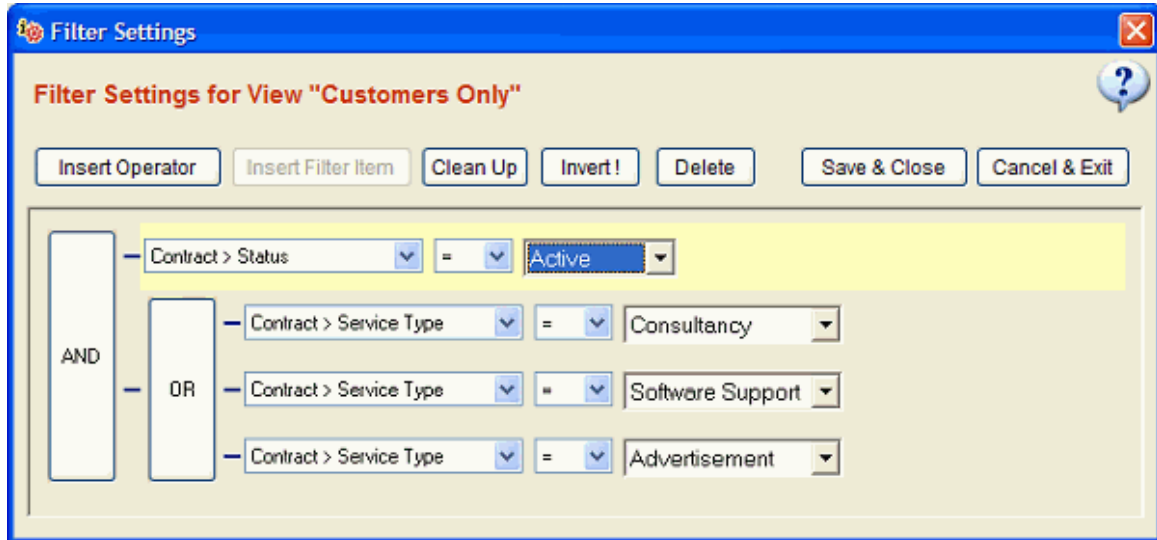
You may create a more complex filters, by joining the criteria lines with logical operators. You may even take a joined criteria set and join it with another operator.

To join an existing criteria line with a new one, select the criteria first. Click "Insert Operator" button.

SpeedBase will join the criteria with a new empty criteria under "AND" / "OR" logical operator. You may invert the operator by clicking the "Invert" button. If you need to add another criteria under an existing operator, click the operator button first to select it and click "Insert Filter Item" button.

You may repeat the same process to create even more complex filters.

The following filter setting lists the records whose status is active and also whose service type is either Consultancy, or Support or Advertisement.



Deleting Criterias and Logical Operators

Select the criteria or logical operator first you wish to delete. If you delete logical operators, all other sub items, i.e. criterias and other logical operators under it will also be deleted.

Buttons in Filter Settings Window and their Functions

Insert Operator: Creates a logical operator which contains the selected criteria.

Insert Filter Item: Add a new criteria line under the selected logical operator

Clean Up: Automatically cleans up the logically non-functional items, you may need it after a delete.

Invert: Inverts all the logical operators

Revert: Discards all changes you have made and reloads the criterias to the last saved version.

Save & Close: Saves changes and exits.

Cancel & Exit: Discards all changes, if you were about to create a new filter, no filter is created. If you have opened an existing filter to modify, no changes are saved.

Creating Relationships

Understanding Relationships

Recommended video: [Creating Relationships](#)

A relationship is defined between two catalogs. It helps to easily access the related information stored in the second catalog while you are viewing a record details of the first catalog. Creating relationships (whenever possible) greatly enhances the performance and ease of information management in your working environment.

SpeedBase supports creating both one to multiple (1-N or N-1) and multiple to multiple (N-N) type relationships between catalogs. In real world applications, various types of information frequently have some relationship between each other.

Note that creating a relationship field actually creates two fields, one for the first and the other for the second catalog!

A Real World Example

Suppose that you store company information you store in a "companies" catalog. Suppose that you also store contact information in a "people" catalog. Somehow, you need to link certain people with a certain company they work for. Whenever you view a company information, you also need to view the list and easily access the details of workers of that company. On the opposite side, if you are viewing details of a worker, you need to easily view and access the company details he/she is working for. It would be waste of time if you had to enter/update the same company information for all of its workers again.

Relationships make it possible to jump from a record you are viewing to another type of record related to the former with a single click. Starting from a company record, you may jump to products of that company, or to the contact details of the manager of it, or to the list of the orders you received from it, or to the phone calls or support activities of it etc

Types of Relationships

There are basically two types of relationships.

1 to Multiple (1 to N or N to 1) Relationships

Suppose that you wish to create a relationship between **Customers** and **Phone Calls**. Suppose that you have distinct records for all of your customers and you also create distinct record for every call you receive. It is evident that a certain phone call record may only be related to a single customer. However, if you look from the customer side, a customer may be related to an unlimited number of phone call records.

1 Customer is related to many Phone Calls. So, we call this as **1 to Multiple Relationship** between **Customers** and **Phone Calls**.

Note that, 1 to N and N to 1 relationships are actually the same thing. So,

We may also call this as **Multiple to 1 Relationship** between **Phone Calls** and **Customers**.

If you create a field of type 1 to N relationship for CATALOG A with a target CATALOG B, SpeedBase will automatically create a field of type N to 1 relationship for CATALOG B with a target CATALOG A

See ["Creating 1 to Multiple Relationships"](#) to learn how to create this type of relationship.

Multiple to Multiple (N to N) Relationships

Suppose that you wish to create a relationship between **Students** and **Teachers**. Suppose that you have distinct records for all students and all teachers. In most scenarios, every student takes multiple courses from multiple teachers. Every teacher also teaches to many students. So every student is related to many teacher as well as every teacher is related to many students. In this case, we have a multiple to multiple relationship.

Tip:

You may think that you can simply forget about other types and create N to N in every case as it already covers the rest. However, an N to N type relationship is not convenient as you cannot get the list of students with related teacher information in a single table. This is due to fact that each row of student has multiple teacher relations which cannot be displayed in a single "teacher" column.

You are recommended to prefer 1 to N (or N to 1) type relationships if there is no (or almost no) actual need for creating N to N relationship.

See ["Creating Multiple to Multiple Relationships"](#) to learn how to create this type of relationship.

Creating 1 to Multiple Relationships

Please read ["Understanding Relationships"](#) before this section if you haven't done already.

Recommended video: [Creating Relationships](#)

How to Create 1 to Multiple Relationship

Click "Database" from main menu, click "Catalogs". Select the catalog you wish to create a new relationship for, click "Fields" button.

A new window containing the field list for current catalog will be opened. Click "Create New" button.

Select "**Relationship**" from **Data Type** selection box,

Select **1-N Relationship** from **Relationship Type** selection box,

Select the target catalog you wish to create relationship from **Relevant Catalog** selection box,

The screenshot shows a dialog box titled "Create New Field" with a subtitle "Create New Column on Catalog 'CUSTOMER'". It contains several input fields and dropdown menus. The "Field Name" field is empty. The "Data Type" dropdown is set to "Relationship". The "Relationship Type" dropdown is set to "1-N Relationship". The "Relevant Catalog" dropdown is set to "PHONE CALL". There are two informational text boxes: one on the right with an 'i' icon explaining relationships, and one at the bottom left with a blue header "Display a List of 'PHONE CALLS' on each 'CUSTOMER'" and a "List Title" field containing "Received Calls". Another box at the bottom right has a blue header "Display a 'CUSTOMER' Lookup Field on each 'PHONE CALL'" and contains a "Lookup Field Title" field with "Calling Customer" and a "Lookup Field" dropdown set to "CUSTOMER > Name". At the bottom are "Create Column" and "Cancel" buttons.

Type a title into the "**List Title**" box. (On record forms, a list of related records from target catalog will be listed under this title.)

Example: If you are creating a relationship for "Customer" catalog and you selected "Phone Call" catalog as target, "Received Calls" would be a nice title. So you may access the full call history of a customer by clicking a menu button.

Type a title into the "**Lookup Field Title**" box. (On record forms, a drop down selection box on every records forms in target catalog will be displayed after this title.) Choose a lookup field, which will help you to identify the record you wish to relate.

Example: If you are creating a relationship for "Customers" catalog and you selected "Phone Calls" catalog as target, "Calling Customer" would be a nice title. So when creating a new phone call record, you will select the customer the call is coming from.

Note that you could do the same thing in the opposite way by creating a **N to 1 Relationship** for "**Phone Calls**" catalog with selecting "**Customer**" catalog as target. The end result would be exactly the same.

Displaying Relationship Fields In Record Forms

The newly created relationship fields will NOT automatically appear on record details window!

You should add the new fields into the record form by using either "Form Designer" or "Menu Designer" depending on the relationship type and your preference.

Example: If you have created a relationship for "Customers" catalog and you selected "Phone Calls" catalog as target,

- 1. Step: Create a side menu button for "Customers" catalog. Open catalogs window, select "Customers" catalog, click "Form Menus" button, install the menu item for the new field. See [Creating Form Menus](#) for more info.

- 2.Step: Add the lookup field into the record form of "Phone Calls" catalog. Open catalogs window, select "Phone Calls" catalog, click "Form Designer" button, add the "Calling Customer" field into the form. See [Creating Form Menus](#) for more info.

Modifying Existing Relationship Fields

Once created, changing the relationship type (1 to N or N to N) or changing the target catalog is not allowed. If you need to change these, you should consider deleting the relationship fields which will also remove all the related data information from records.

Changing field titles and lookup fields are allowed. You may safely modify them whenever you wish.

Removing Relationships

As a relationship represents two information fields stored on each of the related catalog pair, deleting it will remove both fields from the catalogs. You will lose the information of "**related data**" from all records on both catalogs.

See [Erasing Fields](#) for information about how to delete a field.

Creating Multiple to Multiple Relationships

Please read ["Understanding Relationships"](#) before this section if you haven't done already.

Recommended video: [Creating Relationships](#)

How to Create Multiple to Multiple Relationship

Tip! Avoid creating a multiple to multiple relationship if a 1 to multiple relationship satisfies your needs. [More info about this](#)

Click "Database" from main menu, click "Catalogs". Select the catalog you wish to create a new relationship for, click "Fields" button.

A new window containing the field list for current catalog will be opened. Click "Create New" button.

Select "**Relationship**" from **Data Type** selection box,

Select **N-N Relationship** from **Relationship Type** selection box,

Select the target catalog you wish to create relationship from **Relevant Catalog** selection box,

The screenshot shows a dialog box titled "Create New Field" with a close button (X) in the top right corner. The main title is "Create New Column on Catalog 'STUDENT'". There is a help icon (question mark) in the top right. The dialog contains the following fields and options:

- Field Name: [Empty text box]
- Data Type: Relationship (dropdown menu)
- Relationship Type: N-N Relationship (dropdown menu)
- Relevant Catalog: TEACHER (dropdown menu)
- Information box: "Create a relationship between two catalogs to relate different types of information. This will let you easily jump from one information to the other. Consult help documentation for more info. Do NOT prefer type N-N (multi to multi) relationship unless you are sure that other types are not sufficient for your application."
- Display a List of 'TEACHERS' on each 'STUDENT': List Title: Related Teachers (text box)
- Display a List of 'STUDENTS' on each 'TEACHER': List Title: Related Students (text box)
- Buttons: "Create Column" and "Cancel"

Type a title into the both **"List Title"** boxes. (On record forms, a list of related records from target catalog will be listed under this title.)

Example: If you are creating a relationship for "Student" catalog and you selected "Teacher" catalog as target, you may use a title like "Related Teachers" and "Related Students" respectively. So you may access all the related teachers of a student record by clicking a menu button. The same is true for a teacher record.

Note that you could do the same thing in the opposite way by creating a **N to N Relationship** for **"Teacher"** catalog with selecting **"Student"** catalog as target. The end result would be exactly the same.

Displaying Relationship Fields In Record Forms

The newly created relationship fields will not automatically appear on record details window!

You should add the new fields into the record form by using either "Form Designer" or "Menu Designer" depending on the relationship type and your preference.

Example: If you have created a relationship for "Student" catalog and you selected "Teacher" catalog as target, create a side menu button for "Student" catalog. Open catalogs window, select "Student" catalog, click "Form Menus" button, install the menu item for the new field. Repeat the same process for the "Teacher" catalog.

See [Creating Form Menus](#) for more info.

Modifying Existing Relationship Fields

Once created, changing the relationship type (1 to N or N to N) or changing the target catalog is not allowed. If you need to change one of them, you should consider deleting the relationship fields which will also remove all the related data information from records.

Changing field titles and lookup fields are allowed. You may safely modify them whenever you wish.

Removing Relationships

As a relationship represents two information fields stored on each of the related catalog pair, deleting it will remove both fields from the catalogs. You will lose the information of **"related data"** from all records on both catalogs.

See [Erasing Fields](#) for information about how to delete a field.

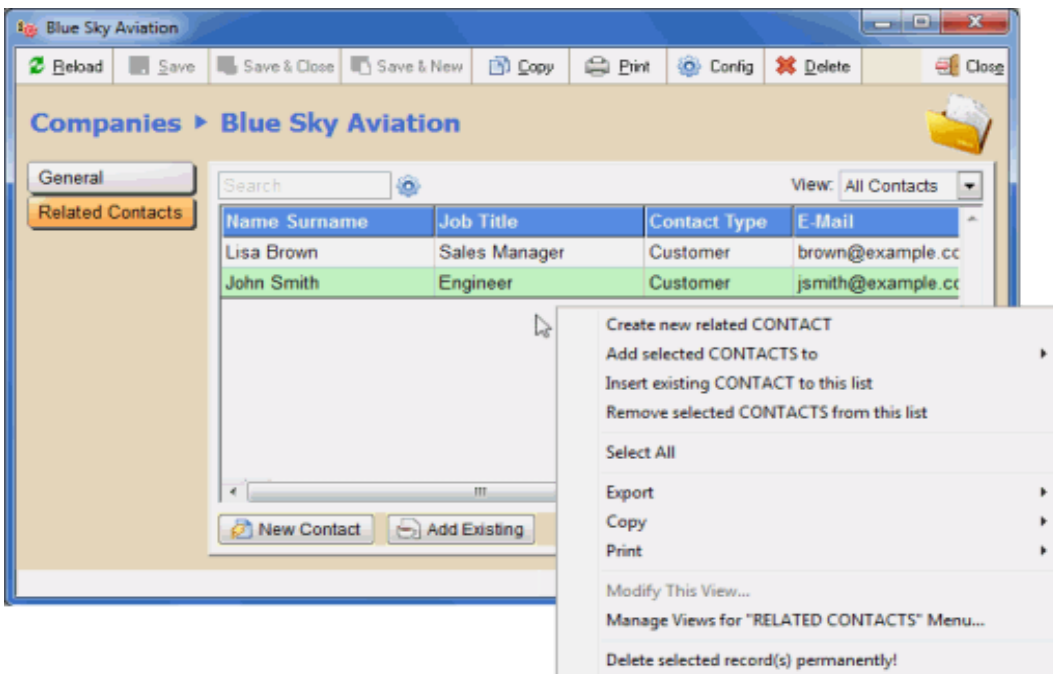
Record Management

Creating Records

There are different ways to create a new record depending on the window currently displayed. When you have opened a catalog to display the record list, you may start creating a new record by clicking the **"New Record"** button from [application toolbar](#).

You may also right click your mouse on any [record list](#) (see picture below) to open the popup menu and select the menu command appropriate for your intention.

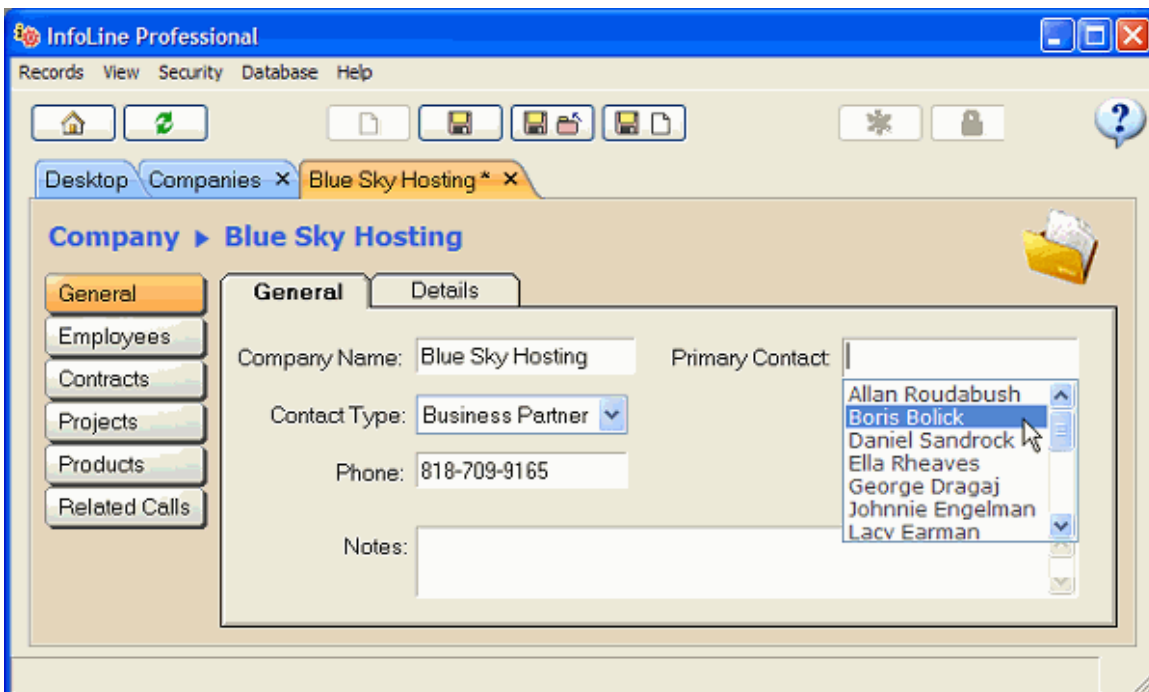
Tip: If an empty form (without input boxes) is displayed after clicking the new record button, this means that you either haven't created any fields for current catalog (see [creating fields](#)) or you haven't placed existing fields to the data form (see [designing forms](#)).



Entering Record Information

Entering record information completed by typing the information text to the boxes and clicking save button from application toolbar. If there is a field (of type relationship) which directs you to choose from existing records from another catalog, SpeedBase will guide you by suggesting records which begin with the letters you typed in.

If there are menu buttons on left side which are assigned to display lists of related information, they will become available after you save the record information for the first time. After then, you will be able to navigate to the displays thru menus and populate the list for related information by right clicking your mouse.

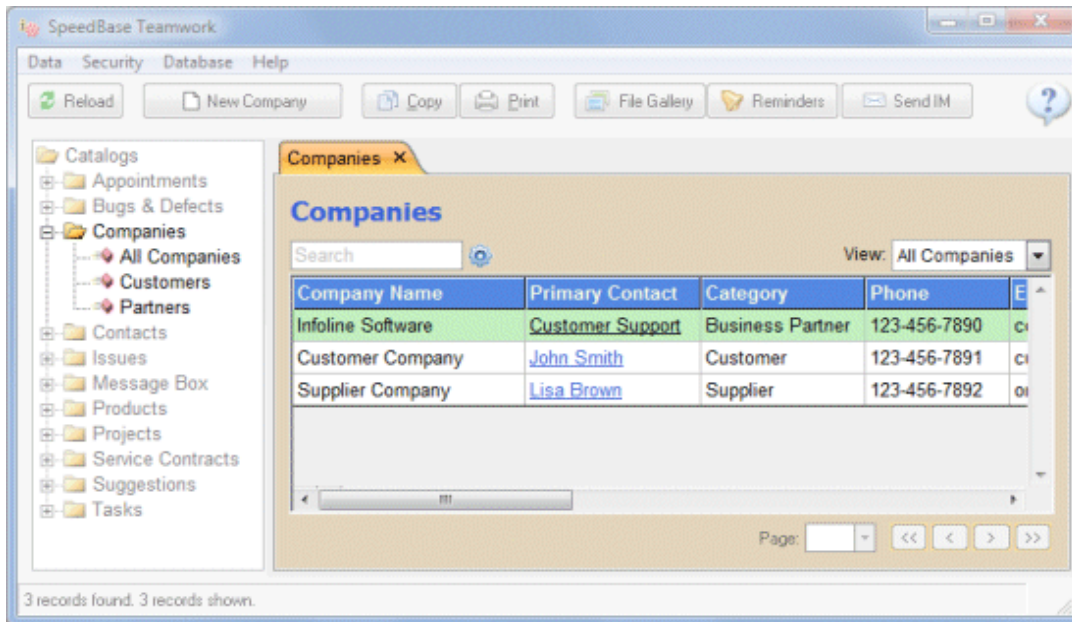


Searching Records

There is a search box on top of the record list area. It is sufficient to type the search phrase and press enter to force SpeedBase to filter out the records according to your search keyword.

SpeedBase searches on all fields by default. Click the search settings button to show advanced search options. You may choose there a single field for the search or modify the search mode.

Click **refresh** button from application toolbar to return to the full record list.



Deleting Records

Warning: Deleting a record is an irreversible action, information stored on all fields of the deleted record will permanently be lost.

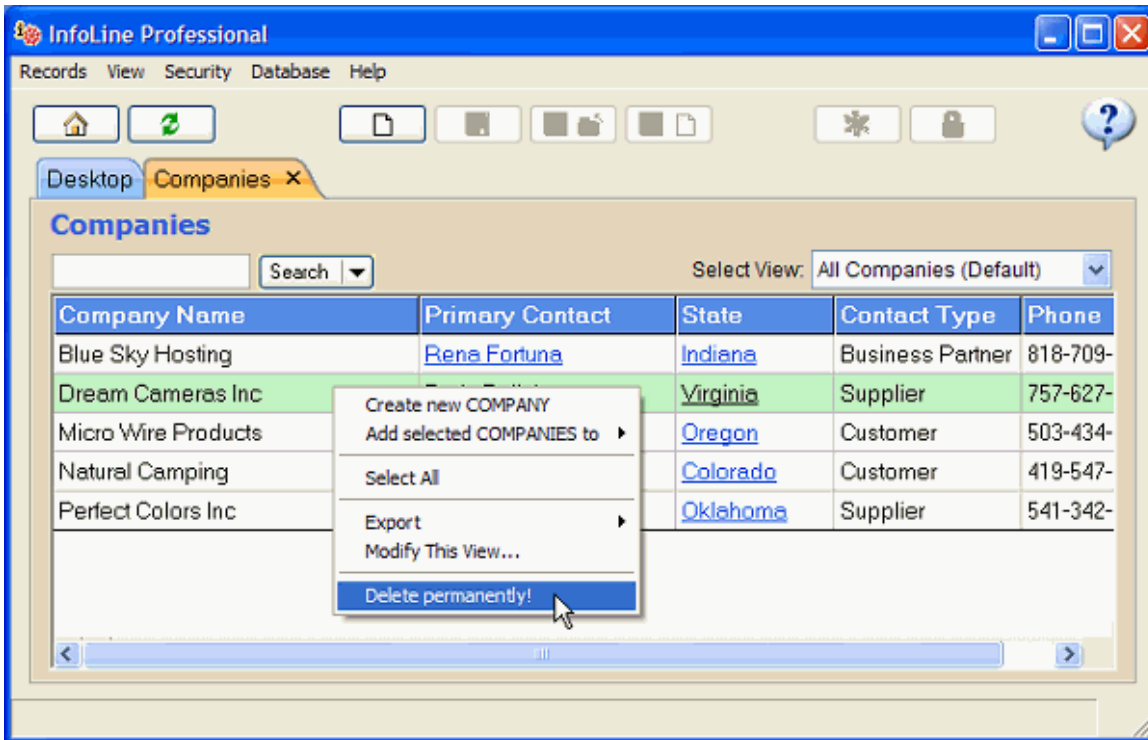
SpeedBase suggest an alternate method to remove records from sight without deleting them permanently. You may deactivate the records instead of deleting them.

See [Deactivating Records](#) for more info.

Deleting Records

While you are displaying a [record list window](#), you may delete the selected record(s) by right clicking your mouse and selecting "**Delete Selected Records Permanently**" from the popup menu.

If you are displaying a [record details window](#), you may delete that record by clicking "Delete" button from toolbar.



Deleting Related Records

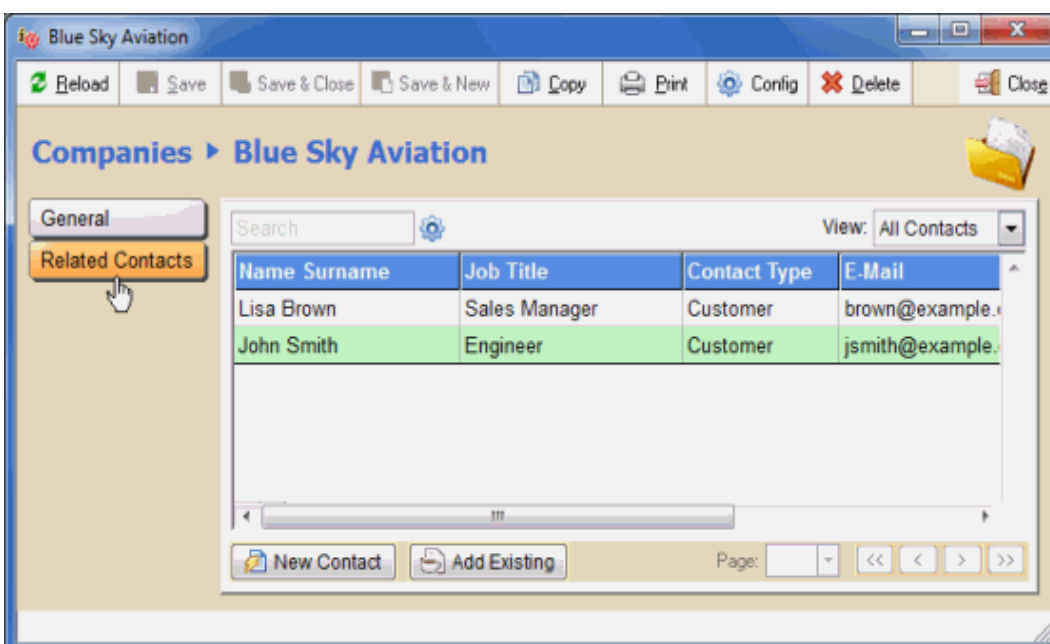
Warning: Deleting a record and removing a record from the related record list are different things.

If you remove a record from the list, only the relationship information is lost, the record itself will continue to exist in the catalog it belongs to.

If you delete a record however, it is permanently erased from the catalog it belongs to, which also removes it from the related record list.

To remove a record from the related record list only, select that record from the list, right click your mouse and select "**Remove From List**" from the popup menu.

To both erase a record and remove it from the related record list, select "Delete Selected Records Permanently" from the same popup menu.



Deactivating Records

When you deactivate a record SpeedBase will mark it as **inactive**. Depending on the [filters](#) you created, the record list window may list only **active** records.

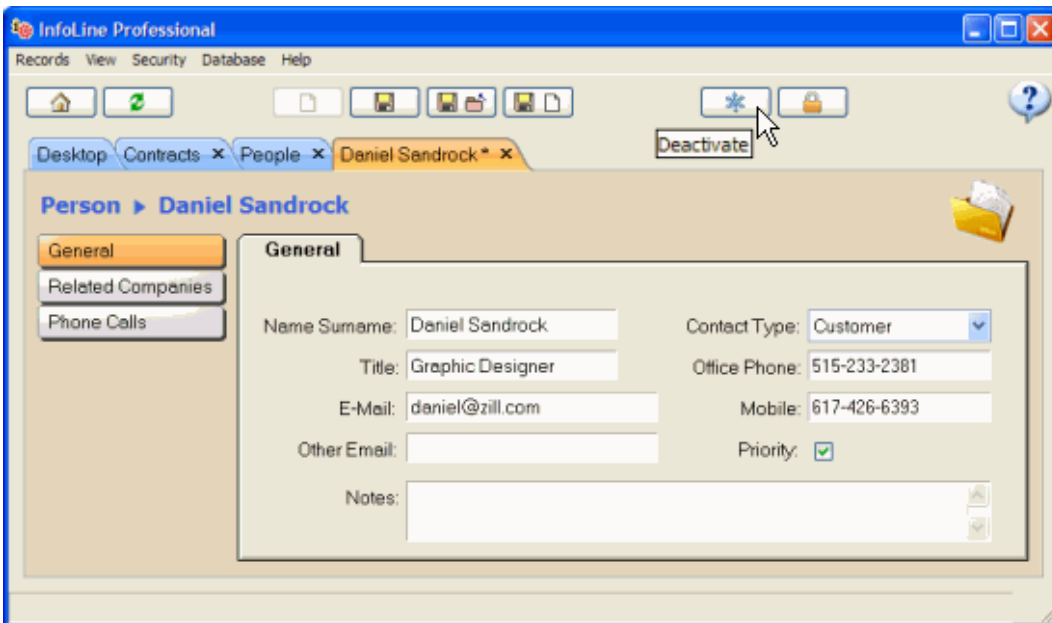
Deactivating a record is very similar to moving a record to recycle bin. Re-activating an inactive record is also very similar to restoring the record from recycle bin. You may control the activity status of records instead of deleting them permanently.

If you wish to control the activity status of records of a catalog, you should first enable that catalog for tracking the activity information. To do this,

- Open [properties window](#) of that catalog by right clicking the catalog name from catalog tree and select "properties" from the popup menu,
- Check "enable activity control" box,
- Save and exit.

This will enable the activity control buttons on the [application toolbar](#). You may now deactivate / reactivate a record when you are displaying a record in [record details window](#).

Tip: You may also wish to disable DELETE right to prevent accidental data loss from [user group settings](#).



How to Hide Deactivated Records From Listings?

You may display only active records by adding a simple filter rule to the views (see picture below). See [Applying Filters](#) for more info about how to create filters.

Tip: You are recommended to also create a "show all" or "show inactives" type view which displays all/inactive records. Otherwise, you may have difficulty to find the disappeared records when you need.



How to Re-activate Records?

While you are displaying a record in [record details window](#), click the deactivate/activate button on toolbar again to reactivate the record.

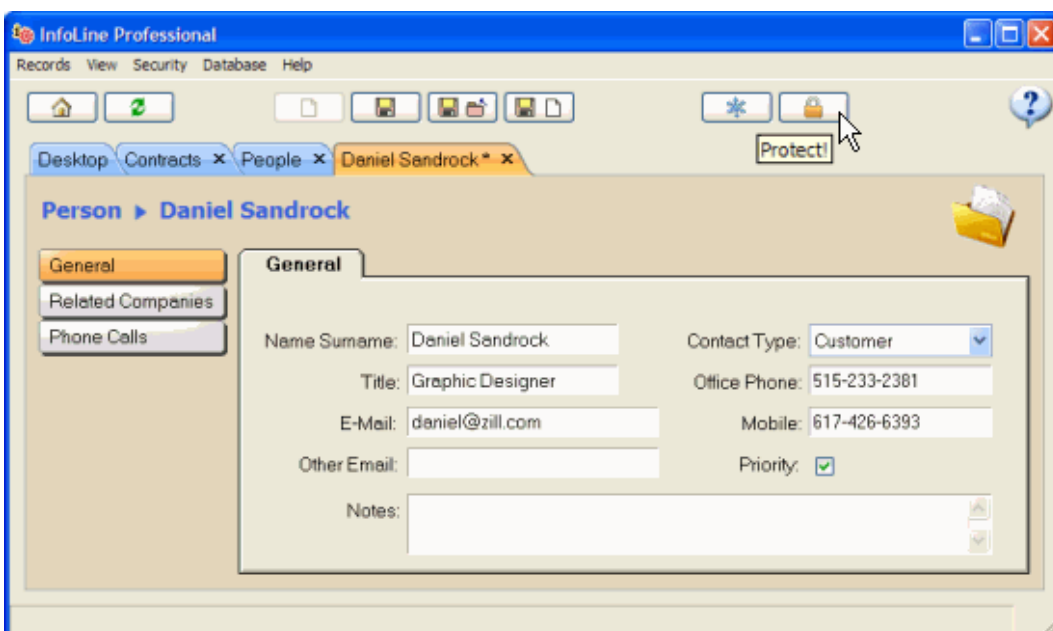
Protecting Records

When you apply protection to a record, SpeedBase will not allow to modify or delete the record any more for any user.

Protection of records is mostly recommended for information types which are no more open to modifications after a decisive point like signed contracts or invoices etc.

Note that an administrative level account in SpeedBase has the right to remove protection from a record. As a single user of SpeedBase, you may utilize this feature to prevent accidental changes to information which is supposed to be kept as read-only.

On a multiuser environment, you may restrict the users from removing protection and use this feature for both prevent accidental and intentional modifications.



How to Protect Records?

If you wish to control the protection status of records of a catalog, you should first enable that catalog for tracking the protection information. To do this,

- Open [properties window](#) of that catalog by right clicking the catalog name from catalog tree and select "properties" from the popup menu.
- Check both "enable activity control" and "enable record locking" boxes
- Save and exit.

This will enable both the activity and protection control buttons on the [application toolbar](#). You may now apply protection to a record when you are displaying a record in [record details window](#).

Tip: After you click the protection button, you will have the chance to undo (unprotect) this action (clicking the button again) as long as current tab is not closed. Once you have closed the tab, you are no more allowed to undo.

How to Discard Protected Records?

While removing protection thru the application toolbar buttons is not available for restricted SpeedBase users, it is still possible to set a protected record to a third and final state, i.e. "Discarded Record". Click the "Discard" button which has replaced now the protection button to discard the record.

Discarding a record is similar to canceling a contract permanently.

This action is also irreversible once the current tab displaying the protected record is closed.

How to Remove Protection From a Record?

It is possible to revert a protected or discarded record to its normal state. To do this, select **Remove Protection** from **Records** menu.

On a multiuser environment, you may restrict this right for other SpeedBase users thru [user group security settings](#).

Import & Export

Importing Records

SpeedBase supports importing data from CSV files or MS Excel worksheets. You may use importing functionality both for creating or updating existing records.

About CSV Files

CSV files (comma delimited files) are simple text files. This file type is the most commonly supported type used to transfer data from various types of database software. So if you are already using any other database software, online database service or spreadsheet software, they will most probably allow you to export your data in this file format. Remember to use either "Save As.." or "Export" command to save/export your data in CSV format.

A typical CSV file contains consecutive field (column) data delimited with comma or TAB character. Each line corresponds to an individual record and the first line is dedicated to field headers. So it is possible to write a CSV file using Notepad only.

Example:

```
"Name","Surname","Age"  
"John","Smith","30"  
"Lisa","Brown","24"
```

About XLS Files

You may save your data from MS Excel program or any other spreadsheet software which supports saving files in XLS format. (Remember to use either "Save As.." or "Export" function of your program and save your file as "XLS" or "MS Excel 97-2003" file.)

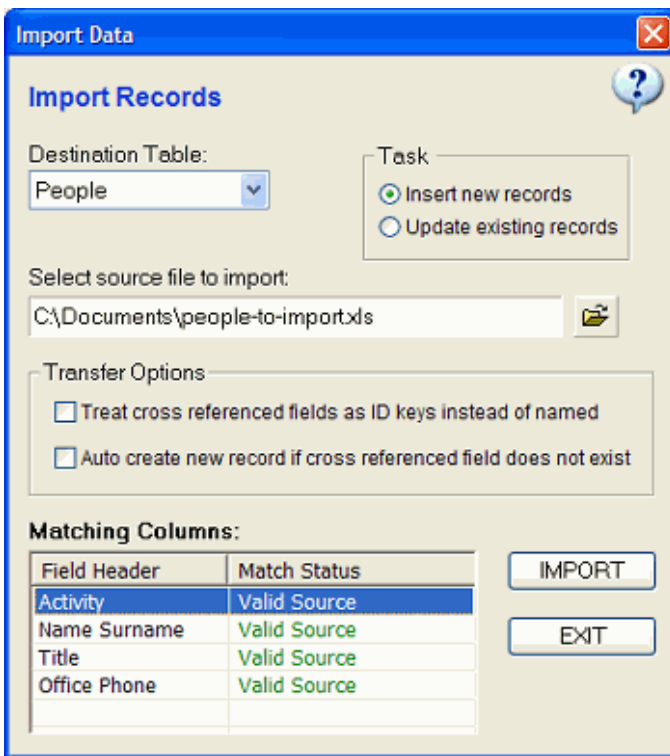
- The file may contain only one sheet of data. SpeedBase will only look for the first sheet if there is more than one sheet.
- The first line of the sheet should contain the column headers.

Key Points to Remember

- **You should have already created the catalog and its fields into which you want to import data.** If you did not create them yet, you will not be able to import as SpeedBase needs to know what data to import into which field.
- Fields can be in any order as long as the same order is used on all rows.
- You may (and are recommended to) include only the fields you wish to import information. If you are importing to create new records, missing fields are set to their default values or left blank. If you are importing to update existing records, missing/unmatched fields preserve their existing values.
- SpeedBase will automatically match fields from the source file with the fields in your database if both have the same field names. Otherwise you may match them manually on import window. Once you have matched fields for once, SpeedBase will remember the matching during future imports and do it for you automatically.
- If you are importing to update existing records, the source file should contain a key field which contains unique data for each record. SpeedBase will use the data from the key field to find out the right record to update.
- If you are importing to create new records, SpeedBase will always assign auto-incrementing ID values to the newly created records. So even if the file contains an ID field, it will be disregarded.

How to Import Data to Create New Records?

- Click "Data" from main menu and select **Import Records**.
- Make sure to select the right destination catalog.
- Select the source CSV or XLS file. If you do not see your file, make sure to select the preferred file type from "open file" dialog.
- From task section, select "insert new records".
- Check matching columns list. You may select a line and click the "match" button to match an unmatched field or change an incorrect match. If a column header of your source file is left unmatched, the information on that column will be ignored during import.
- Click **Import** button to start import.



How to Import Data to Update Existing Records?

In some cases you may need to export existing data, process the records outside SpeedBase and then import it back to your SpeedBase database. If you plan to import the data back, do not forget to include the ID field when exporting the records so it can be used as the key field to find the correct record to update.

- Click "Data" from main menu and select **Import Records**.
- Make sure to select the right destination catalog.
- Select the source CSV or XLS file. If you do not see your file, make sure to select the preferred file type from "open file" dialog.
- From task section, select "update existing records".
- **Key Field:** You should select here the field of your source file which contains unique data to identify each record in your database. If the source file was exported from SpeedBase, you should select the "ID" field.
- Check matching columns list. You may select a line and click the "match" button to match an unmatched field or change an incorrect match. If a column header of your source file is left unmatched, the information on that column will be ignored during import.
- Click **Import** button to start import.

Importing Fields of Type Relationship

It is possible to import fields of type [N to 1 Relationship](#).

Example: If you are importing into the **customer** catalog which contains a relationship field with **company** catalog (i.e. a single company name is displayed for each customer), you may include the company name in the worksheet for that field. For each customer record, SpeedBase will search for the company name in database and matches with the customer record imported if it is found.

Advanced Import Options

For the previous example; if the company name included with customer records does not exist in SpeedBase database, you may force SpeedBase to create a new company record during import. Check the **"Auto create new record if cross referenced field does not exist"** checkbox for this.

For the previous example; you could also include the ID of the company as displayed in SpeedBase for "company" catalog instead of the company name. In this case check "**Treat cross referenced fields as ID keys**" checkbox. In order for this option to work, your source data should contain the valid ID numbers of each company under the name column instead of actual name.

Caution! Do not check any of these checkboxes unless you fully understand their functionality. Otherwise you may end up with some incorrect data imported to your database.

Exporting Records

SpeedBase supports exporting records as MS Excel worksheet file



Quickly Exporting Selected Records

While you are displaying a [record list window](#) or [related record list window](#), select the records you wish to export, right click your mouse to open the popupmenu, click export. You may export either the selected records or all records displayed in the list. SpeedBase will export the records exactly as seen in the current view.

If you wish to control the fields and their orderings, you may open export window instead of using quick export.

Exporting All Records Using Export Wizard

While you are displaying a [record list window](#), open **Records** from main menu and select **Export**. The export wizard window will open. You may here select the catalog to export records from, select the fields to be included in the exported file and their orderings.

If you plan to import the exported data back to SpeedBase database, you should also check "**include ID information**" checkbox.

Reports

Creating Basic Reports

Basic reporting allows you to quickly get a simple report with a fixed format where the layout and all the arrangement of the content are prepared by SpeedBase automatically. You can get the output of the current record or current list of records with just a few mouse clicks without any configuration. Customization options are limited for this report type.

Tip: See "[Custom Reports](#)" if you want to create fully customizable reports.

There are two different types of basic reports depending on the window you initiate printing.

Printing a Single Record

When a record details window is displayed, click print button. This will open print settings window. From the drop down list labeled as "Report Template", select "Default Template". This will create a typically one page report for a single record. The report will contain all of the current field values of the currently displayed record.

The report format is build by SpeedBase automatically and cannot be changed except for several options available on report properties window (see below).

Printing Multiple Records in Tabular Format

When you are displaying a list of records from a catalog, click print button. This will open print settings window.

From the drop down list labeled as "Report Template", select "Default Template". This will create a report in tabular format with the same arrangements of the current view.

On the section labeled as "Data Source", you may choose whether to print only selected records or all records in the catalog. If you select "all records", SpeedBase will add all of the records (i.e. all records on all pages of current view) to the report.

How to Modify Print Layout

Basic reports always refer to the field arrangement of the current view. If you want to change the selection of fields and their ordering, cell widths and sorting rules, you should either modify the current view settings or create a dedicated view to be used only for reports.

[Views and how to create them](#)

Tip: SpeedBase always reserves a single line for each record. If printed text does not fit into a cell, you should consider increasing the cell width or decreasing the width of other cells or remove unused cells or choose printing in landscape to gain more space.

Changing Report Properties

While you are displaying the "Print Settings" window, select "Default Template" and click the settings button on the right of the template selection box. This will open "Report Properties" window. You may here select from available options to modify the view and style of the report.

Designing Custom Reports

For trial users; this feature is available and fully functional during your trial period.

For registered customers; this feature is optional and available only if your license includes custom reporting feature.

SpeedBase includes a powerful custom report designer which allows you to freely design all the content and style you want to see on your report. Once you complete your design, it is saved as a new report

template and can now be used any time to create a report of your records in a custom designed format. You may create any number of templates under each catalog and modify a template any time you want.

Creating a new Report Template

- Open print window, select "custom reporting" from the "report type" box.
- Click to "report manager" button. This will open "Report Templates" window.
- Click "Create New" button. "Report Properties" window will open.
- Select desired report options.
- Click "Save & Exit" button to create the new template.

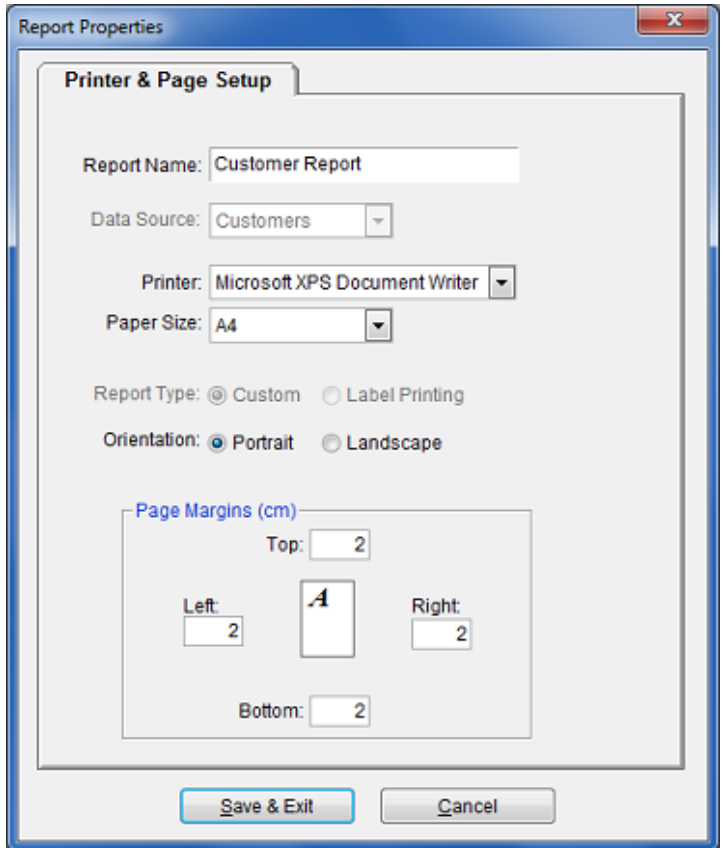
Data Source: Designates the catalog from which record data will be retrieved and displayed in the report. This selection becomes permanent for this template and cannot be changed later.

Report Type: Select "Custom" for the field "Report Type". If you want to create a report for printing labels, see [label printing](#). This selection becomes permanent for this template and cannot be changed later.

Page & Printer Settings: Select the desired default settings for this report template.

Page Margins: The preferred margins here have actually no effect on design or print.

They are only used to show the preferred margin positions during design.



The screenshot shows the "Report Properties" dialog box with the "Printer & Page Setup" tab selected. The "Report Name" is "Customer Report", "Data Source" is "Customers", "Printer" is "Microsoft XPS Document Writer", and "Paper Size" is "A4". The "Report Type" is "Custom" (selected with a radio button) and "Label Printing" is unselected. The "Orientation" is "Portrait" (selected with a radio button) and "Landscape" is unselected. The "Page Margins (cm)" section shows "Top: 2", "Left: 2", "Right: 2", and "Bottom: 2". A preview of an A4 page is shown in the center. At the bottom, there are "Save & Exit" and "Cancel" buttons.

Modifying Report Properties

- Open print window, click "custom reports". This will open "Report Templates" window.
- Select the desired report template from the list, click "Properties" button.
- Make the required changes. Note that some properties become fixed when the report was first created and cannot be changed.
- Click "Save & Exit" button to save changes.

Designing Report Templates

See [Report Designer](#) for detailed explanation about designing a fully customized report.

See [Label Printing](#) if you want to print labels for mail merge.

Printing Reports

- Open the record details window of the desired record, or select the record(s) from a record list which you want to be included in the report.
- Click "Print" button to open print window.
- Select the custom template you have created before from selection box.
Tip: Beware that, SpeedBase will only show templates which are designed for the current catalog. If you do not see the template name you designed before, it belongs to another catalog. You should first display records of that catalog and then invoke print command. You can also check the template by clicking "custom report" button.

- If applicable, select the whether you want to print selected records or all records of the current view from the "data source" box.
 - Click "Print Preview" button to see the preview or "Print" button to create the report.
Tip: The preview window may not display all records requested if large number of records are sent to the preview. This will not effect however the actual printing.
-

Report Designer

For trial users; this feature is available and fully functional for trial purposes during your trial period. For registered customers; this feature is optional and available only if your license includes custom reporting feature.

Designing a Report Template

The basic work flow of creating a report template is as following:

- Open print window, click "custom reports". This will open "Report Templates" window.
- Click "Create" to start a new report template OR select an existing one and click "Design" button. "Report Designer" window will open.
- Adjust properties of each report section by clicking "Section Properties" button
- Design your report by placing data items, computed items or drawing items on desired sections of the the page.
- Adjust properties of each item by right clicking an item on design area.
- Click "Preview" button to check how the final result looks.
- Click "Save & Exit" button to save your design changes to the template.

Page Layout & Report Sections

The report designer shows you the page layout on the left. The page layout consists of 5 major sections each of which represents a certain part of the page or report. When you click a section, SB will show only the corresponding area of the page in full page width. You may determine how much height should be allocated by each section by clicking "Section Properties" button.

Tip: SpeedBase will show the preferred page margins as a dotted red line. This line has no effect on your design or print process and is there only to guide you aligning the items easily. You may change the margins from "Report Properties" window (see [Custom Reports](#)).

Tip: SpeedBase will show the edge of the printable area reported by the printing device as a solid red line. You shouldn't put any items beyond this line as your device will not create output on that area.

Page Header

Represents the area between the physical top edge of each page and preferred top margin. Any item put on this area is printed to the same area on all pages. You may however exclude the first page of the report from "section properties" window.

You may use this area to put page numbers or drawing items that should be displayed on top of each page.

You may change the height of this section by modifying page margins. See [Modifying Report Properties](#)

Report Header

Represents the initial fixed (introductory) content that should be displayed on top of the report. If you leave this section blank, SB will simply skip this section and will not allocate any page area in the report.

Data Section

Represents the data area of the report. Starts after report header and continues thru next pages until all data is written. You will see all data items you can put into the report under this section. When SB creates the report, it will repeat printing this section for each record requested. You may adjust various settings from "Section Properties" window.

Start with New Page: If checked, SB will not continue printing data section after the report header and start from a new page instead.

Keep Together: If checked, SB will not split a record data and start a new page, if the record does not fit in the remaining space of the current page.

Max. Records Per Page: You may optionally determine how many records should be printed on each page. This option is typically used when a single record data should be printed on each page.

Number of Columns: Select how many columns should be used to print data. See related topic below.

Section Height: Desired page height to be allocated for each record.

Sub-Data Sections

You may see one or more section items under the data section. SB will show a sub-data section for each menu item (i.e. relationship) your records have. This section is very similar to the data section. If used, SB will repeat printing this section for each "related" record.

This section has a special property "Data Source", where you can select the desired view in case the menu item has multiple views with different filter attachments.

Example: Assume that you are designing a report for "Companies" and records have a "Contacts" menu to show related contacts. SB will print a company record and then print all related contact records and then next company record and so on.

Report Footer

Represents the final fixed (conclusion) content that should be displayed at the end of the report. If you leave this section blank, SB will simply skip this section and will not allocate any page area in the report. You may force this section to start from a new page from "Section Properties" window.

Page Footer

Represents the area between the preferred bottom page margin and physical bottom edge of each page. Any item put on this area is printed to the same area on all pages. You may however exclude the first page of the report from "section properties" window.

You may use this area to put page numbers or drawing items that should be displayed on bottom of each page.

You may change the height of this section by modifying page margins. See [Modifying Report Properties](#)

Adding / Modifying Data Items

Data items correspond to each field in a catalog. You may place a data item only into the related data section.

- Select the desired data item from the page layout area. SB will also switch to the related page section when you select a new item.
- Click "Insert Field" button to place the selected item on the design area.
- Resize or relocate the item using your mouse. Remember to allocate enough width to the item otherwise data might appear clipped.
- Right click the item to adjust various properties of it or overlapping with respect to other items.
- Remember to add also a label for the data item if you want to show the field name before data.

Tip: If you need to adjust the position or dimensions of the items with more precision, enter the desired values into the related boxes on top and press enter.

Adding Images/Decoration/Computed Items

You may add various shapes and labels to decorate your report.

- Select the desired section from the page layout.
- Click the "Add Drawing" button on top of the designer window and select the desired item.

- Resize or relocate the item using your mouse.
- Remember to right click the item to modify various properties and style as well as overlapping with respect to other items.

Tip:

Remember to click on to the small arrow icon on the right end of the "Add Drawing" button. This will open a menu where you can select from available drawing items or labels.

Page Counter: Displays current page number.

Record Counter: Displays current record number, increases by one on each start of a record section. You may use this item on the record section to show the row number of each record or on the report footer to show the total number of records printed.

Sub-Record Counter: Displays current record number on a sub-data section. Counts each "related" record and resets when a new data section starts.

Deleting Design Items

Click on the design item you want to delete. Press delete key from your keyboard or click delete button on top of the designer window.

Creating Tables inside a Data Section

You may prefer to print data in tabular format (grid style) instead of placing each field one by one in free design mode. To create a table:

1. Select the the data section (or sub-data section) from page layout box on top, left side of the designer window,
2. Click "Section Properties" button, click "Data" tab,
3. Check the box named "Show data in tabular format",
Note that you may not place free style data items and tabular format at the same time. If there are any pre-existing items on current section, SpeedBase will ask you to delete all existing items to continue.
4. Add the desired fields to the "displayed fields" box, you may also adjust the column ordering of items.
5. Click "OK" to save changes, this will create a single data object displayed in tabular format,
6. You may adjust various formatting properties by right clicking on it and selecting "properties".
7. You may adjust column widths by dragging the column borders with your mouse.

Note that, the tabular item is displayed as a single line table on design area. When the actual report is created, SpeedBase will add as many rows as needed to the table until all records are printed.

How to adjust column widths of the table

- Adjust each cell to the desired width by dragging the column borders using your mouse.
- After all columns are adjusted, check if you can see an empty cell (without column name) at the right most side of the table.
- If there is an empty cell, you must enlarge some cells until the width of this empty cell becomes very small but without causing it disappear.
- If you do not see an empty cell, you must decrease the width of some cells until a very small empty cell appears at the end of the table.
- If all looks good, click anywhere outside the table to trigger auto-adjustment, which will not make any significant change if you kept a very small empty cell at the end of the table. After auto-adjustment, the empty cell will disappear and the table gets its final shape.

Tip: Avoid accidentally clicking outside the table which triggers auto-adjustment until you finish all adjustments as described above.

Printing Multiple Columns

It is possible to design a data section with 2 or more columns. You may choose the desired number of columns from "Section Properties" window.

When you adjust a data section to multiple columns, SB will start to display only the first column of the page, cutting the page at the start of the second column on right. You should put all design items into the first column. While creating the report, SB will use the same design for all other columns and fill data from top to bottom on first column and then continue from the beginning of the next column.

Tutorial for Designing Your First Custom Report

Make sure that you have read ["Custom Reports"](#) before continuing this section.

This help section gives you step by step instructions to create your first custom report and understand the basic work-flow. You are recommended to avoid changing any settings that are not mentioned here until you complete the tutorial.

Before starting to design a new custom report, make sure that you have already created at least one catalog with multiple data fields and a sample record.

How to Design a Basic Customized Report?

1. Click "Tools" from main menu, select "Report Manager",
2. Create here the new report and select there a catalog as the source of data,
3. Select the new report and click "Design",
4. By default, you will be looking initially to a page section of 3 cm height. Note that this section will be printed repeatedly throughout the page for each record in case you print more than 1 record. You may increase the height of the section by clicking "Section Properties" button if you need more space per record to fit the data.
5. On left-down side of the window, you will see the "Object Box" with a list of all existing data fields of the report catalog, click each desired field and then drag it to the desired location of the page. Note that, the label on left side is the field header and will be printed as is. The box containing the field header on right side is actually representing the data and will be replaced by the actual data in your record when the printout is generated.
6. If you right click an item you have placed into the section and select "properties", a window will be opened where you may adjust various display options for that item.
7. You may drag and drop each item on the page section until you get the desired appearance.
8. You may also add some non-data items from the "Object Box" under the "Decoration" folder to decorate your report.
9. Click "Report Preview" button to check how the final result looks. A sample report will be generated from existing records in your database.
10. Click "Save & Exit" button to save your design changes to the template.

To print record(s):

1. Display the records of the catalog for which you have created the new report,
2. Select one or more records, click "Print" button from toolbar,
3. On print window, select the report template you have created,
* If you do not see the template name in the list, it means that, you have created the report for a different catalog than the one you are attempting to print records from. A report cannot be generated for the records of a catalog until you have created a report template designed for that catalog.
4. Click "print preview" to check the report before actually printing it.

How to Design a Report with Relational Data?

You may want to generate a report for one or more records including their related data.
e.g. Customer report including related orders for each customer.

This type of report can only be designed if you have already created a relationship between two or more catalogs.

In this example, assume that we have already setup a 1 to multi relationship between a "parent" catalog (e.g. customer) and "child" catalog (e.g. orders).

Before continuing, make sure that the parent catalog has at least one record as well as one or more relational records so you can preview the report with actual data.

1. Create a new report as described above for the parent catalog,
2. Open report designer window for this report,
3. Design the default section by placing the necessary data items for the parent catalog,
4. At the bottom of the "Page Sections" box on left side, you will see 4 small buttons, click the first button to create a new page section, a window to select "section type" will be opened,
5. In the section type list, you should see available relational data sections in the following format:
"DATA > PARENT CATALOG NAME > RELATED CATALOG NAME"
If you do not see such a line, this means that you did not have created any 1-Multi type relationship for the main catalog of this report yet. You must do it first.
6. Select the desired relational data section and click "OK",
7. This will open the section properties window, adjust the following settings only and leave others unchanged for now:
 - Select "Preferred View", which will determine the filtering rule to be used to include related records.
 - Adjust section height if you prefer to allocate more or less space for each related record data.
8. Select the new relational data section you just created from "Page Sections" box,
9. Design the relational data section by placing the necessary data items just like before,
10. Click "Report Preview" button to check how the final result looks.
11. Click "Save & Exit" button to save your design changes to the template.

To print record(s):

1. Display the records of the "parent" catalog for which you have created the new report,
2. Select one or more records, click "Print" button from toolbar,
3. On print window, select the report template you have created,
4. Click "print preview" to check the report before actually printing it.

How is a relational report printed?

Data from the first record (e.g. customer) will be printed on top the page according to the default section arrangement you made. If there are one or more related records (e.g. orders) for that records, they will be printed according to the relational section arrangement you made. That section will be repeated for each relational record. If you have selected more than one record from parent catalog, the output continues with the next parent record and its related records until all selected records are printed.

Label Printing

For trial users; this feature is available and fully functional for trial purposes during your trial period. For registered customers; this feature is optional and available only if your license includes custom reporting feature.

SpeedBase supports printing labels using data from the records in your database. You can use this feature for mail merge purposes.

Designing a Template for Label Printing

- Make sure that you are displaying records of the catalog which you want to use for creating labels.
- Open print window, click "custom reports". This will open "Report Templates" window.
- Click "Create New" button to create a new report template. "Report Properties" window will open.

Paper Size: Select the correct paper size for the label sheet you want to print.

Report Type: Select "Label Printing".

Left Margin: Enter the distance between left edge of the page and the first label on sheet.

Top Margin: Enter the distance between top edge of the page and the first label on sheet.

Label Width/Height: Enter the width and height of the label.

Horizontal Spacing: Enter the horizontal distance between adjacent labels in the same row.

Vertical Spacing: Enter the vertical distance between adjacent labels in the same column.

of Rows: Enter the number of label rows on a sheet.

of Columns: Enter the number of label columns on a sheet.

Tip: Make sure that you didn't enter more rows or columns than available space on page. Otherwise some labels might get printed outside the page borders hence, not printed at all.

Save and close report properties window.

- Select the new template from report list and click "Design" button.
- "Report Designer" window will open and display design area for a single label.
- Design the label by placing data items, computed items or drawing items.
- Adjust properties of each item by right clicking an item on design area.
- Click "Preview" button to check how the final result looks.
- Click "Save & Exit" button to save your design changes to the template.
- Exit "Report Templates" window.

You are now ready to print labels from print window by selecting the report template you just created.

See [Report Designer](#) for more information about design window.

Features

Calculations

Please read the help topic: [Computed Fields](#)

Displaying Statistics

Barcode Processing

You may configure SpeedBase to automatically find and open the record whose barcode is read by a barcode scanning device. To do this, create a small text field in the required catalog and save barcode text for each record. Then, set the catalog and the field carrying barcode data on [system preferences window](#). Whenever you want to use your barcode scanning device, just click the "Barcode" button from the main toolbar and scan a barcode. SpeedBase will automatically search for the barcode and open the associated record window whenever it recognizes a barcode input.

Remember that you may also manually type in the barcode text from your keyboard to open the related record as long as you keep the barcode button activated.

How to Print Barcodes

If you want to print out barcode marks with your reports, you should install a "barcode font" to your computer. There are many free to use barcode fonts on the internet.

Reminders

SpeedBase includes a powerful reminder feature. Reminders are displayed at a specified date and time with sound alert to remind you an approaching event. Note that, SpeedBase should be running at the fire time of a reminder, otherwise, the reminder can only be shown as soon as SpeedBase starts up. To ensure that reminders are displayed on time, adjust SpeedBase to start automatically with Windows on system tray which is the default setting. [Click here](#) to learn how to do it.

There are mainly three different ways to create a reminder.

Creating Custom Reminders

There are two ways to start creating a custom reminder:

- From main window, click "reminders" button on toolbar. This will open a window which displays a list of all reminders created before. You may create new or edit existing reminders on this window.
- Right click the SpeedBase icon on system tray and select "New Reminder".

Reminder

Create Reminder

Create a new reminder which will pop up at the specified time you enter below.

Status:

Event On: Remind To:

Remind: Remind At:

Recurrence:

Mon. Tue. Wed. Thu. Fri. Sat. Sun.

Reminder Message:

Status: Shows the current status of the reminder. An existing reminder is set to one of "Active", "Disabled" or "Dismissed" states. If active, the reminder is armed and is waiting its fire time to display. You may set it to "Disabled" in order to deactivate the reminder. If the reminder is already displayed before and you closed the notification window by clicking "dismiss" button, SpeedBase sets the reminder to "dismissed" state. A dismissed reminder is also deactivated. You may re-activate a disabled or dismissed reminder and set a new event date/time.

Event On: Select the actual event date/time here.

Remind To: Allows you to create a reminder for all users. Used only in multiuser editions.

Remind On/At: Select an exact date/time the reminder should be shown.

Remind Before: Select a time interval which will be subtracted from the event time to calculate the display time.

Recurrence: If the reminder should recur periodically, select the time interval here. When you dismiss a reminder message of recurring reminder, SpeedBase automatically updates and re-activates the reminder for the next recur time.

Message: You may type text to display with the reminder here. The message is displayed when the user clicks the message link on the reminder notification window.

Tip: A periodic reminder always depends on an initial fixed reference date. If for some reason the reference date shifts in reality, the reminder may become out-of-sync. It is better to set it to non-periodic if there is such possibility.

Attaching Reminders to a Record

While you are displaying/editing a record in your database, you may optionally attach a reminder to a date or date/time field of that record. To allow this feature, you just need to enable reminders for that field as explained below:

- Open "catalogs" window from "database" menu,
- Select the catalog you wish to allow creating reminders for its records, click "fields",
- Select (or create new) a date or date/time field which should be used as the event time of the reminder, click "properties",
- On "field properties" window, check "enable reminder feature" box.
- Optionally, you may also choose default settings for the reminders below. (You may always overwrite them on record basis)
- Save and close the configuration windows.

You will now see a small reminder button on the right side of the date or date/time field on each record. You may create and attach reminders to the records you like.

Note that there is no field to enter message when attaching a reminder to a record because the record itself is the message in this case. SpeedBase opens the full record window when the user clicks the link on

the reminder notification window.

Creating Automatic Reminders with each Record

Apart from the traditional "manual" type reminders, SpeedBase can automatically create a reminder in the background whenever you create a record which has a critical date or date/time information. Examples are: Meeting time of an appointment record, due date of a bill, expire date of a domain etc. If you just tell SpeedBase to do so once, you do not have to create and adjust a new reminder every time you create an appointment.

In order to allow SpeedBase to create automatic reminders,

- Open "catalogs" window from "database" menu,
- Select the catalog you wish to create automatic reminders for its records, click "fields",
- Select (or create new) a date or date/time field which should be used as the event time of the reminder, click "properties",
- On "field properties" window, check "enable reminder feature" box.
- Optionally, check "Auto-activate reminder on date input" box.
- Adjust the default values for the reminder according to your preference.
- Save and close the configuration windows.

If you've checked "auto-activate" box, SpeedBase will always and silently create and attach a reminder to a record whenever,

- you create a new record with a valid date or date/time information for the field you configured or,
- you change the value on the date or date/time field you configured.

If you've left "auto-activate" box empty, SpeedBase will not automatically create reminders, instead, it will show you a button after the date input box, which will allow you to attach a reminder to the record if you want to. This option is more usefull if you need reminders only for some of the records you create.

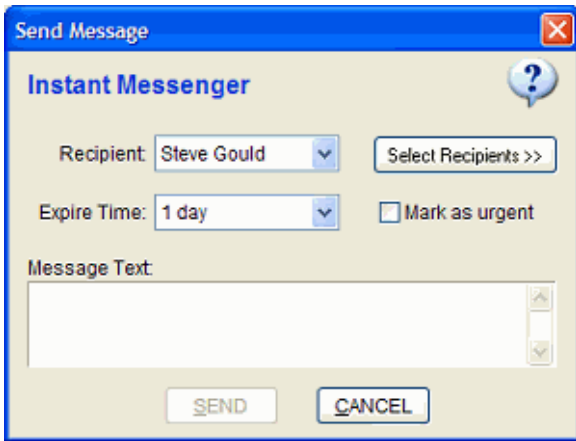
It is also possible to change the settings of a reminder which was created automatically with a record at a later time. Open the record and click the button for reminder settings which is shown on right side of the associated date/time field. You may change the settings according to your preference or disable the reminder if needed.

Instant Messenger

Available in SpeedBase TeamWork edition.

SpeedBase has a builtin online messenger which enables the users to send and receive simple messages between each other. Instant Messenger is a fast, private and convenient way to send notifications, announcements or any other small pieces of information.

When you send an instant messenger to an online SpeedBase user, the user will see a notification window on his/her desktop. If the user is not online at the time the message is sent, the notification will be displayed whenever the target user starts SpeedBase.



How to Send an Instant Message

Click the "**Send Message**" button from application toolbar. This will open the messenger window.

Recipient: Select the SpeedBase user you wish to send message.

Expire Time: The time frame that SpeedBase should try to deliver your message to the target user, if the user does not logs in. If this time frame is passed before the user is online again, no notifications will be displayed any more.

Message Text: Type your message.

You may click "**Select Recipient**" button to send your message to more than one user. The recipient list also displays which users are online and can receive your message immediately.

Keyboard Shortcuts

You may find available keyboard shortcuts supported by SpeedBase below.

Most Useful Shortcuts Supported by Windows Operating System

Move cursor to the next item/object/box: TAB

Move cursor to the previous item/object/box: SHIFT+TAB

Cut: CTRL+X or SHIFT+DEL

Copy: CTRL+C or CTRL+INSERT

Paste: CTRL+V or SHIFT+INSERT

Select All: CTRL+A

Undo: CTRL+Z

Move cursor to the next word: CTRL+Right arrow

Move cursor to the previous word: CTRL+Left arrow

Go to the beginning of content: CTRL+HOME

Go to the end of content: CTRL+END

Close/Cancel: ESC

For a full list of Windows shortcuts, search for "list of windows keyboard shortcuts"

Shortcuts Specific to SpeedBase

New Record: CTRL+N

Save Record: CTRL+S

Find Text: CTRL+F (Applies to text fields)

Find Next: F3 (Find the next occurrence of the last searched text, applies to text fields)

Close Current Catalog: CTRL+Q

Reload/Refresh: F5

Copy Selected Record(s): CTRL+K

Print: CTRL+P

Load Next Record: CTRL+Page Down (available on record window)

Load Previous Record: CTRL+Page Up (available on record window)

Close Current Window: ESC

Open Help (Context Sensitive): F1

Useful Tips

- Press CTRL+N to create new, CTRL+S to save, ESC to exit a record window.
- Press F5 to reload a record window or a record listing.
- Press F5 to undo all changes and revert to the last saved state of a record.
- Press F1 on any window whenever you need help about current window.
- Press CTRL+A to select all text in a field.
- Press CTRL+Home or CTRL+End to go to the beginning or end of the text in a field.
- Press CTRL+Right/Left arrow keys to quickly move cursor in a text content.
- To delete a date entry in a date, text or numeric field: Press CTRL+A and then DEL

Mouse Shortcuts

Remember that you may access various available commands by right clicking your mouse on an object like a catalog, view, a list of records or selection of records.

Database Management

Creating a New Database

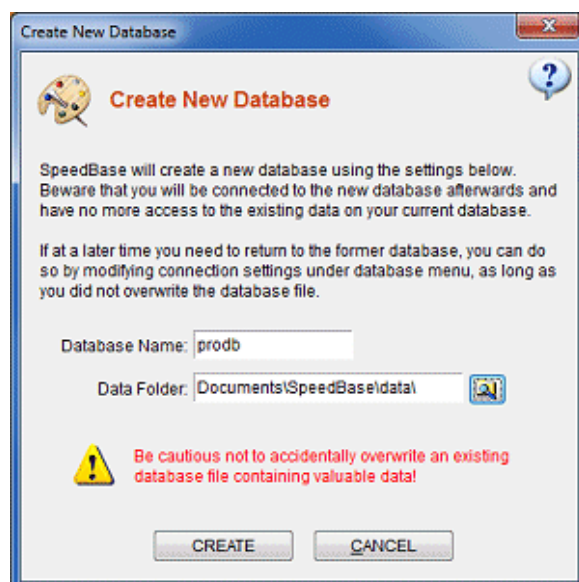
When you start SpeedBase the first time after installation, a new, empty database is created. It is also possible to create a new database at a later time. New users are recommended to do some training with the first database and creating a new one before starting to enter actual data.

How to Create a New Database

WARNING!

SpeedBase will ask you for a database name. If you create the database using the same name and location as your current database, it will be overwritten and all data in your current database will permanently be lost. Use a different name if you wish to keep your current database.

- Open "**Database**" from main menu, select "**Create New Database**". The "**Create Database**" window will open.
- Select the file name wish to use for your database.
- Select the data folder location where your database and other data files will be saved.
- Click "Create" button.



Working With Multiple Databases

SpeedBase allows you to maintain multiple database files and connect to any of them by modifying [database connection settings](#).

Creating and working with multiple databases is safe as long as you give a different file name for each database and you stay aware of which database you are connected to. You may also use this feature to create a second database for experimental modifications you want to try without putting actual data in danger.

Working with two (or more) databases for saving actual data on both is not recommended unless you definitely need to isolate data.

Designing Your Database

SpeedBase allows you to design your database from scratch and/or modify your existing design as much as and any time you want. A well designed database can save you time, speeds up your work flow and organizes your information more efficiently.

In order to achieve a well designed database, you are recommended to make some paperwork to clarify what information types you need and their relationships.

Sample Design Outline

An example of outline for a simple database design is given below. You can sketch your own design by replacing the names, adding other required fields or removing unnecessary ones.

Major categories of information (catalogs): *Contacts, Appointments.*

For Contacts catalog, I need:

- *Name - text*
- *Email - text link*
- *Birth Day - date d/m/y*
- *Contact type - selection box containing "vendor", "business partner", "staff", "customer"*
- *Notes - multiline text*
- *History of appointments - should show the list of all appointments assigned to this contact*

For Appointments catalog, I need:

- *Subject - text*
- *Start time - date & time*
- *Total time in hours - numeric*
- *Estimated sale value - monetary*
- *Contact Name - select from a list of existing contacts*

Relationship Notes:

- *Each contact person can have any number of appointments.*
- *Each appointment record is related to a single contact.*

Notes about Business Flow:

- *We need to track contacts and history of appointments scheduled to them.*
- *Every day we schedule a number of appointments between a customer and one of our staff.*
- *Upcoming and past appointments should be easily filtered out and upcoming ones should notify the assigned user before 2 hours.*

See [Building Your Database](#) for detailed information about how to design your database.

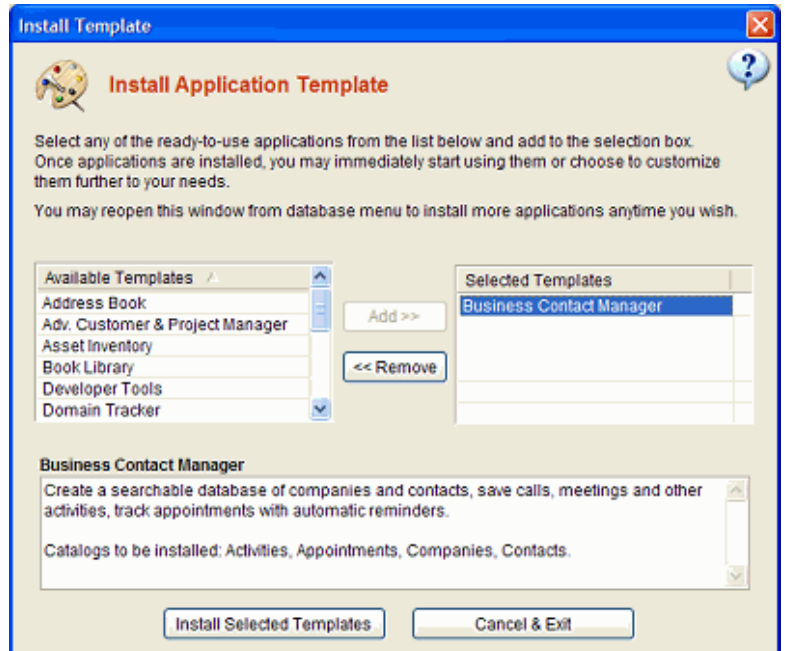
Installing Application Templates

For users who wish to make the quickest start or just see the capabilities of SpeedBase, a plenty of ready-to-use application templates are available for install.

What is an Application Template?

It is simply a preconfigured, predesigned database content with one or more catalogs, fields and other structural items. When you select and install a "Contact Manager" template for example, SpeedBase configures your database so that you can save and manage company, people and appointment information.

SpeedBase suggests you to install application templates whenever you create a new database. You may also manually open this window by selecting "Install Application Templates" under "Database" menu.



The key points you should know about application templates are given in the Q/A below:

How do I install an Application Template?

Click "Install Application Templates" from "Database" menu, select the template you wish to install from the list, click the "Add" button. Click "Install Selected Templates". You may add and install multiple templates if you wish, but new users are recommended to move "slower". You can always install more templates any time you want.

Do I really need to install Application Templates?

When you click to a template name on the list, information about main uses as well as the content of the template is displayed below. If you think that a template seems suitable for your needs, you may install it. Even if you do not find exactly what you are looking for on that template, you can always modify the database items, e.g. add new or remove unnecessary fields until it fits your requirements. A template should be considered as a quick starting point.

If none of the templates seems interesting to you, you can choose to start from scratch. Note that it is possible to build exactly the same functionality of an existing template by creating catalogs, fields and views manually.

What if I have the same catalogs already before installing a template?

You should act more carefully in this case. If there is already a catalog having the same name as the catalog which will be installed with the template, SpeedBase will merge these two during install. New fields are added and placed on the record form and as a result, old and new fields may look entangled to each other. Do not think this as a disaster, because, you only need to open the [form designer](#) and rearrange the field placements as well as removing duplicates.

If there are no overlapping catalogs, SpeedBase will always create new, independent catalogs and your existing configuration is not effected at all. Note that if a template contains a catalog named as "contacts" and you also have a catalog named as "people", both aiming to save the same type of information, no

merge occurs and you end up with two catalogs for storing the same type of information. To prevent this to happen, you may rename your existing catalog to "contacts" just before the install to force a merge.

How do I uninstall a template?

SpeedBase does not distinguish between database items which are created during a template install and created manually by your self. You can simply delete a catalog which was created during a template install to get rid of it. Make sure that you do not have valuable records in the catalogs you are about to delete.

I installed a template but then messed up things. How do I repair it?

Reinstall the same template, SpeedBase recreates missing fields and views in this case. You may also prefer to first deleting the catalogs before reinstall which are created during the template install. Make sure that you do not have valuable records in the catalogs you are about to delete.

Exporting/Importing Your Database Design

If you are looking for "importing data" see [importing records](#).

If you are looking for "exporting data" see [exporting records](#).

You may export your full database design elements, i.e. catalogs, fields, form designs, views, filters etc. to a file. The exported file is actually an application template which you may later import to another (preferably empty) database to reproduce exactly the same catalogs, fields and other design elements as your original database.

The final result is apparently a copy of your database without any records or file attachments at all.

Caution! It is not possible to backup or move location of your data by using the template export/import features!

Sharing Application Templates with Others

An application template file only contains the structural information of your database design but does not contain any data or records. So it is safe to share your database design with other SpeedBase users in general.

Beware however that an application template contains the titles you gave to catalogs, fields, views, reports etc. If you have used any sensitive text for naming such database construction elements, you may consider renaming them or excluding those catalogs having such names from export.

Exporting Application Template

- Click "Database" from main menu, click "Export Application Template". This will open the "Export Application" window.
- Leave the "include all catalogs" box checked unless you specifically want to exclude certain catalogs from export.
(Beware that, a partial export is not recommended as it may result in missing elements depending on the relationships of your database.)
- Fill in the desired file/template name into title box. You may leave description box empty.
- Click "Export" button to save the design information to file.

Importing Application Template

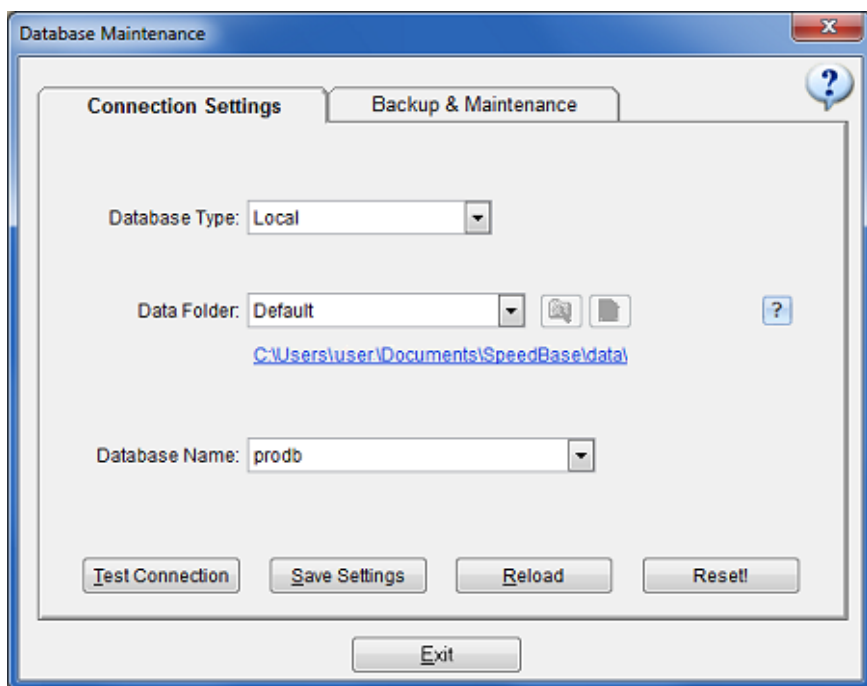
Caution! You are recommended to create a [database backup](#) before importing a template if your database contains data.

- Click "Database" from main menu, click "Import Application Template".
- Select the application template file you have previously exported.
- SpeedBase will import the design information from the template file.

Tip: If you are unhappy with the final result after import, you may choose to revert to the latest [database backup](#).

Connection Settings

Connection Settings window allows you to specify database connection information and apply maintenance if needed.



Changing Connection Information

Database Type: By default "local" is selected here and SpeedBase connects to its built-in, local database. Starting with version 4.0 and later, SpeedBase also provides you an alternative option to connect to your database on an SQL server. You may find detailed information about this connection type on [SQL Server](#) page.

Data Folder: The "**data folder**" is the folder where your database and all other related data files are saved. When default selections are used, the data folder is located inside your documents folder of your computer. The path of this folder is "MyDocuments\SpeedBase\data" and you may navigate to that folder by clicking the path link displayed right under the data folder selection box.

It is possible to move your data folder to a different location like a storage device or shared network folder, as long as you set the new location of the data folder here. Changing the location of your data folder is explained on [this help page](#).

This folder is also the only folder you need to copy when you want to take a backup of your data manually.

Database Name: File name of the database. If you have created multiple database files, SpeedBase shows all available databases in this drop down list. You may switch to another database by selecting a different item from the list.

Test Connection: Click to test whether the connection succeeds before saving the changes.

Save Settings: Saves the current connection settings.

Reload: Ignores changes and reverts the settings to the last saved state.

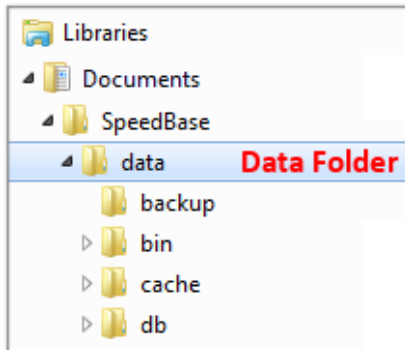
Reset: Sets the connection settings to the application defaults.

Caution!

Do not confuse the data folder "DATA" with the "DB" folder which is a subfolder inside the data folder and should NEVER be selected as data folder.

By default, the data folder is named as "DATA" by default, but it may have a different name if you have selected a different location on your disk in the past.

Whenever you need to adjust connection settings after a new installation, or, you want to copy / move / backup your data, make sure that you are dealing with the right folder as shown in the example image below.



Multiuser & Remote Connections

Connection Options

By default, SpeedBase connects to its built-in, file based database and does not require a server machine or installation of a server side software (with the exception of SQL server option). You may choose and go with any of the available connection options given below whichever works best for you.

- **Single User on a PC:**
This is the default installation to a computer with Windows operating system for local use only.
- **Local Network:**
You may connect to your database using a computer in your local network via a shared folder. SpeedBase should be installed on to the computer with Windows operating system for each user. Your database however might be located on any computer or storage device within your local network. Remote connection via internet is not possible in this option.
Note that, you most likely have a local network already if you have multiple computers at home or in the same office that share the same internet connection.
- **VPN:**
You may connect to your database via a VPN connection. All you need is to setup a VPN server for this option (see below). SpeedBase should be installed on to the computer with Windows operating system of each user. You may then connect from anywhere around the world via internet. Your connection is secured by the VPN software with password and encryption. We recommend [Hamachi](#)
- **SQL Server:**
This option allows you to remotely connect to your database from anywhere via internet. You must have the required technical skills to install and manage SQL server on a server machine to go with this option.
You may consider moving to sql server if you need remote access without the requirement of a VPN, you already have a server machine with sql server and you want to optionally share your data with some other software or web interface.
More details and setup instructions are explained [on this page](#).
- **Remote Desktop:**
You may connect to your database via a remote desktop software or device. This option allows you to connect from anywhere around the world. You only need to install SpeedBase to the remote server machine running Windows operating system. The clients can be any device (mobiles, tablets) with any operating system as long as they support remote desktop connection. Your data is secured by the remote desktop software with password and encryption.
Beware that opening multiple remote desktop connections to the same host computer requires

additional licenses from Windows server product family. This makes this approach more suitable for companies who already have setup a RDS (terminal services) based computing environment.

Caution!

Do not try to share your database between multiple computers by using file sharing services like Dropbox, Google Drive, OneDrive etc. These services are based on synchronisation and do not technically create shared folders as in Windows operating system. Connection from multiple devices -even if at different times- via these type of services are NOT supported and will most likely cause serious damage to your database.

Key Points to Remember

- SpeedBase is a desktop database application. It is NOT an online database service, i.e. it is not possible to access your data from a web browser by simply opening a web site. This also means that, it is NOT possible for a random, malicious internet user to access to your data by taking advantage of a security hole on your web site.
- As many users as your license allows may concurrently connect to your database and work as a team.
- File sharing services like Dropbox, Google Drive etc. may NOT be used to connect to your database via internet as these services do not create a real shared folder like in Windows operating system.
- **For multiuser access:** All data (i.e. records, design changes, layouts, views etc.) is saved to the same single location and all users will see/share the same data unless you create access restrictions. No data is stored on individual user computers.
- **For multiuser access with local network connection:** You do not need to install SpeedBase or any other software to your server. You actually do not need a server, however you need to employ either a computer or a storage device to keep your database. That device should be left up and running in order to accept connections from users.

How to Setup Multiuser Connection within a Local Network

SpeedBase can connect to your database thru a shared folder on your local area network. Follow the steps given below to allow multiple users to connect to your database:

1. Choose a computer, a storage device or your existing server in your local network on which your database file will reside. Try to choose a device which is up and running during whole working hours if not all time, as your database will only be available as long as it is up.
2. Create a shared folder. (See the end of this page for more information about creating shared folders)
3. Go back to the computer where your current database was created. Locate the data folder of your database. To find out the folder location, open "connection settings" window from "system" menu. The path is displayed under "local data folder" title.
4. Click on the data folder link on connection settings window to browse that folder on Windows Explorer.
5. Right click the data folder, click "Copy". (Its location is "My Documents\SpeedBase\data" by default unless you changed before)
6. Browse to the shared folder, right click the shared folder and click "paste". This will create a copy of the data folder including your database and other data files.
7. Start SpeedBase, open "connection settings" window, click browse button under the title "local data folder location". Browse into the shared folder, select the copied version of your data folder, click OK.
Caution! You should select the path of your **data folder**, do not select the folder having the name **db!**
8. On "connection settings" window, select your database file from the box titled "Database Name". Click "Save Settings". Click "Exit". SpeedBase will now connect to the database from the shared folder.

- Repeat the last two steps on all other computers to allow them to connect to the same database under the shared folder.

Tip: If you cannot see any entry in the "database name" selection box, you have probably selected the wrong folder as "data folder". Try selecting either the parent or the subfolder of the currently selected folder.

Tip: Practically, you will be able to connect to your database as long as you are able to browse to the shared data folder via Windows Explorer.

Caution!

Make sure that the connection settings window of SpeedBase on each computer shows exactly the same data folder location and database name. You are strongly recommended to remove any older, unused, duplicate copy of your data folder from your network to ensure no computer gets connected to an old copy of your database by mistake in the future.

Testing the Connection

It is essential to make a test if the database is shared on all computers successfully.

- Login to SpeedBase from one of the client computers and make some change on a record in your database.
- Move between each of the client computers to check that your modification is visible on all of them. You may need to click "reload" button.

If the change is not visible try clicking the **reload** button on the current window.

If the change is still invisible, check connection settings to make sure that all computers are connected to the same database file on the same shared data folder.

How to Setup Multiuser Remote Connection using a Virtual Private Network (VPN)

There are a number of easy to use, easy to setup VPN products available on the internet. Once you setup the VPN software on both of your host and client machines, the VPN software will allow the user on client computer to browse shared folders of the host computer. You may then adjust [connection settings](#) on SpeedBase to connect via the shared folder.

In some cases you may need to adjust firewall settings on either machines to allow the VPN product to connect successfully. Consult the documentation of your VPN product or consider to get help from a network expert if needed.

Creating a File Share on Windows 7

[Share a Folder in Windows 7 \(video\)](#)

SQL Server Connections

By default, SpeedBase connects to its built-in, file based database and does not require a server machine or installation of a server side software. Starting from version 4.0 and above, SpeedBase supports connection to a remote SQL server so you may keep your database on an SQL server. This option allows you to remotely connect to your SQL server from anywhere around the world via internet.

Before evaluating this option, make sure that you have reviewed all other available connection options given [on this page](#) as this option requires more technical skills to setup and maintain.

Requirements

- This options is available in SpeedBase version 4.0 and above.
- This option is available only if your license covers "SQL Server Connectivity" component, otherwise you may need to purchase it separately.
- You, or an IT professional in your company must have the necessary skills and technical knowledge to install, manage and backup your SQL server.
- You must have a running SQL server installation on a server machine which was configured to accept remote connections.
- Microsoft SQL server 2005 and above editions are supported.

Caution!

SpeedBase does NOT install or manage SQL server software for you. It also does NOT backup your database on SQL server. You must have the required skills and technical knowledge to install, manage your SQL server and deploy an appropriate backup solution. Technical support is only provided for the issues that are related to SpeedBase product and does not cover sql server specific issues.

How to Switch to a SQL Server Database

Note that, even after migrating to SQL server, you may still choose to save file attachments to local data folder. This, however may complicate backing up file attachments on a multiuser license as each user would then save files to the data folder on their own machine. You are recommend to move your data folder to a shared network drive and update connection settings for the shared data folder location on all machines before starting the migration.

Before you can start to use an SQL Server to manage your database, your current data must be migrated to a new, empty database on your SQL server.

Follow the steps given below to setup SpeedBase to use your SQL server to access your database:

- While not mandatory, you are recommended to complete the initial design and customization of your database on your local computer before moving it to your SQL server.
- Make sure that your SQL server is configured to accept remote connections.
- Open firewall settings of your server machine and make sure that the port numbers used by your SQL server are enabled.
- Open the management software of your SQL server and create a new database, also assign a user with full modification rights to this database.
- Open "connection settings" window of SpeedBase, select "SQL Server" from "database type" selection box.
- Enter connection information and then click "Test Connection" to verify that SpeedBase is able to connect to your SQL server.
- Click "migrate" button to start the transferring of all your data to the SQL server. This may take some time depending on the size of your data. Once finished, the database on your SQL server will be an identical copy of your local database.
- Save changes. All changes you make from now on will be done on the remote database on your SQL server.
- For multiuser connection, go to each of other client computers and just adjust the connection settings to connect to your SQL server. Do NOT attempt to initiate the migration again.

Caution!

Files are NOT migrated to SQL Server. If you have attached files to your records, they will still be accessed from your computer or local network.

Caution!

If for some reason you decide to redo the migration of your database, you must first delete the database created on your SQL server and then create a new database.

Caution!

If for some reason you decide to return to your local database, you may do so by adjusting the connection

settings. Beware that you may only return to the latest state of your local database just before the migration. It is NOT possible to migrate your current data in the opposite direction i.e. from SQL server database to the local database.

Advanced Users: How to Share Your Existing Data on Your SQL Server With 3rd Party Software or Server-Side Scripts?

SpeedBase cannot display or manage your pre-existing data on your SQL server, however, you may create a new database, tables and columns within SpeedBase and then move your existing data to these new tables. This data can then be viewed or processed by both server side scripts or SpeedBase.

Caution!

The database design of the tables and fields created by SpeedBase should never ever be modified by any 3rd party software or script.

The system tables of SpeedBase (which does not contain user data) should also never be modified by other software, neither at design level nor data level.

Doing so may easily result in unpredictable issues, loss of data or corrupted database. No technical support will be provided in such cases.

If you need to modify a user table, add/remove fields, change field properties etc. you must do it using Speedbase application interface only.

All other software may only execute simple SELECT/CREATE/UPDATE/DELETE queries for records on USER defined tables only.

The recommended way to share your data with 3rd party software is as following:

1. Create the tables and fields in SpeedBase on local database (i.e. on default installation),
2. Create a new, empty database on your sql server and adjust it to allow remote connections,
3. Open SB, open connection settings and migrate your data to this new SQL server database (see above on this page),
4. Import your existing data to the new database,
5. Make all necessary adjustments in order any other software or server side scripts to connect to the new database and update data.

User Preferences

User preferences are dedicated settings for each SpeedBase user. Every user can save in this window his/her own preferences.

Open "**Database**" from main menu, select "**Preferences**" and then click to "My Preferences" item.

Behavior

Open each catalog in new tab: When you click a catalog folder from catalog tree, the list of records of that catalog will be displayed. If you check this box, clicking each distinct catalog will open a new tab on the main window.

Open each record in new window: If checked, each record will be displayed in a new external window.

Mouse sensitive popup tips: If checked, a tip balloon is displayed whenever your mouse moves thru a tip icon or help button. Uncheck this box if you find this behaviour annoying, in this case the tips are shown only if you click to the tip icons.

Minimize to system tray: Hides SpeedBase window to system tray if you click the minimize button. You may restore the window by clicking the SpeedBase icon on system tray.

Continue running in the background if closed: If you close the main window by clicking the X button, SpeedBase will be minimized to system tray by default and stays running. You may uncheck this box to terminate the application completely, but note that, SpeedBase needs to be kept running in order to display the reminders or instant messages on time.

SpeedBase requires very little processing power when kept running on system tray.

Default Catalog: Select the catalog which will automatically open when you start SpeedBase.

Message Sounds: Select how much message sounds should be created.

Default Snooze Time: Select the time in minutes at which a reminder is postponed when the reminder window is closed without dismissing.

Startup

Remember my login name: If checked, the login window will remember the last user name that is logged in, when SpeedBase is started.

Remember my password: If checked, you will automatically be logged in on startup using the last used user name and password. So the login screen is bypassed. You may prefer this setting if you are the only user of the computer and/or the data on your database is not confidential from other people who share the same computer.

Start SpeedBase when Windows starts: This should be left checked to ensure that SpeedBase is kept running in order allow the reminders and instant messages are displayed timely.

System Preferences

System preferences are adjusted by the administrator and they are effective for all SpeedBase users. As most of these settings are stored in your database, they will change if you connect to a different database or you create a new database.

Open "**Database**" from main menu, select "**Preferences**" and then click to "System Preferences" item.

Display

Toolbar Style: Select the style of the main toolbar. New users are recommended to prefer "large buttons with text".

Field Labels: On [record detail windows](#) the titles of fields can either be left aligned with some space to the field box or stuck to the left side of the field box. Choose the style you prefer. You may need to open [form designer window](#) for each of your catalogs to rearrange the label positions after changing the alignment.

Date & Time

Date Format: Select the date display format you wish to use.

Time Format: Select the time display format you wish to use.

First Day of Week: Select the first day of week on your locale.

Data Conversions

Copy Format

You may customize the formatting of the data when the "Copy" button is clicked from the main toolbar.

Include Field Titles: If checked, the field titles are also added to the copied record(s).

Skip Empty Fields: If checked, empty fields do not create an empty line or title in the copied data.

Field Separator: Select a special character or type a custom character which will be inserted between successive data fields.

Record Separator: Select a special character or type a custom character which will be inserted between successive records.

Header Separator: Select a special character or type a custom character which will be inserted between field titles.

Tip: If you want a tabular format, where field titles are on top and each row represents a record, check "include field titles", uncheck "skip empty fields", select field/header separator as "tab" and record separator as "new line".

Tip: If you want each single line to have a field title and field value, check "include field titles", select field separator as "new line", record separator as "double line" and type a colon into the header separator box.

Text Representations

Checked Box: Enter the corresponding text value to be used on reports when a checkbox is left checked.

Unchecked Box: Enter the corresponding text value to be used on reports when a checkbox is left unchecked.

General Button: You may overwrite the name used for the general button which is displayed on record windows.

Barcode Reader

You may configure SpeedBase to automatically find and open the record whose barcode is read by a barcode scanning device. To do this, create a small text field in the required catalog and save barcode text with the records. Then, specify the catalog and the field carrying barcode data on this window. Whenever you want to use your barcode scanner, just click the "Barcode" button from the main toolbar and scan a barcode. SpeedBase will automatically search for the barcode and display the right record.

Performance

Max. records per page: Select the maximum number of records which are displayed on each page of a [record list window](#). If you wish to list more records on a page you may increase this number. If the time needed to list the records becomes considerably high, you may decrease it.

Max. items in guide box: When you type into a field of type relationship, SpeedBase displays a list box to suggest a list of records which begin with the typed text, if this list loads too slowly you may decrease the maximum number.

Check for system events: SpeedBase periodically checks system events to take the necessary action whenever an instant message is received or a reminder needs to be displayed. Setting this interval to a large value will impact proper operation of the reminder feature. The recommended value is 3 sec.

Backup & Recovery

Auto create daily database backups: (Strongly Recommended) By default SpeedBase automatically creates daily database backups. Keeping this feature active is essential in order to recover from an unlucky database failure or loss of data due to accidental user action. SpeedBase automatically deletes the older backups when the number of backups reach a predefined number.

Backup & Restore

Back Up & Restore on Local Database

If you want to move your whole data to another computer see the page [Changing Location of Data](#)

Caution!

By default, SpeedBase is configured to use a local database after installation.

If you have modified the database type setting later to use a Microsoft SQL Server, you should read the help page [Back Up SQL Server](#) instead.

If you are not sure which database type is in use, click "Database" menu from main window, select "Connection".

What Data Do I Need to Back Up?

There are 3 separate group of files which you must make sure that they are backed up regularly to avoid any possible disaster like hard drive failure, incorrect data modification by user mistake, virus damage, theft, fire etc.

1. Master database
2. Database snapshot backups
3. File Attachments

What is the automatic backup feature? What is a snapshot backup?

By default, SpeedBase regularly creates snapshot backups of your master database. The backup interval can be adjusted from preferences window and should never be turned off.

The snapshot backups are very useful to go back to an older state of your database in time, in case some data is deleted or updated mistakenly by a user or you just made some experimental changes to the database structure which you wish to undo.

Note that, this feature is not available for SQL Server connection.

Caution!

Snapshot backups do not contain file attachments. You may not use this feature to back up or restore file attachments.

Caution!

Beware that automatic snapshot backups are NOT meant to protect your data from disasters like hard drive failure, viruses or physical threats like theft or fire. By default, these files are saved to your local disk.

How to Take a Snapshot Backup Manually?

Although SpeedBase takes regular snapshot backups in the background, there might be cases when you need to back up the very last state of your database just before making some critical changes on your database or importing a large amount of data. To do this, open connection settings window from database menu and click "Backup Now" button.

How to Restore from a Snapshot Backup?

Open connection settings window from database menu, select the backup file you wish to restore from the list and click "Restore" button. Beware that, once you restore from a backup, you agree to lose all data created/updated between the creation time of backup and now.

How to Back Up My Whole Data?

Because of the diversity of the available backup methods as well as varying user preferences, SpeedBase does not provide here a "one size fits all" type of automatic backup solution. Note that, SpeedBase keeps all data (excluding files saved as shortcuts) under a single data folder, so this is also the only folder which needs to be backed up.

How to Back Up Manually?

Simply copy and paste your **data folder** to the backup media you prefer.

To find out the location of your data folder, open [connection settings](#) from database menu. The path is displayed in the box labeled as "data folder".

Beware that, this approach may not protect your data against viruses or physical threats depending on the preferred backup media.

How to Back Up Using Existing Backup Software?

If you already have some sort of backup software solution, you may configure it to include your data folder as well during periodic backups.

Beware that, this approach may not protect your data against viruses or physical threats depending on the features of the backup solution.

How to Back Up To Cloud?

In order to protect your data from an event like drive failure, virus attack, malicious user action or else, you are recommended to back up your data to cloud. You may consider using a cloud based file backup or synchronization service (e.g. Dropbox, Google Drive etc) for this purpose.

To back up your data to cloud, simply copy and paste your whole data folder into the synchronization folder. Beware that, file attachments that are saved as "shortcut" are not part of the data folder and should be backed up separately.

CAUTION!

Never try placing your whole data folder into a cloud synchronization folder. This may look a great idea at first but because of the way how synchronization process works, it is possible that your master database will get either damaged or rolled back to an older state resulting in severe loss of information.

How to Restore Your Data Folder from a Backup?

Remember that you are likely to find a much more recent snapshot backup than an external one. Consider restoring from a backup copy of your data folder in case snapshot backups are not available or you also need to restore file attachments.

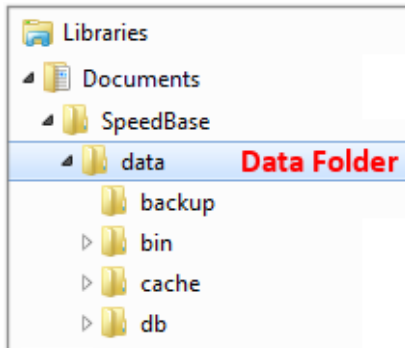
Follow the steps given below to restore from a backup copy:

- Locate the data folder in your backup media and copy it to the desired location on your hard drive.
- Open [connection settings](#) from database menu.
- Change your data folder location to the new one. SB will now search for existing database files under the new data folder.
- Select your database file from the drop down box.
Tip: If the database selection box remains empty, you have most possibly selected the wrong folder as the data folder. Try choosing either the parent or sub folder. Remember also that data folder has not the same path as your database folder.
- Save changes and exit. SB will connect to the new database at this point.
- If you have a multiuser license, repeat the connection setup on all other machines where SpeedBase was installed.
- Check your data as well as file attachments to make sure that you have restored the correct backup.
- Open preferences window, select backup section and make sure that the backup folder target is either "default" or set to a desired location.
- You are highly recommended to delete or move the older data folder to somewhere else to prevent any use of it by mistake in the future.

Another alternative approach to restore your data folder by keeping it in the same location is as following:

- Open SpeedBase, click "Data" menu, click "Exit" to terminate it completely. If you have a multiuser license, make sure that all other users have terminated the application in the same way.
- Locate your current data folder, rename, delete or move it to some other location. If you are unable to do this, check the previous step.
- Locate the data folder in your backup media and copy it to the same location as your original data folder.

- Start SpeedBase. If it cannot connect to your database, open [connection settings](#) and select the data folder location you just copied as well as database file.
- Check your data as well as file attachments to make sure that you have restored the correct backup.
- Open preferences window, select backup section and make sure that the backup folder target is either "default" or set to a desired location.
- You are highly recommended to delete or move the older data folder to somewhere else to prevent any use of it by mistake in the future.



Additional Information to Partially Back Up Data

This additional information is included for advanced users who would like to do partial backups, possibly using separate ways and timings for optimization purposes.

How to Back Up Master Database?

Your database file is located inside the "db" folder which is a subfolder of your data folder. Whenever you back up your "data folder", your master database is also backed up as well.

To learn the path of and navigate to your "data folder", click "database" menu, select "connection".

How to Back Up Database Snapshot Backups?

By default, snapshot backup files are located inside the "backup" folder which is a subfolder of your data folder. Whenever you back up your "data folder", snapshot backups are also backed up (to a safer location) as well.

Beware that however, snapshot backup folder can optionally be changed to anywhere else from preferences window. So, if you decide to change the location of this folder, you need to ensure that, that folder is backed up as well as data folder.

Tip: It is possible to automate the backing up of snapshot backups only. You may change the snapshot backup folder location to point to a folder inside a synchronized folder. This will ensure that your database is backed up regularly to cloud. Beware that however, file attachments are NOT covered in this method and you must still back up your whole data folder as well as any files that are saved as shortcut within reasonable time intervals.

If you do not have file attachments at all, it is sufficient to only back up snapshot backups. You may change the snapshot backup folder location from preferences window.

How to Back Up File Attachments?

Note that, SpeedBase does NOT store file attachments in your master database, so backing up only master database or snapshot backups does NOT mean that file attachments are backed up. You should consider the following cases for file attachments and adjust your backup procedure accordingly:

- If a field of file/image data type was set to "copy to local data folder", files attached to that field are always copied into the data folder. So backing up your "data folder" in full, will also back up these files as well.
- If a field of file/image data type was set to "save as shortcut", files attached to that field are always accessed from their original location. In that case, you must make sure that each of these files are backed up from their original location. You may consider keeping attached files in a single dedicated folder tree to make backup process easier.

If you have a number of file fields with mixed setup, make sure that they are all backed up for both cases above.

Back Up & Restore SQL Server Database

Caution!

This help section applies to Microsoft SQL Server connection only! By default, SpeedBase is configured to use a local database after installation.

If you did not modified the database type setting, you should read the help page [Back Up Local Database](#) instead.

If you are not sure which database type is in use, click "Database" menu from main window, select "Connection".

CAUTION!

SpeedBase does NOT have any functionality to automatically back up your SQL Server database.

You must use your own preferred method to safely and regularly back up your SQL Server database.

We recommend you also to test the backups to make sure that they are properly created and can be restored without any issues in case you need them.

What Data Do I Need to Back Up?

For an SQL Server connection, there are 2 separate type of objects which you must make sure that they are backed up regularly to avoid any possible disaster like hard drive failure, incorrect data modification by user mistake, virus damage, physical threats like theft, fire etc.

1. Your database on SQL Server
2. File Attachments

How to Back Up / Restore Your SQL Server Database?

Backing up an SQL Server database and restoring it is beyond the scope of this help documentation. For further information, please consult the documentation of your SQL server or backup software.

How to Back Up File Attachments?

Note that, SpeedBase has multiple different methods to save file attachments. Backing up your SQL server database does NOT mean that file attachments are also backed up. You should consider the following cases for file attachments and adjust your backup procedure accordingly:

- If a field of file/image data type was set to "copy to remote database", files attached to that field are always written to your SQL Server database. So backing up your SQL Server database will also back up these files as well.
- If a field of file/image data type was set to "copy to local data folder", files attached to that field are always copied into the data folder. You must back up the "data folder" in order to back up file

attachments.

CAUTION!

If you have a multiuser license and client computers were not set up to use the same current data folder located on a shared network folder, it is possible that individual users have saved their file attachments to a local folder on their own machine. If this is the case, you must backup data folders on each client machine.

- If a field of file/image data type was set to "save as shortcut", files attached to that field are always accessed from their original location. In that case, you must make sure that each of these files are backed up from their original location. You may consider keeping attached files in a single dedicated folder tree to make backup process easier.

If you have a number of file fields with mixed setup, make sure that they are all backed up for both cases above.

Security

Login Window

This feature is available after registration of the product.

SpeedBase can optionally ask for username and password on startup. This feature is also automatically activated when the product is registered.

If you have newly registered the software and see the login window for the first time, you may log on by just leaving the username as "admin" and password box empty. This feature should be considered as a basic protection to keep away curious people who have access to your computer.

How to Activate or Disable Login Step

Open "Database" menu, select "My Preferences", click "Startup" tab. If you check both "remember my login name" and "remember my password" boxes, SpeedBase will not ask you for username and password at startup.

You may optionally require username + password or only password on startup.

Setting Password

You may change your password by opening "Security" menu and selecting "Change Login Password". SpeedBase will ask for your current password to proceed. If you haven't set a password before, leave the input box for old password empty.

How Secure is my Data?

Since SpeedBase does not allow access thru internet, there is no way for internet users to access your data and your database is as secure as any file on your desktop. You usually do not need to activate login protection if you are the sole user of your computer and you already use a password protected user account on Windows.

Note that, password protection of SpeedBase should be considered as a basic security precaution to keep your data away from curious people who you allow to use your computer and work on your windows account. For added security, you are recommended to keep your Windows user account private and create a separate Windows account for other people who you allow to use your computer.

Record Protection

Please read the help topic: [Protecting Records](#)

Multiuser

About Security Management

SpeedBase has two layers of security management.

Specify Default Access Permissions For All Information Objects

On the first layer, users are grouped into several security roles (i.e. user groups) and every role has its own set of permissions where you may easily control read/write permissions on database level.

For each group of users which work in the same team/department, a different security role (such as 'support team', 'trainee' etc.) is created, so they share the same permissions when accessing various information in your database. So simply assigning an existing security role to a new user is sufficient to apply previously defined access rights to him/her.

See [User Groups](#) for more info.

Create Access Right Exceptions For Catalogs / Fields / Users

In case you need a more detailed access control, you may define further access right exceptions on the second layer, which overwrite the default permissions inherited from the first layer.

See [Advanced Access Rights Manager](#) for more info.

SpeedBase has the following security control features:

- Controlling detailed permissions for records like displaying, updating, activating, exporting etc...
- Applying default access permissions in usergroup level
- Applying extended access rights for the owners of records
- Creating access right exceptions for the selected user
- Creating access right exceptions for the selected catalog
- Creating access right exceptions for the selected field
- Enabling/disabling access right definitions

Data Security

For default installation, SpeedBase uses its integrated (local) database. Your database is never accessible from the internet and all your data is saved on your own local computer/network. That means, your database is as safe as any other file on your desktop against any malicious internet user.

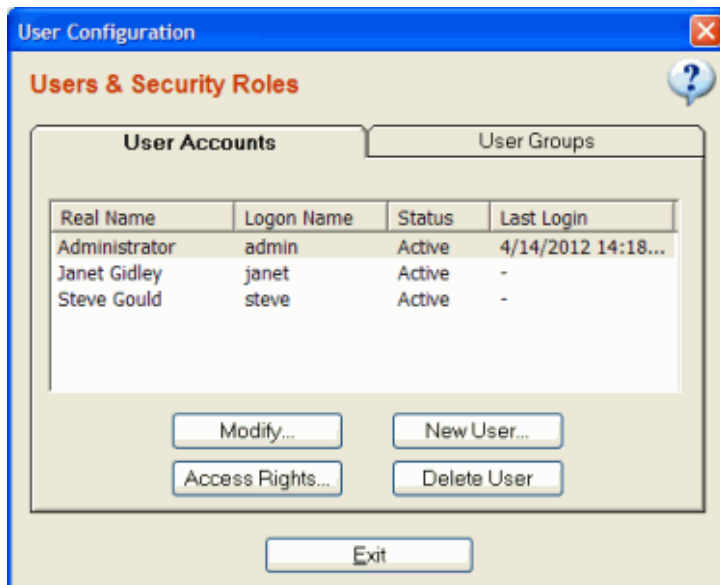
Important!

For multiuser (Teamwork) license:

Beware that, access rights management is designed mostly for preventing accidental data loss, to keep the desired part of the information away from curious people around and from your own users who simply do not need it. This feature shouldn't be considered as a high level of protection against your own users. Do not consider it as a way to hide sensitive information from your own users.

User Management

When running SpeedBase on a multiuser environment (TeamWork edition), you may create as much user accounts as your license allows. You may then apply various security settings to the users on user level, on user group level or on both.



Creating a New User

Open "**Security**" from main menu, click "**Users**". This will open a window where you will be able to manage users as well as user groups.

Click "**New User**" button, type the login name, full name and password of the new user respectively. Click "**Create User**" to add the new user to existing user list. You may also click "**User Groups**" tab of the window and add this user to an existing [user group](#).

If SpeedBase does not allow you to create a new user, you have probably reached the license limit for maximum number of users. Note that your license will determine how many active user accounts you may maintain. You may buy a new user license or deactivate an unused user account in this case.

Adding a User To a User Group

If you plan to apply access right restrictions to the users, it is highly recommended to create at least one more [user group](#) other than the existing administrators group. You will then have the ease of applying the same restrictions to all users of the new user group.

To add an existing user to a user group, select the user account in the user configuration window, click **"modify"**, click the **"user groups"** tab on the **"user properties"** window, click **"Add"** button and select the usergroup.

You may add a user to more than one user group. In this case the user will gain all the extra rights from the second user group. Note that, the rights of a user is never decreases if you add him/her to another user group, they are only elevated.

Creating Access Right Exceptions For a User

The access rights of a user is determined by the security settings of the user group the user belongs to. However, you may still create exceptions which will overwrite the rights gained/lost thru user group settings.

To do this, select the user account from the user configuration window, click **"access rights"** button and create the exception you need using **"access rights manager"**. See ["Advanced Access Rights Manager"](#) for more info.

Activating / Deactivating a User

You may prefer to deactivate a user account instead of deleting it. Account credentials of inactive users cannot be used to login SpeedBase.

To change the activity status of a user, select the user account in the user configuration window, click **"modify"**, (un)check the checkbox for activity status, click **"save"** button.

Deleting an Existing User

If you wish to delete a user account completely, select the user account in the user configuration window, click **"delete user"** button. Deleting a user also deletes all custom views, filters etc. created by that user. You cannot undo this action.

Warning: If you have created access permissions to the record owners as described in ["Applying Owner Rights"](#), and later delete a user, who is assigned as the owner of some records, these records will be set to an unassigned status, and may become invisible to all users depending on your security settings. To prevent this to happen, consider deactivating the user instead of deleting it. If you lose access to some records due to this reason, deactivate the access right directive about ownership temporarily in order to display the records. Then you can assign a new user to these records which show an empty record owner.

User Group (Security Roles) Management

This feature is available on a multiuser environment (TeamWork edition).

User groups are used to create a certain level of access rights. It is much easier to manage security roles than managing access rights of each user separately.

Example: Suppose that you have support team in your office but you do not want them to access information about sales or other sensitive information which they do not need for their job. But you wish them to have read-only access to customer information and read/write access to support cases information. Create a user group dedicated to support team and adjust the access permissions for the user group only. Finally add all team members to this group to apply the group rights to the support team.

In case a new member has joined the support team, it is sufficient to add him/her to the group to apply the same rights.

If you modify the access permissions of a user group, all users under that user group are affected at the same time.

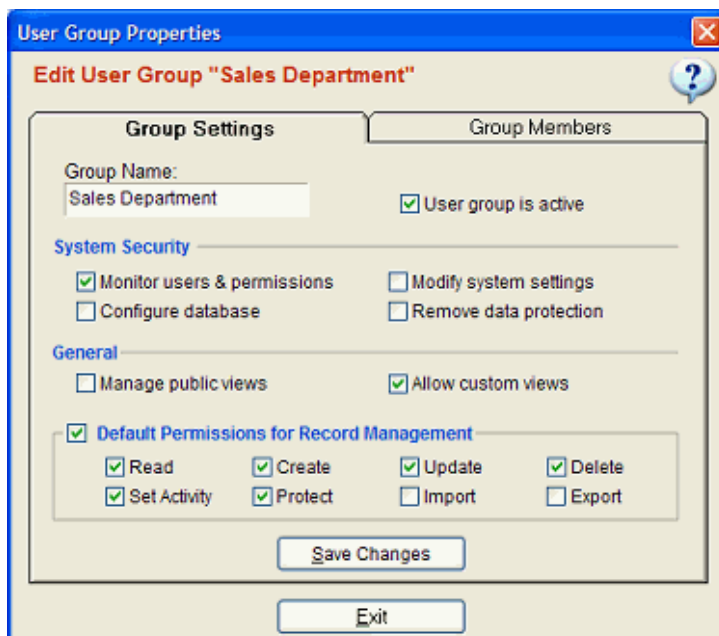


Creating / Modifying User Groups

Open "**Security**" from main menu, click "**User Groups**". This will open a window where you will be able to manage user groups.

Click "**Create New**" button, type a "**group name**", check the permissions you wish to grant to this user group. **Tips:**

- You may create any number of user groups.
- You cannot grant the right to modify security settings / access rights to a user group you have created. This right is reserved for the builtin "**system administrators**" group only.
- It is possible to restrict the access rights of "**system administrators**" group. This is allowed intentionally to easily observe the effect of an access rights arrangement.



Monitor Users & Permissions: Allows the users of the group to monitor user group permissions and access rights.

Modify System Settings: Allows the group users to modify system preferences.

Configure Database: Allows the group users to modify database connection settings.

Remove Data Protection: Allows the group users to remove protection from a record which is set to the protected status.

Manage Public Views: Allows the group users to create/modify/delete all [public views](#) that are shared by all users.

Allow Custom Views: Allows the group users to create [custom views](#) dedicated to their user profile. (recommended)

Default Permissions For Record Management: Sets the default permissions of the group users to access information in your database. These permissions are valid for all catalogs and field of the database. You can always create exceptions to overwrite them on catalog, field or user level.

Tip: If you plan to grant full access to most of the information in your database, check all the default permissions and create access right exceptions for the catalogs you wish to restrict. On the other hand, if you plan to only grant access to a few information in your database, uncheck all the default permissions and create access right exceptions for the catalogs you wish to grant access.

Adding/Removing a User To/From a User Group

Open user groups window, select the user group you wish to modify, click **"modify"** button, click the **"group members"** tab on the **"user group properties"** window. To add a user, click **"add"** button and select the user. To remove a user select the user from member list and click **"remove"** button.

If you add a user to a second user group, the user rights are elevated to gain the extra rights coming from the second group.

If you remove a user from a user group, the user loses all added rights he/she gained from that user group.

Creating Access Right Exceptions For a User Group

The (data) access rights of the group users are determined by the group settings. However, you may still create exceptions which will overwrite the rights gained/lost thru group settings.

To do this, select the user group from the user group list, click **"access rights"** button and create the exception you need using **"access rights manager"**.

See ["Advanced Access Rights Manager"](#) for more info.

Deactivating a User Group

You may deactivate a user group by unchecking the **"user group is active"** checkbox. This will disable all rights gained from this user group.

Deleting a User Group

To delete a user group, select the user group from the user group list, click **"delete group"** button.

Deleting the the user group **"system administrators"** is not allowed.

Advanced Access Rights Management

It is recommended to read [About Security Management](#) before this section.

This feature allows you to create access rights exceptions for user / catalog / field level. It is possible to grant a user group or a single user access for certain operations for a catalog while restricting the other.

To open **access rights management window**, open **security** from main menu and select **access rights**. This window displays a list of existing access right directives.

Creating / Modifying Access Right Directives

Click **"Create New"** button. This will open the **"access right settings window"**.

Authority: Select the authority to which you wish to apply this access right setting. This may be either a selected **user group** or a selected **user**

Apply To: Select **catalog** or **field**. If you select catalog, the settings will be valid for records of the selected catalog. If you select field, the settings will only affect the selected field of the catalog it belongs to.

Select Catalog/Field: Select the catalog or field to apply the access right setting.

Is Active: You may enable / disable this directive using this checkbox.

Apply To Record Owners Only: If checked, the settings you define will be applied only if a user is the owner of the record. This option is available only if the selected catalog has an owner tracking field. See [Applying Owner Rights](#) for more info.

Access Permissions For Record Management

Read: Allow to display the content of record / field

Create: Allow to create new records in this catalog

Update: Allow to make changes on the content of records in this catalog

Delete: Allow to delete records in this catalog

Activity: Allow to activate/deactivate records in this catalog

Protection: Allow to set a record as protected in this catalog

Import: Allow to import records from a file into this catalog

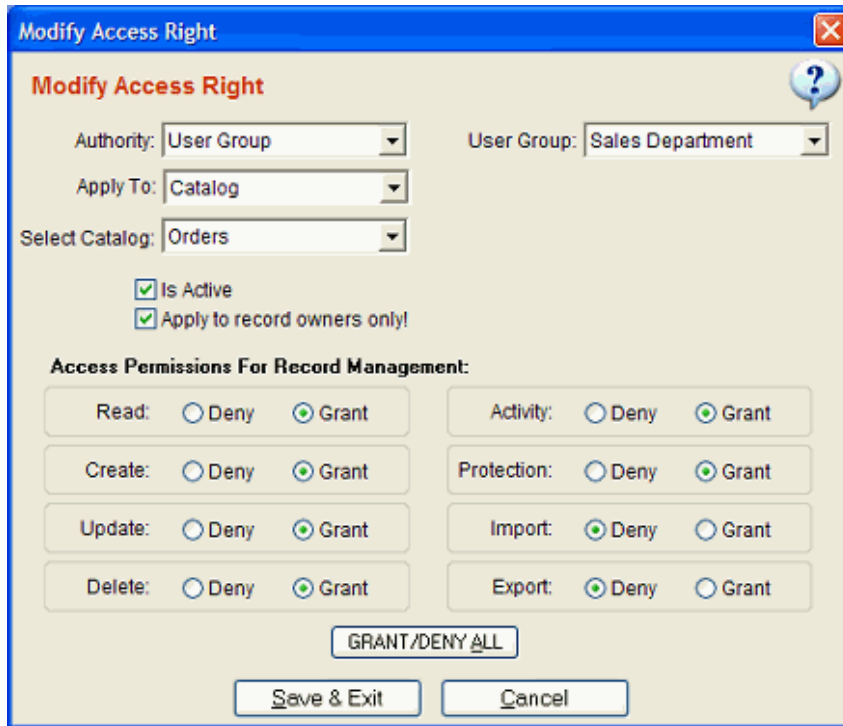
Export: Allow to export records to a file from this catalog

Applying Extended Owner Rights

On a multiuser environment (Network edition), it is possible to restrict a SpeedBase user to only view (or modify) the records which are assigned to him/her. This feature helps to minimize accidental modification of information in your database and also makes sure that a certain segment of information can only be modified by the authorized personnel.

This feature can easily be utilized by simply adding the system field "record owner" to your record form which allows you to set one of the users as the owner of the currently displayed record. The users also can change the ownership to other users, which makes it very convenient for example to pass a certain task to another user.

The "record owner" field is a system field created by SB automatically which is available for all catalogs. Use the [Form Designer](#) to add this field onto your record form.



How to Grant Extended Rights to the Owners?

You need to create two access rights directive, one to restrict access by default and another one to grant access to the record owners.

Example: Suppose that you wish that the members of your **sale team** are allowed to monitor all of the **order** records but every member is allowed to modify only the orders of his/her own. This example assumes that you have a catalog named as "Orders".

- Create a user group and name it as "**Sale Team**". Grant all default permissions for record management.
- Add the users of the sale team to the this user group.
- Open [Advanced Access Rights](#) window.
- Click "Create New" button, select "Sale Team" for user group, select "Orders" for the catalog, check "is active", **uncheck** "apply to record owners", grant only "**read**" and "**create**" permissions and deny all others. Save the directive.
This will become the default behavior to all users.
- Create a second directive. Select the same user group and catalog as before. But this time, make sure that you have **checked** the "apply to record owners" checkbox. Grant also all permissions for this directive and save.
This will create an exception for the currently logged on user and the user will have full access to the records which are assigned to him/her only.

The members of the sale team can now display all the order records but every one can only make changes to the records he/she owns. (If a user assigns a different user to a record he/she loses the modify right for that record.)

Knowledge Base

Registering SpeedBase

The steps starting from the first install to getting your license are summarized below:

- Download the trial edition of SpeedBase Professional from [download page](#) and install it to your computer.

- Evaluate it up to 30 days. You may get help from online help pages or [contact support](#) whenever you need assistance.
- If you find the software useful, visit the [product page](#) to determine which product is best for you.
- Continue to [order page](#) and place your order.
- You will receive an email containing your license code and information within approx. 24 hours.
- Click **Help** from main menu of SpeedBase and select "**Register SpeedBase**", this will open the registration window,
- Copy and paste your license code into registration window. Click "**Complete Registration**" button. Restart SpeedBase.

Congratulations! You are now a registered user and trial limitations has been removed. Your SpeedBase license is valid for lifetime, there are no subscriptions or monthly payments. If you have to reinstall your operating system or move to another computer, you may use the same license code to register the software again.

If you haven't received your registration email...

If you still haven't received your registration information after 2 days of your order, please make sure to check your spam folder in your mail program or webmail. If you cannot find the registration message do not wait longer and contact us thru [license retrieval page](#), so we can take immediate action to resubmit your key.

If you are moving to a new computer...

Enter your license code to the registration window of SpeedBase as described above. If you have lost your license code [click here](#) to request your license code or contact support. See also [this document](#) for details about transferring your data.

Installation

- Download SpeedBase installer from [download page](#)
- Double click the downloaded executable and follow the instructions. (You may need to unzip first if you downloaded in ZIP format)

Switching to Multiuser (TeamWork) Edition

If you just got your multiuser license, you will most probably want to move your current data folder location to a shared location where all other client machines will connect.

- Follow the instructions [given here](#) to change your data location.
- Install SpeedBase to each client machines. On first startup it will attempt to create a new database, allow it to complete this step.
- Complete [registration](#) using your existing license key.
- Open connection settings window from database menu. Click the drop down box and set the data folder preference as "custom". A folder browser window will open. Navigate to the data folder location and select the data folder. Select also your database file name. Click "test connection" button to test the connection. Save changes.
- Repeat the last step on all client computers.

New Client Installation for Multiuser (TeamWork) Edition

- [Download](#) and install SpeedBase to the new computer.
- On first startup it will attempt to create a new database, allow it to complete this step.
- Complete [registration](#) using your existing license key.
- Open connection settings window from database menu. Click the drop down box and set the data folder preference as "custom". A folder browser window will open. Navigate to the data folder location and select the data folder. Select also your database file name. Click "test connection" button to test the connection. Save changes.

Uninstallation

To prevent accidental damage to your existing data, the uninstaller never deletes your data folder and database(s) you have created during your usage of SpeedBase. If you want also destroy your database and related data files, you may manually delete your data folder which is located under "My Documents/SpeedBase" unless you have changed to a different folder. (You may determine the correct location of it from [connection settings](#) window)

Uninstalling from Windows XP / 7 / Vista

- If SpeedBase is running, open main window, click "Data" from main menu, click "Exit"
- From start menu, locate SpeedBase program group, click "Uninstall SpeedBase"

Alternatively you may uninstall from control panel.

Uninstalling from Windows 8

Uninstall from the Start Screen:

- On the Start Screen, type the name of the application you want to install.
- From the list select the required one and right click on the program.
- Select Uninstall.

Uninstall from the Control Panel:

- Press Windows and x key to open a task list from the bottom left corner of the screen.
- Select Control Panel.
- Select Programs and Features.
- Double click on the program you want to uninstall and follow the onscreen instructions.

Uninstalling from Windows 10

Select the Start button, then select Settings > Apps. Choose the program you want to remove, and then select Uninstall.

Upgrading to a New Version of SpeedBase

Before downloading and installing the latest (or any older) version of SpeedBase, make sure that the release date of that version is not later than the expiration date of the latest support/upgrade extension you purchased. If it is later, you will not be able to complete the install and upgrade.

Make sure that you have registered SpeedBase with the most recent license key you have received following your latest purchase. If you register with an older license key which was sent to you during an older purchase, you may not be able to install the software and receive a warning stating that your support term was expired. We recommend you to disregard and discard older license key(s) whenever you make a new purchase and receive a new license key to prevent this issue happening.

Upgrade Policy

- You may install and upgrade to any newer version of SpeedBase which has a release date not later than the support/upgrade expiration date of your current license key.
- Even if the upgrade term of your current license was expired, you may still install/upgrade to any later version which has a release date prior the expiration date of your upgrade term **at all times**.
- If your upgrade term does not cover the release date of the current version, you may [purchase support/upgrade extension](#) to become eligible to upgrade to the current as well as upcoming versions of SpeedBase for another year.
- If you do not want to upgrade to the most recent version of SpeedBase at this time, you may always download and install the older version you were so far running [from this page](#).
- [Contact us](#) if you have any questions or issues about upgrade and installation.

How to Check Eligibility of Upgrade

- Open SpeedBase, click "database" menu, select "information". Make sure that the "upgrade expire date" displayed here is not older than the release date of the version you want to install.
- You may also find the expiration date of your upgrade term from the email you received after your latest purchase from us.
- You may find the release date of each version just near the download link.

"After a new installation I've received a message saying my upgrade term was expired. What should I do?"

That means, the upgrade term of your current license does not cover the version you installed. You must uninstall the version you just installed and then install the version which was covered by your upgrade term [from this page](#).

Upgrade Process

You are strongly recommended to check the [upgrade information page](#) before installing a newer version than you are running in order to learn about important changes as well as new features. Beware that, there may occasionally be changes which may effect how your data is displayed/processed and you might be required to make some adjustments.

When you install a newer version of SpeedBase, your database may also be required to go over an upgrade process depending on the version you are installing. Basically, if either the left or middle part of the version number was increased compared to the version you are running, a database upgrade will be executed. Unless otherwise is stated on release notes, your data will not be affected during upgrade.

How to Apply Hotfix Updates

If you have received a download link for a hotfix, follow the instruction given below to install the update:

- Exit SpeedBase. To ensure proper termination of the software, you should click "exit" from the "data" menu of SpeedBase. Alternatively you may right click the SB icon on system tray and select "exit". (Terminating from the application menu prevents it to continue running in the background.)
- From "My Computer" browse to the folder where SpeedBase is installed. (Tip: Right click the shortcut icon of SpeedBase and select "open file location")
- Download the update.
- Open the downloaded zip file and copy all content into the SpeedBase installation folder. Approve the overwrite warning to replace existing files.
- Start SpeedBase.

Tip: If you are unable to overwrite existing files, make sure that you have terminated SpeedBase successfully (see above).

Tip: If you do not receive overwrite prompt, make sure that you have selected the installation folder correctly.

Changing Location of Your Data

Scroll down if you only want to change data location but not SpeedBase install location.

How to Migrate Your Data and SpeedBase Installation to a New Computer

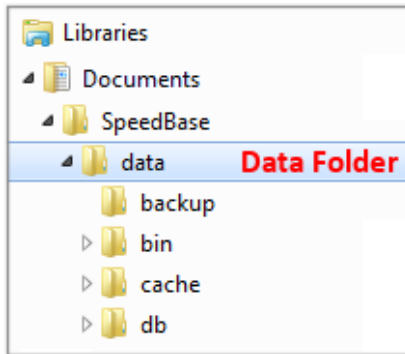
Follow the instructions given below, if you want to permanently move both your data and SpeedBase installation to a new computer.

This information applies to single user editions.

- [Download](#) and install SpeedBase to the new computer.
- Start SpeedBase on the new computer. On first startup it will attempt to create a new database, allow it to complete this step.
- Complete [registration](#) using your existing license key.
- Click "data" menu, click "exit" to terminate the software properly.
- Go to your old computer; locate your actual data folder (see picture below), copy that folder to a storage device.
If you do not know the current location of your data folder, start SpeedBase on your old computer and then open connection settings from database menu. The path will be displayed under the label "data folder".
- Go to your new computer, paste the data folder to a desired location.
- If not already installed, install SpeedBase on the new computer.
- Start SpeedBase, if it requires you to create a new database, just click "continue" and cancel the next window. You won't use it anyway.
- Open connection settings window from "database" menu. Click the drop down box and set the data folder preference as "custom". A folder browser window will open. Navigate to the location where you just pasted your migrated data folder and select the data folder. Select also your database file name. Click "test connection" button to test the connection. Save changes.
- For multiuser license: Repeat the last step on all client computers.

Caution!

Do not confuse the data folder ("DATA") with the database folder ("DB") or any other folder.



How to Change Data Folder Location

Follow the instructions given below, if you just want to change the location of your data to another folder, storage device or a computer on your local network.

- Start SpeedBase, click "data" menu, click "exit" to terminate the software properly. If you have a multiuser (TeamWork) license, you should repeat this step on all other clients and make sure that no instances of SpeedBase are connected to your database.
- Locate your current data folder (see picture above), copy that folder. If you do not know the current location of your data folder, start SpeedBase on your old computer and then open connection settings from database menu. The path will be displayed under the label "data folder".
- Navigate to the target location where you want to keep your data. Paste the data folder there. Make sure that the target location has both read and write permissions. The location should also be a shared folder if multiple client computers will connect. Beware that, the target location may not be a virtual drive (like Dropbox etc.) unless you are connected via a VPN connection.
Caution! If your data folder is located on a shared network drive, you should navigate and select it by browsing thru the network. Do not directly select it from your hard drive even if the shared folder is located on your local computer.
- Start SpeedBase, open connection settings window from database menu. Click the drop down box and set the data folder preference as "custom". A folder browser window will open. Navigate to the target location and select the data folder. Select also your database file name. Click "test connection" button to test the connection. Save changes.
- For multiuser license: Repeat the last step on all client computers.

How to Make Your Database Available to all Windows Accounts ?

This document applies if you want to run SpeedBase with multiuser access on a RDS (remote desktop services or terminal services) environment.

By default, your database is located under your own documents folder. If a user logs on using a different Windows account, that document folder becomes invisible and SB suggests you to create a new database. If each user only needs to access his/her own private database, then this works just fine. But if you want the same database to be available to all users, all you have to do is, to move your data folder to some public folder and then adjust connection settings from SpeedBase as described below:

- Open SpeedBase, click "data" menu, click "exit".

- Open your "my documents" folder, double click "SpeedBase" folder,
- Right click "data" folder, select "copy"
- Go to the desired folder which is visible to all users, right click on an empty area, click "paste"
- Start SpeedBase,
- Click "database" menu, click "connection settings"
 - * If you get a warning telling that database cannot be found, click "ok" and then click "Open Config." on the next window
- From connection settings window, select your new data folder location (you should select the folder named as "data")
- Select your database file name,
- You should repeat the same changes to connection settings under all other Windows accounts.

Important!

To prevent accidental use of the older data folder, either delete it or move that folder to some backup location.

How to Manage and Documents & Files

There are different approaches to organize files and documents depending on your needs and work flow. Choose the one which suits best to you.

Simple: Attaching Limited Number of Files to each Record

- You have records to which you want to attach files (e.g. Projects).
- You are sure that, for all times, the maximum number of files you may attach to each record is a small, limited number (e.g. less than 10).
- You do NOT need to save additional information about the file itself.

If conditions given above apply, do the following:

- Estimate the maximum number of files you may attach to a single record and [create as many file fields](#) for the catalog in question,
- Add all new file fields to your form using [Form Designer](#).

This option also has the advantage of displaying attached file names with each record on a tabular view.

Advanced: Attaching an Unlimited Number of Files to each Record

- You have records to which you want to attach files (e.g. Projects).
- You want to be able to attach any number of files to each record without limitation.
- You need to save additional information (e.g. description, version etc.) about the file itself.

If conditions given above apply, do the following:

- [Create a separate catalog](#) to save each file (e.g. File Archive),
- [Create a file field](#) on this catalog and optionally, more fields to save information about file,
- Create also a Multi-1 relationship field on catalog File Archive and set the target catalog as the main catalog (e.g. Projects),

This option requires more steps to display or attach files but allows you to attach any number of files to a record and also track some extra information about the file itself.

Field Limit

You may create any number of catalogs and up to 248 fields on each catalog. The actual limit for data fields you may create depends on your selection of data types. Certain data types allocate 2 fields from the limit each.

When you create one of the following field types, the remaining number of fields you may create decreases by 2 instead of 1.

- Relationship field: A relational lookup field which shows data from parent record. Only the catalog showing the lookup field is affected.
- Computed fields which retrieve and display data from parent record. These are the computed fields for which the task is set as "Copy data from parent record".
- File fields.

Tip: You may check the number of currently allocated/remaining fields from the field list window. Right click the desired catalog, select "Fields". The information is displayed at the bottom of the field list window.

In majority of applications there are relatively fewer number of these type of fields and the maximum number of fields you may create is well above 200.

If your application requires significant number of these type of fields, you may calculate the actual maximum fields you may create as shown in this example:

Example

3 text field spend 3

1 computed field showing parent data spends $1 \times 2 = 2$

5 computed fields doing any other type of calculation spend 5

3 file/image field spend $3 \times 2 = 6$

Total fields allocated: $3 + 2 + 5 + 6 = 16$

The remaining number of fields you may create: $248 - 16 = 232$

Downgrade Instructions

To get the advantages of new features as well as for data safety reasons, you are recommended to upgrade to the latest version of SpeedBase available. This page describes how to downgrade your existing installation to an older version in case of exceptional conditions.

Beware that, an older version of SpeedBase will not be able to open an upgraded version of your database. You will have to restore the latest backup which was created with the older version of SpeedBase. So any changes you made after the last upgrade will be lost.

- Exit SpeedBase. To ensure proper termination of the software, you should click "exit" from the "data" menu of SpeedBase. Alternatively you may right click the SB icon on system tray and select "exit". Terminating from the application menu prevents it running in the background on windows taskbar. If you are running a multiuser edition (TeamWork), make sure that all instances of SpeedBase have been terminated on all machines.
- Uninstall SpeedBase either from the uninstall link on start menu or control panel.
- Download the older version you wish given on this page and install.
- Start SpeedBase. If it does not recognize your database file, open connection settings window and restore the latest backup available which was created with the older version of SpeedBase.

Tip: If SpeedBase does not recognize the restored backup file again, you most possibly have selected a backup which also was created with the newer version. Try selecting and restoring a more older backup in this case.

Download Links for Older Versions of SpeedBase

You may find download links of the older versions of SpeedBase on the [upgrade page](#).

Missing Data & Recovery

Caution!

Being unable to connect to your production database and being able to connect but unable to see some of your data / records are two different and completely separate issues. You must first understand which one is the case before following an appropriate solution given on this page.

"I am trying to adjust connections settings but my database is not listed in the selection box"

- **You might have selected a wrong data folder location.**

If the data folder location was selected incorrectly, SpeedBase cannot find and show your database name. Beware that you should NEVER select the "DB" folder which is a subfolder inside the data folder. The data folder is typically the parent folder of the "DB" folder and may have a different name if you have selected a different location to keep your data in the past. Check [this page](#) for more information about selecting the data folder location.

"I am unable to locate or connect to my database"

"I can only see outdated data from the past in my database"

- **You might have modified connection settings or created a new database, hence connected to the wrong database file.**

Open connection settings window from database menu. Make sure that both the data folder path and database name are all correct.

If in the past, you have created a copy of your data folder somewhere else, you might have multiple data locations with one of them being older. So make sure that you have selected the data location from the right hard drive / computer / network location.

- **Your database needs maintenance.**

In some rare conditions, you may receive an error message that your database file cannot be opened even though your connection settings are correct. You are recommended to apply maintenance to your database once a month or after each large amounts of data import/delete. To do this, click "database" menu, select "Backup & Restore", click the "compact/repair" button just for once. The optimization will be completed in a few seconds.

- **(For multiuser environment only) Another user might have accidentally overwritten your database by creating a new database or restoring an older state of your database using the same file name of your database.**

If you are sure that this was the case, you may restore your database from a recent backup. Click "database" menu, select "Backup & Restore", select a recent database backup which was created before the event and click "restore" button.

"I do not see some or any of my records / catalogs anymore"

- **The filters you assigned to the views might be hiding (filtering out) some records.**
You are recommended to keep at least one view without filter attachment on each catalog. Right click the catalog, select "create new view", add desired fields to the "displayed field" box. Save changes. Click on the new view you just created.
- **Current view does not contain any fields to show.**
If you create a view but do not add any fields into the "displayed fields" list, then no records can be displayed. Open view settings and add at least one field.
- **The missing records might be displayed on a different page than the page you are displaying.**
Change the current page using the page navigation buttons on right bottom of the window. You may also use the search box or sort records by clicking on a column header to find the record(s) you are looking.
- **You might have set some of your catalogs as invisible.**
Click "database" menu, select "catalogs", can you see now all missing catalogs? If yes, select the catalog, click "Properties", make sure that the box "display on catalog tree" is checked. Click "reload" from toolbar after exit.
- **You might have restricted your own access rights.**
 - Click "security" menu, select "user groups", select your user group, click "modify". Make sure that all permission boxes are checked.
 - Click "security" menu, select "Access right manager", delete or deactivate all access right entries.
 - You might have logged on to SpeedBase with a restricted user account.
 - Make sure that you did not moved your user account to a restricted user group.
- **(For multiuser license) You didn't click the reload button.**
Beware that adding or modifying a record on a client computer will not automatically update the view on other client computers. Other clients may need to click the "reload" button once to refresh their screen.
- **(For multiuser license) You might have logged in as a SpeedBase user which does not belong to any user group.**
When you create a new user in SB, you should always attach that user to one of the user groups (or to the default "system administrators" group if you didn't create any user group before). Otherwise the user will not have access right to any data.
Click "Data" menu, select "Exit" to terminate SpeedBase. Restart it and make sure to login using a user name which has admin rights. You may then attach the previous user account to a user group you want.
- **You enabled cache for current catalog.**
If you enable cache for a catalog, records which you created/modified recently may not be displayed until you click "reload" button. This feature should only be used temporarily and in exceptional cases when the network is too slow and you accept that data displayed on screen may not be up to date. To disable caching, right click the current catalog, select "properties", uncheck "use cache" box and save changes. Click reload button.
- **(For multiuser license) Another user might have accidentally deleted your records or a catalog which was containing records.**
If you are sure that this was the case, you may restore your database from a recent backup (see below).

"I have accidentally modified my data by doing an incorrect import."

"I have accidentally deleted records or database fields."

Changes you made on your database cannot be undone. You should restore your database from existing backups. Click "database" menu, select "Backup & Restore", select a recent database backup which was created before the change and click "restore" button.

"I have mistakenly made a series of updates on my records, how can I locate these records?"

Use the system field "Modified On" as a sorting criteria to find the most recently updated records:
Use the system field "Created On" as a sorting criteria to find the most recently created records:

Contact [support](#) if none of the recommendations given above resolves the issue.
