12. Sample IQBases (i.e. IQ templates)

12. Sample IQBases (i.e. IQ templates)

Here is a list of sample IQBases, mostly user-contributed, showing some applications of InfoQube:

IQ Functionality

1. Grid Display Modes   (KeithB)
"Daily Logs" and Group Items by Sort Column   (KeithB)
-- link to nonexistent node ID 842 --   the shopping list from the default sample file (KeithB)
-- link to nonexistent node ID 1373 -- Iq manual (captured Jan 2010)
Manage item recurrences in IQ manage item recurrences (Armando)

Workflow

Daily Grid / Diary example Daily (diary) grid sample   (KeithB)
My Workflow - SAMPLE file working with linked files; keeping track of item status/progress; simple time-tracking (Tom)
Using IQ for writing & tasking Writing project example   (KeithB from Jan's blog description)
Journal and AddressBook Journal to addressbook ideas   (KeithB per Jan ideas)
IQMinutes : a sample IQBase to organize meeting info, etc. IQMinutes-a sample IQBase to organize meeting info, etc (Armando)

Other

An Inventory sample   (KeithB)
A Blank Database. A blank database   (KeithB)
How can I create a simple note and cross-link the contents? new file with sample data, but with the items and 'Welcome' grid removed (all text removed but the 'structure' of the database remains) (Tom)
Sync with Mantis Issue Tracking Database The Mantis issues tracking database, as of March 31 2010 (sync'd and uploaded by KeithB)

Captured Contents of Threads / Forums About IQ

Forum .SNDB 2-16-2009 a test capture of this forum as of feb 09   (KeithB)
IQBase of the old Forum capture of the previous forum   (KeithB)
-- link to nonexistent node ID 556 -- Capture of the Donation Coder thread on infoqube   (KeithB)
Forum topic SNDB Forum topic SNDB (forum topic titles only) as of 11-13-2010) (KeithB)

Pierre_Admin 2017/07/23 15:18

- 70 views

Daily Grid / Diary example

Daily Grid / Diary example
The attached IQBase is a subset my "Daily" grid I re-created from my working database. I'm very happy with this now. Maybe someone will find it or some concept in it useful.

I use this Daily grid to (daily!) quickly jot a few notes about the day, and what transpired. If I get verbose, I enter additional info in the HTML pane.

This is amazingly useful to know what happened on a given date in the past. I can't remember dates very well, and this compensates.

Note:
The Date field is entered manually by double-clicking. If I'm entering at a later date, I pick the appropriate date.
The Day, Month and Year fields are calculated via "Smart Fields", and come in extremely handy when I want to filter a column. See Smart Fields
I can easily column filter by Fridays, in 2009 to see what the meal history is for example.
The HTML? column is to show items that have something in the HTML pane.

The grid by defaults sorts by date.

Daily (7) ✕

Daily

#	Date	Month	Day	Year	Item	Meal	HTML?
1	2009-08-21	août	ven.	2009	cut 2/3 of the grass due to downpour. stopped by Bob's house a few minutes.	new Tuna recipe on bun with lett...	☐
2	2009-08-22	août	sam.	2009	Northwoods final move. Bill & Chair & kids, Bill & Marilee, all our gang. First stopped at our house with couch and boxes. Had a really good lunch of sandwiches and such. Then took Bill's stuff to St. Peters and unloaded. I drove Maria and Emily to Lindell, then I went to art supply store, and got some plasticine type clay for Clare and Anna, and a sketchpad for Maria. A little tired the rest of the day, rested a bit.	crockpot pork with gates bbq sa...	☑
3	2009-08-23	août	dim.	2009	Sometimes I forget to enter anything		☐
4	2009-08-24	août	lun.	2009	I try to enter at least a little bit daily.	hotdogs, Trader Joe bagged fries...	☐
5	2009-08-25	août	mar.	2009	Maria too much homework to drive. Trimmed some limbs from the oak tree in back.	leftover bbq pork, spiced diced t...	☐
6	2009-08-26	août	mer.	2009	Figured out touch crosshatching problem for Dave. Let Maria drive through backroads of St. Ann		☐
7	2009-08-27	août	jeu.	2009	Laid out bunch of holes in ug, fun. Gave Maria parking practice.	Marinated chicken	☐

IQ as a Relational Database: Book Review Process

IQ as a Relational Database: Book Review Process

IQ as a Relational Database: Book Review Process

InfoQube is exceptionally powerful and allows user to create functionality which traditionally requires a significant investment of time and programming knowledge using a relational database.
**[Download the working sample here !](#)**

In this example, we'll describe a end-to-end book review process with the following pieces of information:

- Authors
- Books
- Reviewers
- Book Reviews
- Rating (individual and overall)
- Outcome
- Communications

In addition, specific views will ease these management tasks:

- Flagging late reviews
- List of book reviews for each reviewer with status
- Pivot pie chart showing the count of Authors per country

The end result will be a dashboard to manage all aspects of this process:
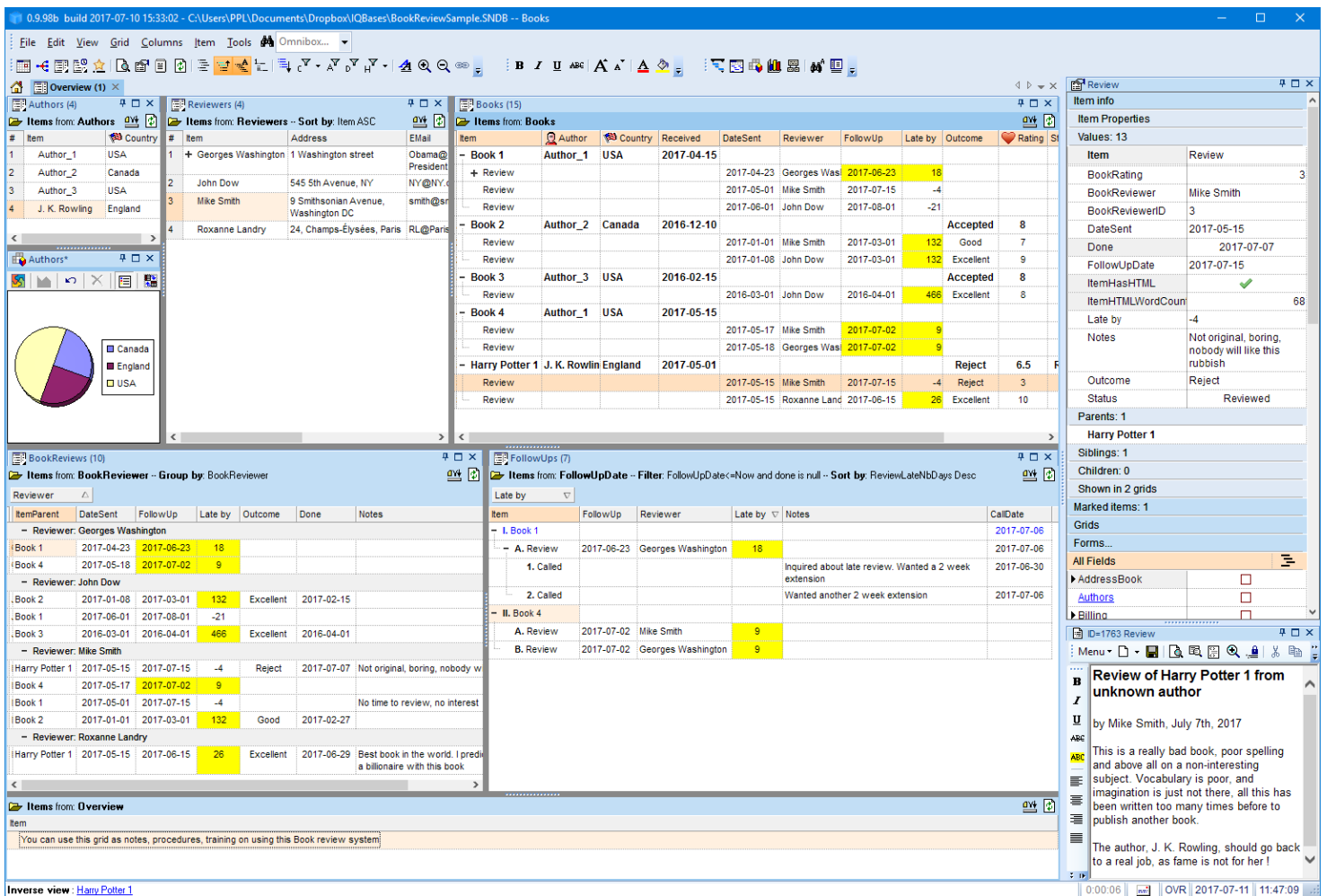
1. Creating the Source Grids

We'll use the Item field as much as possible. It will hold the most pertinent information of each source table. While this is not essential, it fits with the overall InfoQube's philosophy and, in general, eases information management.

You can either perform these steps on an existing IQBase or on a new IQBase (with sample data)

The source grids (i.e. database tables) are:

- Authors
- Reviewers
- Books

1.1 Authors Grid

1. View > Grids > New Grid...
2. Set the Grid name to Authors.
   This automatically creates a Yes/No field, named Authors, to mark specific items as being book authors
3. Add any contact information fields to this view (such as Tel and EMail)
   One way to do this is to show the Properties pane, open the All Fields section in field tree-view mode.
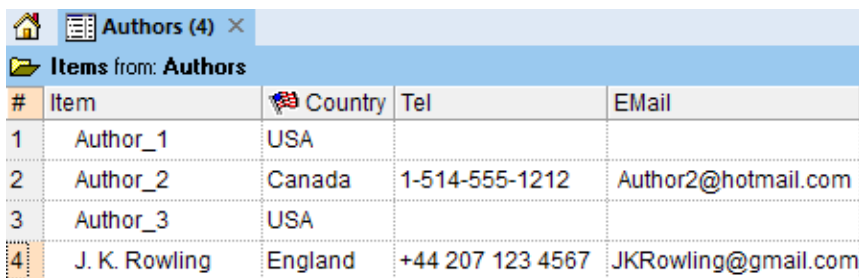
All build-in contact related fields are under the field AddressBook

4. We'd like to enter the Author's country, which is not in the sample IQBase, to do this:
    1. Open the Manage Fields dialog
    2. Click on New
    3. Name it AuthorCountry
    4. Type = Text
    5. Editor type = Auto-list of values
    6. Click Close
5. Add this new field to the grid (using Add / Remove Column dialog or right-click on the field in the Properties pane and select Show field in the current grid
6. To have a more user friendly field caption, right-click on the header and select Column Header > Caption…
    1. Replace AuthorCountry with just Country.
    2. Right-click and choose the flag icon
    3. Click OK
7. Add a few authors to this grid

Important: Since this grid will be used in a pop-up list, it needs to be set visible to other applications. 2 ways to do this:

- Grid properties > Options > Grid visible to other applications
- Grid > Create an ODC file

The grid should now look like this:

1.2 Reviewers Grid

Repeat the same steps for Reviewers:

- Grid name: Reviewers
- Create a numeric field ReviewerID with Auto checked (creates an auto-number)
- Columns: Item, Address, Email, Notes, CallDate, ReviewerID

Important: Since this grid will be used in a pop-up list, it needs to be set visible to other applications.

The grid should now look like this:

Items from: Reviewers -- Sort by: Item ASC

Item	Address	EMail	Notes	CallDate	Revi...
+ 1. Georges Washington	1 Washington street	Obama@President.com		2017-07-07	4
2. John Dow	545 5th Avenue, NY	NY@NY.com			2
3. Mike Smith	9 Smithsonian Avenue, Washington DC	smith@smith.com			3
4. Roxanne Landry	24, Champs-Élysées, Paris	RL@Paris.fr			5

1.3 Books Grid

The books grid is the central view of the review process. It shows:

- Book information (name, author, date received, average rating, outcome, status)
- Under each book entry, a list of review entries, one per reviewer (reviewer's name, date submitted, deadline, rating, done date)
- Summary of communications with reviewers
- The HTML pane can contain rich text content for each review and book review process output report

Books (15) × OutlineStyles (4) ×

Items from: Books

Item	Author	Country	Received	DateSent	Reviewer	FollowUp	Late by	Outcome	Rating	Status	Done
− Book 1	Author_1	USA	2017-04-15							In Review	
+ Review				2017-04-23	Georges Washing	2017-06-23	17			Late	
Review				2017-05-01	Mike Smith	2017-07-15	-5			Cancelled	
Review				2017-06-01	John Dow	2017-08-01	-22			In Review	
− Book 2	Author_2	Canada	2016-12-10					Accepted	8	Printing	2017-03-01
Review				2017-01-01	Mike Smith	2017-03-01	-2	Good	7	Reviewed	2017-02-27
Review				2017-01-08	John Dow	2017-03-01	-14	Excellent	9	Reviewed	2017-02-15
− Book 3	Author_3	USA	2016-02-15					Accepted	8	In Stores	2016-08-31
Review				2016-03-01	John Dow	2016-04-01	0	Excellent	8	Reviewed	2016-04-01
− Book 4	Author_1	USA	2017-05-15							In Review	
Review				2017-05-17	Mike Smith	2017-07-02	8			In Review	
Review				2017-05-18	Georges Washing	2017-07-02	8			In Review	
− Harry Potter 1	J. K. Rowling	England	2017-05-01					Reject	6.5	Reject Sent	2017-07-08
Review				2017-05-15	Mike Smith	2017-07-15	-8	Reject	3	Reviewed	2017-07-07
Review				2017-05-15	Roxanne Landry	2017-06-15	14	Excellent	10	Reviewed	2017-06-29

Steps are as follows:
To store the book information:

1. Create a new grid, named Books
2. Create field BookAuthor: This popup will show entries in the grid Authors
   (It uses an SQL query to be able to pick up both the name and country of the author at the same time)
   - Type: Text
   - Editor: SQL query
   - Pop-up list: SELECT Item as BookAuthor, AuthorCountry from Authors
   - Save all listed fields: checked

3. Create field BookReceived
   - Type: Date
   - Default value: int(now)

4. Create field Outcome: Outcome of the review, pop-up list

     1. Type: Text
     2. Editor: Auto-list of values

5. Create field BookRating: Average of Reviewer's rating of the book, between 1 and 10 (max)
     1. Type: Number
     2. Column Equation: Parent = AVG(Children)

6. Create field Status
     ○ Type: Text
     ○ Editor: Auto-list of values

To store the book review information

1. Create field BookReviewer: This popup will show entries in the grid Reviewers
   (It uses an SQL query to be able to pick up both the name and ID of the reviewer at the same time)
     ○ Type: Text
     ○ Editor: SQL query
     ○ Pop-up list: SELECT Item as BookReviewer, ReviewerID as BookReviewerID from Reviewers
     ○ Save all listed fields: checked

2. Create field BookReviewerID
     1. Type: Number

3. Create field DateSent
     ○ Description: Date the review request was sent to the reviewer
     ○ Type: Date
     ○ Default value: int(now)
     ○ Auto-assignment rules: A: [FollowUpDate] = [DateSent] + 60 | E: [FollowUpDate] =

4. Create field FollowUpDate: Will be shown in yellow when a follow up is required (such as when the review is late)
     ○ Type: Date
     ○ Conditional Formats:
        Criteria: [ReviewLateNbDays] > 0 and [Done]=0
        Formats: BackColor=&H00FFFF

5. Create field ReviewLateNbDays: Will be shown in yellow when the review arrived late
     ○ Description: Nb of days the review is late
     ○ Type: Number
     ○ Row Equation: = datediff("d", [FollowUpDate], now)
     ○ Auto-update checked
     ○ Conditional Formats
        Criteria: >0
        Formats: = BackColor=&H00FFFF

Optional: To ease the creation of a review, you can create a form:

2. Creating Reviews Management Grids

3 support grids will be created to better manage reviews:

2.1 FollowUps Grid

The FollowUps grid show the list of reviews which require a follow up with the reviewer, typically because it is late:

- List all late reviews (i.e. FollowUpDate is past and not done)
- Sorts reviews by how late they are
- Book name is shown as a context parent (it could also be shown as a column if desired)
- Sub-items show the call log
- CallDate at the review and book levels show the most recent call

2.2 BookReviews Grid

The BookReviews grid uses IQ's built-in grouping feature (see 5. Sorting and Grouping Items for details)

Users can group by any displayed field, to view reviews by DateSent, Outcome, or as in this example, by Reviewer:

BookReviews (10)

Items from: **BookReviewer** -- Group by: BookReviewer

Reviewer △

ItemParent	DateSent	FollowUp	Late by	Outcome	Done	Notes
− Reviewer: Georges Washington						
Book 1	2017-04-23	2017-06-23	17			
Book 4	2017-05-18	2017-07-02	8			
− Reviewer: John Dow						
Book 2	2017-01-08	2017-03-01	-14	Excellent	2017-02-15	
Book 1	2017-06-01	2017-08-01	-22			
Book 3	2016-03-01	2016-04-01	0	Excellent	2016-04-01	
− Reviewer: Mike Smith						
Harry Potter 1	2017-05-15	2017-07-15	-8	Reject	2017-07-07	Not original, boring, nobody will like this rubbish
Book 4	2017-05-17	2017-07-02	8			
Book 1	2017-05-01	2017-07-15	-5			No time to review, no interest
Book 2	2017-01-01	2017-03-01	-2	Good	2017-02-27	
− Reviewer: Roxanne Landry						
Harry Potter 1	2017-05-15	2017-06-15	14	Excellent	2017-06-29	Best book in the world. I predict that she will be a billionaire with this book

2.3 Overview Grid

The last grid will combine all the preceding ones in a unified view, using docking panes. That way, users can see all aspects in a single view, kind of a dashboard.

To create this view:

1. Create a new grid, named Overview
2. View > Grids and right-click on Authors. Select Copy View.
3. Back in the Overview grid, right-click on the tab and select Paste View
4. The Authors grid will be shown in a pane to the right edge of the Overview grid
5. Repeat the above procedure for the other grids
6. Rearrange panes to built a set-up close to the fist screenshot at the top of this page
   (The end result will depend on how panes were actually rearranged)

n.b. The Overview grid itself is not really used, though users could enter management notes and instructions. Its main purpose is to be a placeholder for other grids

2.4 Adding a Pivot Chart

When MS Office 2002 and up is installed, pivot tables and charts can be used inside InfoQube. To demonstrate this, we'll create a pie chart showing the author's country

1. Open the Authors grid
2. If the Overview is grid is already open, this will move focus to the Authors pane, which is not what we want. Hold Shift when opening the Authors grid to open a new copy
3. View > Pivot Chart

4. Show fields and drag Item to the data area. Drag the AuthorCountry field to the x-axis
5. Choose the chart type. In this case, a Pie chart was chosen
6. Show the Legend
7. Right-click on the tab and select Copy View
8. Switch back to the Overview grid (or open it if closed)
9. Right-click and select Paste View
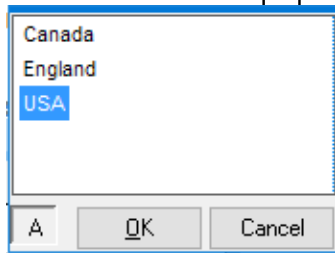10. Drag the pane to move it if desired
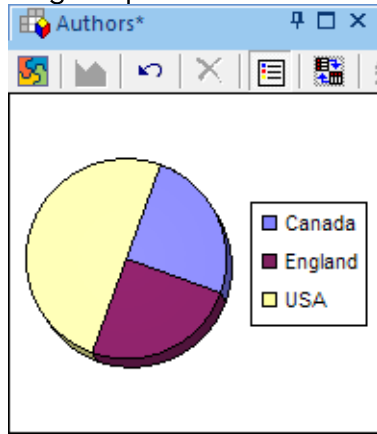
3. Using the Book Review App

3.1 Managing Authors

The Authors grid has just 2 columns:

- The column Item contains the author's full name
- The column Country (field AuthorCountry) is an auto-list:
  - Enter the country in the text box, or
  - Press F2 to show a pop-up list of current values:

- As the number of authors increases, the list can be filtered using column filters

3.2 Managing Reviewers

As for Authors, it is easy to add / edit / remove Reviewers. Note that:

- The ReviewerID is an auto-number, so no need to edit it manually.
  It isn't really used in this example but is there to show how to normalize the data.

3.3 Managing Books

To manage books:

- Enter the title in the Item column
- Move to the Author column and press F2. The list of authors will be shown:

  Select the author and both the BookAuthor and AuthorCountry fields will be automatically filled
- Enter the date the book was received for review
- Update the Status and Outcome columns (i.e. fields) as the review process goes on

3.4 Managing Book Reviews

In this solution, book reviews are entered as sub-items of each book. To add a review:

- Add a sub-item (Ctrl + Enter or use the Review form)
- Enter the date sent.
- The DateSent field has an auto-assignment which will automatically fill the FollowUpDate to be 60 days later. You can change that default or manually change the FolowUpDate
- Move to the Reviewer's name column and press F2. The list of reviewers will be shown:


  Select the reviewer and both the BookReviewer and BookReviewerID fields will be automatically filled
- Update the Status and Outcome columns (i.e. fields) as the review process goes on
- The Late by column (field ReviewLateNbDays) automatically updates as time goes by (its row equations has Auto-Update checked). It is recalculated on each change of day
- When the review is done, do Item > Mark as Done (Ctrl + M) to fill the done date
- Both FollowUp and Late by cells will turn yellow when a review is late. Once the review is done, the FollowUp column yellow color will be removed as no follow up is required
- For each review, sub-items can be added to track that review (calls, documents sent, etc)

- The review item's HTML pane can be used to hold the reviewer's evaluation:
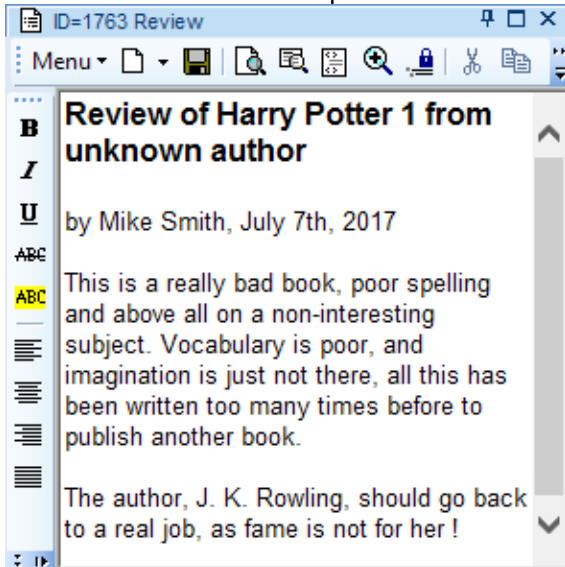
(a little bit of humor here, though based on a true story. See J.K. Rowling post here)

Note: By design, there is no cascading updates / deletes. So changes to the Authors and Reviewers lists will not be reflected in the book reviewers

3.5 Doing Follow-ups

We all have busy schedules, so need to be reminded when a deadline approches or worse, when it is passed. The FollowUps grid can help you manage reviews and show you a short list of reviewers to contact, such as:

- Call the reviewer
  - Calls are entered as sub-items of the review. You can use / customize the Call form to quickly enter call information / log
  - Call date is automatically entered and bubbles up to the parent items, so you see when the last call was made
    (avoids the embarrassment of calling a reviewer twice)
- Send an automated email, reminding he or her about the deadline. To do this:
  - Create a template item and enter the email content in the HTML pane. You'll probably need 2 templates, one for a coming deadline, and one for a past deadline
  - See 6. Example : Generating Invoices and -- link to nonexistent node ID 884 -- for details
- The grid shows reviews that are not done and have a past follow-up date. This can be fine-tuned for individual needs. A column filter could be used, but in this example, a source filter was used instead, as it has more advanced filtering capabilities
  To do so:
  - Grid > Source Bar
  - The current filter is: FollowUpDate<=Now and done is null
  - To show the coming deadlines, next week for example, the filter would be ReviewLateNbDays<0 and ReviewLateNbDays>-7 and done is null
  - The source filter has a dropdown button which shows recently used filters (press Delete to clean up the list if need be)

4. Building upon this Sample

This sample was designed to demonstrate many of the advanced features of InfoQube, and how these could be used to handle a specific task

It is just a start though and more could be done, such as:

- Color-code items based on user-specified criteria
- Show reviews on the Calendar. Color coded, such as the start of the review could be shown in green and the due date in red
- Use the Gantt chart to show a graphical view
- Use a Timeline view when the number of reviews increases, as a more compact view than Gantt charts
- Use filtering, sorting, hoisting and searching to effectively manage all reviews
- Use Microsoft Office Pivot table and Pivot charts as a reporting tool
- Create a live connection to other applications, such as Excel, so other people can view all (or part) of the review process
- Use the HTML pane to capture reviewer's reports and eventually send these to the author
- Use Email merge to send information to reviewers, to authors, etc
- Set-up an EmailToIQ address so reviewers and authors can send information to be automatically retrieved by InfoQube

Pierre_Admin 2017/07/07 15:13

- 154 views

IQbase Requests

IQbase Requests

IQBase Requests

You have a need for a particular function but do not know how to go about it. Enter it here as a child page.

Perhaps other users will chip in and do it for you (or at least, get you on the right track)

Pierre_Admin 2017/10/10 22:48

- 8 views