

KKSys

Help

Documentation

Section 2:

User guide and

Help

**Full output documentation for the ITC
KKFU Project, September 2024
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The KKFU ICO System

A special Application has been developed for use by field-officers. It shows the specific parts of the KKSys database which are of use for these staff.

The following help document outlines the general functionality and use of this Orixia App.

Remember that the App accesses the KKSys database, and so all data entered is managed and merged into the central database.

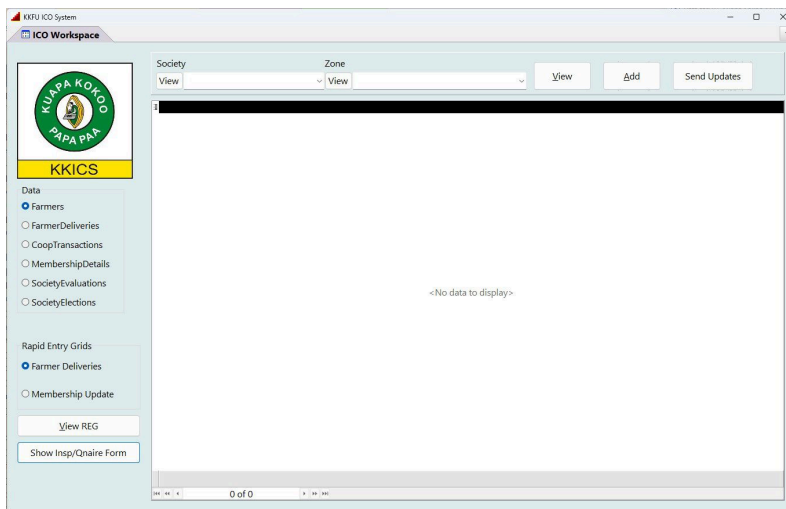
This means that care should be taken when entering and editing data to ensure all data entered is accurate and correct.

Related document links:

[1. The Inspection/Questionnaires data-entry system](#)

[2. Creating a new Questionnaire](#)

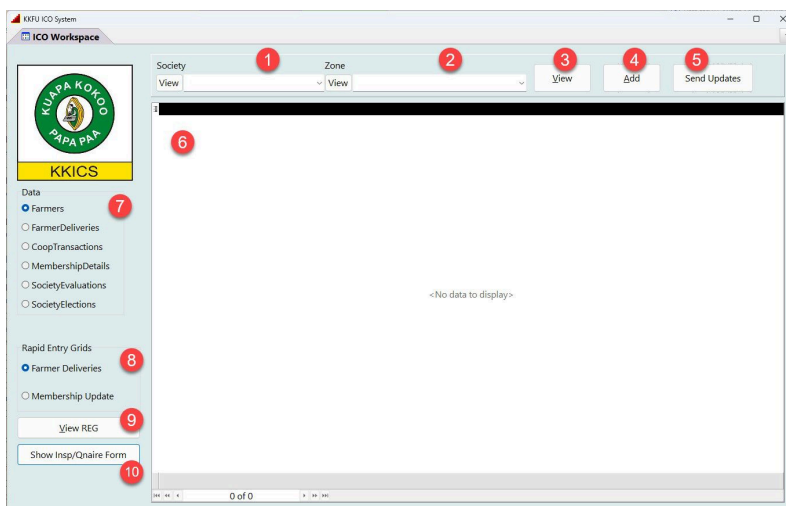
ICO-System Main Screen



ICO-System main screen

The ICO system is installed onto a laptop like all other Orixia Apps. The database should be installed first, and then the "ICO System" executable file copied onto the laptop. **Registry setting** for KKSys must also be added to the laptop to ensure that the system works correctly.

Main Elements of the ICO System



ICO Main Screen, enumerated

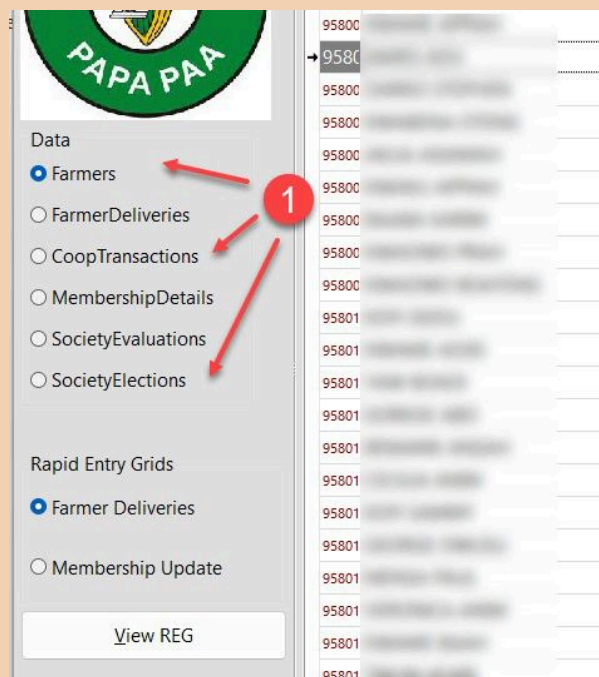
1. Pick list for selecting one "Society".
2. Pick List for selecting one "Zone".
3. "View" Button: Once a Society and Zone have been selected click here to view records in the **results-grid**.
4. "Add" Button: Once a Society and Zone have been selected click here to add a **new record** to the selected data-table.
5. "Send Updates" Button: Once data has been added to the system, and the user is in a location where their computer is connected to the data-network, click this button to upload updates to the cloud.
6. Results-Grid: Once the "View" button has been clicked data will display here.
7. Data-selector. Click on one item in this list to choose what data to show in the **results-grid**.
8. Rapid Entry Grid Selection. Click on one item in this list, then click "View REG" to open the selected Rapid Entry Grid.
9. "View REG" click on this button to open the selected Rapid Entry Grid.
10. "Show InspQnaire Form", click this button to open the **Inspection/Questionnaires data-entry system**. Details of this system are included in a separate help-document

Details of the system for entering answers to questionnaires can be found at this link:

[The Inspection/Questionnaires data-entry system](#)

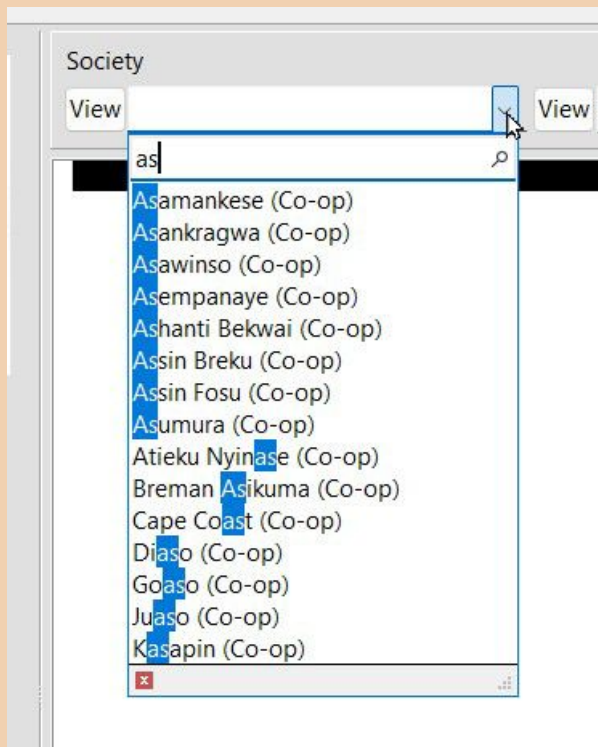
Finding and Viewing Data

To find and view data in the KK-ICO System undertake the following steps.



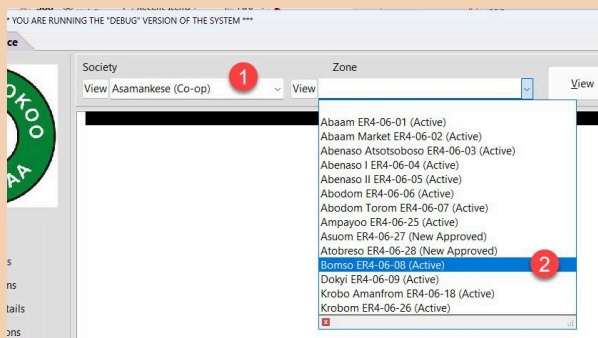
ICO Data selector

From the data-selector, pick the data-table who's data you want to see. Only one type of data can be shown in the results-grid at any time.



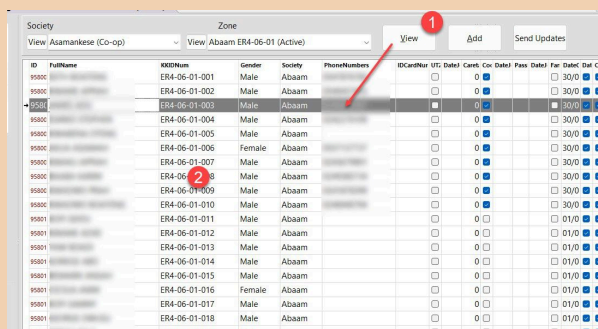
ICO Society Picker Search

In the "Society" search field, click the "down-arrow" and start to type the name of the Society. The list of societies will reduce as you type. Once the society you want is visible, click on it to select it.



Select One Zone

Once the Society has been selected (marked 1., in the image) The "Zone" search can be used. Only those Zones for the chosen society will appear. Users can type into the Zone search field in the same way as they can for the Society search field. Once you have found the zone you are looking for, click to select it.



View Farmers

Once a Society and Zone is selected, click the "View" button (marked 1.) and the results-grid will fill with data.

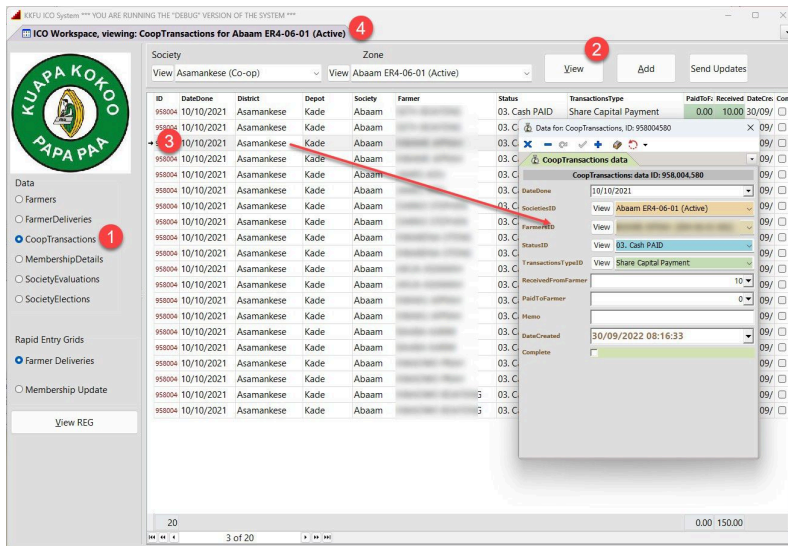
Users can **double-click** on any row to open and Edit Form to access and edit the data for that record.

Remember that the results grid is a full "Orixa" grid, with capabilities for searching, grouping, printing, export to Excel etc.

To view more details about how to use the Orixa Grid, look here:

[View Grids for viewing, sorting and finding larger numbers of records](#)

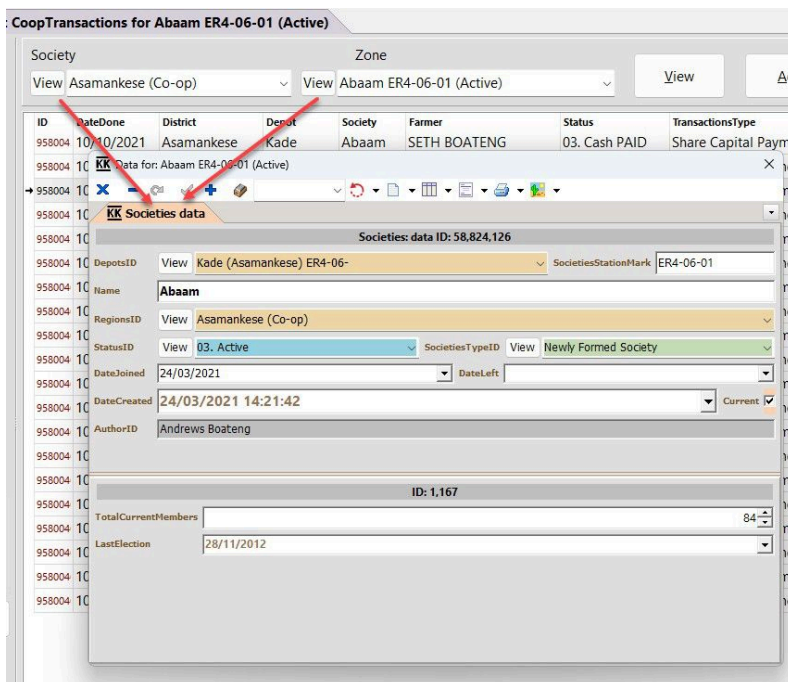
Editing Data



ICO System Entering data: Coop-Transactions

Steps for editing data

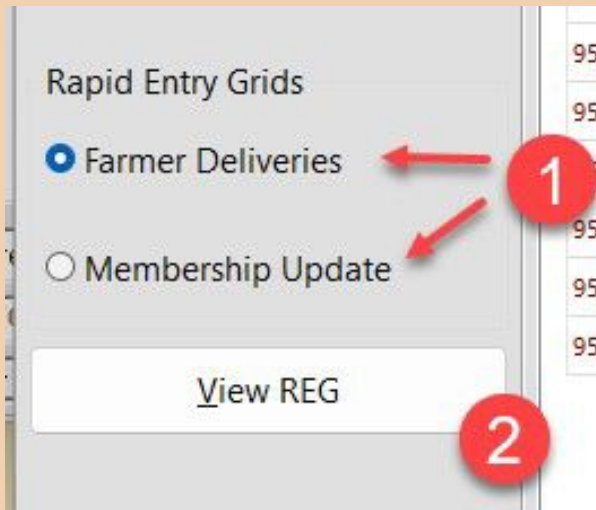
1. Pick on type of data
2. Select Society, and Zone and click "View"
3. Double click any row in the results grid to access the Edit Form.
4. Note that the title of the window adjusts to show the data being viewed, in this case "Coop Transactions for Abaam".



Accessing Society and Zone data for editing

NOTE: Users can also access data for the Society and Zone from the ICO System. Just click on the "View" button beside the Society and Zone search-fields.

Rapid Entry Grids



ICO Rapid Entry Grids

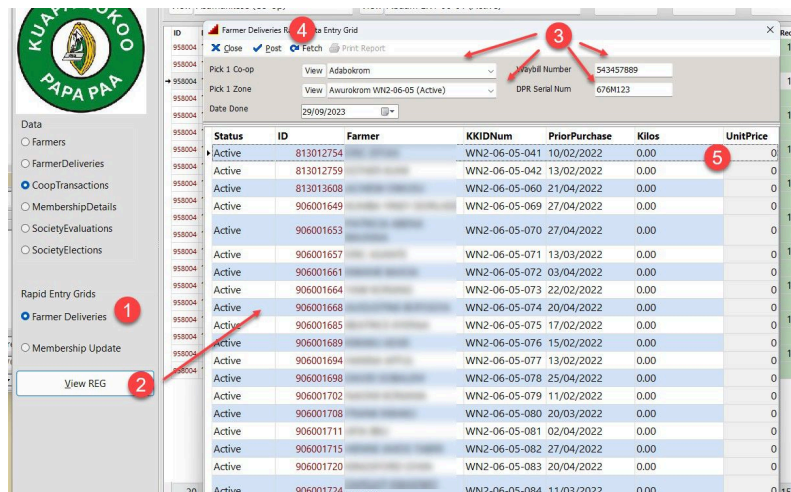
KKSys includes "Rapid Entry Grid" systems which allow users to add data rapidly.

The ICO System gives access to some of these. Pick one from the list (1.) and click the "View REG" button.

For example an ICO officer may want to enter large numbers of "farmerDelivery" records, reusing the same "WayBill" or "DPRSerial Number".

The ICO System allows the officers to access these systems that speed up regular data entry.

Accessing and using the Farmer Deliveries Rapid Entry Grid



Accessing the Farmer Deliveries Rapid Entry Grid

1. Select the "Farmer Deliveries" rapid entry grid choice.
2. Click "View REG"
3. Complete the data fields which will be duplicated for each record.
4. Fetch data for the grid.
5. Add row-by-row data as required. In the example above, the "kilos" delivered by each farmer should be added.













With Rapid Entry Grids, once data entry is complete, the "Post" button must be clicked to send all the data to the database.

Installing KKICOSys

Follow the same steps as for KKSys, but in place of KKSys.exe, use KKICOSys.exe. The image below shows the files required. Note that some "DLL" files are only required on computers with older Windows operating systems to provide functionality which is present in newer versions of Windows.

Try to install without these DLLs and in case of errors at start up such as "library file not found", add these DLLs.

The "WebView2Loader_x64.dll" is used by the **mapping** system, and is required for this part of the system to work.

Name	Date modified	Type	Size
 dxlni.ini	01/02/2024 09:42	Configuration sett...	6 KB
 en_GB.aff	15/06/2016 09:26	AFF File	73 KB
 en_GB.dic	15/06/2016 09:26	txtfile	686 KB
 en_US.aff	15/06/2016 09:26	AFF File	4 KB
 en_US.dic	29/03/2024 15:54	txtfile	738 KB
 en_User.dic	30/03/2024 15:18	txtfile	0 KB
 KKICOSys.exe	30/03/2024 12:09	Application	23,650 KB
 KKLogo.jpg	14/10/2016 16:30	JPG File	27 KB
 libeay32.dll	29/09/2022 16:49	Application exten...	2,234 KB
 ssleay32.dll	29/09/2022 16:49	Application exten...	378 KB
 vcomp140.dll	27/09/2019 19:07	Application exten...	157 KB
 WebView2Loader_x64.dll	17/03/2023 12:42	Application exten...	154 KB

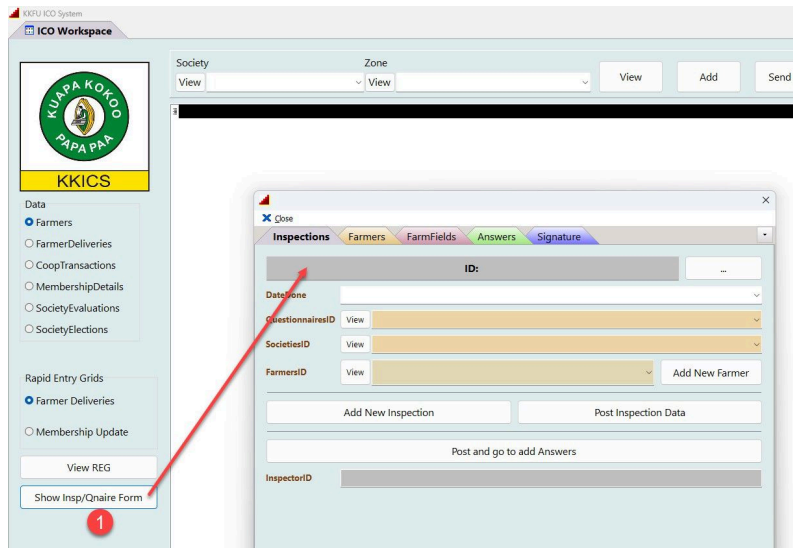
Files Required for KKICOSys.exe

The Inspection/Questionnaires data-entry system

A sub-system has been added to the KK ICO System specifically to make the addition of Inspection and Questionnaire data of all types easier to achieve.

Please review the following document for guidance on how to use this system.

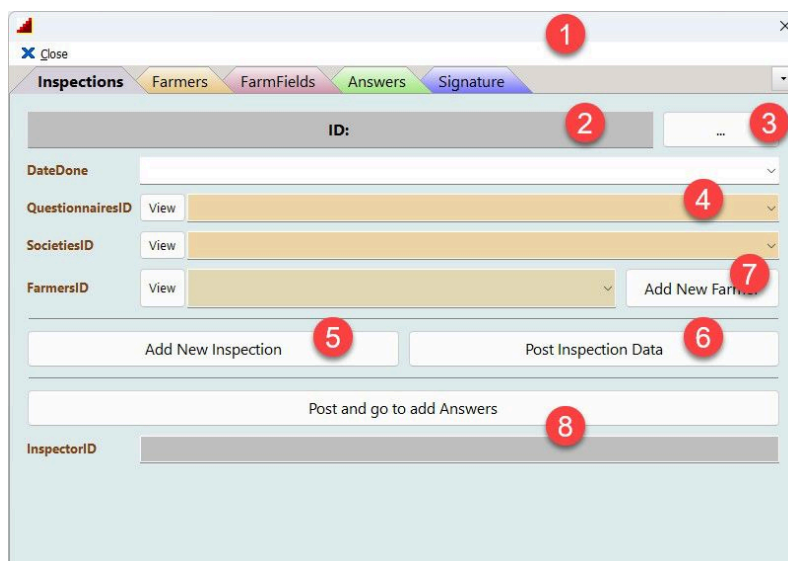
Accessing the Inspection / Questionnaires system



Showing the Inspections/Questionnaire form

To view the system, click on the "Show Insp/Qnaire Form" button. The system will open, showing a new **blank** Inspection record. Note that the system has 5 main pages: Inspections, Farmers, FarmFields, Answers and Signature. The purpose of these pages is described below.

Areas of the Inspection / Questionnaires Form "Inspections"



Details of the main screen of the Inspections/Questionnaire form

1. Main window of the new form, with 5 pages visible. **Note:** Some of these pages may not be visible once data-entry starts, depending on whthe types of data required by particular Questionnaire.
2. ID field. Note that this field is **blank** until the "Add New Inspection" button is clicked, or the "Previous Inspections button (marked with "...") is clicked.

3. The Previous Inspections button. Click here and a new inspection record will be added to the database.
4. QuestionnairesID. After adding a new inspection, the user can select the Questionnaire they wish to undertake from the list.
5. Add New Inspection button. Click here to add a new inspection record to the database.
6. Post Inspection Data button. Click here, after editing data to post the results of your work on this page to the database. If your work is entered correctly you will jump directly to the next required page, such as "Farmers" or "Answers".
7. Add New Farmer button. Sometimes the farmer you are questioning will not be present in the database. If you have reviewed the list of farmers in the "Farmers ID" field and you cannot find the required farmer, then click here to add data for a new person/farmer.
8. Post and go to add Answers. Click here to go directly to the "Answers" page, without updating the farmer or farm-field data.

Farmers data-entry page

The screenshot shows a web browser window with a 'Farmers' data-entry form. The form is titled 'ID: 833,002,008'. It contains several input fields and dropdown menus. The 'TitleID' field is set to 'Mr'. The 'KKIDNum' field contains 'WS12-06-314-007'. The 'FirstName' field contains 'ANDREWS' and the 'LastName' field contains 'GATIE'. The 'DateOfBirth' field is set to '07/08/1981'. The 'GenderID' field is set to 'Male'. The 'IDCardTypeID' field is set to 'Ghana Card' and the 'IDCardNumber' field contains '08098080'. The 'DateJoinedCoop' field is set to '30/12/1899' and the 'CoopMember' checkbox is checked. There is a section for 'PhoneNumbers' which is currently empty. At the bottom of the form, there is a button labeled 'Post and go to next Step' with a red circle containing the number '1' next to it.

Farmers data-entry page

This page includes all the core data required by Kuapa Kokoo about the farmer. The user can review and cross-check this data with the farmer during this step of the questionnaire. They can confirm all the details, edit and update them. It is particularly important to check that an "IDCardNumber" is added, as this will be used to interface KKFU data with data from Cocobod.

Note that multiple **phone numbers** can be added for a farmer, these should be separated by commas, in the form: 0554234234, 0522543543.

Note: If fuller details about this farmer are needed, the farmer's main data-entry forms can be accessed by clicking the "View" button next to the farmer's name on the "Farmers" page.

Farmer-fields data-entry page

Farmer-Fields data-entry page

This page is used to capture data about the actual farmer-fields owned or operated by a farmer

1. Data entry fields from the prior page, Society, Inspection and farmer.
2. DateDone
3. Acreage and yield related fields: These can be set manually. Note that if the "Show Map for this field" button is used, the acreage may be computed by the mapping process.
4. Latitude and longitude: These can be set by the user or set by using the "Show Map for this field" button.
5. Add Farm Field button
6. Delete Farm Field button
7. Show Map for this field.

Most of these fields are self explanatory. If you click "Show map for this field" you will open the Mapping data entry form. Review how to use this in this topic:

Mapping Data in the Inspeicions/Questionnaires system



Mapping in the ICO System

A full review of this process is covered in the following link:

[Mapping Systems in KKSys](#)

Adding "Answers" on the Answers data-entry page

The Answers page is designed to show a user interface displaying the **Questions** for the currently selected **Questionnaire** and allow the user to add Answer data. The user can click between Questions and see data-entry fields at the bottom of the page for entry of answers.

The system is built to include a number of checks and tests to ensure that data is entered correctly, and to ensure that data is linked to the selected farmer, ensuring that all data is robust and traceability is really fully accomplished.

Answers data-entry 1: Main features of the page

1. Progress bar. This shows the total number of questions and the number of the current question
2. Next Section button
3. Next Question button
4. Prior Section button
5. Prior Question button
6. Area for adding Answer data. This will vary for different questions, allowing entry of numbers, money-values, text, Yes/No answers, Dates etc.
7. Optional "Note/Memo" field.

Answers data-entry 2: Optional "guidance" field, and Yes/No/NA answer options

Features of the Answers data-entry page

1. As the type of answer required is different a different set of answer options appears for the user.
2. Note that questions can include optional "Guidance", giving the user suggestions for how answers can be picked.

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05. Social Issues

05. When children between 11 - 17 years of farmer/worker work on the farm, it is only age-appropriate work and outside of school hours

Select one or more answers:

1 Yes; Children only do age-appropriate work outside of school hours

2 No; Children perform hazardous work **1**

3 No; Children perform work during school hours

4 N/A; Farmer/Worker does not have children

Memo

2

Answers data-entry 3: Multiple choice answer and "Memo" field

Features of the Answers data-entry page

1. Options to select "one or more" answers.
2. Note that in some cases if a certain answer is selected the system will prompt the user to add a Note. In this case please enter the note here.

Signatures data-entry page

Close

Inspections Farmers FarmFields Answers **Signature** **1**

Clear **4** **3** OK

2

Sign here.

Test And Verify Inspection

Questionnaire Signature Page

Once all answers are completed, some Questionnaires demand the addition of a signature from the farmer.

1. The "Signature" data-entry page.
2. Screen area where the user can make a mark using the mouse or finger to create a signature.
3. OK button will post the signature image to the database for storage.
4. Clear button will blank off any signature allowing the user to try again if they are not happy with the current attempt.

Creating a new Questionnaire

The KKSys includes a programmatic system for creating and managing Questionnaires. This has been carefully designed to enable a range of fairly complex programmatic features to be added to the questionnaires while they are actually being used.

When first encountered, the system will appear complicated and unwieldy. However the different components are designed to work together well, and once understood will reveal how powerful they are.

Using the system, KKFU staff can create and manage complex multi-section, multi-question Questionnaires on a wide range of topics and immediately incorporate the answers into a database directly linked to their Societies, Staff, Farmers and Members.

Technical Introduction

The technical details of the data-structure of the Questionnaire system can be found here:

[Questionnaire related database elements](#)

Technical details of the data-tables of the Questionnaire system are found here:

[The Questionnaires data-object](#)

[The QuestionSections data-object](#)

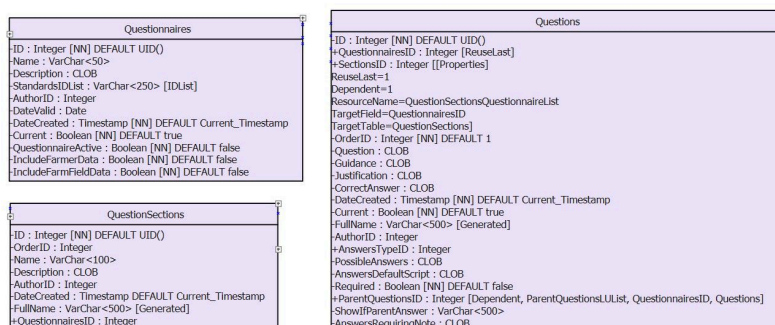
[The Questions data-object](#)

[The Inspections data-object](#)

[The Answers data-object](#)

[The NonConformities data-object](#)

Data-Structure for Questionnaires: Why are there so many data-tables?



Questionnaires, QuestionSections, Questions, Answers, NonConformities

In Orixia's relational database model, data is separated into separate "atoms" of data as far as possible, as this makes data management far more fast and efficient. The data structure appears complicated on the surface, but in fact it is less complex than it appears once the

Each "Questionnaire" as used by an ICO officer consists of one "heading" record from the Questionnaires data-table, which just provides a **name** for the questionnaire, and acts as a unit to link to all the questions. Each Question is a separate record in the Questions data-table, and all Questions with one "QuestionnairesID" will be returned when the Questionnaire is run.

Each "Inspection" is a record of the data gathered by the ICO Officer. It consists of one "heading" record from the Inspections data-table, which links to one farmer, and one Questionnaire. The Inspection then links to a number of "Answers" records. **There should be one "answer" for each "question" in the Questionnaire.**

Stated like this the data-model does not look so complicated. There are 2 extra data-tables:

- QuestionSections: This just provides the ability to separate a Questionnaire into sub-sets in a particular order.

- NonConformities: Any Answer may be good in itself. However, sometimes farmers may **infringe** on norms or practices. In other words they may do something (such as using proscribed chemicals, or employing child-labour) which is not allowed. In such cases ICO officers can add a NonConformity record to the answer record in a particular questionnaire. KKFU staff can then run reports returning the NonConformity records for one Society or Zone, allowing ICO Officers to return to particular farmers and check that they no longer infringe on norms or practices.

Steps to create a new Questionnaire

1. Create a new "master" Questionnaire record with the name of the Questionnaire. If the Questionnaire needs to be reviewed at some point in the future set the "DateValid" to the date at which the Questionnaire will **stop** being valid and should be checked. If the questionnaire contains links to a particular Farmer be sure to tick the "IncludeFarmerFieldData" tick-box.
2. If the new Questionnaire includes multiple sections, add "QuestionSection" records with the names for the sections. Ensure that each of these has the "QuestionnairesID" set to the new Questionnaire.
3. Add Questions. Type in the Question, and set the QuestionnaireID to the new Questionnaire. If the Questionnaire contains sections, set the QuestionSectionID. Complete other fields in the Questions record, following the rules set out in the [Questions Data-Object](#) help-document.
4. Run the [Inspections Questionnaire form](#) , and jump through the Questions to check that they display correctly. If special features such as skipping questions or checking for particular answers forms part of a questionnaire, provide some test values to check that it operates as expected.

Issues with ICO System installation and procedures for fixing problems

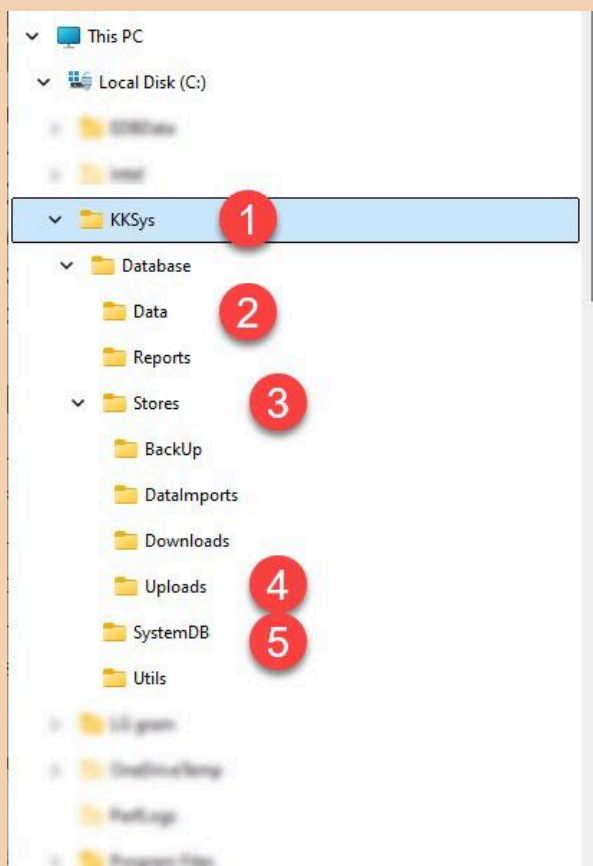
The ICO System has been installed on laptop computers for ICO staff members. In some instances this installation may have failed to un-install the existing KKSys.

If ICO staff have used both systems, they may have created update files or made updates to data which are now contained in 2 databases.

The following article details how to diagnose the issues with this, and how to fix the problems that can result.

How should a laptop be set up?

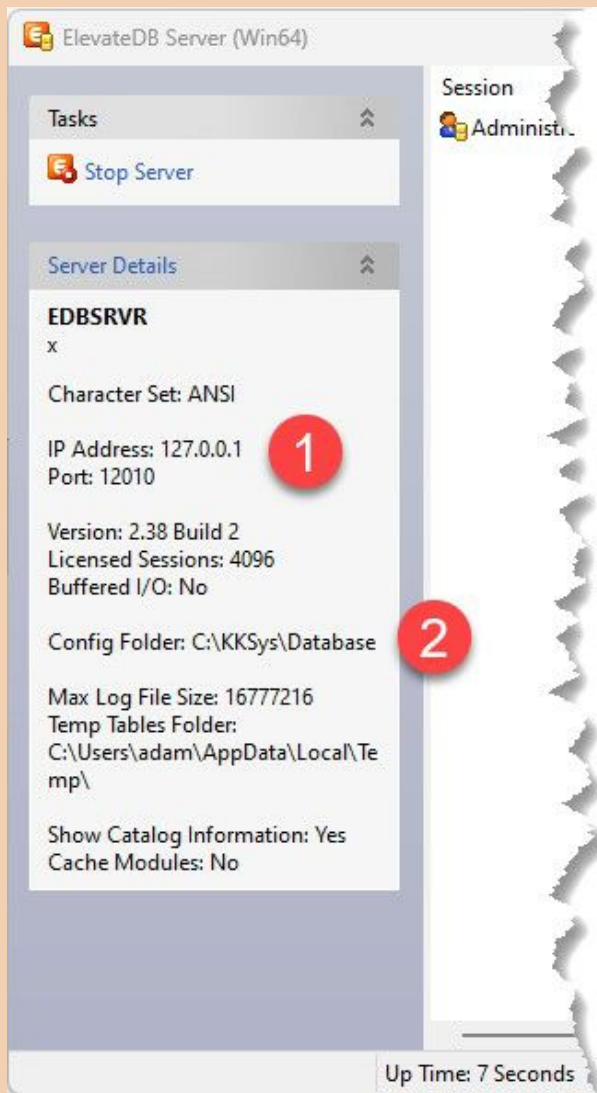
1. There should be a single folder on the laptop which contains the KKSys database. It can be in any folder, but usually it will be in a folder such as C:\KKSys or C:\KKICOSys.
2. The EDBSRVR should be running, and have a "Config folder" which is the same as the folder from step 1. The EDBSRVR IP Address should be 127.0.0.1, and Port 12010.
3. The Orixa settings for the computer should store an IP Address and Port which are the same as those set in step 2., so that all Orixa programmes access the database through the EDBSRVR.



KKSys Set up on disk

Folder Set up holding all system files

1. One base folder into which all data-files are copied.
2. One "Data" folder which contains all the table-files for the database.
3. One "Stores" folder, which contains folders used to hold upload and other data.
4. The Uploads store. This should contain **all** updates for this laptop.
5. SystemDB. This contains the data-files for the SystemDB database, which includes the UID computation that sets Unique ID's for the database records.



EDBSRVR Set up

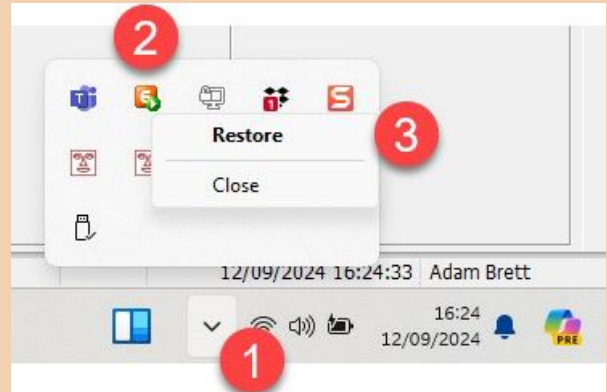
EDBSRVR Set up and running correctly

1. IP Address and Port
2. Details of the Config Folder.

Note that you can also review the Version and Character-set in this window to check these have the correct values.

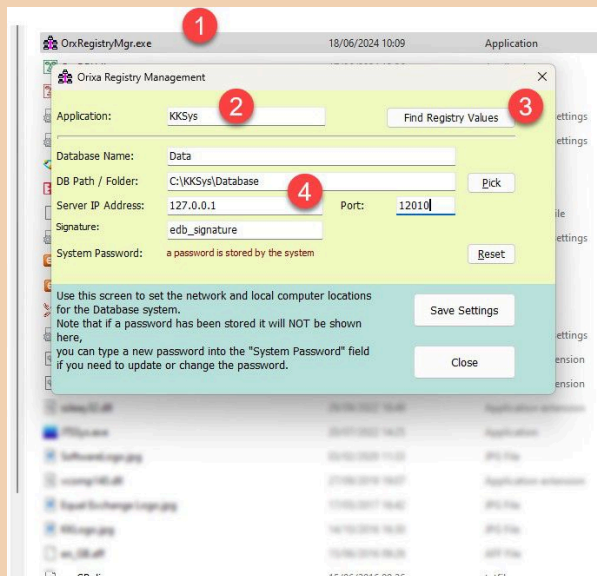
If any changes need to be made, click "Stock Server" and Click "Edit Server Options" to open a window in which you can adjust database settings.

If you do not know how to access the EDBSRVR



Restoring EDB Server from the Task-Area of the task-bar

1. Click on the "Task area" arrow in the bottom right of the computer screen.
2. Find the EDBSRVR icon.
3. **Right click** on the icon in the task-bar and click on "Restore"



Check values of Orixa setup on a computer

Registry Settings for Your system

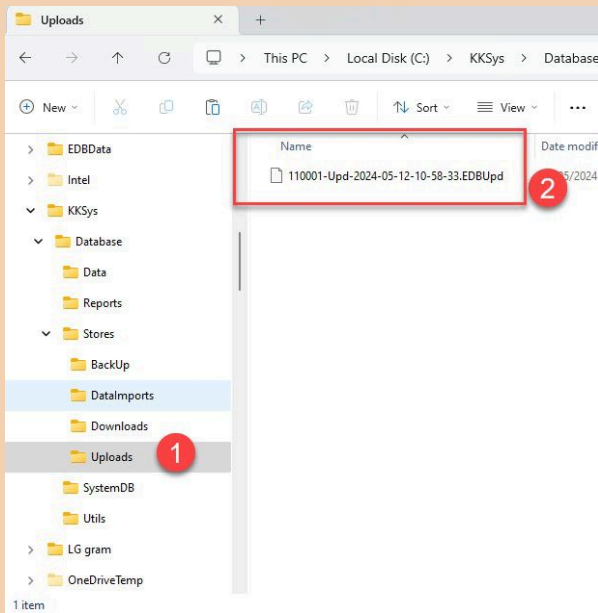
1. Find and run the OrxRegistryMgr.exe
2. Type the name of your application into the "Application" field.
3. Click "Find Registry Values"
4. Check that the values stored on the computer match the values seen in the earlier steps.

Review how the database is set up on the laptop, and correct any issues.

1. What database(s) are set up on the laptop. Review whether there is just one (for example under "KKSys") or if there are 2.
2. Check whether EDBSRVR running correctly, and that it is connected to the correct version of the database? Check that EDBSRVR is in the "task area" of the task-bar, and check that it is running (green arrow icon, not red-dot icon).

If the user has used one database and then transferred "smoothly" to a new database there will not be any problems. Update files from the first database can be uploaded to the server together with update files from the second database. All updates should load without any problems.

Finding and uploading update files.



Finding Update files

If the user has used 2 systems, **first** make sure they have **saved updates** in both systems.

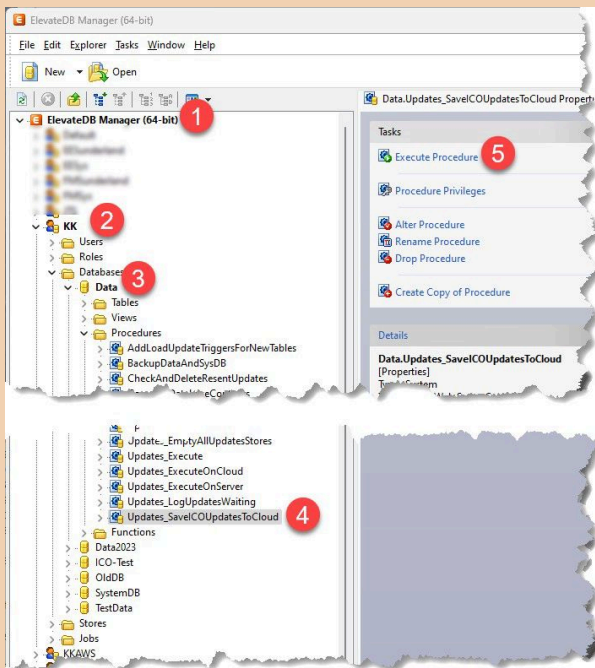
Then find update files in all Uploads folders, and copy them into the Uploads folder for the new database.

1. Uploads folder.
2. Update file.

Find and review ALL update files on the computer.

Some update files may have come FROM the server or cloud, they will be clearly named "SERVER-XXX" or "COLOUD-XXX" and can be ignored.

ALL other update files should be moved into the currently active "Uploads" folder used as the Uploads store by the laptop.



Setting up and using EDB Manager on a laptop

Once all uploads have been moved into the correct folder, open EDB Manager.

1. If the user has not used EDB Manager before, there will be no database-sessions visible in the tree. Right click on the tree and selected "Add New Database Session". Make sure that the session is set up with the same settings used on all other laptops.
2. Navigate to the KK Database (note it might have another name, such as KKSys or KKICOSys, the name is unimportant, so long as it connects to the KKSys database.
3. Open the "Data" heading, and the "Procedures" heading. Note that the Procedures may not be listed alphabetically, if the machine is newly set up.
4. Fond the "Updates_SaveICOUpdatesToCloud"

procedure. If it is not present, run a script to create this procedure.

5. Execute the Procedure. Set the "aUserID" parameter to a random 3 or 4 digit number on each laptop. Be sure to use a different number on each laptop.

Next Steps

Once the updates files are uploaded to the cloud, they should merge/incorporate into the database. If there are issues during the merge-process these can be solved by row-by-row checking of update files, as described here:

[Issues with Replication and Update Files in Orix](#)

If all updates are incorporated and work well, any "second" database which exists on an ICO Laptop should be deleted / removed. Keep the second database until you have verified that all updates have incorporated, just in case there is a need to return to the second database to extract new, missing data from it.

Farmer Delivery Phone Application (beta testing version)

A sub-system has been added to the KK ICO System specifically to make the recording of Farmer-Delivery data by staff in the collection sheds easier.

Please review the following document for guidance on how to use this system. It is a simple phone application with only a few screens

The current version of this Phone App works with connection to the internet, so phones must be on the network for it to function correctly.

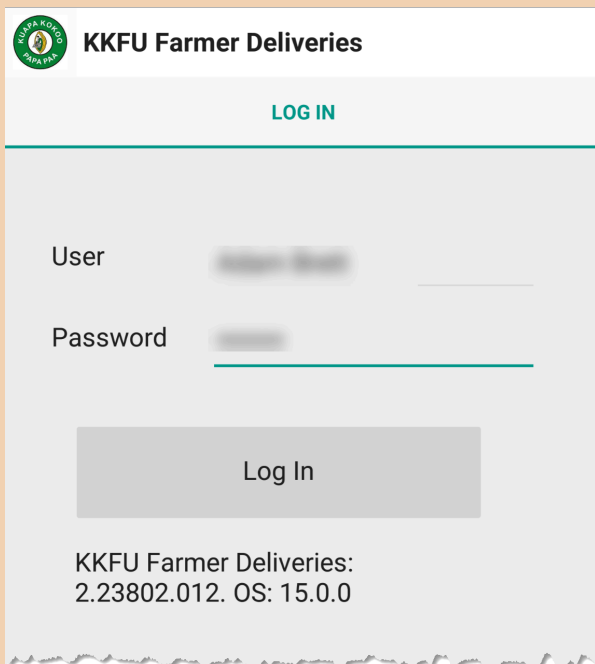
App Installation

The application can be downloaded from:

<https://www.orixa.co.uk/downloads/KKFUDeliver.apk>

Note: Once the App is downloaded onto the phone, the phone will usually run and install it automatically. The user on the phone will be asked to "OK" at various stages, and should click "Yes/OK" at each step. The exact steps vary from phone to phone, so they are not shown here. If the App is not installed automatically, navigate to the phone's "Download" folder, find the KKFUDliver.apk file and run/install it. This may occur with phones which are more tightly set up for App installation. In this case it may be necessary to say "yes" to the installation of "third party Apps."

App Use



FarmerDelivery Log In Screen

Log in Screen

Users enter their own name, as it is recorded in the database, and their password.

KKFU IT staff will have to create User and Passwords for all users expected to use the system. The Log In process has been developed in this way to ensure that hackers cannot access the KKSys.

Only users who have been personally set up by the IT staff will be able to log-in.



KKFU Farmer Deliveries

PICK FARMER

LIST DELIVERIES

VIEW DELIVERY



View Deliveries ³



Add Delivery ⁴

Asawinso

Rome B WN5-06-101

ABENA LUCY WN5-06-101-081 ²

Phone Num: 0248717160

Ghana Card:

Co-op Member:

Date Joined: 22/02/2019

Field Acreage: 1.00

FarmerDelivery Farmer Data Screen

Pick Farmer Screen

When the user opens the App this screen will be blank, as no farmer has yet been picked.

The user should:

1. Touch the top area of the screen, a list of Co-ops will open. The user should pick their Co-op. Once the Co-op is selected, click the second section of the screen, a list of Zones will open. The user should pick their Zone.
2. Once the Co-op and Zone are selected the user can click on the third area of the screen to view the list of active Farmers in the selected Zone. The user should pick the farmer who they want to view data for. Once the farmer is selected, other data (such as Phone number etc.) will also be listed.
3. To **view all deliveries** for the selected farmer, click here.
4. To **add a delivery** for the selected farmer, click here.



KKFU Farmer Deliveries

PICK FARMER

LIST DELIVERIES ¹

VIEW DELIVERY

Bags Delivered 2024

4.136 ³

2024-08-07 - 0 bags. >

2024-07-23 - 2 bags. >

2024-07-22 - 1.768 bags. >

2024-07-22 - 0 bags. >

2024-01-05 - 0.368 bags. >

2024-01-01 - 0.352 bags. >

2023-12-02 - 0.592 bags. >

2022-01-19 - 0.352 bags. >

2021-12-16 - 0.288 bags. >

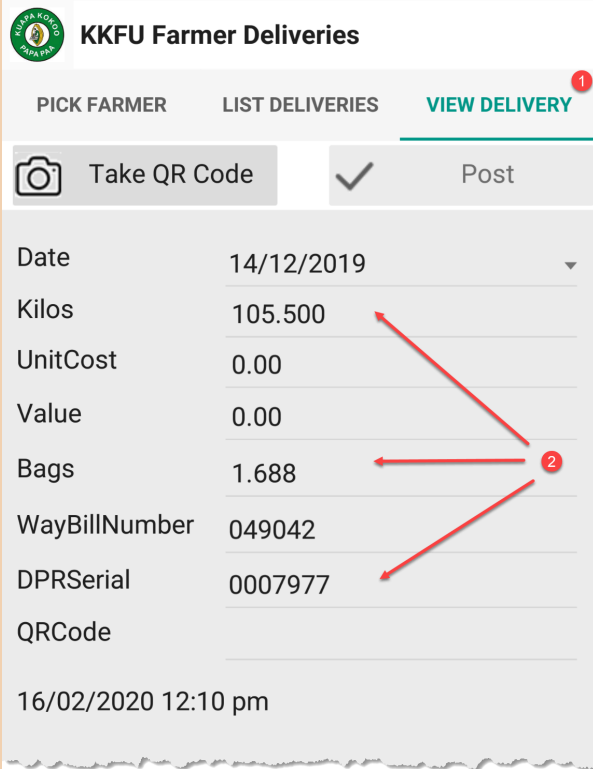
2021-11-11 - 0.16 bags. >

FarmerDelivery List Deliveries Screen

List Farmer Deliveries Screen

1. If the user clicks "View Deliveries" from the previous step, this screen will open.
2. All Deliveries for the farmer will be listed, in **reverse date order**. The Date of the delivery (starting with the year, then month, then day) will be shown, followed by the quantity of cocoa delivered, in Bags.
3. At the top of the screen the total bags delivered for the current year (in this case 2024) will be shown.

To view full details of any order, simply click on it, and you will navigate to the "View Delivery" screen.



FarmerDelivery View Delivery Screen

The View Delivery Screen

If the user has clicked "Add Delivery" from the Pick Farmer screen, they will come to this screen, but a **new delivery** will have been added.

If the user has clicked on any prior delivery from the List Deliveries screen, the user will view the details of the selected delivery.

The user can go back to the "Pick Farmer" or "List Deliveries" screen at any time, just by clicking on the appropriate heading on the screen.

1. View Delivery screen, with Date, Kilos, and other values linked to the delivery. Note that the "UnitCost" of the cocoa will update automatically from KKSys once a "current cocoa price" has been added.
2. Details of the delivery. Note that for all past deliveries this data cannot be edited by the user. The user can only edit newly added deliveries.

For newly added Deliveries, the "Post" button will be activated. The user can click on this to upload any new Delivery onto the KKSys Cloud.

KKSys Rapid Entry Grids and Forms

KKSys includes a number of custom grids and forms, added to the user interface to enable rapid data entry. Details of these parts of the system, how to use and access them are detailed in the following help-documents.

[1. Societies Membership Update Form](#)

[2. Farmer Deliveries Rapid Entry Grid](#)

[3. New Members Form](#)

[4. Membership Updates Dashboard](#)

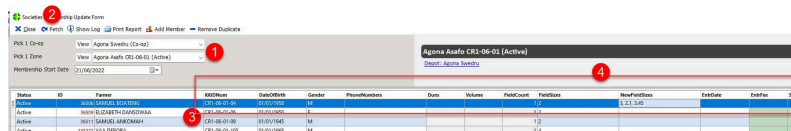
[5. Mapping Systems in KKSys](#)

Societies Membership Update Form

KKSys includes a rapid-entry data-form to make multiple data entries into the KKSys database for farmer-membership data.

This form includes data cells for Phone-numbers, Membership-Dues Paid, The sizes of the farmer's fields and other items. Using this form allows data entry to multiple parts of the database to be done more quickly.

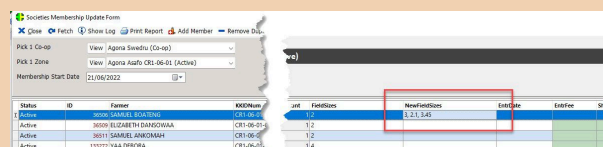
Areas of the Societies Membership Rapid Entry Grid



Societies Membership Update Form

1. Pick Co-op and Zone, this reduces the number of farmers that will be seen.
2. Click the "Fetch" button, this will fetch data for all active farmers in the selected Co-op / Zone.
3. Active farmers are shown with their existing data (Phone number, Farm-Field details etc.)
4. The user can add / edit the data. As the user moves between the fields in the grid the data will be updated to the database. There is no need to "Post" data, this makes the process easier and quicker, but also means that the user should take care with data entry. The user can enter new data in any of the blank columns, and the values entered will be updated in the database.

Adding and updating columns such as New Farm Fields



New Field Sizes Column

There is a free-entry text field in the form with the heading "NewFieldSizes". The user should enter all the fields for the farmer into this field, separated by commas.

For example if a farmer has three fields with sizes 3 acres, 2.5 acres and 1.25 acres, the User should enter: "3, 2.5, 1.25"

As the user moves to the next row or column, the new data will be posted to the database.

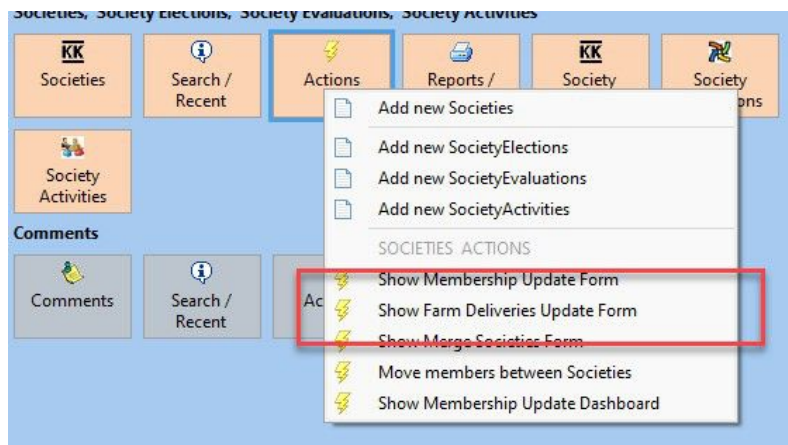
Other useful features of the Membership Update Form

- Double-click on any row of the grid once it is activated to open the Edit-Form for the farmer shown on that row.
- Click on the "Depot" link in the top right hand side of the window to show the Depot Edit-Form.
- Click on the "View" buttons for "Co-op" and "Zone" to see the Society's Edit Form.
- If a farmer is found who is a new member, click the "Add Member" button at the top of the screen to show a form for adding the new member's details.

Farmer Deliveries Rapid Entry Grid

A Rpaid Entry Grid has been added to speed up data-entry for FarmerDeliveries. This allows entry from the data-sheets returned by Recorders to be entered onto the system more quickly.

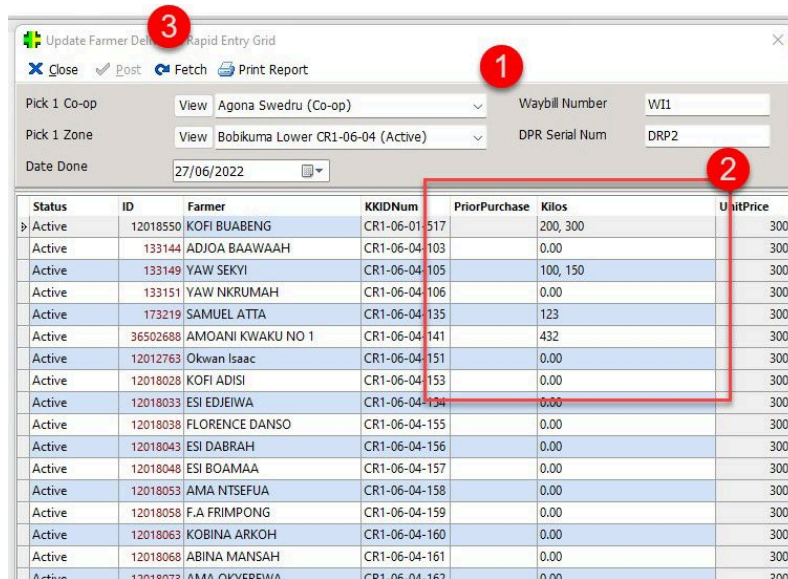
Accessing the Rapid Entry Grid



Farmer Deliveries Rapid Entry Grid

To access the grid, select "Show Farm Deliveries Update Form" from the "Societies" "Actions" icon.

Using the Rapid Entry Grid



Areas of the Rapid Entry Grid

The image above shows the Rapid Entry Grid once some data-entry has been undertaken. A "Co-op" and "Zone" have been selected, Membership data has been fetched, and some data for "Kilos" delivered have been added.

1. When the grid first opens the Co-op and Zone will be blank. Select a Co-op, then pick a Zone. Only Zone's for the picked Co-op will appear in the list. In the top part of the Form the user should also pick a "Date Done" (the date of the transactions) and enter a Waybill Number and DPR Serial number.
2. The user can then enter all cocoa deliveries for farmers, row by row. Note that if a farmer has made more than one delivery **with the same date, waybill and DPR number** they can be entered separated by commas.

3. Once the data for a single Waybill / DPR Serial number / Date is all entered the "Post" button will illuminate. Click this button to post all the data to the database.

The user should then repeat the above steps for **all** zone, dates, waybill and DPR details that they have to.

Each time the "Zone", "Date Done", is changed the user should click "Fetch to return new data. "Waybill" and "DRP Serial" will be reset each time the user clicks "Fetch."

Note that the "PriorPurchase" column is added (blank in the above example) which shows the latest date recorded in FarmerDeliveries for each farmer. This field is added to make it easier for the user to check when a farmer's data was last entered, to ensure there is no double-entry of data.

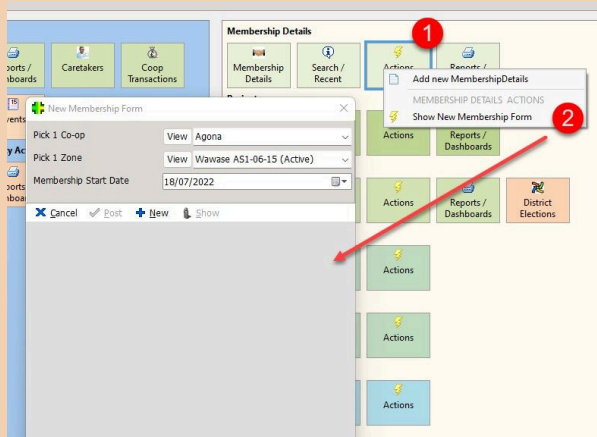
Remember, you can double-click on any row to see the data about the selected Farmer. This allows cross-checking of the data which has been added.

New Membership Form

KKSys includes a rapid entry form for addition of individual new members data. This allows users to add data relating to farmers who have joined Kuapa Kokoo.

This rapid entry form just slightly stream-lines the data-entry process. Manually adding "Person", "Farmers" and "MembershipDetails" records individually has exactly the same result as using the New Membership Form, but takes a bit longer.

Using the New Membership Form



KKSys New Membership Form 01

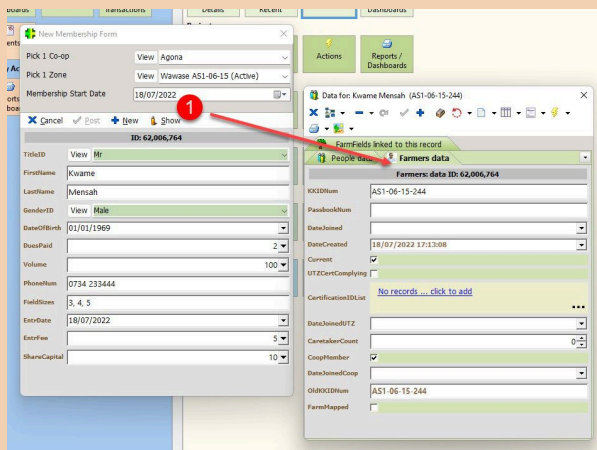
Accessing the New Membership Form

1. Find the "Actions" button for the Membership Details entity on the main page of KKSys
2. Click "Show New Membership Form." The window will open

KKSys New Membership Form 02

Entering Data

1. Pick Co-op, Zone and Start Date for the member. Click the "New" button to open the data-entry panel.
2. Fill in all data-fields as needed.
3. Once the data is complete, click the "Post" button. This will post the record to the database.

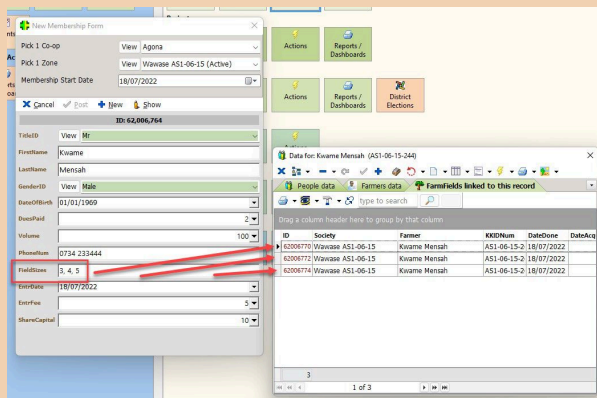


Show New Farmer

Once you are happy that all the data for the farmer has been entered correctly, click the "Post" button to insert all the data.

You can then see this farmer's data by clicking the "Show" button. (Marked 1., in the image on the left).

Note that KKSys will automatically allocate this new farmer a new KKIDNum, which will be the next available KKID for the selected Society.



View New Farmer's Farm-Fields

All data on the New Membership form is added to the farmer, and separated as per the data segregation of KKSys.

Note (shown in the image on the left) that multiple field-sizes can be entered, separated by commas, and this will result in multiple farm-field records being added for the farmer.

Once a farmer is added you can add more, simply by clicking the "New" button, and repeating the data entry process. Remember to change the name of the Co-op or Zone if entering details for different Co-ops and Zones.

Membership Updates Dashboard

KKSys includes a Dashboard to allow rapid reviewing of the details of members of particular societies.

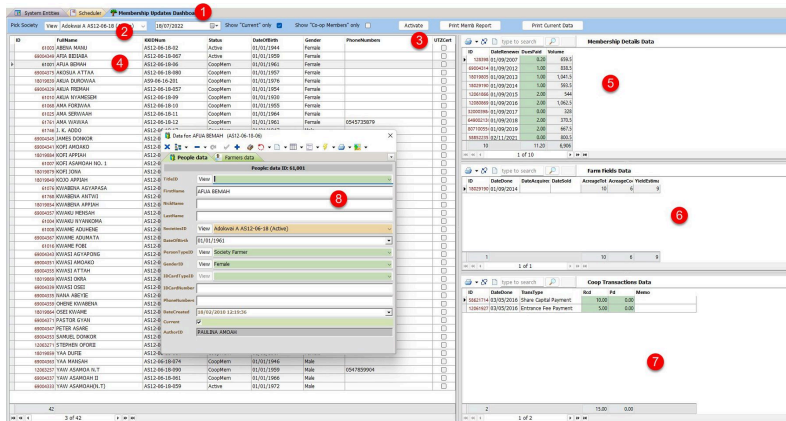
All users of KKSys can access this, and it is a useful general screen for jumping to specific data about a Society and its members.

Accessing and using the Membership Update Dashboard



Show Membership Update Dashboard

1. In the Societies Entity, click Actions.
2. Then click "Show Membership Update Dashboard"



Activating the Membership Update Dashboard

The Membership Update Dashboard will open **blank**. To activate it so it appears as above, take the following steps:

1. Ensure the dashboard is visible.
2. Select a Society from the list in "Pick Society", note that the first items in the list **may be blank** so scroll down to find the one you need, or type in the name to find it.
3. Once you have selected a Society, click "Activate" to show all the members.
4. The grid opens with all members and their details. As you scroll through the list the other grids on the screen will fill with data for that member.
5. This is the grid of membership details, showing each year that the farmer has paid dues and been a member.

6. Farm-fields data. This grid shows the size of the farm that the farmer has registered with Kuapa Kokoo.
7. Co-o Transactions data. This grid shows money paid to and received from the farmer, as recorded in KKSys.
8. Double-click on any farmer to open their Edit-Window.

Mapping Systems in KKSys

KKSys includes integration with Google Maps to enable farmer-fields to be mapped by latitude and longitude, and for the outlines of the extent of farmer-fields to be marked with "polygons" showing the exact extent of the fields.

The Farm Fields Edit Form

The screenshot shows the 'FarmFields data' edit form. At the top, it displays 'FarmFields: data ID: 500,048'. The form includes several sections:

- SocietiesID:** View zzz/Antokrom WN2-06-76 (Inactive)
- FarmersID:** View YUSSIF BOADU (WN2-06-76-001) (marked with 1)
- DateDone:** 12/10/2016 (marked with 2)
- DateAcquired:** (empty)
- DateSold:** (empty)
- PlotCode:** (empty)
- AcreageCocoa:** 0, **AcreageCertified:** 0, **AcreageTotal:** 6.725067048694 (marked with 3)
- MinorSeasonYield:** 0, **MajorSeasonYield:** 0, **TotalYield:** 0
- YieldEstimate:** (empty)
- Latitude:** 6.5489908819379, **Longitude:** -2.17230668370753 (marked with 4)
- DateCreated:** 12/10/2016 15:26:44, Current
- InspectionsID:** View (empty), FarmMapped

The **Map Data** section is highlighted with a red box (marked with 5) and contains two tabs: **Image** and **Polylines**. The **Image** tab is active, showing a satellite map with a red polygon overlaid on a field. The **Polylines** tab is also visible.

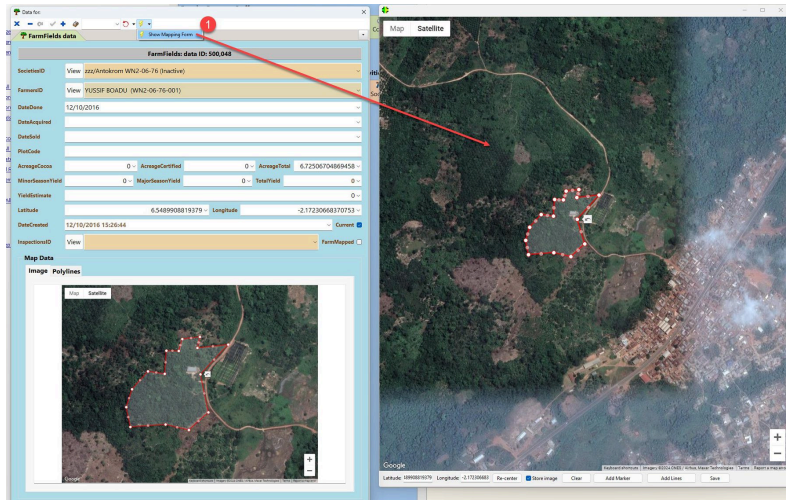
Farm Fields Edit Form with Mapping Image

Features of the FarmFields Edit Form

1. Select a Farmer from the KKSys database to link to this field-data.
2. Add the date of the inspection.
3. The size of the field will be **automatically computed** when you mark the extent of the field on the map.
4. The user can manually enter the Latitude and Longitude of the field. If this is done, when the map is displayed it will be possible to show the stored location.
5. If the field has already been mapped a screen-short from Google Maps will be stored as an **image** in the database. This is done to ensure that there is a record of the extent of the field which can be seen even if the internet network is down or unavailable. Note the **"Polylines"** field. This contains XML formatted data containing the Lat/Long coordinates for

the points which outline the field. If complex programming is required on any of this data this data can be accessed in code to do this.

Entering farmer-field details so that the latitude, longitude and field-outline can be stored

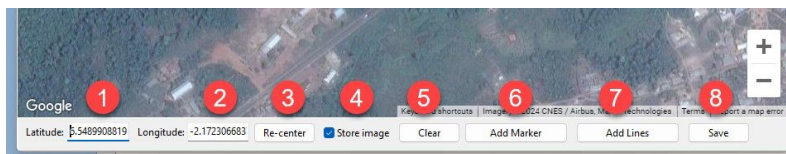


Farmer Fields with Map manipulation form open

To actually set the outline of a field go to "Show Mapping Form", as shown at 1., in the above image. Clicking will open the mapping form which accesses Google Maps and displays the polygon data which is stored with the field.

If no data is stored, or the "default" latitude is still present, the map will show centred on **Kumasi**.

Using the Mapping Form

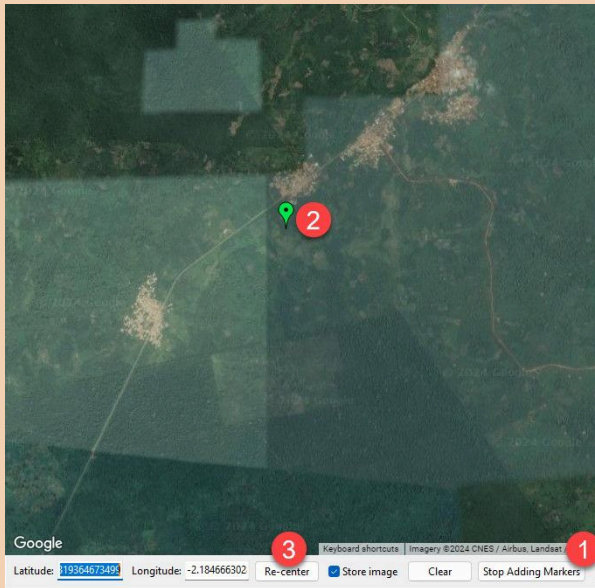


Mapping Form data-entry

Manipulation of the position and features of the map is controlled using the editing systems shown in the above image.

1. Latitude field.
2. Longitude field.
3. "Re-center" button. If the user manipulates the Latitude and Longitude, or adds a **marker** to the map, click on this button to shift the whole map to be centred on the new co-ordinates.
4. Store Image. Leave this box ticked to store an image of the map in KKSys. Untick it and no "screen-grab" will be taken during the "Save Map" process.
5. Clear button. Clicking this button will remove all polygon lines. If this is done by accident and the user does not want to store the result, close the Mapping Form **without** clicking "Save".
6. Add Marker button. If the user wants to mark a field location on the map, click this button and then click on a point on the map which is the centre of the field. A green location marker will appear.
7. Add Lines button. If the user want to mark the extent of a field, click this button and then click on the points that mark the edge of the field. This is shown in more detail in the next session. **Remember:** the user should "Zoom" the map in or out so that the area shown on the screen matches roughly with the extent of the field, whilst also showing some surrounding geographical features.
8. Save button. Once the user has completed editing they can click this to post all the data into the database.

Detailed instructions on how to find a field location, add markers and polygons

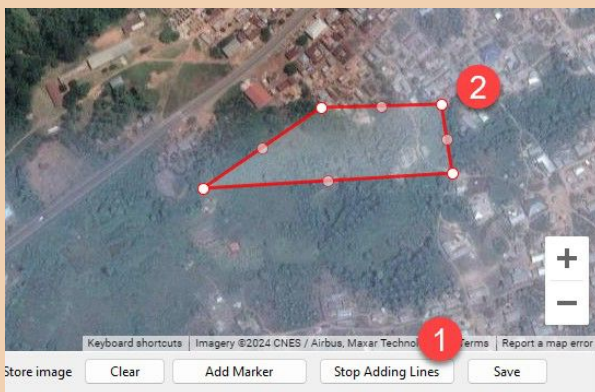


Setting a marker for the field center-point

The user should first use the map tools "+/-" and dragging with the mouse to move to the rough location of the field, or they should enter the latitude and longitude manually.

Once they have the map correctly Zoomed and they can see the location of the field they should take the following steps:

1. Click on the "Add Marker" button, its caption will change to "Stop Adding Markers"
2. Click on the location on the map that is the rough centre-point of the field.
3. Click the "Re-center" button.



Marking Points 1

Marking the outline of a field

1. Click the Add Lines button, to start working
2. Then click on the points of the map which mark the extent of the field.

Note that as well as clicking on parts of the map to **add** points you can also click-and-drag on points on the polygon to change its shape. This includes clicking and dragging "between points" at the mid-point of each line to change it's shape.



Marking Points 2

Once you have finished marking the polygon lines for the extent of the map, click the Save button, marked 1., in the image. This will record all data needed by the system into the database.

TeleAgric Dashboard

A dedicated program has been developed to manage Kuapa Kokoo data-flows for its TeleAgric Call Centre. This program is called the TeleAgric Dashboard.

The details of how program should be used are detailed below.

What is the TeleAgric Dashboard for?

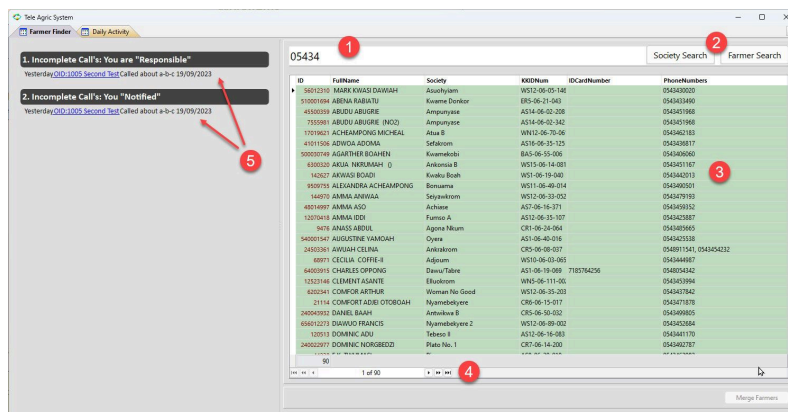
The call-centre team at KKFU use the TeleAgric Dashboard to manage work-flows when they are calling farmers and interacting with them. If a farmer has a serious issue, such as diseases to their crops, the TeleAgric Dashboard can be used make a note of this issue and to trigger communications to field staff for them to visit this farmer, and the "Calls" records added to the database can be used to manage and track the issue to ensure it is resolved.

The TeleAgric centre does more than just show and manage data about phone-calls made to farmers. It also gives TeleAgric staff access to KKFU farmer records. By updating these the call-centre team will verify and update farmer data stored by KKFU. Data such as farmer phone numbers, KKIDNumber, Ghana Card Number, Society Membership details etc. can all be cross-checked, entered and reviewed.

KKFU management may also want TeleAgric staff to phone specific farmers, or zone purchasing clerks directly to communicate about issues such as Society Elections. When this is done, the work can be recorded in the database as a log to show what has been done.

The call-centre team can also undertake useful data-cleaning of the database as part of their day-to-day work. The KKFU database has some issues, such as duplicate farmer records. When TeleAgric Centre staff find duplicate records for one farmer, they can undertake "merge" operations.

The Main Screen of the TeleAgric Dashboard



Main Search Screen of TeleAgric Dashboard

Areas of the main screen, as highlighted by the numbers above:

1. The **Search Field**: When finding Society or Farmer records, first enter a search term in the search field. In this case part of a **phone number** has been entered. When the search is run all records with farmers matching this phone number are returned.
2. The **Society Search** and **Farmer Search** buttons. Click on either of these to search for records in the database which match the text in the Search Field.
3. The **Results Grid** this shows either farmers or societies. Click on any row and an Edit Form for the selected farmer or society will open allowing the user to edit data.
4. Grid scroll-bar: allows easier navigation of the Results Grid and shows the number of records returned.
5. The **Calls Dataviewer** this area of the main screen returns a view of any Calls that the user has not completed dealing with. The use of this dataviewer is described in more detail later in this document.

Intelligent Search in the TeleAgric Dashboard

The TeleAgric Dashboard has been programmed to try to make location of farmers fast, easy and intuitive. The KKFU database includes hundreds of thousands of farmer records, so to return data quickly special programming has been done behind the scenes. The user can enter part of the farmer's **phone number, first name and last name, Ghana Card Number or KKID-Number** and the Dashboard will return only those records which match the search term.

ID	FullName	Society	KKIDNum	IDCardNumber	PhoneNumbers
3850380	AMMA BADU	Kwartro	BASA-06-18-114		
31872	AMMA BADU I	Nkoroso	er10-06-17-012		
349	AMMA BADOYA	Asiedsonyame	CRS-06-15-062		
12356	AMMA BAAH	Humbire	WNH-06-21-044		
14884	AMMA BAAH	Kwabada II	ERS-06-20-150		
2702703	AMMA BAAH	James Nkwanta B	W56-06-33-031		
5489	AMMA BAAH2	Asawinso A	WHH-06-27-031		
4850068	AMMA BAAWA	Taylor Junction	AS10-06-16-084		
100001483	AMMA BAAWA	Ankrakrom	CRS-06-08-088		0546529052
4625	AMMA BADU	Ackaakrom	WN6-06-01-040		
6871	AMMA BADU	Akuhyeye	AS19-06-12-011		
17589	AMMA BADU	Memo Mem I	AS2-06-20-062		0249621203
5400072	AMMA BADU	Fufuo	AS13-06-21-031		
5514	AMMA BADU	Awiesu	AS13-06-10-047		
6127	AMMA BADU	Kwehu Oda A	ERS-06-08-044		
6462	AMMA BADU	Nobewam	AS7-06-21-005		0245482851, 0244579778
6636	AMMA BADU	Fobikrom A	WS13-06-21-127		
6693	AMMA BADU	WURUBEGU/APAPRESO	AS3-06-25-005		
13985	AMMA BADU	Mamponting A	AS6-06-37-020		
15933	AMMA BADU	Mamponting A	AS6-06-37-021		
13580	AMMA BADOYA	Kaga Nkwama	BA5-06-27-007		

Farmer Name Search

If the user types **part** of the first and last name of the farmer, separated by a space, matches will be returned.

Note that this can be very useful as the exact spelling of farmer-names in the database is not very precise. Users can enter the parts of the names that they are confident about.

Provided that at least 4 characters are entered, the number of records returned is usually manageable.

Users should take care when using very common sequences of letters such as "Kwa" or "Ama" as these may return many thousands of records. Try to add some extra letters to narrow your search.

ID	FullName	Society	KKIDNum	IDCardNumber
864001368	A.P.C	Nobewam	AS7-06-21-579	
58559364	ABDULAI HARUNA	Nobewam	AS7-06-21-399	
11505828	ABENA ADUTWUMWAA	Nobewam	AS7-06-21-462	
63843	ABENA AMPUNTU	Nobewam	AS7-06-21-110	
63857	ABENA ANIREWAA	Nobewam	AS7-06-21-004	
64273	ABENA ANOKYEWAA	Nobewam	AS7-06-21-003	
86400941	ABENA ANTWIWAA	Nobewam	AS7-06-21-557	
58553155	ABENA ASANTEWAA	Nobewam	AS7-06-21-374	
64084	ABENA ATAA	Nobewam	AS7-06-21-008	
64048	ABENA BOUR	Nobewam	AS7-06-21-007	
11506146	ABENA DEWAA	Nobewam	AS7-06-21-490	
120012983	ABENA GETRUDE	Nobewam	AS7-06-21-522	
63986	ABENA GYAMFUAA	Nobewam	AS7-06-21-009	
58560975	ABENA HENEWAAA II	Nobewam	AS7-06-21-420	
440009652	ABENA KWABENA	Nobewam	AS7-06-21-550	
120013014	ABENA KYEREWA	Nobewam	AS7-06-21-524	
58553144	ABENA MANU	Nobewam	AS7-06-21-372	
58566368	ABENA NSIAH	Nobewam	AS7-06-21-437	

Farmer Search by KK-ID Number

If the user types **part** of the KKID-Number, matching farmers will be returned.

Again, users should attempt to enter enough letters and numbers to narrow the search, as short sequences will return very large numbers of farmers.

The Intelligent Search also searches for part of **phone number** or **Ghana Card Number**, enter parts of any of these and the search will find them.

ID	FullName	Society	KKIDNum	IDCardNumber	PhoneNumbers
14014997	AMMA ASO	(All)	AS7-06-16-371		0543459352
68971	CECILIA COFFIE-II	(Custom...)	WS10-06-03-065		0543444887
570015397	PRINCE TETTEH	<input type="checkbox"/> Aboabo II	AS14-06-34-008		0543450970
		<input type="checkbox"/> Abodom			
		<input type="checkbox"/> Abomoso B			
		<input type="checkbox"/> Abraham Krom			
		<input checked="" type="checkbox"/> Achase			
		<input type="checkbox"/> Adiembra Assin			
		<input checked="" type="checkbox"/> Adjourn			
		<input type="checkbox"/> Agona Nkum			
		<input type="checkbox"/> Ahodwo			
		<input checked="" type="checkbox"/> Ahiadom			
		<input type="checkbox"/> Ampenkro			
		<input type="checkbox"/> Amponsahkrom B			
		<input type="checkbox"/> Ampunyase			

Filtering the results

Once records are returned, remember that you can filter the Results Grid by clicking on the header-column and selecting values, as shown in the image.

They can also **right click** on the grid to access a useful menu of detailed commands.

More details about using the Orix Data Grid can be found here:

[View Grids for viewing, sorting and finding data](#)

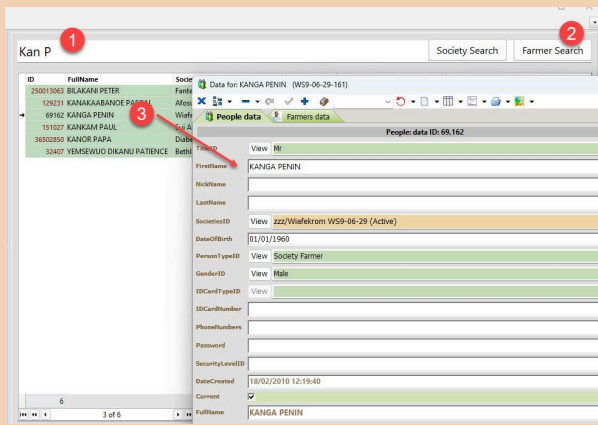
ID	Society	SocietiesStationMark	Status	Region
1633	Konongo	AS7-06-14	06_Non Operational	Konongo

Search by Society Name

The Intelligent Search will also search for **Societies/Zones**. In this case, enter part of either the zone's name or StationMark.

Note that when Societies are searched, the Results Grid color changes to Blue, indicating different data is present.

Double-click on any row to open the **Edit Form** for the selected Zone.

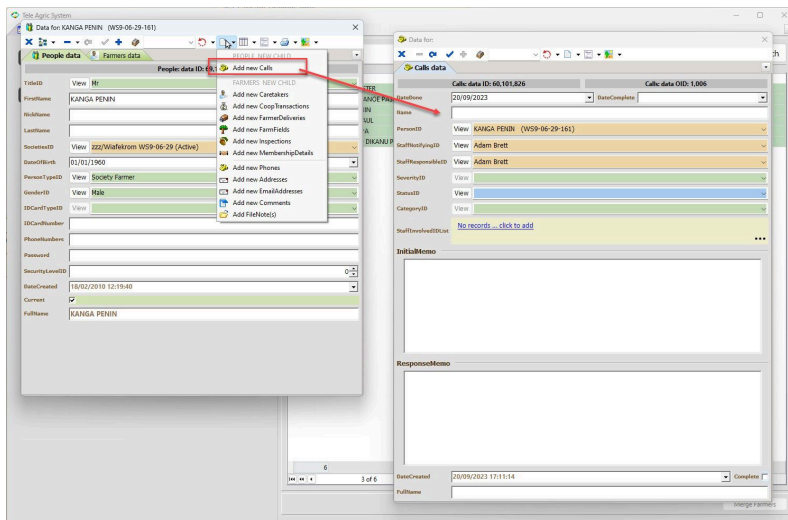


Finding and opening a farmer's record involves the following steps:

1. Enter a search-term.
2. Click the farmer-search button.
3. Find the row in the Results Grid.
4. Double-click on the row in the Results Grid to open the Edit Form for the selected Farmer.

Finding and opening the farmer record

Adding Calls and Farmer Details from the Edit Forms



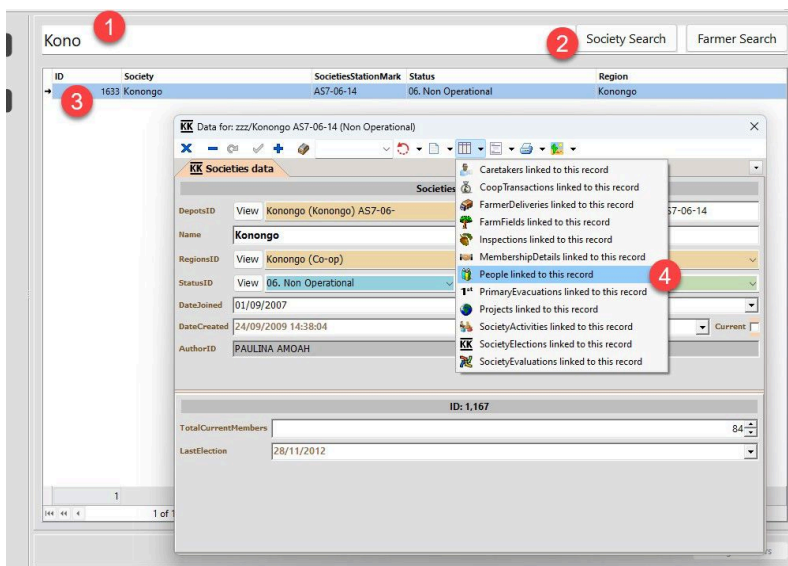
Adding new "Calls"

Once the Farmer's Edit Form is open, the information about the person will be shown. All details stored in the database for the Farmer can be found in parts of the the Edit Form, either on the "People data" or "Farmers Data" . pages

To add a new Call the user should click on "Add new Calls" from the "New Child Record" menu, as shown in the image above. The Calls Edit Form will open.

Details of how to use the Calls Edit Form are further down in this help-topic.

Accessing Societies records from the TeleAgric Dashboard



Accessing farmer details from the Societies Search

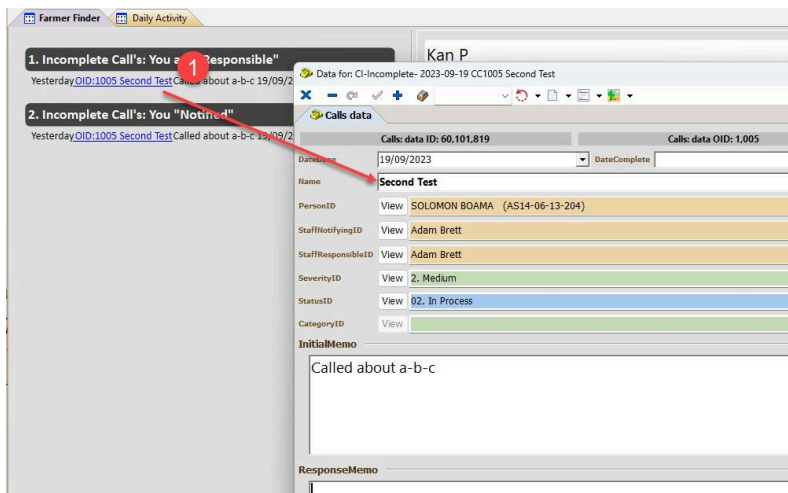
If users first access a Zone record, to find farmers of the selected Zone, take the following steps

1. Type part of the name of the Society/Zone.
2. Click the "Society Search" button.
3. Find the Society in the Results Grid.
4. In the Edit Window, select "View Items", "People linked to this record".

Once the Society/Zone Edit Form is open the user can update data relating to the Society/Zone. From the People Edit Form they can access all data as via the direct Farmer-Search detailed above.

The Calls Dataviewer

The Calls dataviewer is marked with "1." in the image below.



Accessing Incomplete Calls from the Calls Dataviewer

The calls dataviewer opens on the left hand side of the main screen of the TeleAgric dashboard. It lists all "Incomplete" Calls.

Usually a user will mark the "Status" of a "Calls" record "03. Complete" at the end of the call. This indicates that the work relating to the call has been completed. In this case details of the work done will be stored in the Calls record, but it will not reappear in the TeleAgric dashboard.

Users can leave some Calls "incomplete" (with a status of "Investigate" or "In Process") in this case the calls will remain visible to them, so they can check on their progress and completion.

The TeleAgric Daily Activity Worksurface

This part of the TeleAgric system is shown in the image below.



TeleAgric Daily Activity Worksurface

The second screen of the TeleAgric Dashboard is a "Daily Activity" worksurface. This brings together all the items a user has worked on per day. It is a useful way to navigate work done per day.

1. Click on the "Daily Activity" tab to access this part of the Dashboard.
2. Click on a date, to show Calls records for the selected date.
3. Calls for the selected date will show. **Double click** on any item to show its Edit Form.

Actions within the TeleAgric Dashboard

The main data-entry process for TeleAgric staff is to log their calls in the Calls Edit Form. The parts of this form, and how to use them are detailed below.

The screenshot shows the 'Calls data' form with the following details:

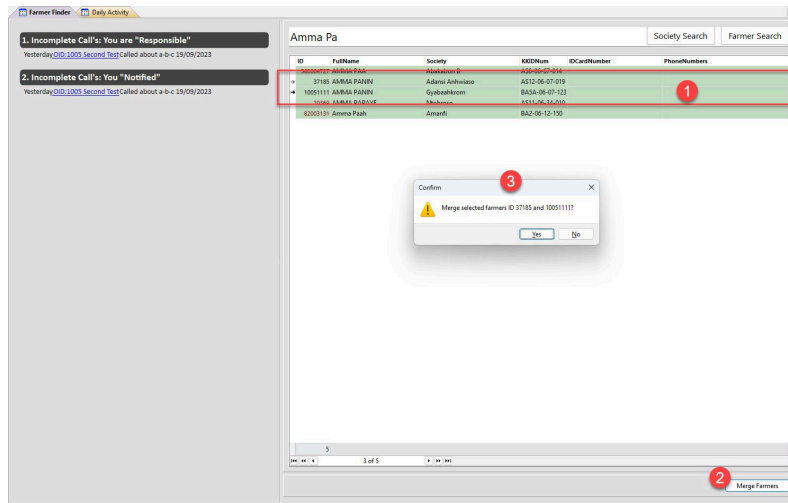
- DateDone:** 20/09/2023
- DateComplete:** (empty)
- Name:** (empty)
- PersonID:** View KANGA PENIN (WS9-06-29-161)
- StaffNotifyingID:** View Adam Brett
- StaffResponsibleID:** View BOATENG SOLOMON
- SeverityID:** View 2. Medium
- StatusID:** View 01. Investigate
- CategoryID:** View Bonus
- InitialMemo:** Farmer says that they have not received Bonus.
- ResponseMemo:** Solomon will investigate
- DateCreated:** 20/09/2023 17:11:14
- Complete:**

Parts of the Calls Edit Form

1. **Date Fields:** These record the date when the Call was made or received, and the date when the issue was resolved. Often the "DateDone\" and the "DateComplete" will be the same.
2. **Name field:** This is used to **title** the call. The user can write any words they wish.
3. **Severity, Status and Category:** These fields contain lists the user can pick from to set the type of Call that is being made.
4. **Initial Memo:** The user must write something in this field to provide details of the call.
5. **Response Memo:** If a follow up is needed, the user can use this field to add extra details about the Call.

Merging Farmer Records

The KKFU database unfortunately includes a good number of duplicate farmer records. Part of the work of the TeleAgric system is to find and merge these records. To do this undertake the following steps.



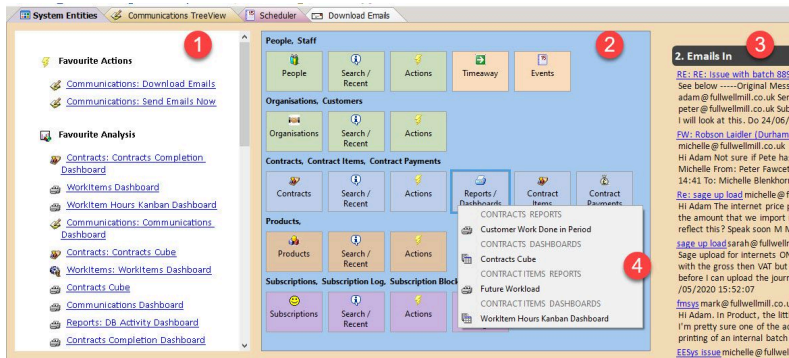
Merging Matching Farmers

1. **Shift Click** two records in the results Grid showing duplicate farmers. When this is done the "Merge Farmers" button at the bottom of the screen will become active.
2. Click on "Merge Farmers" button.
3. When asked to confirm click "Yes".

Note that when the "Merge" procedure runs a **database stored procedure** called "MergePeople". If there is a need to change the functionality of the "Merge People" process in the TeleAgric dashboard, it can be done by making changes to this procedure. The code of the TeleAgric Dashboard program does not need to be updated.

The System Entities Screen

Main features of the System Entities Screen



System Entities Main Screen

1. Favourites Dataviewer. This area of the screen is empty when the user first uses the system. It gradually fills up with items related to their activity using the system. For most users their work will end up being listed in this part of the screen. By clicking on the items in this list they can reach the parts of the system they use most frequently.
2. The "Master Entities" section. The most important Entities in a system are shown here. Entities are sets of data-tables in the database which have been linked together so they can be used to manage a business or organisation.
3. A custom-dataviewer: In this case showing automated emails sent by the Orixia server.
4. Clicking on each icon in the System Entities screen will open a list of options, as shown here. These options relate to work users can undertake using the system.

The System Entities screen is the first page that opens into your system. This is the entry point for the system, and can be crowded with a lot of icons.

Most users within any business only have responsibility for certain areas. For example in a factory some staff might be mainly responsible for "Production" while others might be responsible for "Sales". In this situation there will probably be a "Production" and "Sales" Entity visible in the System, and these staff would only need to access the parts of the system they can reach from their Entities.

Remember to right-click with your mouse

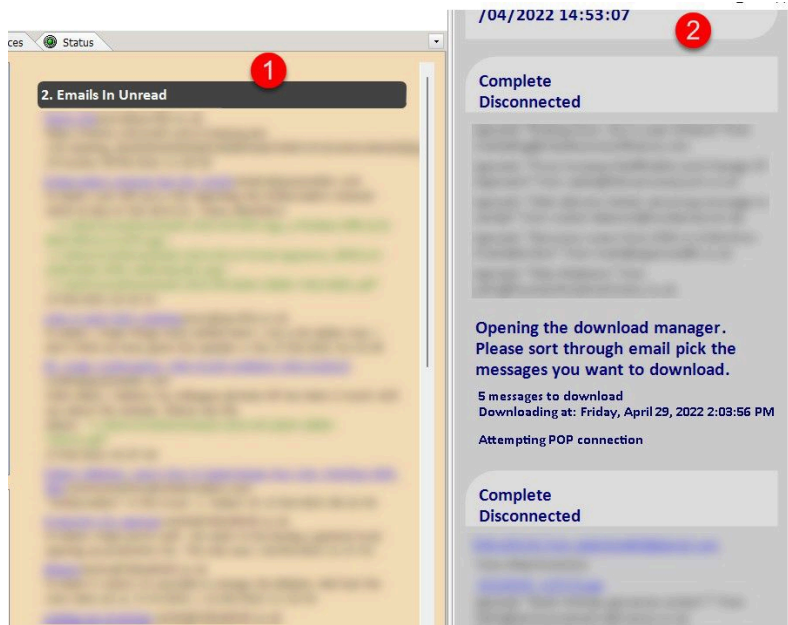
Through out Orixia most objects on the screen have some "intelligence", if you right click with the mouse a list of choices called a **context menu** will open that relate to the particular item. This is a standard for the system, and helps to reduce the number of buttons, links and other pieces of "furniture" on-screen.

As you start to use the system please try to right-click on as many objects as you want, to see the context menus which appear. Efforts have been made to ensure that right-clicking on an object opens a list with relevant choices, even choices as simple as "close this now".

Note that the main screen also features a useful **main menu** details of its operation are covered in the following topic:

[The System Main Menu](#)

Additional Elements of the System Entities Dashboard



System Entities Main Screen Message Log

Some, but not all System Entities Dashboards feature extra elements as shown above

1. "Data viewers" these are visual components which can be used to display and access data together with summary information about it.
2. The System Message Log. This opens whenever the system undertakes a complex task, and want to give you updates and messages about what it is doing. Error messages are also displayed here.

How to use the System Entities Dashboard

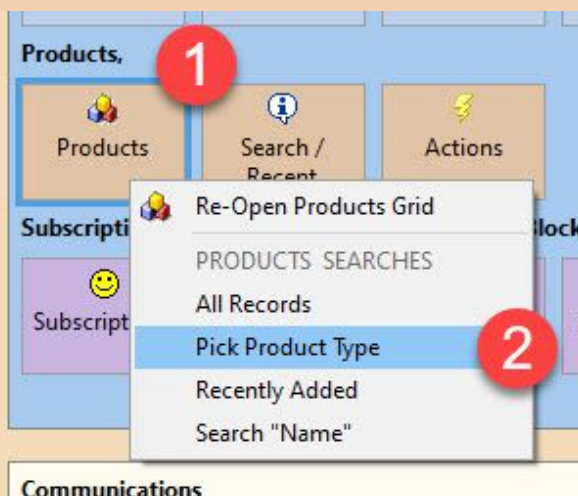
Entities: Your general purpose point of entry into the system



An Entity in a system, holding access to the "Contracts", "ContractItems" and "ContractPayments" BusinessObjects

1. The names of the linked BusinessObjects are detailed at the top. Clicking on this text moved the Entity to the top of the screen and opens a "search box" allowing quick searches, detailed below.
2. The Contracts BusinessObject Icon. Click here to see a list of Grid-views you can access for this BusinessObject, click here to see a list of options, how these work is detailed below.
3. Search / Recent. If you wish to find an individual "Contracts" record, click here to see recently opened records you might want to re-open, or to open a search-list, details of which are laid out below.
4. Actions. Not all Entities will have this button. Click here to see the actions that can be done to this Entity. This is the starting point for accessing tasks or work you can do in the system.
5. Reports / Dashboards. Not all Entities will have this button. Click here to see a list of options to show data linked to this entity.
6. The ContractItems and ContractPayments icons. Both these BusinessObjects are "children" of the Contracts BusinessObject, so they are shown in this Entity group. Clicking on either icon opens a list of view-grid options similar to the one described in 2., above.

Accessing view-grids, edit forms, actions and dashboards from the Entity



BusinessObject View-Grid Button

The Main BusinessObject Icon

Clicking on the icon for a particular BusinessObject opens a menu listing options to view grids of data for this BusinessObject and any related "extension" objects.

Clicking on an item in the list will open a grid of records in the database.

Details of the view grid, and how to work with it are covered here:

[View Grids for viewing, sorting and finding large numbers of records](#)



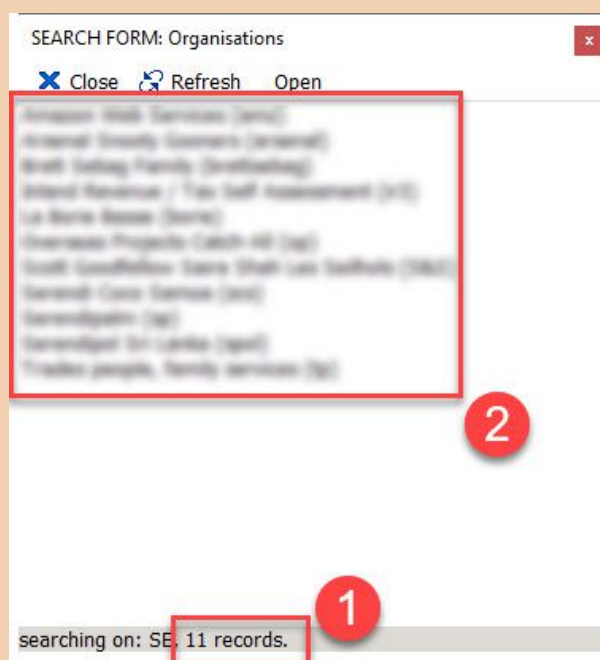
BusinessObject Search Button

The "Search / Recent" Button

1. Click here to open access to allow searching for individual records of any BusinessObject linked together in the current Entity.
2. Below the search options "RECENT RECORDS" are shown, with the past 20 records you have viewed for this BusinessObject. Note that records opened **anywhere** in the system are always added to "recent lists", and there are several places you can access this list for a BusinessObject.

If you click on the "Record Search" a window will open listing **all** the records in the system for the selected BusinessObject. you can type in this list to search for the text you have typed. Once you find the record you are looking for, double-click on it to open it.

Note that for more complex BusinessObjects with multiple data-tables. This button will show options for searching "Extension" and "Child" data linked to any BusinessObject.



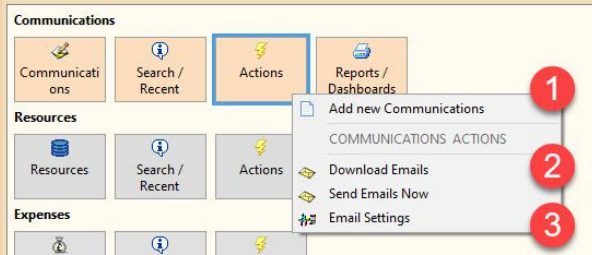
BusinessObject Record Search Form

A "Record Search" window with search text entered

1. The user has typed "SE", this has filtered the list of all Organisations to find only those whose name includes the text "SE". Note that the search text can occur anywhere in the name.
2. Clicking on any of the list will open this Organisation's Edit Form.

Note that typing "Esc" at any time deletes the search, returning the list to its full number of items. Also, pressing "Delete" at any time deletes the final character from the current search text.

At any time the user can double-click on a record to open the Edit Form for this data-record.

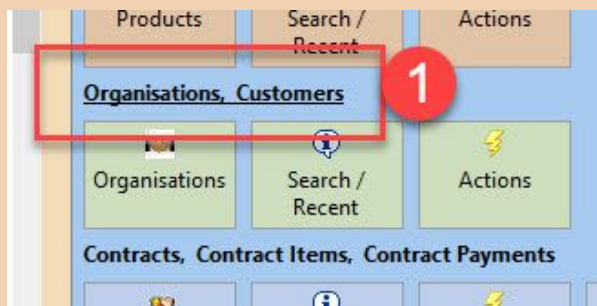


BusinessObject Actions Button

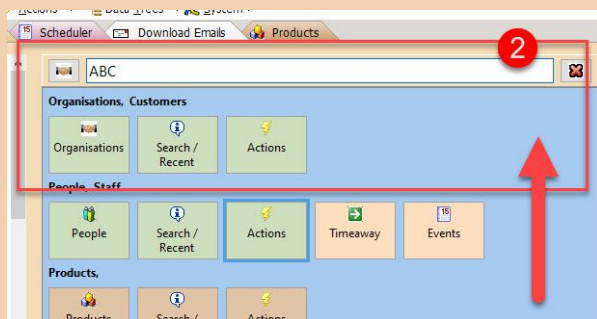
The "Actions" button

The actions button is more dynamic than other parts of the Entities screen, and depending on the particular Entity very different items may be shown.

1. Most BusinessObjects include an option to "Add new ..." from the actions button. Click here to add a new record for the selected BusinessObject to the database.
2. Some BusinessObjects will include dedicated actions that can be accessed from this list. These will trigger special work by the system.
3. A few BusinessObjects include custom-code written with special functionality that are accessed from this list.



BusinessObject Quick Search 1



BusinessObject Quick Search 2

The System Entities Quick Search

1. Click on the Title of the entity you wish to search. This "gives focus" to this entity, moving it to the top of the window and opens the quick-search field.
2. The entity will move to the top of the screen (as shown by the arrow) and a search box will open. You can type anything into this search box, and the system will do its best to find data based on your entry.

You can type in the ID or FID (Batch Number) of the record you are looking for, if you know it, followed by "ENTER" / "RETURN".

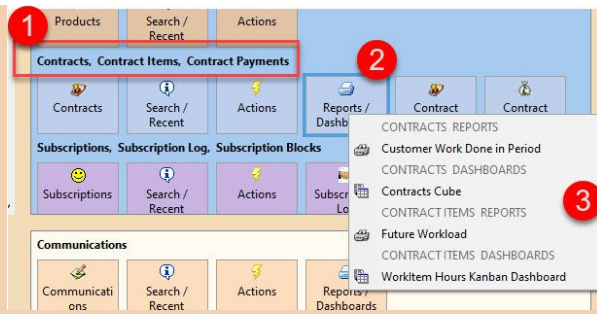
You can also type in a name or date (if the data is date-based)

You know which Entity is being searched because it is pulled to the top of the screen, and its icon is shown in the left side of the search box.

The system will try to a record based on what you have entered. If it finds more than one record with this initial search then a list will open with all the records matching this search.

The "Reports / Dashboards" button

Many, but not all Entities will include this button. It serves a similar function to the "Actions" button. It shows a list of work that can be done related to the selected Entity. It is different from the Actions button because it shows a list of ways of outputting and viewing data, whereas the Actions button is used to trigger processing and work by the system.



BusinessObject Reports Dashboards 01

1. Items in the list which produce "paper-like" reports and PDFs will be marked with a "printer" icon.
2. Items in the list which produce dashboards with charts/grids and data-cubes will be marked with this icon.

More detail on viewing and using Dashboards is shown here [Data Dashboards: Viewing data visually](#)

The main features of Edit Forms: customized controls to enable effective data-entry

Orixa Edit Forms display data for one record in a Business Object data-table, and allow users to edit and insert data.

To speed up user data entry extensive customizations are possible within Edit Forms, making them more powerful and capable.

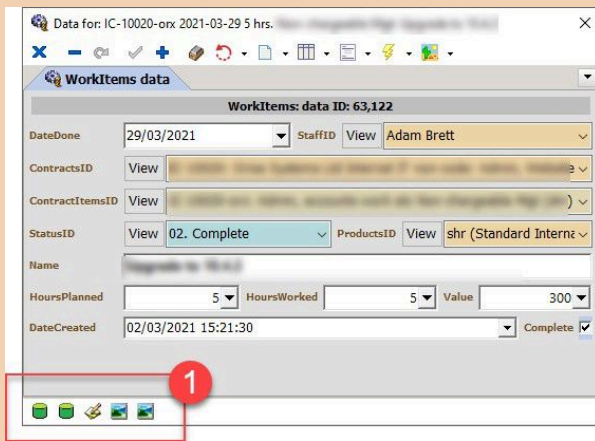
Main elements of the edit windows

The screenshot shows a software window titled "Data for: Adam Brett (Orixa Systems Ltd)". It features a toolbar at the top with various icons (1). Below the toolbar are two tabs: "People data" (selected) and "Staff data". The main area contains a form with fields for "FirstName" (Adam), "LastName" (Brett), "OrganisationsID" (Orixa Systems Ltd (orx)), "JobDescription", "PersonTypeID" (Staff), and "DateCreated" (09/12/2019 09:53:04). Below these are sections for "Phones", "Addresses", and "EmailAddresses". A red circle with the number 2 highlights the "JobDescription" field. A red circle with the number 3 highlights the "Addresses" section. A red circle with the number 4 highlights the "People data" tab.

A typical Edit Form

A Record displayed in the "People" data-edit window. Note the screen areas, who's function is explained below:

1. The main "toolbar" for the edit window. All actions such as adding, deleting or posting data, viewing linked data etc., are accessed from the toolbar.
2. The main "data layout" area for the edit window. The fields in the database table are displayed here and can be edited by the user.
3. The "summary data layout" area. This shows **linked data** for this record, pulled in from other tables in the database, usually lists and summaries such as total numbers of holiday-days taken by a staff-member, or the total value of unpaid invoices for a customer. This data is always read-only, and is provided to allow you to easily see key data for any record.
4. Data layout tabs. Some edit-windows show data for multiple, linked data-tables. In this example you can see "People" and "Staff" data-records have been added. Usually there is only a single tab, with the name of the database table showing here. Only "Master" entities (such as the "People" entity shown here, or the "Organisations" entity) can have multiple tabs



Shortcut Links - a toolbar showing all linked and "child" records.

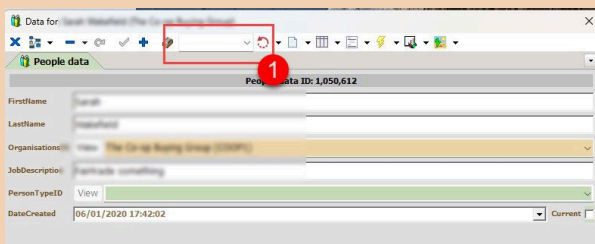
Shortcut Links bar

If a data-record is linked to other records in the database, Shortcut Link will display, as shown at 1. in the image on the left.

Links to Comments, FileNotes and Images are shown here, as well as links to other "child" BusinessObject records.

Click on any of the Shortcut Links icons to open the linked record.

Not All links are shown in Shortcut Links, to avoid overcrowding. This behaviour is controlled by the Developer of your App.

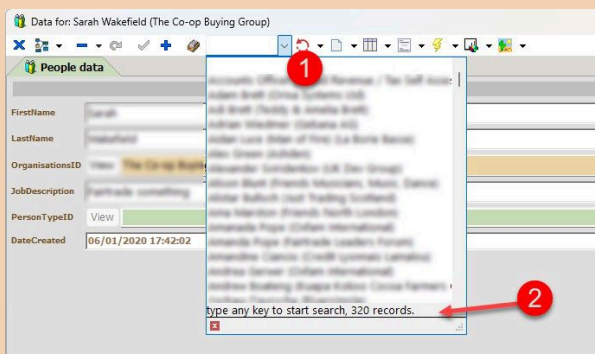


Edit Form Search Panel

The Edit Form Search Panel

If your Developer has enabled the "Edit Form Search Panel" an empty text-field will appear in the Edit Form Toolbar. (marked 1., in the image)

Use this panel to navigate to records in the data-table.

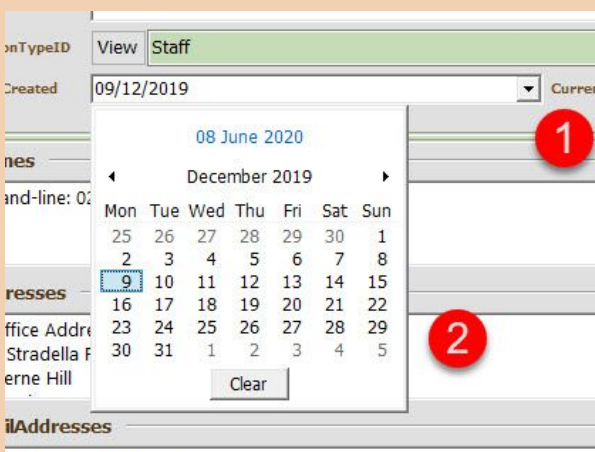


Edit Form Search Panel in Use

The Edit Form Search Panel In Use

1. Click on the Edit Form Search Panel and press "Enter" or click the "down-arrow". A list of records in the data-table will appear.
2. Start typing, and the list will narrow-down based on the text you type.

Move to the record you want to view and press "Enter" (or double click on the item with the mouse) to navigate to it.



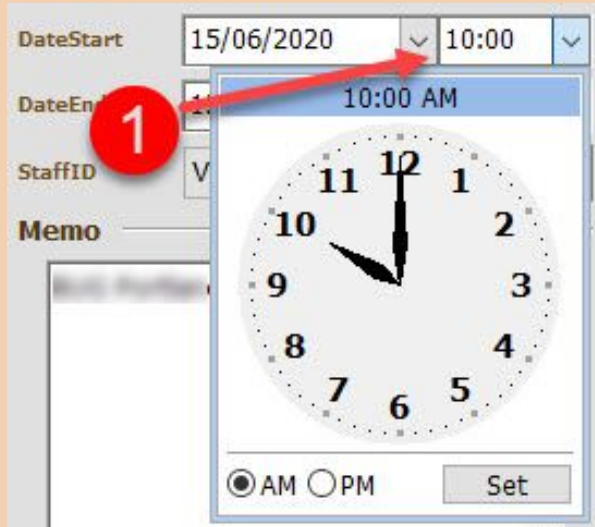
Date Editor

Data containing Dates

Any record which contains data defined as "Date" data in the database, will automatically appear with a date-editing features.

In the image the "DateOfBirth" field is a date in the database,so clicking on 1., opens the "Date editor" shown at 2.

This date-editor allows "zooming". If you click on the main date ("November 2015" in the image) the editor will zoom out to allow selection of first months, and then years.

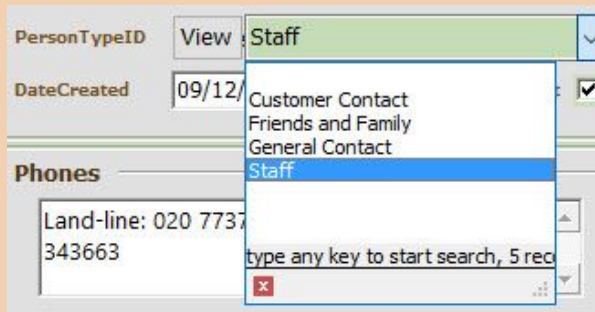


Time Editor

Data containing "Timestamps" (a date + a time of day)

If a record contains fields which are defined in the database as "Timestamps" they will display with a date editor **and** an additional "time" editor, as shown in the image.

This allows visual selection of the time of day, by clicking on the clock-face, and selecting "AM" or "PM".

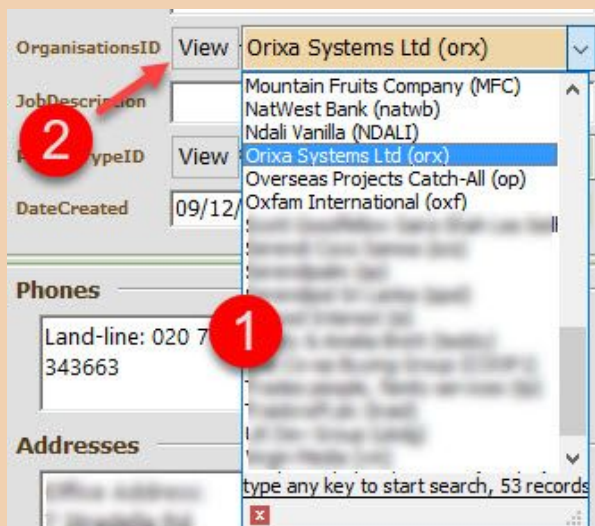


The above list shows "type" data, remember this is only one of several possible lists that can be created by the system. Others include "Status" lists, and "Linked Record" lists, detailed below.

Most data-tables in the database include data-fields to allow grouping and classification of the records based on lists. The example on the left shows the options for "types of people".

Note that all "Type-lists" (which usually display green in the edit window) can be amended and edited, provided you have adequate security.

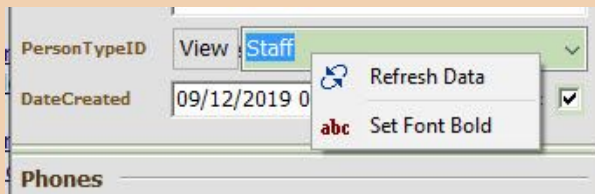
If the list does not contain all the items users requires, click on the "View" button to the left of the list to view the linked record. You can then edit the data and insert new records.



Linked Records

A key feature of Orixia is its ability to link different data-tables together. In the example on the left, a person linked to the Organisation "Orixia Systems Ltd".

1. Click the drop-down arrow to open the list of Organisations in the database. The drop-down list will always show a full list to choose from
2. You can View the linked record s Edit Form by clicking the "View" button. All View buttons function in the same way, so it is possible to move from record to record through all linked items in your database.
3. The list of Organisations can be searched by typing. Typing will search the list for the search-text typed by the user. Hit "Escape" at any time to cancel a search.



Refresh List

All lists in the system are "asynchronous", so new records that are added to the system after the form has been opened will not be visible immediately.

If a record is not present, to refresh a list, right click on it and select "Refresh".



ID List Editor: Linked lists of simple records

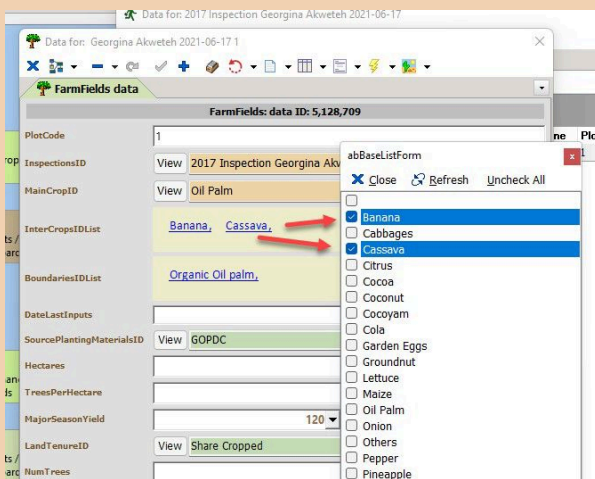
ID-Lists

Orixa includes the ability to create pick-lists from which multiple-entries can be selected.

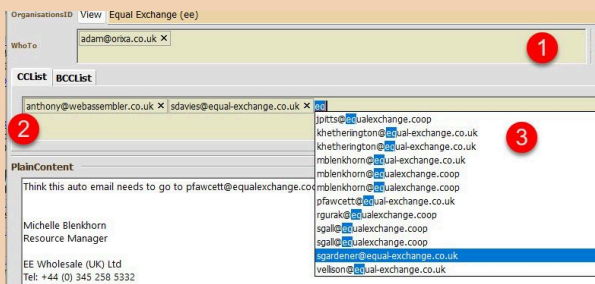
These "ID Lists" show light-yellow marked 1. on the left.

Click on any item in the list to view the linked data. Or double-click on the light-yellow area to open the full list to pick from, as shown in the lower image on the left.

Pick-lists of records to add in an ID-List are formed from data entered elsewhere in your App, so you can control and change the list of records.



ID List showing picking form



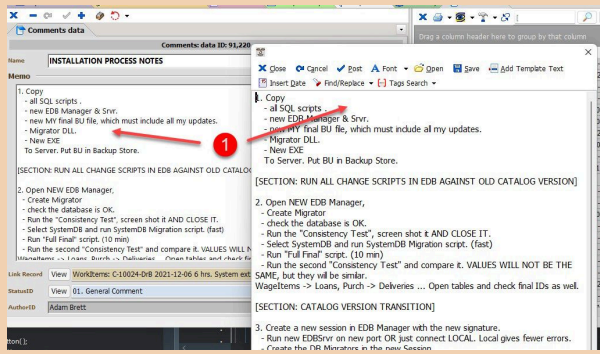
Edit Form "Token Edit" Control

The "Token Edit" Control

Orixa includes the ability to show "lists with x's" as shown in the image. The user can type or pick elements, and each is shown in a box, with an "x" beside it allowing deletion.

This mimicks the functionality of applications where users can type and pick things like email addresses from saved lists.

1. The Token Edit.
2. Items in the list, which can be deleted by clicking the "x".
3. A list of items to pick-from.



Memo Edit

for a longer Help document about the "Memo Editor" please look at this item: [The Orixia "Memo" window](#)

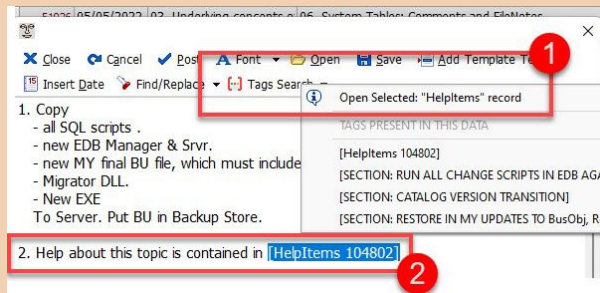
Long Text / Memo Fields

Any field which is define in the databased as a "CLOB" or "MEMO" field (which allows long sections of text to be saved) will display a long-text editor, as shown in the image.

This editor has many built-in behaviours, such as cut/copy/paste, spell-checking etc.

Double-click on the field to open a **dedicated text-editor** which can be expanded in size, and which features additional capabilities as shown in the image on the left.

- Insert any text you want into the memo-field by clicking on "Open" and selecting a suitable text-file from your computer.
- Similarly you can save text in any field to a file on-disk, by clicking on "Save".
- Find/Replace allows global searching of longer text documents, and features the windows standard "F2" and "F3" to repeat the action.
- The "Add Template Text" button opens a window of text segments the user can add to the field. The user has to add entries to this list for it to be useable.
- The "Insert Date" button simply adds the current date to the text being written.
- The ability to hear the contents of the memo spoken by your computer, using Text-to-Speech.



Tags Search link to Specific BusinessObject Record

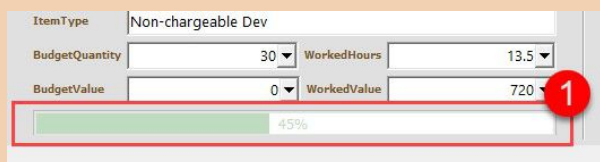
Orixia " Tags Search" Feature

The Orixia Framework includes the capability to add "Tag-searching" to long-text / memo fields.

Tag-searching simply adds a very minimal mark-up" capability to the memo field, allowing staff to type in text enclosed in square brackets and to have these "tags" interpreted by Orixia.

This can be a really useful feature, and is discussed in more detail here:

[The Orixia Memo window](#)

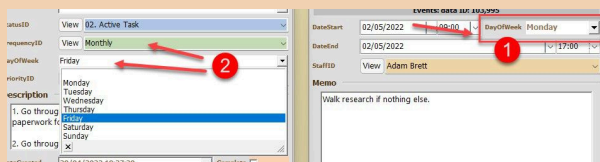


PercentUsed or PercentBar control

Percentage Completion

Specialized forms can include a "PercentBar", also called a "Progress Bar", this is used to display items with their completion-percentage.

Users usually cannot edit a "PercentBar", its value will change depending on other data in the App.



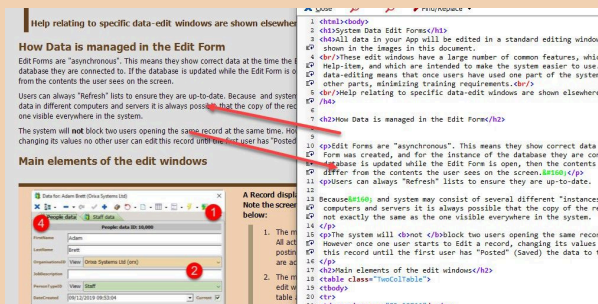
Day Of Week Edit

Specialized forms can include an Edit which shows a day-of-the-week, allowing users to easily pick one day, or see the day of the week for a particular date.

Specialized Elements of User Interface

Orixa includes a full set of basic editors for values such as dates and numbers, to make it easy for users to reliably enter data. It also includes a set of specialized editors for managing links between the data, which are key to how Orixa works.

Finally, it includes a small number of specialized data-entry mechanisms for handling useful processes and forms of data, these are less widely used, but are still available if your App should need them.

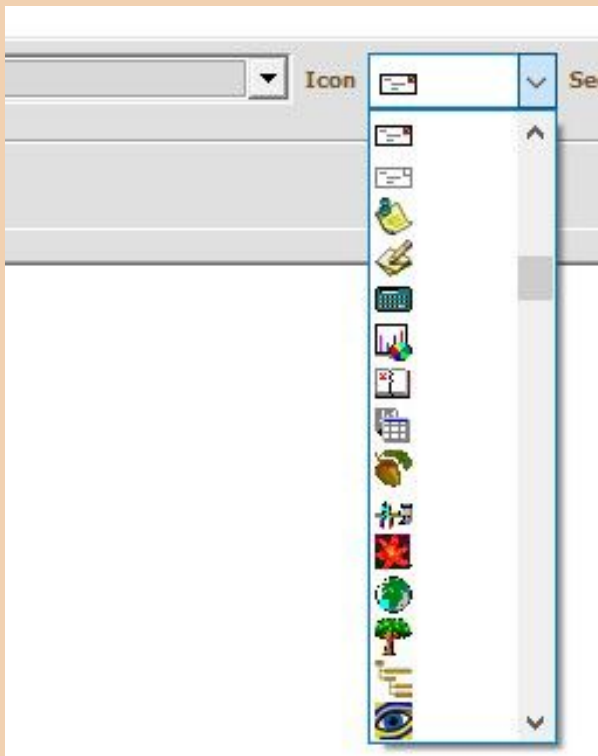


HTML Editor with Mark-up Editor open

The HTML Editor

The text you are reading right now was edited in an Orixa HTML Editor. This allows the presentation of complex data with formatting, tables, images etc. Users can review and edit the data, and it can be shown in any part of the App.

[To review HTML Editor's Features and Short-cut keys check this link](#)



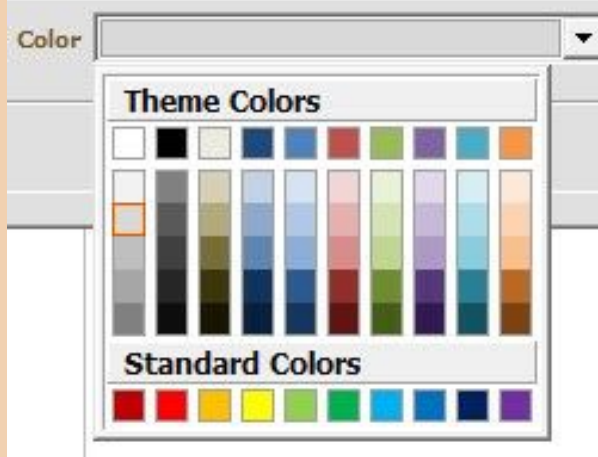
Icon picker

Icon-picker

Orixa includes a short-cut to link records to tiny icon-images. This linkage is achieved by your Developer, and allows any record in any data-table to be linked to an identifying image. This can be useful if records are displayed visually.

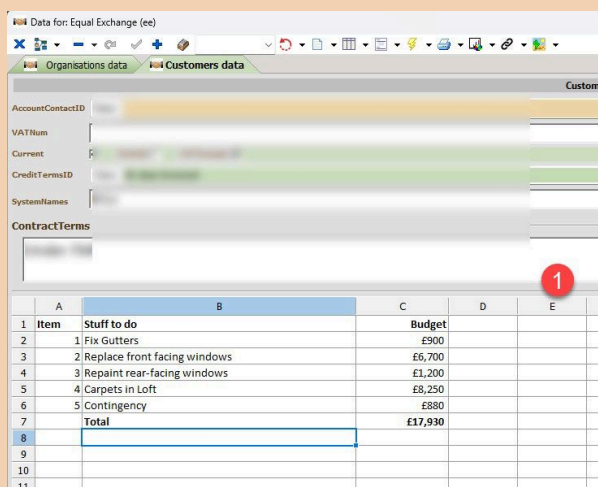
Note that these icons can then be used in elements of your App such as the "links-list" detailed above,.

Color Picker



Color Picker

If it is useful to link a record to a color, your Developer can add a Color-field to a data-table in your App, and individual records can be assigned a color.



Spreadsheet component within Application

Spreadsheet editor

If it is useful to link a tabular / spreadsheet data-entry process to a Business Object Edit Form, this can be done easily using Orixa.

Full details of all the features of this editor are detailed in a longer help article here:

[Orixa Spreadsheet Editor](#)

Adding data

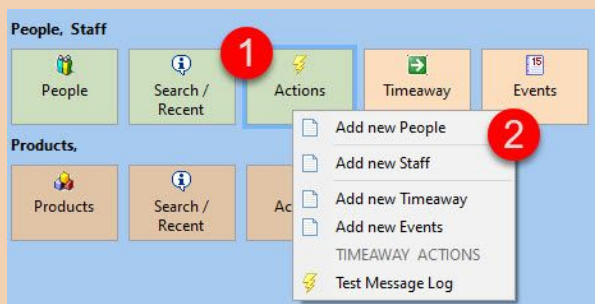
All Orixa data-entry is managed within **Edit Forms**. These are standardized editing windows that format underlying data in a way that should make them easy for users to understand and use.

Wherever you are in Orixa, if you see a standard edit window you know that it is a place where you can add and edit data. Other user interface elements such as data viewers, grids, charts etc. are almost always usually read-only. This means that as you move around your Orixa system you can never change data just by viewing, opening or looking at items. To edit data an edit form must be visible.

To edit data, double click on an item that is linked to a data-record and an Edit Form will open. If you do not have adequate security to view or edit data your action might be blocked at this point. Once open the Edit Form gives access to a whole range of actions, data-views, reports and dashboards which are linked to the Business Object that creates each Edit Form.

The detailed function of the edit form, its reports, views, dashboards etc. are all dealt with in other Help documents. Every edit form will be different, and contain edit-fields based on the database table it brings data from. You will need to learn what the fields in each Edit Form are used for. Special Help should be available on each Edit Form if this is needed.

From the System Entities Screen

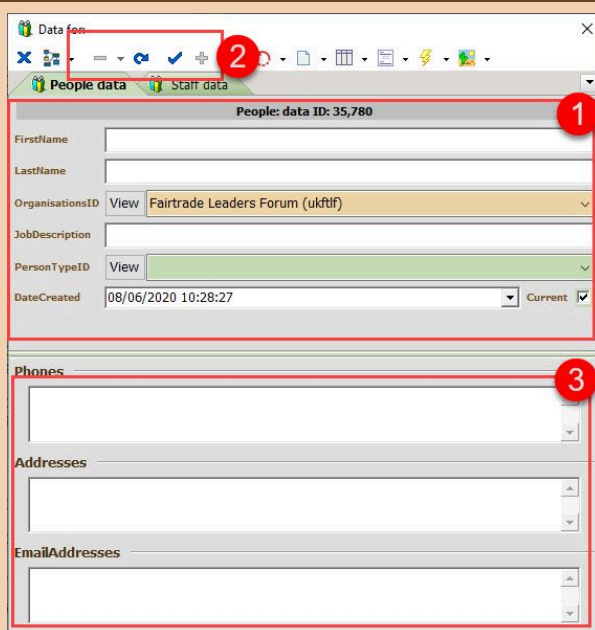


New Record

To Add Data

The first place you can add data in the system is from the System Entities screen

1. Select the entity with BusinessObject into which you want to add data, and click on the "Actions" button.
2. A list of Actions will show. The top of this list should include items "Add new xxxxx", for each BusinessObject. Click on whichever BusinessObject you want to add data to.



Edit Data

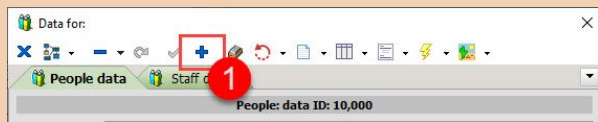
Adding data in Edit Form

Just click on the blue "+" button in the top of the window (marked 2., in the image)

For basic use:

1. Enter data for a new record into the fields provided. Each field has a clear name attached (FirstName, LastName etc. in the image).
2. Click the blue "tick" to post/save data to the database, or click the blue "undo arrow" to cancel an edit.
3. Remember that that **summary panel** does not allow editing of data. You can only edit data in the area marked "1." in the image.

Note that the summary panel is optional and will not be present in all edit-forms.



Add data

Repeatedly adding data

Once an edit form is open, if you are entering many records, just click on the blue "+" to insert each new data record.

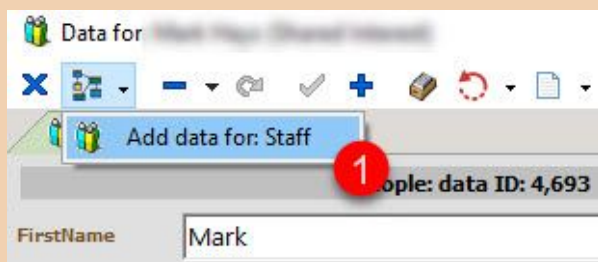
Adding Extension data to a record

Very often BusinessObjects in Orixa are segmented into parts, with each part in a separate data-table. There is a "Master" data-table, and then additional "extension" data-tables which hold pieces data that do not need to be added to every record.

For example, all Orixa systems include a standard "People" data-table. This just contains "FirstName", "LastName" and a few other simple fields. If you want to extend your system you can add extra fields to the "People" data-table. However you might be better to add an **extension** table for example "Staff", or "Farmers" which can be used to hold data for People who are also Staff or Farmers. In this way you do not need to see all the data-fields that relate to Farmers when you are editing Staff data and vice versa.

By using the **extension** model Orixa can easily scale up and hold complex data, and data can be stored efficiently. All farmers' data is stored in the "Farmers" data table, but this table does not store the farmer's names. Their names are stored in the "People" data-table. Searches for Farmers will return the People Edit Form, with a Farmers tab added. In this way you can easily search for any data, and see all the interlinked parts in one place.

An Edit Form will only allow the addition of extension data if the BusinessObjects in the database are linked together following standard Orixa framework rules.



Add Extension Record

Adding Extension data records

Find the "Extensions" button in the Edit Form (shown at 1., in the image). Click to view a list of extension data you can add, and click to add the one you want ("Add data for: Staff" is shown in the image).

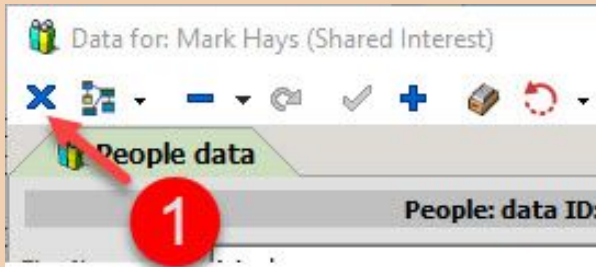
The addition of this Details record does two things:

1. It allows new fields to be stored in the database (such as a Staff member's Department, team, payroll number etc.).
2. It changes the definition of the person into a person who is also a staff member.

Becoming a staff member may "unlock" new actions you can do, for example with "Staff" you might be able to add "Wages", but with a "People" record you cannot.

The Edit Form toolbar

Throughout the system programmatic actions are accessed either by clicking or right-clicking on a particular item for actions which are directly related to that item. Programmatic actions (such as printing some report, opening a new part of the program etc.) are accessed via toolbars, and the toolbars are always located at the top of the section of the screen occupied by the element. This is done in an attempt to standardize the user interface and make it as simple and easy to understand as possible.

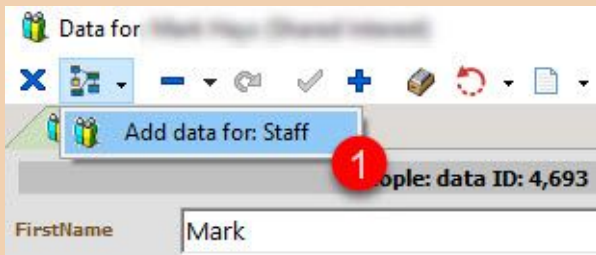


Framework Form Close Button

The Close Button

Any part of the system which allows the user to close it, features this simple "x".

Click on it to close this part of the system



Framework Form Add Extension Record

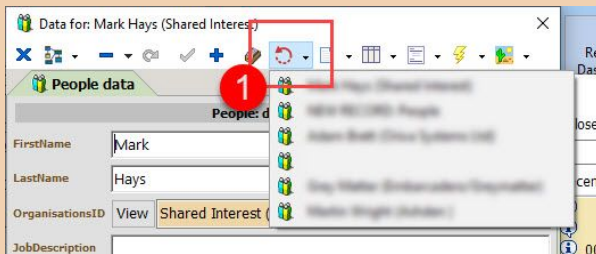
The "Add Extension Data" Button

Some data-tables in the system are linked together with "Master" data-tables (such as "People" and "Organisations") and "Extension" data-tables (such as Staff and Suppliers).

All Staff are People, and are recorded in the system with data in two data-tables, the "People" table and the "Staff" table. The People table is used to hold basic data about the person, while the Staff table "extends" this data with information specific to staff.

In this way the system can be made flexible and hold data efficiently. A person can be added to the system, and later (if they become a member of staff) Staff data can be added.

This concept is widely used to allow data to be separated into useful "chunks", and to reduce redundancy.



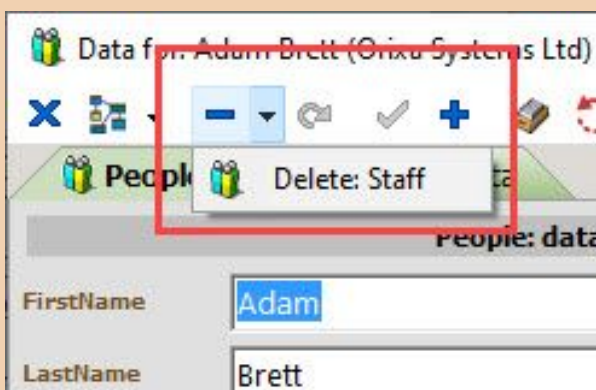
Framework Form 11 Recent List

Main Menu "Recently opened" button

This button replicates the "Recent List" shown in the Model Diagram Entity, described elsewhere in the Help.

Clicking on any item in the list will immediately show the database record for the selected record.

As a user opens different records in the system, they are automatically added to this list. The list contains up to 20 entries.



Framework Form Delete

Main Menu "Delete Record" button

Clicking on the main "minus sign" delete button will delete all delete the content of all the Tabs (Farmers, People) in an Entity one-by-one. Users will be asked to confirm deletion before each tab is deleted. If a record has only one tab, they will only be asked once.

If a user wants to delete just one tab, they should click on the down-arrow beside the "Delete" button (shown in the image on the left) and select the tab they want to delete from the list.

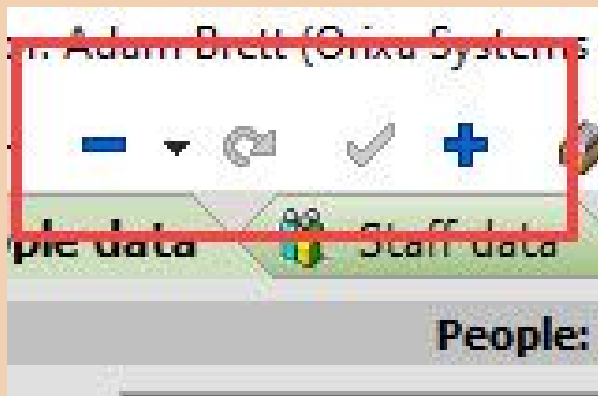
Note that it is often impossible to delete records in the system.

If any record is linked to other data (for example a Farmer with Purchases data, or a Staff member with Wages data) attempting to delete the record will be blocked.

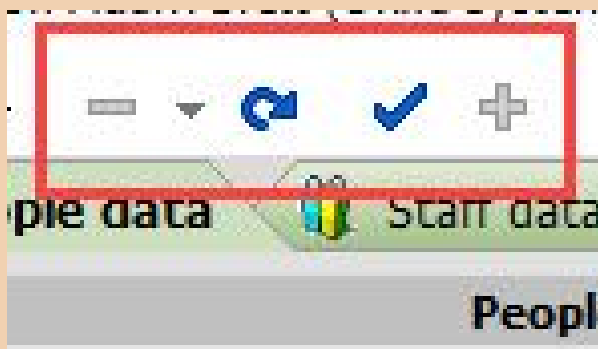
This is due to the fact that deleting the record leave an "orphan" records in some other data-table. This seems like a severe constraint until you realize that it is rarely necessary to delete records. Simply untick the "Current" field in most data-tables and they will be de-selected from view in the system.

This feature is designed to guarantee safety and integrity of the system database.

If it is necessary to completely delete data, it is possible to write system procedures to do this. These procedures will incorporate code to update or delete the "child" data for any records so that no "orphan" data is left behind.



Undo-Post-Add Buttons on a newly opened record



Undo-Post-Add Buttons once a record is being edited

Main Menu "Add, Post and Undo" buttons

The next three buttons on the menu control the main actions for editing data

"Undo" (the backwards arrow) this cancels any edits the user has made.

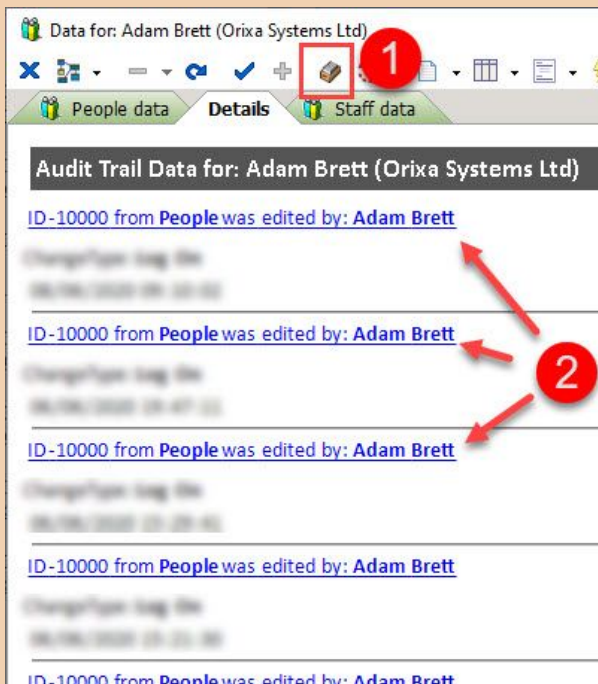
"Post" (the tick) this sends edits the user has made to the database, storing them for others to view.

"Add" (the "+" sign) this inserts a new record into the database.

Note how the buttons change as you start to edit data in an edit-form. This helps to indicate the state of the data.

When the "Post" button is illuminated blue, the data in the edit-form has **not** been posted to the database.

Note that when an edit window is closed if data has not been posted the system automatically posts it for you.



Framework Form Edit History Listing

"Audit Trail" button

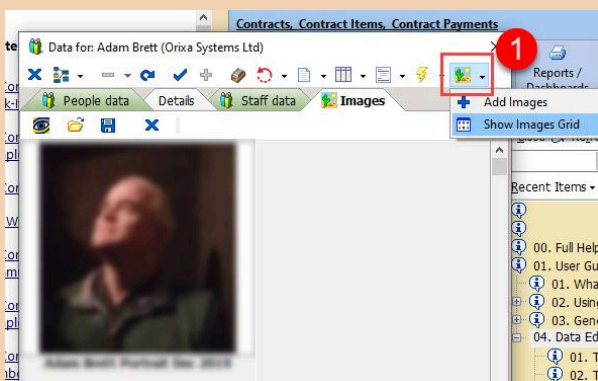
Whenever a user edits any data in the database a small "audit trail" record is added to the "EditHistory" system-table in the database.

To view details of the change, click on any blue-underlined "link" to open an Edit form with details of the changes. Note that this form is read-only.

If you want to see changes a user has made click on the "Audit Trail" button marked "1." in the image on the left. This opens a window listing changes made with the name of the user who made the change and details of the date and time the record was edited.

This audit list can be used to check changes made in the database, particularly to check whether users have been tampering with data or doing things wrong.

This Audit Trail is automatic for all edits of all records by all users. It does not store a full "change listing" (ie details of the changes that were made). Full change-listing can be done using other features in the system.



Show Images

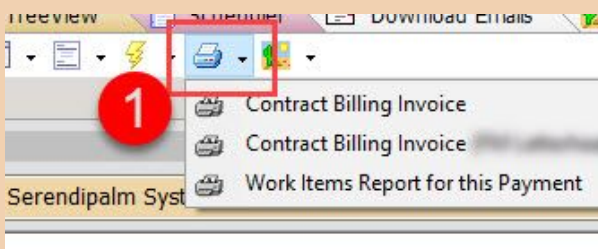
"Show Images" Button

The "People" BusinessObject includes links to the Images system-table, as shown in the image. This allows any number of images to be linked to each data-record in the "People" table. These images can then be viewed, edited and used in the System.

Any BusinessObject can be linked to the Images system-table. Usually only a few actually are linked in this way.

This image-store is designed to store images while minimizing the size of picture-files in the database, and also stores "thumb" images with all generated images, allowing easy retrieval of small versions of the images.

More detail on managing images in the system can be seen here: [The System Images Grid](#)



Edit Form Print Reports

Printed Reports Button

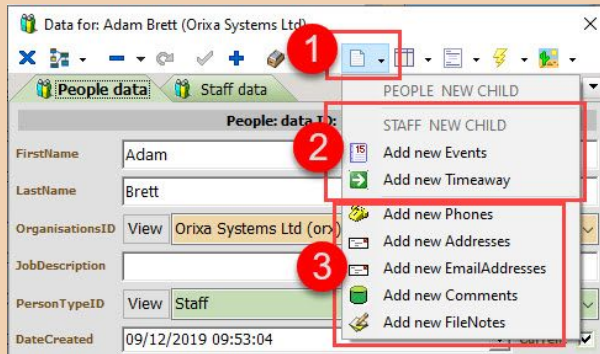
Click on this button to show a list of Reports linked to the BusinessObject.

Some reports will only be visible if you have adequate security.



Framework Form Items Menus

"New Items", "List" and "Grid" buttons



FF New Items

New Items

This lists all "child" data-tables which can be linked to the currently visible record. It is usually possible to add "Comments", other entries in this list will depend on the particular data you are looking at.

Click on any item to add a new record to the selected data-table, with a link back to the current record.

1. The "New Items" button
2. Sub-lists of new child-data that can be added are grouped together with their linkage to the Business Object.
3. Data linked by soft-links are shown at the bottom.



FF Linked Items

List Items

This list should contain some of the same list as the "new" list, but with the option to view any linked data.

Click on any item to see the list of linked records from each data-table.



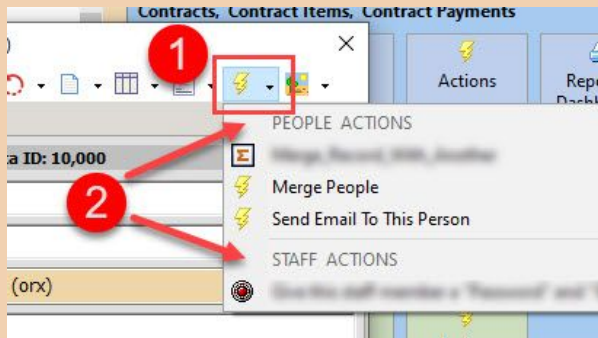
FF Child Items

Grid of child Items

This list should contain some of the same list as the "new" button, but with the option to view linked data in a "grid" format.

Click on items in this list to see the linked records.

1. Click here to access the list of child-grids.
2. Linked records are grouped according to the business-object they are linked to.



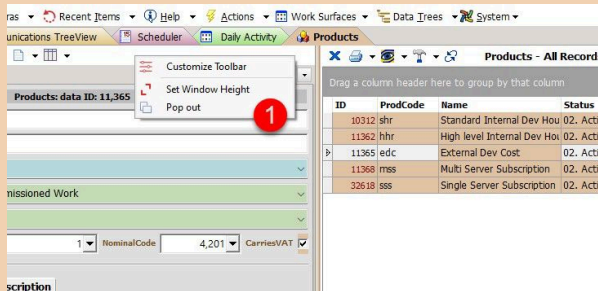
Actions Menu

Actions available for a data-record

Each Business Object may have programming added to allow actions to be triggered when the user is editing a record.

For example, sending an email to the selected person.

1. These actions are accessible from the "Actions" button.
2. The actions are segmented by Business-Object.



Toolbar Popup Menu

The toolbar contains multiple buttons with their own actions and menus. However it also contains a menu of its own.

right click on the toolbar **away** from any other button or label and the Toolbar Popup Menu will appear.

This contains 3 items:

1. "Customize Toolbar" clicking on this item opens a window allowing the user to show and hide tool-bar buttons.
2. "Set Window Height" Clicking on this item opens an entry screen to allow the user to set the height of the edit window. This can be easier than resizing it using the mouse in some situations
3. "Pop Out." If the window is "parented" within the Application screen, so it is fixed next to some other item, but you would like it to be free-floating, click on this item and the window will "pop out" so you can position it wherever you want on the screen.

Commonly used fields in Edit Forms

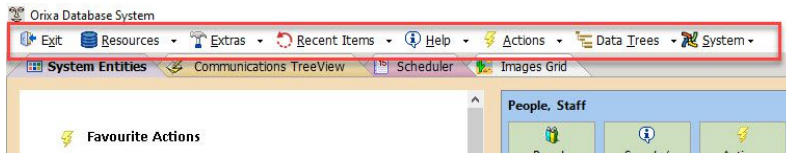
A typical Orixa edit-window

1. **ID** and **OID** fields. These are the automated reference-counting fields added by Orixa to your data. Each ID or OID is unique. Every record in the database has an ID field, and this rises for every record added. This means that ID fields are **not sequential** in one data-table, but they are sequential over the whole database. Some tables have an "OID" field. This increases within one single table, so "OID" fields **are sequential**, allowing them to be used in some situations such as accounting where an absolute order is important. Both fields can be very useful for keeping track of records
2. **StatusID**: This is a drop-down list, similar to the "type IDs" detailed above, but it includes the capability to **order** the type-list, and extend management of the records using the **Kanaban Board** concept.
3. **Tick-box fields**. These are commonly used to track the state of a data-record. Orixa allows users to add and edit these within their Business Objects, and allows for them to be set by **computation** so the value of other data may tick or untick them.
4. **DateCreated**: This is automatically set to the date/time that the record was created, and it cannot be changed. **AuthorID**: This is automatically set with the name of the last person to **edit** a record. **Complete** once ticked, users cannot edit the data in an edit-form unless they first un-tick this field. The Complete field is useful as a soft control on editing data. **Current**: Usually this box is ticked by default when a new record is created. The current field is useful to control appearance of records in lists and reports.

The System Menus

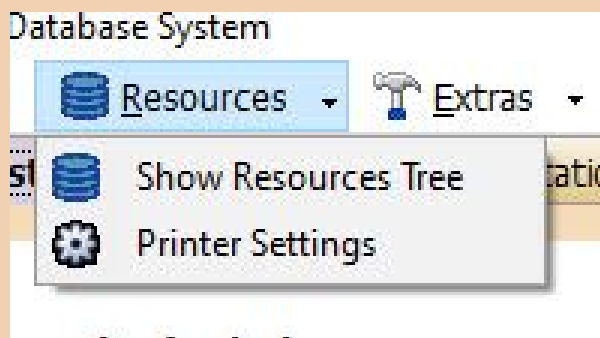
Orixia includes a standard menu. This document provides details of its operation, and shows where it can be extended and added to by Developers.

The main system menu



System Entities Main Menu

Elements of the main system menu



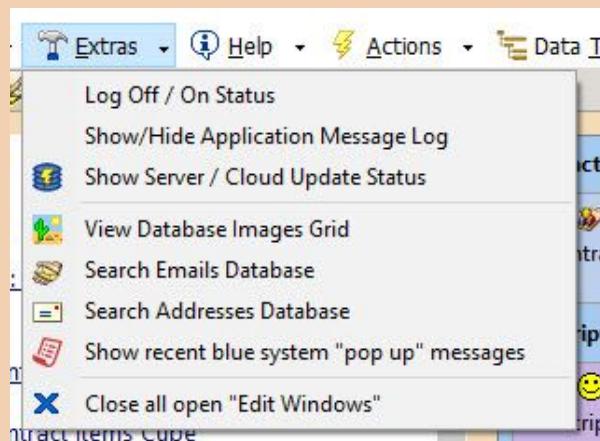
System Entities Resources Menu

The "Reporting" item of the main-menu

The items on this menu open the system "Resources Tree" and a dialog-form for printer settings.

Full details of how to use the the "Resources Tree" is covered here:

[The Resources Treeview](#)



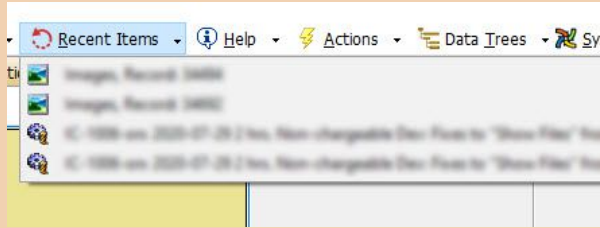
System Entities Extras Menu

The "Extras Menu"

The exact content of this menu will vary from system to system. The image shown on the left may not exactly match your system.

- Log Off / On Status: Click here and the system will log you off (if you are connected) or log you back in if you have disconnected.
- Show/Hide Application Message Log: The message log is the grey area that opens on the right-hand side of the system, showing messages. Click here to show / hide.
- View Database Images Grid: This opens a grid containing all the images stored in your system, with options to search and find the specific image you want.
- Search Emails / Addresses: Opens a list of system-saved email and address data for searching / finding records.
- Close all open "Edit Windows": If your screen is crowded with large numbers of

open windows floating above it, click here to close them all.

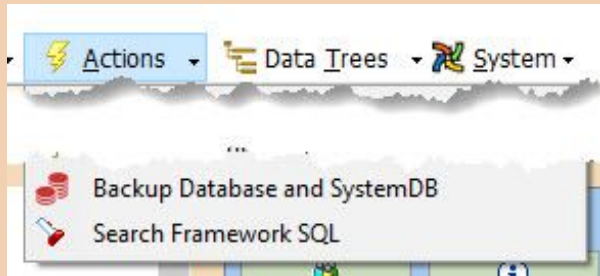


System Main Menu Recent Items

Recent Items Menu

Click here to see the most recent 30 records you have viewed. Use this list to go back to a record you looked at recently without having to search for it.

The list is reset each time you restart the system.



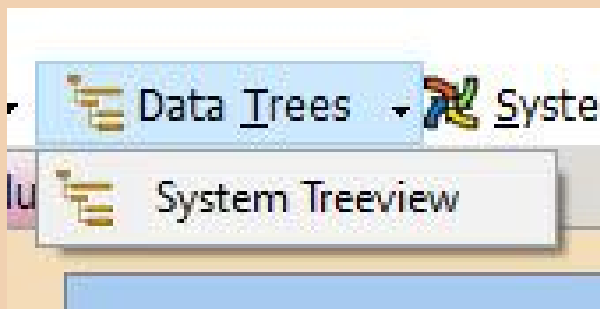
System Entities Actions Menu

The System "Actions" Menu

The contents of this menu are dependent on your system.

The list that is displayed here shows **System Procedures** that is special pieces of programming that your developer has added to your system.

The items in this list will vary from system to system depending on additions that have been made.



System Entities Data Trees Menu

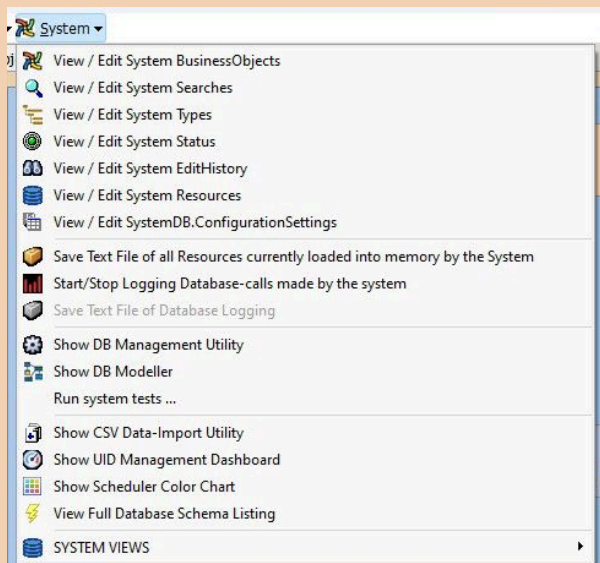
The System Data Trees Menu

The contents of this menu are dependent on your system.

Your developer can add "tree-views" to your system, which lay out the data in your system so you can work with it.

The details of what tree views are and how to work with them are detailed later in the help.

Any tree view that your develop has added will be listed here.



System Entities System Menu

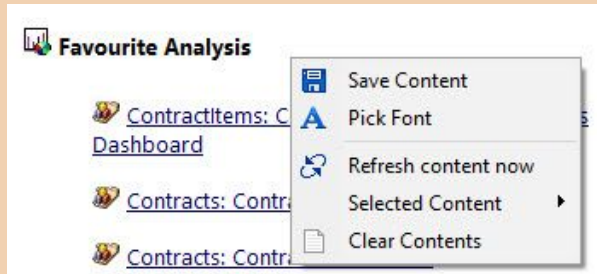
The System "System" Menu

This menu is only visible to higher level users of the system.

Its contents are detailed in the "Developer Guide" section of this manual here:

[System Administrators Guide](#)

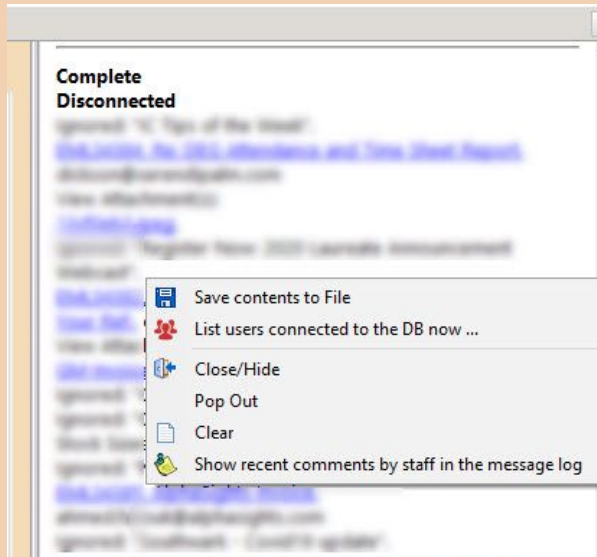
Some examples of Context Menus



System Entities Analysis Context Menu

The context menu of "Favourites" screen in System Entities

Note the item "Selected Content" allows you to show / hide categories of content, so you can customize it to show items you want.



System Entities Message Log Context Menu

The context menu of the "messages" screen in System Entities

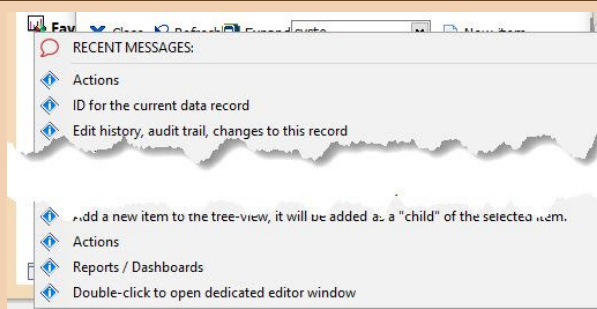
Whenever a system action takes place a grey-window containing messages from the system will open on the right-hand-side.

Right-click for the context menu for this screen. Note the "close/hide" option shown here.

The program "status bar"

Along the bottom of the system screen there is a grey bar, separated into sections. These show recent messages, a version number for your system, the current date / time, and the name of the person currently logged on (this should show your name).

Some parts of the status bar have their own context menus. These show system information.

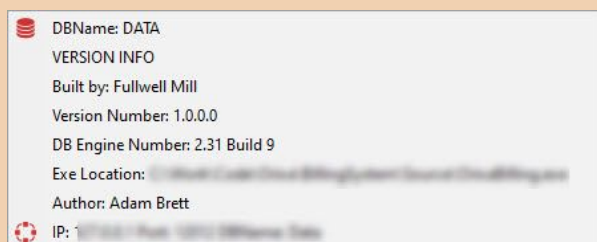


System Entities Recent Messages

Recent messages

As users move around the system "hints" display, to explain the purpose of different parts of the system. These hints are displayed on-screen, if you hold the mouse still, and are shown continuously in the status bar.

Right-click on the first section of the status bar (1.), and the 20 most recent hints can be viewed as shown (2.)



System Entities Version Info

System Version information

Right click on the "version number" section of the status bar to see the details of the current system.

These can be useful to confirm that you are running the latest version, and to check details such as the database connection you are using.

Charts: using the system to Visualize data

The Orixa includes capability to display data in a wide variety of graphic "chart" formats. Charts are most commonly displayed in System Dashboards, but can also appear in reports.

Charts come in 2 "flavours" charts based on grid-data, which are explained here, and charts which are linked to data-cubes, which are explained in the data-cube help item.

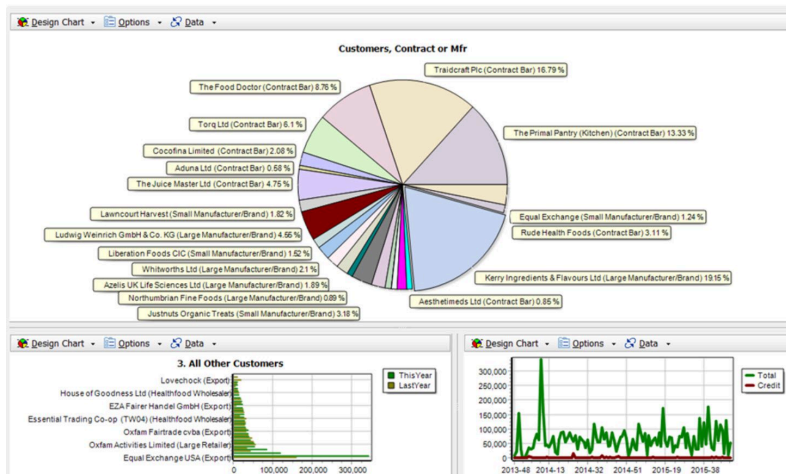
Note that all Orixa data can also be viewed from other business productivity tools such as Microsoft Excel via Excel's ODBC data management systems. Therefore any staff with knowledge and understanding of using Excel charting can build charts in Excel which draw their data from your Orixa database.

Charts are added to the system by adding a data-record to the "Resources" system-table, and then designing the chart within your App to control how your App displays the record. How to do this is dealt with in a developer help topic Creating Reports.

Link to Developer help topic:

[Creating Reports, charts and dashboards](#)

Charts in Dashboards



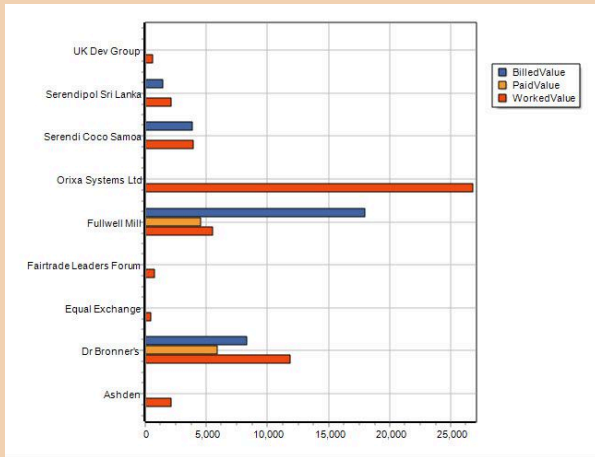
A set of charts displayed in a dashboard in a system

All charts create visualizations using live data from the database of your App. If any user has added data it will automatically be added to the chart giving truly live data-analysis. A wide variety of chart types can be created.

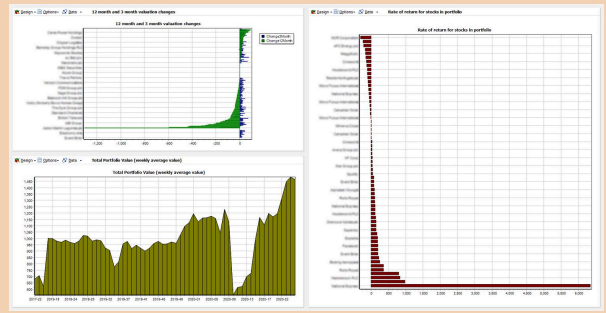
Examples of types of chart that can be produced in Orixa

All the major charting formats are supported by Orixa, such as vertical and horizontal bar-charts, line and area charts and pie charts. All can be presented in 2D or 3D formats with customizable colours, labelling and layout.

Charts can be arranged together in Dashboards providing summary data in a selection of different formats within one user-window.



Charts Multibar chart



Charts Examples: Vertical and Horizontal Area Charts

These styles of charts are excellent for tracking how quantities vary over time.

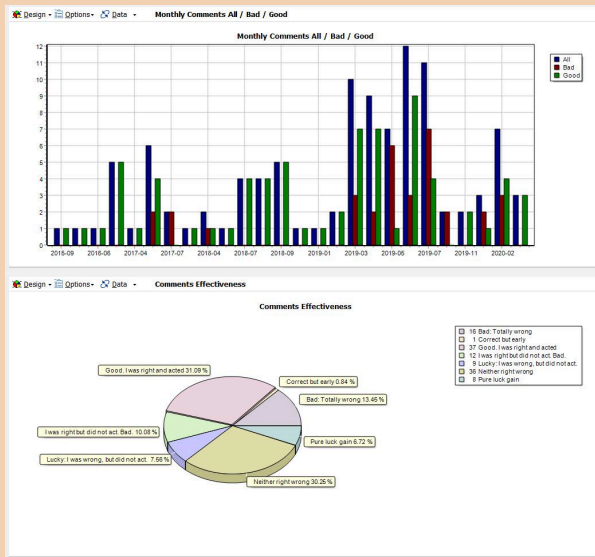


Chart Examples: 3D pie charts and 2D vertical bar charts can be mixed.

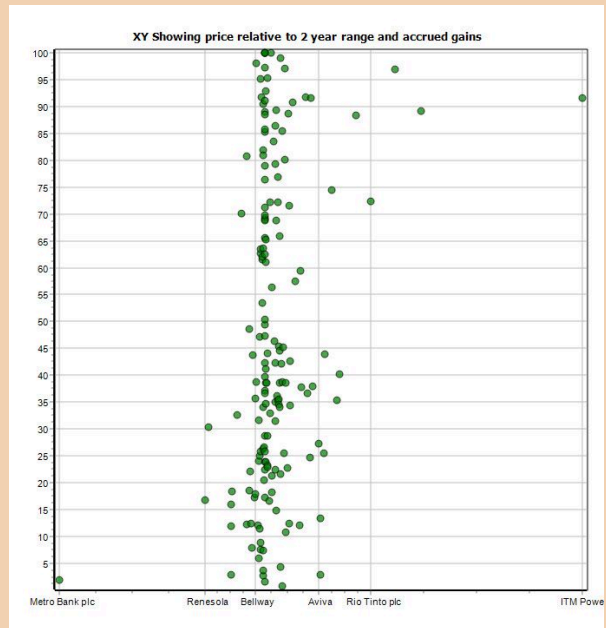


Chart Examples: An XY Scatter chart. This form is extremely useful for data such as the water activity levels of food products.

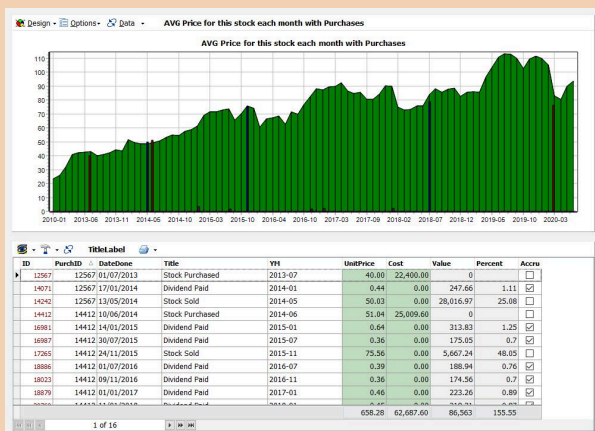


Chart and Grid Example: Dashboards can combine charts with other forms of data-presentation.

Editing and designing Charts

All charts are built from data which is returned from the database. Your System Administrator should write the SQL scripts to do this. Once data has been returned to a dashboard users with adequate security levels are free to edit and update the views shown in the charts.

If a user clicks on "Save" in the "Design Chart" menu then the updated chart will be saved for others to see.

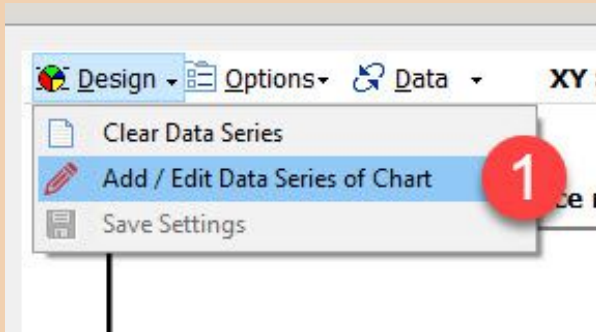


Chart Design menu

The "Design Chart" Button

If you have a new chart which has not yet been set up you need to add "Data series" for the user to view.

This is done from the "Design Chart", "Add / Edit Data...." menu-option (1.)

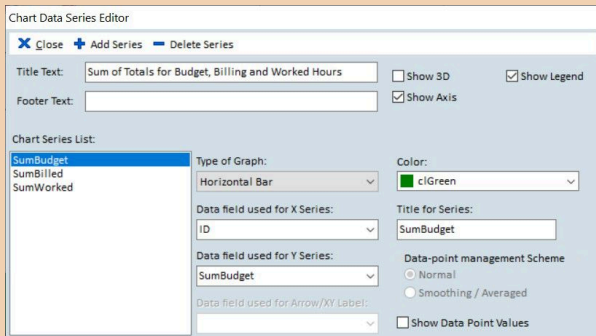


Chart Series Editor

The Chart series designer

Select the Type of Graph, the options for the X and Y series, options for color etc. and click "Update".

After you close you will see how the resulting chart looks.

The easiest way to learn how to use the Chart series designer is to experiment with it.

Chart design has been kept reasonably simple to make it as easy as possible for users to work with it.

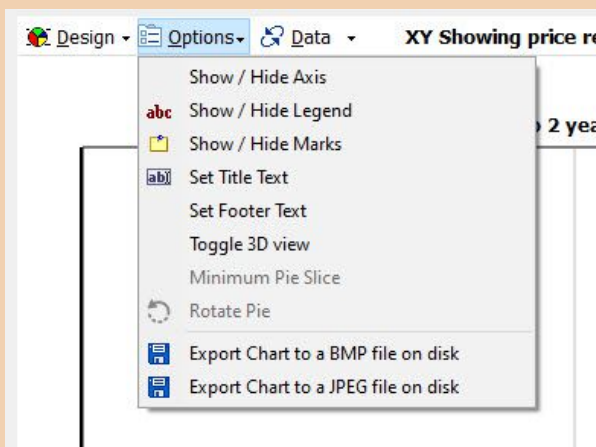


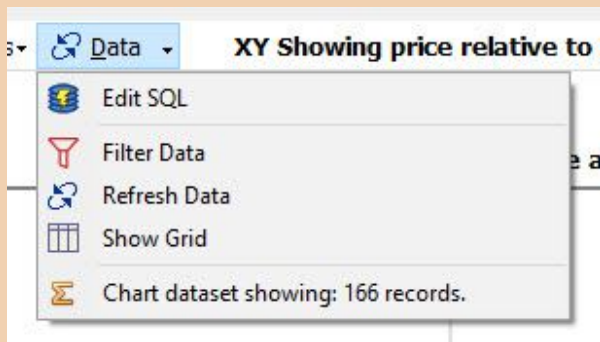
Chart Options Menu

The Options menu

Through this menu various options can be accessed to change the look and layout of a chart.

Most of these options are self-explanatory.

Note that this menu also includes options to export any chart as an image file for use outside the system.



Charts Data Menu

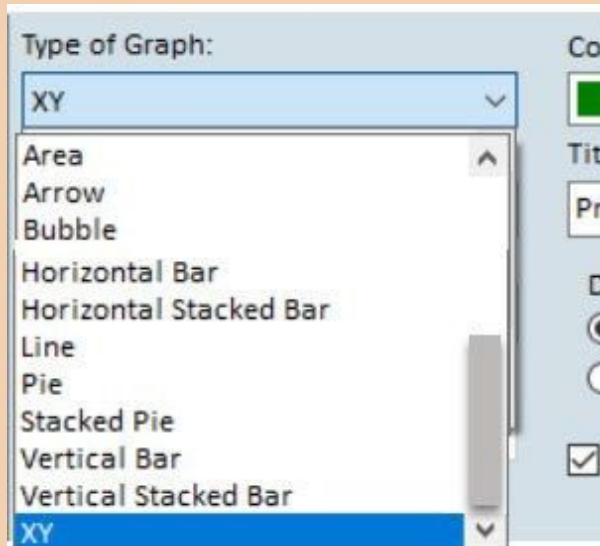
The Data Menu

This menu gives access to the underlying data that is shown in the chart.

It can be Filtered, Shown in a grid, or refreshed.

Note that if a user has adequate security level they can even edit the SQL script which creates the chart.

This allows power-users to update charts easily, directly within the system.



Charts Different Axis Types

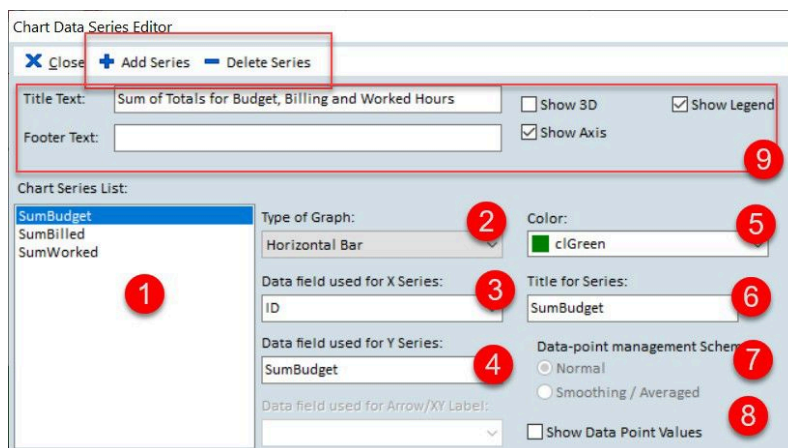
Different Axis Types

Orixa supports a small selection of useful axis types, including more esoteric options such as "Arrow" "Bubble" and "XY" as well as more common options such as Pie and Bar.

Note that care needs to be taken in Chart design, to ensure that there is enough screen-space to effectively display a chart. Too little space on-screen may result in a "squashed" chart which does not really show useful data.

There is an art to writing SQL Scripts which return data which is suitable for display in a Chart format.

Actually Editing a Chart-Series



Editing a chart series: Step by step guide.

1. All the "Series" in the chart (the displayed data) are listed in the Chart Series List Box. Click on any series and click "Add" or "Delete" to add and remove a series.
2. Select the type of chart series from the drop-down list (note the full list in the "Different Axis Types" table above).

3. Select the data-fields to use for the axis and value, or X and Y value of the chart. Note that the display here varies depending on the type of chart selected.
4. Some chart types require 2 and other require 3 data fields. In the image above only 2 are enabled for data entry, but if the "Arrow" or "Bubble" chart-types are selected all three fields will accept user-data.
5. Select the color of the data-series.
6. Select a title for the series.
7. Data can be displayed "as is" or a 5-point rolling average display mechanism can be used. Use the "Smoothing/Averaged" option if the data contains a high level of fluctuation and you wish to reduce this without mis-representing the data.
8. If the "Show Data Point Values" box is ticked data-points on the chart will have a label added showing the value. This can be very messy on complex chart-types, so it is left un-ticked by default.
9. Chart Settings Panel. Edit the values in these fields to change how the charts basic features display. The values in these fields do not affect the types of chart-series that are displayed, but change the look of the whole chart.

Common Errors when creating charts:

- The data-field selected for the "value" component(s) of a chart-series **must** be numbers. If a text, date or string field is selected an error will occur.
- It is hard to mix certain chart-types, but Orixa will still try to display them if it can. If one chart-series is a pie-chart and a second is an XY chart Orixa will display a very messy chart which does not make sense.

Chart Types to choose for different types of data:

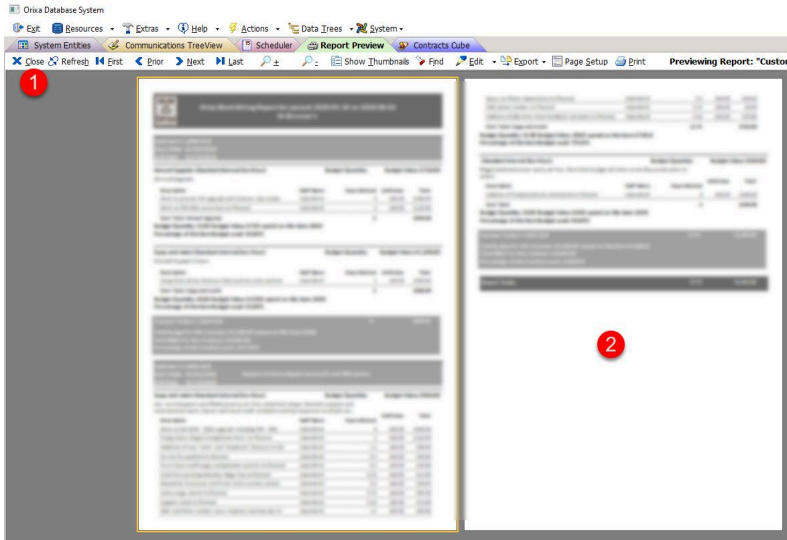
- **Pie charts and Bar charts** to display 5 25 records.
- **Horizontal Bar charts** to display 15 60 records.
- **Line charts** to display large numbers of data points, up to thousands. If your dataset is returning larger numbers than this it will not improve visually and it will be slow to load, but it will still display. Try to rewrite the SQL for your chart with additional GROUP BY clauses to reduce the size of the dataset.
- **XY Charts** to show the "scatter" of data, for example the spread of the level of productivity of different farmers against the size of their farms. This allows you to see which size of farmer is the most productive in an interactive scatter-chart form.

It is rarely useful to display charts that contain many hundreds or thousands of values, as the graphic format of chart representation does not easily convey such large densities of data. If your dataset is returning larger numbers than this it will not improve visually and it will be slow to load, but it will still display. Try to rewrite the SQL for your chart with additional GROUP BY clauses to reduce the size of the dataset.

The Report Preview Window

When a report is run in the system to create a printed output or PDF the result is displayed in the Report Preview window, shown below.

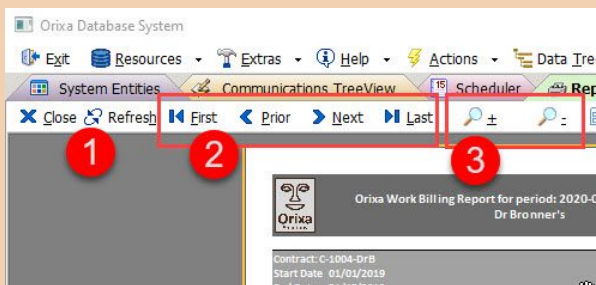
Note that this window is opened as a new Tab in the system, and can be left open for as long as required. To close it, click the Close button in the main menu.



Report Preview Page

1. The Main Toolbar for the report preview window, which is described in more detail below, the "Close" button will close the preview, but it can be left open while the user does other work on the system.
2. The main display area for the report.

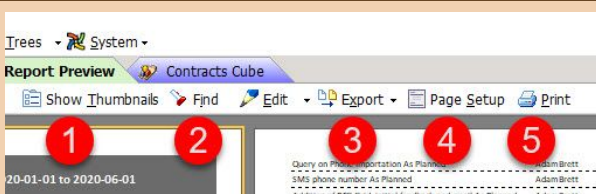
The Report Preview Main Menu



Report Preview Page Toolbar

Refresh, Navigation and Magnification

1. Refresh: Click here to rerun the report and fetch fresh data from the database for the current report.
2. Navigation buttons, click on these to move through the preview of the report.
3. Magnification buttons, expand and contract the size of the report preview.

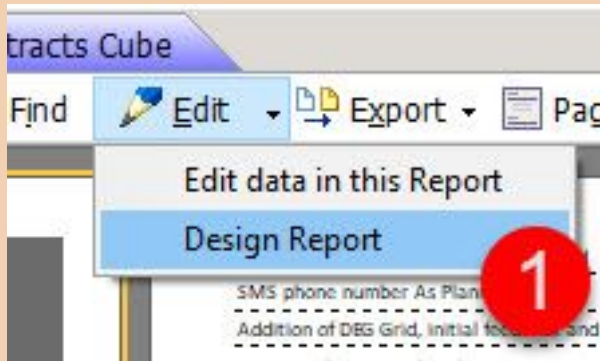


Other general menu options

1. Show Thumbnails adds a visual display of all the pages of the report in thumbnail size on the left hand side of the preview screen.

Report Preview Page Toolbar

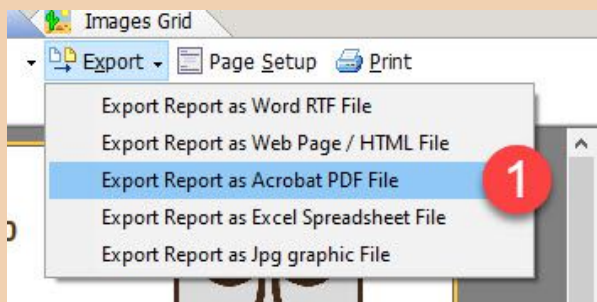
2. Find: Opens a search-box to find text within the report.
3. Export, click here for a list of options to export the report preview to a permanent file on-disk.
4. Page setup: Use this to alter the margins of the report.
5. Print: Click here to send the report to a printer.



Report Preview Page Design Report

Editing Options

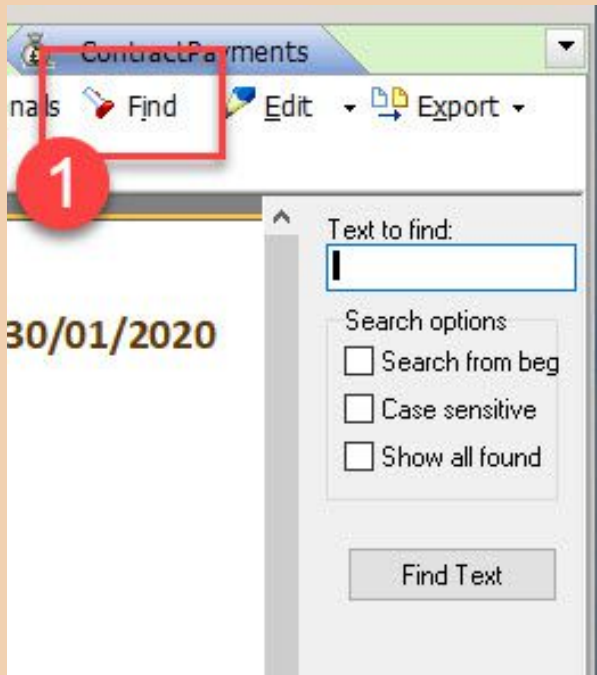
Admin users of the system can click on "Design Report" (1) to open the report-designer, which allows full customization of all reports in the system. Details of how to use the Report Designer are covered in the "Administrator" section of the help documents.



Report Preview Export

Export Options

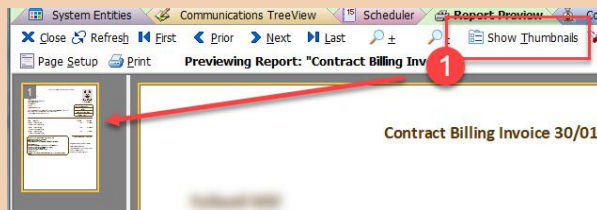
As well as printing a paper version of your report, ORixa allows permanent export of the data in a selection of commonly used formats, including PDF, JPG Image, and HTML File.



Report Preview Find

Find Button

When the find button is clicked (1), a small dialog window will appear to allow the user to navigate the document.



Report Preview Show Thumbnails

Show Thumbnails

When the "Show Thumbnails" button is clicked (1) the preview window will add a small area with thumb-nail sized versions of the pages. The user can click on any one to jump to that page.

KKFU System Installation and database management

This section provides links to help-documents related to the installation and management of KKFU Orixia systems.

KKFU uses a "back office" Orixia App "KKSys", an App designed for use by ICO officers in the field, and a "Teleagric" app which can be used for management of contacts with Farmers and staff by the Teleagric phone team. Installation is fairly straight-forward, Users run an App and view data stored in an Orixia database and shared between the Apps. For users in the office, both management and Teleagric team-members, can use the system as soon as they have been set up as a user, with a Password and Security Level, and given access to the KKSys or Teleagric executable on their PC or laptop.

For ICO officers, a local copy of the database must be made, and a database server must be set running on their computers. This is a more technical process, which is detailed in the help documents listed below.

[1. Installing the ICO System](#)

[2. KKSys Laptop Installation](#)

[3. KKSys Database Access: Frequent Issues Check-sheet](#)

[4. Managing AGIS Inspection Data Importation](#)

[5. Working with the "Import AGIS Data" and "Import Mapping" Screens](#)

[6. Save Local Updates Procedure](#)

[7. Incorporating data from the 2023 KKFU database into the 2024 version](#)

Installing the ICO System

The following document works through several options for installation.

When a computer already has a "KKSys" installation, when a computer is completely new, and when a computer already has an ICOSys installation but needs an upgrade or database replacement.

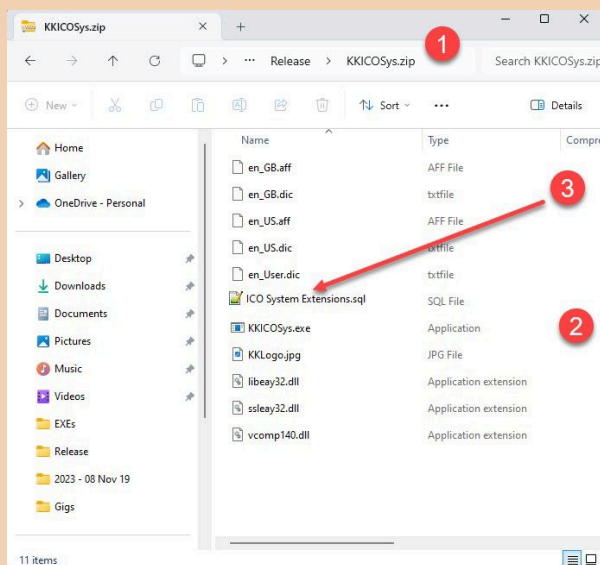
Installing on Laptops or tablet computers which already have KKSys installed

To install the ICO System, please follow the following steps:

1. Download the ICOSys.zip file from the Orixia website.
2. Copy the Zip file onto the ICO Laptop or tablet.
3. Extract the files from the Zip file into a folder under "C:\KKSys"
4. Run the "ICO System Extensions.SQL"
5. Check the "signature" in the Windows Registry Settings

The work required for some of these steps is detailed below.

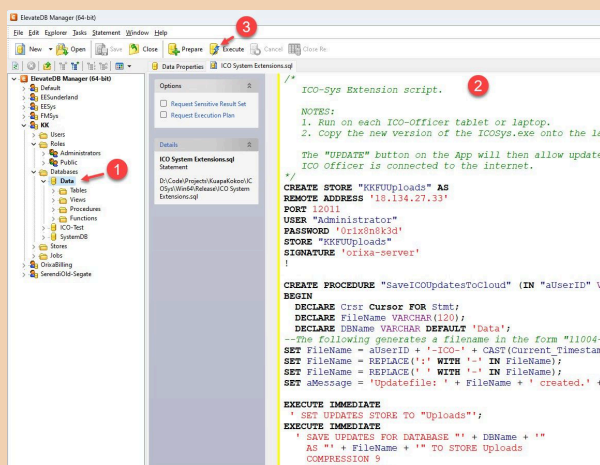
Running the "ICO System Extensions.SQL"



Files in ICOSys.zip

The KKICOSys.zip file

1. The user has double clicked on the ZIP file to show it's contents.
2. All the files in this window should be copied to some location on the laptop, such as "C:\KKSys\ICOSys"
3. The ICO System Extensions.SQL file



Once the files are copied across run EDB Manager

1. Ensure that the "Data" database is open and has focus.
2. Open the "ICO System Extensions.SQL" file.
3. Press "Execute"

Checking the Orixia "signature" in the Windows Registry

To undertake this please consult the web-page:

[Orixia Registry Settings \(www.orixa.co.uk/122455\)](http://www.orixa.co.uk/122455)

Note that for the new ICOSys, a new registry value must be added with Name = "Signature" and Value = "edb_default".

Installing the ICO System on new laptops or tablet computers

- Undertake the normal installation process for KKSys, but then replace the "KKSys" executable file with the ICOSys file.

The installation steps are detailed here:

[Laptop Installation Steps \(www.orixa.co.uk/115065\)](http://www.orixa.co.uk/115065)

Replacing the Database on an ICO machine with a replacement version

Undertake the following steps

1. Download the database backup file into the "Backup" folder / store on the user's computer.
2. If the user is using the OrxServer open it and restore the database following the steps laid out in the following link
3. If the user is using the EDBSRVR open EdbManager and **manually** restore the database

Link for step by step instructions for replacing the database:

[Restoring a database from a backup file in the Orixia Server Program \(www.orixa.co.uk/177794\)](http://www.orixa.co.uk/177794)

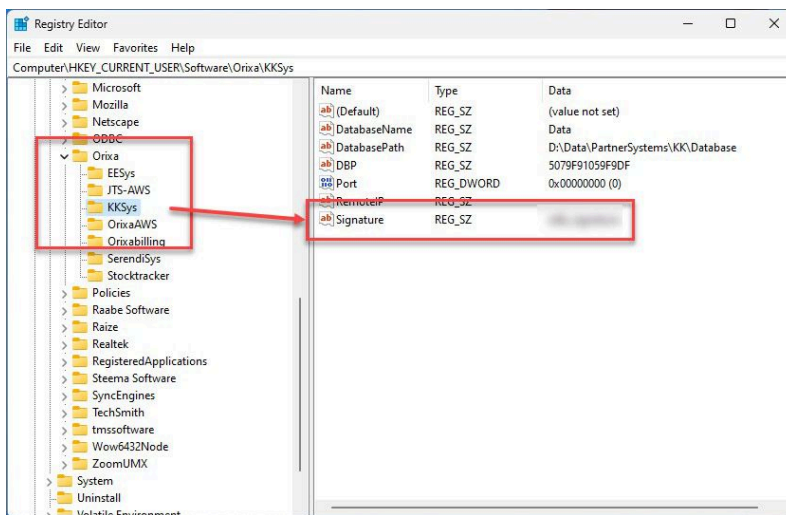
KKSys Laptop Installation Steps

Please follow these steps to make an installation on a KK laptop

Upgrading an existing laptop installation

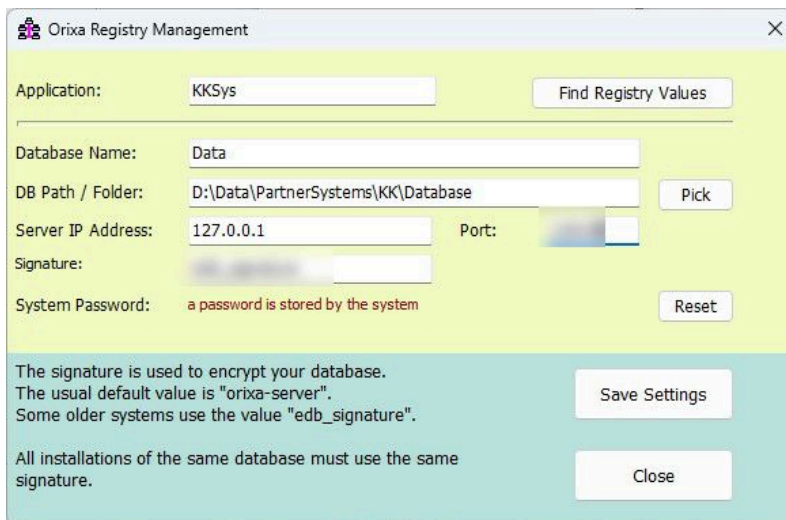
1. Take new backup files for the "Data" and "SystemDB" databases.
2. Copy the new EXE file into the appropriate folder on the laptop.
3. Use the backup files to restore the databases.
4. Check that the Updates Store is empty, with no "EDBUpd" files waiting to be transferred.
5. Check for the presence of the "edb_signature" in Regedit.exe under Current_User/Software/Orixa/KKSys

Reviewing the "Signature" settings in Regedit:



Database "signature" settings

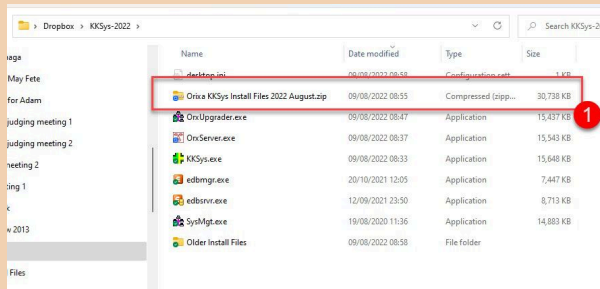
To Reset These:



Orixa Registry Management Utility

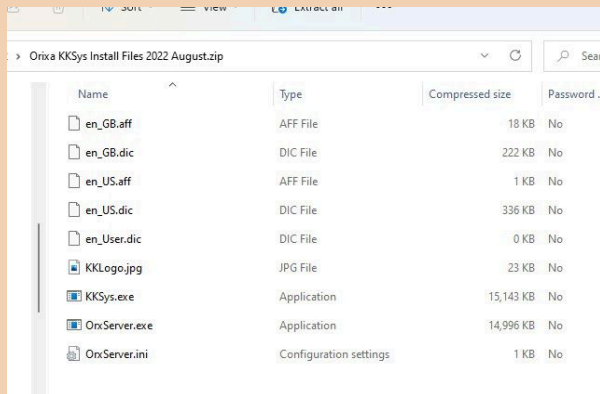
Open the Registry Management Utility, enter the Application Name "KKSys" and find registry values, then ensure that the "Signature" field is set correctly, other registry settings can be checked at the same time.

Installing onto a new laptop



Install Files from DropBox

Find the latest versions of the needed files. These may be stored on the server in the "Utilities" folder, or they may be available from the Orixia website "Downloads" page.



Contents of the ZIP file

The zip-file contains all the files needed for the laptop install.

Dictionary files (6 in total)

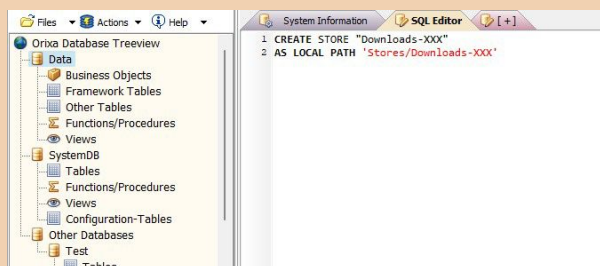
KKLogo.jpg (splash screen logo)

KKSys.exe, or IKKICOSys.exe or TeleAgricSys.exe

OrxServer.exe

OrxServer.ini

Supporting DLL Files



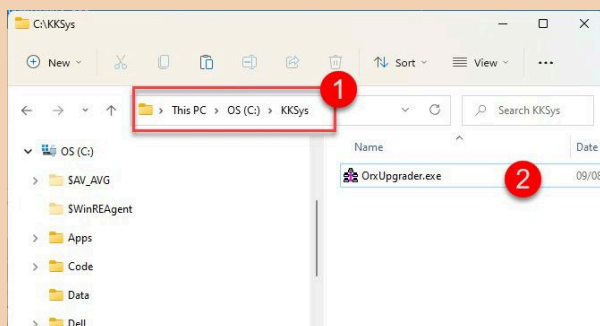
Create a new user-store

On the server, open the DB Management Utility page of KKSys and create a new downloads store for the new user by running the SQL Script:

```
CREATE STORE "Downloads-XXX"
AS LOCAL PATH 'Stores/Downloads-XXX'
```

change "XXX" in the above store to a unique number for the new user.

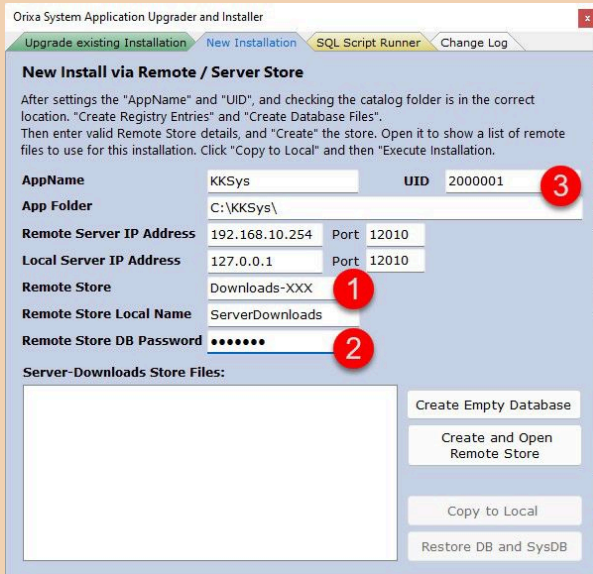
Then Copy a Backup file for the Data database and SystemDB database into the same store.



Create "C:\KKSys" and copy file

On the laptop, Copy the "OrxUpgrader.exe" into a folder "C:\KKSys" (shown at 1.). If there is a previous installation of KKSys in this folder, delete all the files.

Then run the OrxUpgrader program (shown at 2.)



OrxUpgrader New Installation page

In the OrxUpgrader

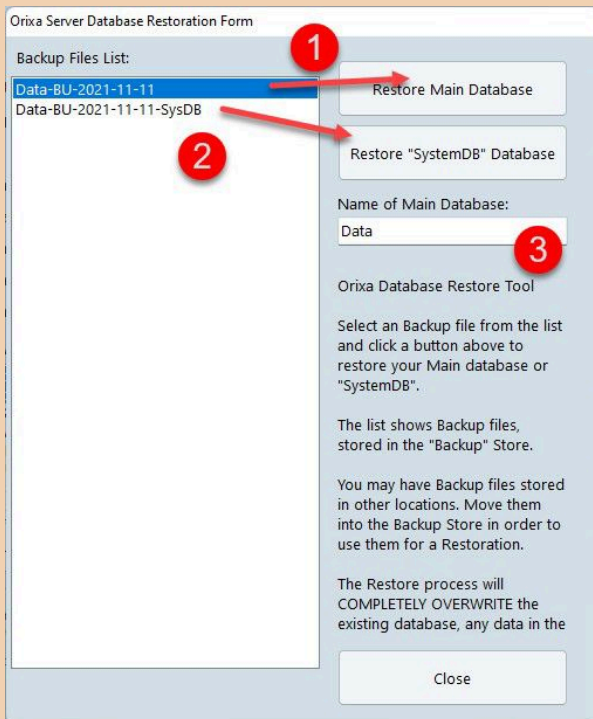
Find the "New Installation" page, then:

1. Set the name of the Remote store to the same name used in the script above.
2. Enter the database password.
3. Enter a UID for the new user.

Then click "Create Empty Database", "Create and Open Remote Store".

After this point the files in the remote store should become visible in the window.

Now click "Copy to Local" all the needed files will be copied into the correct places in the laptop.



Restore database screen

Finally, click "Restore DB and SysDB", a window will open (shown in the image) listing the backup files you have copied across.

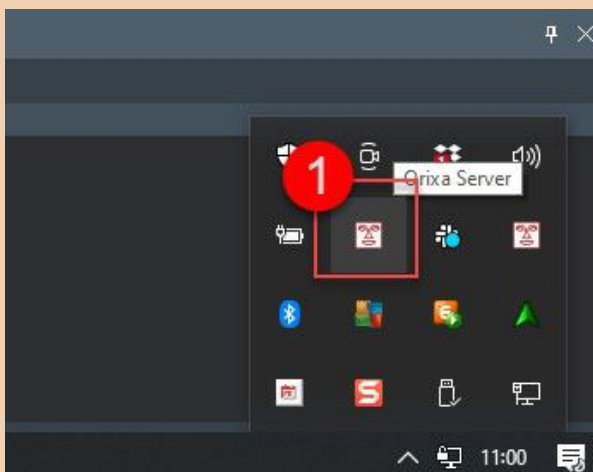
Follow the instructions on the screen to restore the databases.

1. Click the backup file for the maindatabase, and click "Restore Main Database".
2. Click the backup file for the SystemDB database and click "Restore SystemDB Database" button.
3. **NOTE:** If your main database is **not** called "Data" please put the correct database name here.

Once this step is complete the installation is complete and the application is ready to run.

Find the application in the C:\KKSys folder, and double-click it to run.

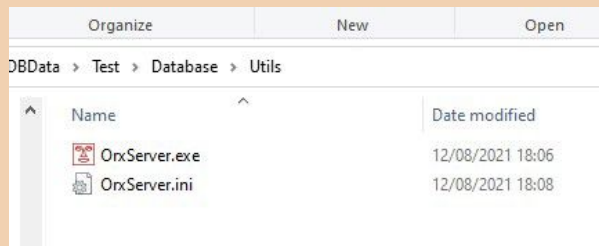
You can also add a short-cut to the program on the laptop desktop.



Once installation is complete the OrxServer program should show running in the Task-Notification Area (marked 1. in the image).

This program runs to connect the KKSys to the database on the laptop. You may need to add this program to Windows Start up folder, as it is not always possible for the installer to do this automatically. See instructions on how to do this at the end of the document.

The OrxServer Running on the test machine



The "Utils" folder with the OrxServer and its Ini File

The OrxServer program is saved in "\\Database\Utils".

If you need to start it manually you can find it there, and double click to run it.

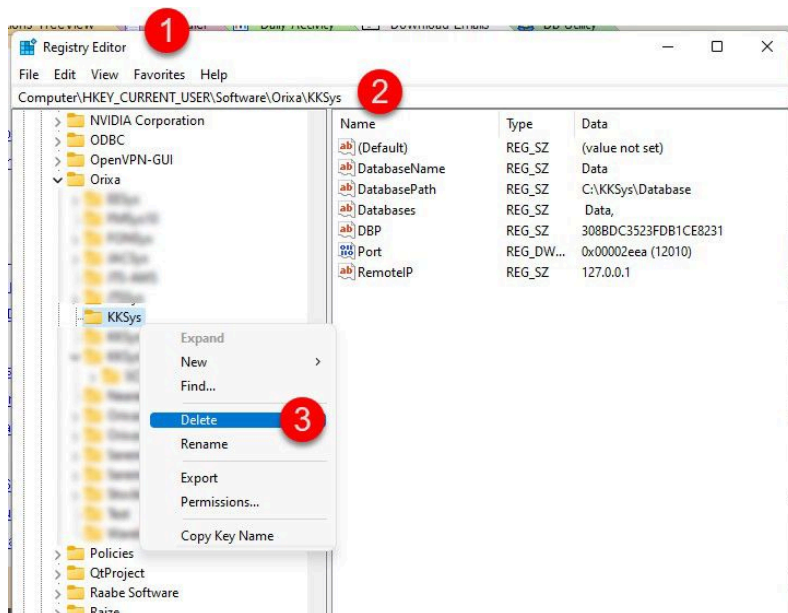
Sometimes it is necessary to mark this program as "safe" for Windows Defender or any other anti-virus.

Common issues and problems

OrxUpgrader.exe does not run / appear

This is usually because of issues with anti-virus. Review and try to fix this on the machine.

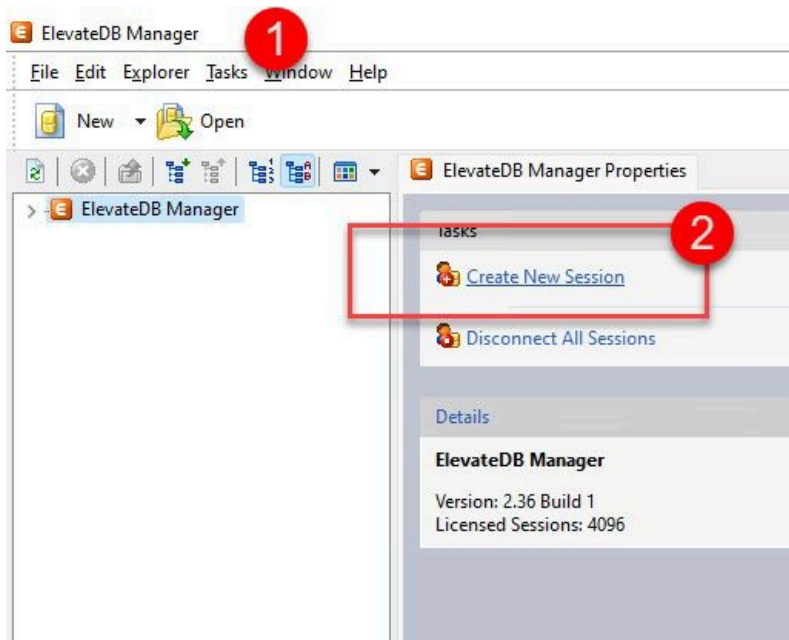
This may be due to "bad" entries in the Windows Registry. If there is a problem run Regedit.exe and navigate to HKEY_CURRENT_USER\Software\Orixa\KKSys and **delete** the key.



Registry Editors, Orixa location

Once the installation runs the installer cannot connect to the Server to download the installation files

In this case, run EDB-Manager on the machine, and try to create a new database session which links to the Server (Remote Session, Character-set ANSI, IP Address 192.168.10.254). You may then need to fix network settings on the laptop to enable connection to the server, but the error messages provided by EDB Manager will help diagnose the problem.



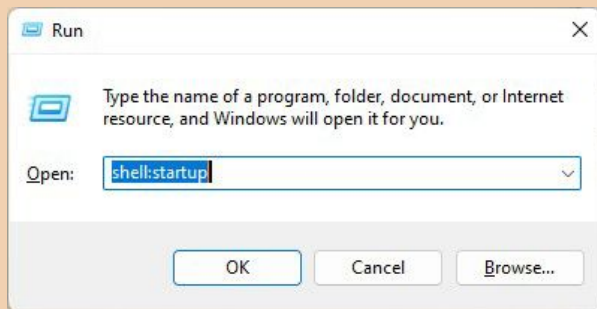
EDB Manager Create Session

Everything runs well, but once installed running the EXE gives an error such as "cannot connect" or "connection refused"

Check that the OrxServer.exe is running in the Task Bar, run it. Run EDB Manager and create a new session to connect to it (Remote Session, Character-set ANSI, IP Address 127.0.0.1, port 12010) review any errors and fix them. It is possible that the OrxServer has been set up with "wrong" settings, check these in the OrxServer.ini file.

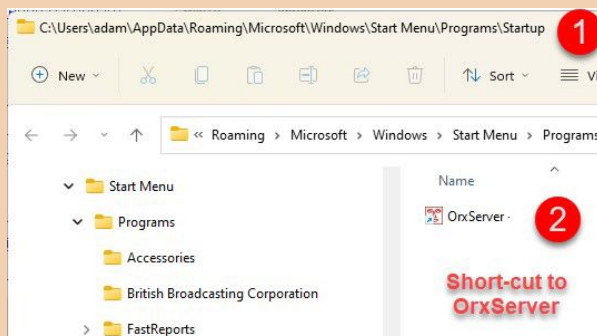
On restart KKSys does not run, or gives a "cannot connect" or "connection refused" error

Check that OrxServer.exe is running. Add it to the Windows Startup Folder to ensure it runs every time the computer switches on.



Shell:Startup

Type Windows-Key + "R", and in the "Run" box, type "Shell:Startup" and click "OK".



Start up folder

The Windows start up folder will appear (note the location, marked at 1., it is possible to navigate to this directly in windows explorer)

Copy a short-cut to the OrxServer into this folder (shown at 1.) once this is done the OrxServer will always run at start up.

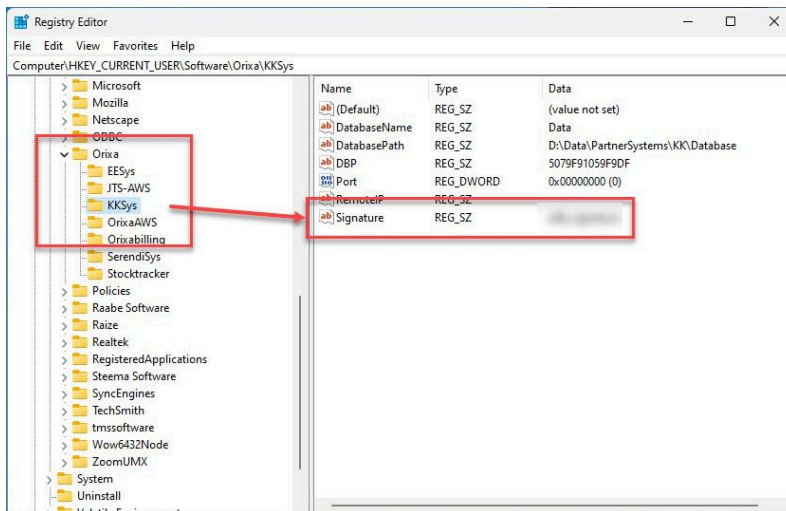
KKSys Database Access Issues

This page is a holder for helpful sections on how to ensure that the database works well on all new installations.

Failure to Open: Check Database Registry Settings

If a KKSys application is run on a computer and it fails to open with an error message "**Server Refused Connctcion**" it is possible that the Registry Settings for the computer in question are not correct.

Registry Settings can be reviewed either using the OrxRegistryManager, or Windows Registry Editor.



Database "signature" settings

To Check the Registry Settings

1. Open the Windows Registry Editor, as shown in the image above.
2. Navigate to the Registry Key HKEY_CURRENT_USER/SOFTWARE/Orixa/[your-app-name]
3. In the panel on the right, check that the settings are correct.
4. If they are not correct, right-click on any setting, and select "Modify" from the list which appears.

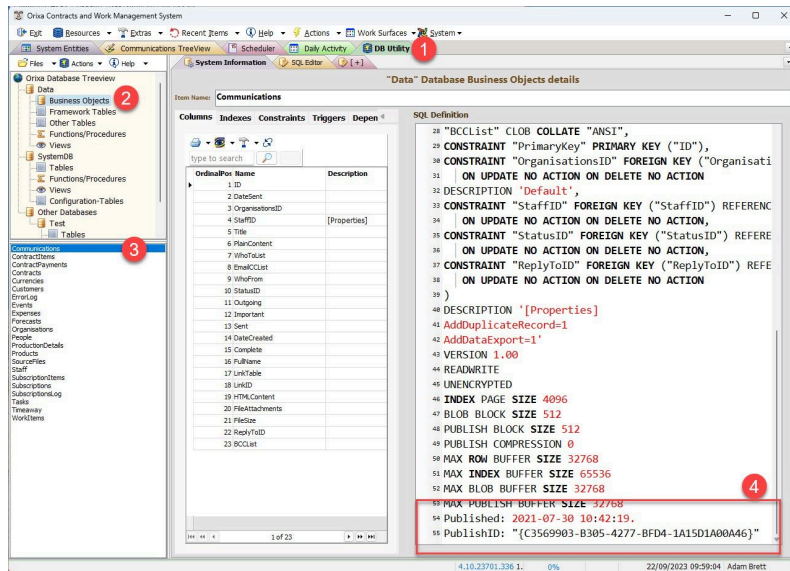
What should my Registry Settings be?

The values of Registry Settings for your App are secret and should not be shared. Your Developer or Administrator will have the details and can share them with you.

Call to "Save Updates" fails to produce an update file

The KKSys App runs as a multi-user-multi-node installation. Each user has their own instance of the KKSys database, and when they make changes to this the changes are saved in a log. The user can save logged changes to an Update File which can pass their changes back to the server. This enables multiple users of the KKSys to share and update data, even when they are outside network coverage.

When KKSys is newly installed on a staff laptop, the database must be **published**. If this step is missed, the resulting database will be set up in **stand-alone** mode, and no update log will be stored.



Check "Published" status of Table

To find out whether an installation of KKSys has been published, please take the following steps

1. Open the DB Utility on the user's computer.
2. Navigate to "Business Objects" in the Orixa Database Treeview
3. Click on any data-table in the list.
4. At the bottom of the SQL Definition for this data-table, the "Published" date, and "PublishID" will show.

If the "Published" details are not present, please run the following script:
PUBLISH DATABASE "Data", this SQL statement must be run from the Orixa Server

Running SQL Change Scripts

If a small change needs to be run (adding or altering the structure of a data-table) then please refer to this help page:

[Running SQL scripts to Change your App \(www.orixa.co.uk/85382\)](http://www.orixa.co.uk/85382)

If you are making a larger change, such as restoring a database or publishing a database, the SQL should be run from the Orixa Server, to see the steps needed for this, please refer to the final section of this help page:

[The Orixa Server Program \(www.orixa.co.uk/26000\)](http://www.orixa.co.uk/26000)

Managing AGIS Inspection Data Importation

KKSys includes tools to import data entered by field-officers using AGIS.

This allows large scale importation of inspection data without re-keying.

However, it is a technical process and care must be taken to ensure it is done properly.

The following document gives a procedural guide to the steps to take in this process.

Basic Steps in the process

1. Download AGIS spreadsheets, ideally with the correct columns as needed.
2. Prepare the sheets, by removing data which cannot be imported. This simply involves **deleting the top row** from the sheet.
3. Save the edited sheets as **CSV files** into the correct **Server Imports Store** folders on the server computer, where they can be imported.
4. Open KKSys and run the "Import AGIS Inspection Data" Action. This will ask you to enter the file names for the newly created CSV Files, and click "OK".
5. Data to be reviewed will then be added to the "Raw data" import tables in KKSys. Users can run the Rapid Entry systems to display this data on the screen, undertake a review of the uploaded rows, and correct data as needed.
6. Once you are happy with all the data on-screen, click the "Post" button on the Importation screens to import it. This will work through all the data checked in step 5., above and post it to permanent storage in the database's main "People", "Farmer", "Inspections" and "Farm-Fields" data-tables.

Notes on running VBA in Excel

Many steps in the preparation of a spreadsheet are identical. If the work has to be done many times it can be very worthwhile to create **scripts** to undertake repetitive work.

A brief document explaining how to do this can be found here: [Programmatic manipulation of Excel Files](http://www.orixa.co.uk/111799)
(www.orixa.co.uk/111799).

Preparation of data from the downloaded AGIS Spreadsheets if they contain ADDITIONAL COLUMNS

Ignore the following section if the exported AGIS Excel files match your needs.

Object ID	GlobalID	NYINAJ	Farmer Firstname	Farmer Lastname	Farmer Station	Farmer's	Society Name	Zone Name
1	0c32680-0661-4819-9546-4b0b92626611		JAMES	AMISA	old	004	AS13-06-46 AS13-06-46-004	Nyinhah Nyensenkrom (AS13-06-46)
2	21f1211c-e05d-4211-8233-599090c1c139		DORIS	TARESA	old	004	AS13-06-46 AS13-06-46-004	Nyinhah Nyensenkrom (AS13-06-46)
3	4f1a41fb-e526-4062-ae44-8afca0d58dc		OPPOING	DAVID	old	001	AS13-06-46 AS13-06-46-001	Nyinhah Nyensenkrom (AS13-06-46)
4	61746268-3025-464a-a53c-71885867dcd2		ANKOMA	JOSHUA	old	015	AS13-06-46 AS13-06-46-015	Nyinhah Nyensenkrom (AS13-06-46)
5	54ad4921-a74b-4017-8a3a-6207f03c745		AKWASSI	ADDAI	old	022	AS13-06-46 AS13-06-46-022	Nyinhah Nyensenkrom (AS13-06-46)
6	2181a111-7075-44e9-b5d9-13a0790c752		AKOSUA	KOHEMNA	old	002	AS13-06-46 AS13-06-46-002	Nyinhah Nyensenkrom (AS13-06-46)
7	81d4d75d-0341-4500-84f5-6002ca483cd4		AKUA	TUROYAANO	old	023	AS13-06-46 AS13-06-46-023	Nyinhah Nyensenkrom (AS13-06-46)
8	74fcaad0-7a85-454e-9812-373c3625cd0		KWADWO	AYISI	old	019	AS13-06-46 AS13-06-46-019	Nyinhah Nyensenkrom (AS13-06-46)
9	4a48a118-3877-4414-a7ab-11438e77c8e		KWADWO	YOMBOR	old	013	AS13-06-46 AS13-06-46-013	Nyinhah Nyensenkrom (AS13-06-46)
10	829eae89-4d59-4017-864a-1802a99d6dc		MENYI	AGYEWAA	old	006	AS13-06-46 AS13-06-46-006	Nyinhah Nyensenkrom (AS13-06-46)
11	129186dc-def8-4f54-bd3b-9eb2f49e2f5		STEPHEN	BEA	old	007	AS13-06-46 AS13-06-46-007	Nyinhah Nyensenkrom (AS13-06-46)
12	e55407c0-8854-4992-9749-e5eae8c2424		YAW	BOAHEN	old	003	AS13-06-46 AS13-06-46-003	Nyinhah Nyensenkrom (AS13-06-46)
13	613a0a94-293d-42c3-a4aa-d0be09997a6d		KOJU	LAAR	old	107	AS13-06-20 AS13-06-20-107	Nyinhah Boboso (AS13-06-20)
14	18404796-d2e1-426f-b05f-9f5c01c1330e		PAUL OBENG	AGYEMAN	old	070	AS13-06-20 AS13-06-20-070	Nyinhah Boboso (AS13-06-20)
15	52e0e2f5-43ed-42ec-922e-6b5ab440f205		MENU	LAAR	old	004	AS13-06-20 AS13-06-20-004	Nyinhah Boboso (AS13-06-20)
16	b565c093-6b14-477d-a2cb-b92e0e11f35		AMODKO	LAAR	old	015	AS13-06-20 AS13-06-20-015	Nyinhah Boboso (AS13-06-20)
17	0e8582b9-77f9-46ec-842f-4e99a4e0f017		AGNES	AWUA	old	050	AS13-06-20 AS13-06-20-050	Nyinhah Boboso (AS13-06-20)
18	77c0a0af-d5ad-402d-8d08-01cc01eae0ef		SAHUEL	MENSAH	old	018	AS13-06-20 AS13-06-20-018	Nyinhah Boboso (AS13-06-20)
19	82278783-01e8-4106-86c1-9eab0d583a2		MARY	DONKOR	old	043	AS13-06-20 AS13-06-20-043	Nyinhah Boboso (AS13-06-20)
20	afcb3607-b5af-4c35-9fab-7f6e0a0b0e0		KONLIAN	MOKTOKA	old	084	AS13-06-20 AS13-06-20-084	Nyinhah Boboso (AS13-06-20)
21	cc259031-6372-4033-9d4d-13f9f0b36063		AMANKWAA	JOE	old	079	AS13-06-20 AS13-06-20-079	Nyinhah Boboso (AS13-06-20)
22	6590e5a5-d4e1-4930-9e11-3221e66800c		MENU	FAUSTINA ATIA	old	108	AS13-06-20 AS13-06-20-108	Nyinhah Boboso (AS13-06-20)
23	4520e0e7-0f43-4d0f-ac54-0f00e519a6e		SUSUANA	DWUMAAH	old	064	AS13-06-20 AS13-06-20-064	Nyinhah Boboso (AS13-06-20)
24	1455857c-310a-44db-82fa-5f25668e51d		ACHEAMPONG	GEORGINA	old	029	AS13-06-20 AS13-06-20-029	Nyinhah Boboso (AS13-06-20)
25	0993826c-2e6d-470f-a04d-7ee85e5019b		ALICE	DUFFIE	old	013	AS13-06-20 AS13-06-20-013	Nyinhah Boboso (AS13-06-20)
26	1671776e-40f7-4029-8100-01c028e226e		KWAI	ALFRED	old	009	AS13-06-20 AS13-06-20-009	Nyinhah Boboso (AS13-06-20)
27	704646ac-a578-479f-b80c-946ca187491		ANANF	DWUMAAH	old	109	AS13-06-20 AS13-06-20-109	Nyinhah Boboso (AS13-06-20)

AGIS Data in XL format

The image above shows the AGIS spreadsheet. Note that there are a very large number of columns (for all the questionnaire data gathered by field-officers). At present relatively few columns are imported into KKSys, but this may be extended in future.

1. The AGIS data includes a **KKIDNum**. This is the most critical field in the importation process, as it is used to link the AGIS data to a specific farmer in the KKSys database. During the importation process it is vitally important that this is cross-checked to ensure that it matches a value in KKSys. The importation process assists with this, but cannot be fully automated.
2. The AGIS data includes a column "1.7 Farmer Status" which can have a small number of values. These values are used during the data importation process. An "old" farmer **should** already have their details included in KKSys. A "new" farmer **should not**. However it is possible for "old" farmers not to be present, or for "new" farmers to be present in the system. During the importation process KKSys tries to check for this, and match farmers to records in KKSys. Again, this cannot be fully automated and staff using KKSys need to cross-check data well.
3. The AGIS data includes a **GlobalID**. This is used during the importation process to match farmer and farm-field data together.

GlobalID	Hidden Zone	Hidden Farmer	1.17 Total Farm Acreage
36 b5f5de45-404e-4269-9acb-15f1a5f879ae	Nkyensenkrom (AS13-06-20)	JAMES AMISA	6
37 7e4d4f0b-8fb6-4123-9113-a70c8be152d5	Nkyensenkrom (AS13-06-20)	DORA TAABEA	15
38 7ae77f27-0054-4c3a-b4ee-5d16bd93649d	Nkyensenkrom (AS13-06-20)	OPPING DAVID	25
39 82h7fr5R-671r-df9d-8757-5r36920e0951	Nkyensenkrom (AS13-06-20)	ANKOMA JOSHUA	4

Note that the Excel file has multiple tabs. You will prepare each one, and then save it separately.

The main Inspection data is on the first sheet. The linked details of each farmer's farm(s) is on the second sheet.

AGIS Data sheets

GlobalID	Hidden Zone	Hidden Farmer	1.17 Total Farm Acreage
1 f59b596e-f7fe-4131-89fa-f7ce05ea824e	Nkyensenkrom (AS13-06-20)	JAMES AMISA	6
2 3f4554b3-e6b8-4d28-890f-e1f5705d0628	Nkyensenkrom (AS13-06-20)	DORA TAABEA	15
3 4e87830c-d231-4d23-98cf-2321fcd9417b	Nkyensenkrom (AS13-06-20)	OPPING DAVID	25
4 c504f74c-8883-4518-926f-19a31ae53061	Nkyensenkrom (AS13-06-20)	ANKOMA JOSHUA	4
5 48d19ef1-18bf-4cdf-b5e1-4e30d09c5481	Nkyensenkrom (AS13-06-20)	AKWASI ADDAI	4
6 5a982e1-6af3-4d75-a9e6-367178096923	Nkyensenkrom (AS13-06-20)	AKOSUA KOMENA	7
7 2aa74f8-9e9e-4545-a85e-f41e3ff37b7e	Nkyensenkrom (AS13-06-20)	AKUA TUROYAANO	4
8 254e60e-d671-4d61-9901-28bcd132fb82	Nkyensenkrom (AS13-06-20)	KWADWO AYISI	8
9 df8a45bd-cba3-4d2c-a506-d8ca6d288e61	Nkyensenkrom (AS13-06-20)	KWADWO YOMBOR	4
10 1825c63d-e055-49b5-8ef0-23a719f06588	Nkyensenkrom (AS13-06-20)	MERCY AGYEIWAA	3
11 d9abb436-70ff-4f34-84d0-a4a11b28e6c0	Nkyensenkrom (AS13-06-20)	STEPHEN BEA	9
12 285d013e-d496-44f4-8cae-ebb047bc32dc6	Nkyensenkrom (AS13-06-20)	YAW BOAHEN	6
13 75a9d506-092b-4920-b82f-1b8a53d75e11	Nkyensenkrom (AS13-06-20)	KOJO LAAR	2
14 066f4af6-5228-4176-8c15-cb536836fbbf	Boboso (AS13-06-20)	KOJO LAAR	4
15 39e2639d-2447-4266-bc19-05990c1307ad	Boboso (AS13-06-20)	KOJO LAAR	3
16 940d86b-0565-4d68-a980-dc2603c19ac3	Boboso (AS13-06-20)	PAUL OBENG AGYEMAN	3
17 c2147903-e9f7-4c55-bf94-c4b44c76b79e	Boboso (AS13-06-20)	MENU LAAR	2
18 1803838-eeed-4ec5-8e61-78097d2f202	Boboso (AS13-06-20)	MENU LAAR	2
19 ec162fb7-306d-4b0e-990a-d62948a69b06	Boboso (AS13-06-20)	AMOAKO LAAR	5
20 5114862-6abe-49aa-8cb2-1e4235a718d4	Boboso (AS13-06-20)	AMOAKO LAAR	4
21 84a8506e-5faa-44c7-a8e5-41e9173ba397	Boboso (AS13-06-20)	AMOAKO LAAR	2
22 6496f9b6-9172-4ac7-826e-96bc52955757	Boboso (AS13-06-20)	AGNES AWIJA	1
23 e187e576-9b19-4fa9-a86b-b0db2dbbde6f	Boboso (AS13-06-20)	SAMUEL MENSAH	4
24 e4f70105-875f-45c0-b028-d22a49c5c05d	Boboso (AS13-06-20)	SAMUEL MENSAH	5
25 a0f54987-b1c1-4633-926f-19a31ae53061	Boboso (AS13-06-20)	SAMUEL MENSAH	5
26 5e5c6b1a-c9fb-4f99-9f16-2b0f87645121	Boboso (AS13-06-20)	SAMUEL MENSAH	3
27 aa5c4bdc-0e51-4d95-a0f6-fe5d9776da87	Boboso (AS13-06-20)	MARY DONKOR	3
28 04c9e786-95d8-42dd-a92b-b2fc6778f312	Boboso (AS13-06-20)	AMA ATIAA	4
29 2ba9a84-4985-484d-bfa7-5bf04669641f	Boboso (AS13-06-20)	KONLAN MOKTOKA	2
30 1eb3e79f-221b-4d63-8cad-9cb59e15a419	Boboso (AS13-06-20)	KONLAN MOKTOKA	2
31 99f15bd4-121c-401e-98ad-12bf25ce3c81	Boboso (AS13-06-20)	AMANKWAA JOE	2
32 be49f4e6-750a-4185-a6da-969c40df75ea	Boboso (AS13-06-20)	MENU FAUSTINA AFIA	1
33 d38b5efd-c385-4905-86df-892bd28d49a0	Boboso (AS13-06-20)	SUSUANA DWUMAAH	5
34 8f60f5db-9f7a-4629-bc0a-fda5fcc89c5	Boboso (AS13-06-20)	ACHEAMPONG GEORGINA	2
35 6ca1368b-3102-47a8-98f5-ab0c45a61d8f	Boboso (AS13-06-20)	ALICE DUFIE	3
36 d6edf5b-3fc8-459e-8d03-3141d9c60b52	Boboso (AS13-06-20)	KWAKU ALFRED	4
37 53471e8-b491-451f-a531-638080defd29	Boboso (AS13-06-20)	ANANE DWUMAAH	4
38 008f2524-31e4-48fe-94bd-75ca4f719167e	Boboso (AS13-06-20)	ADPIAH TWUMAAH	1

On the second sheet farmer farm-acreages are recorded.

1. Second sheet shows farm-details.
2. The farmer-name is carried over from the first sheet.
3. One farmer can have multiple rows in this sheet, dependent on the number of farms they have

Farm-Details Sheet

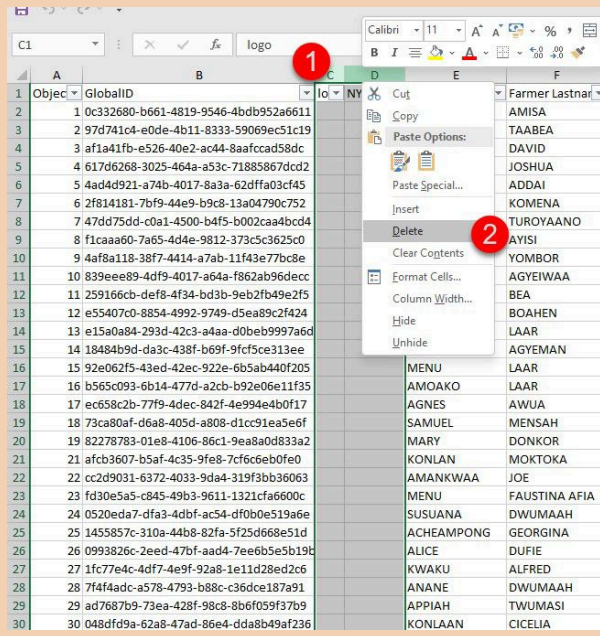
B	C	D	H
31-89fa-f7ce05eab24e	Hidden Zone	Hidden Farmer	ParentGlobalID
f28-8900-e1f5705d0628	Nkyensenkrom (AS13-06-46)	JAMES AMISA	117.5 0c32680-b661-4819-9546-4db952a6611
f23-98cf-2321f06411b	Nkyensenkrom (AS13-06-46)	DORA TAABEA	3200 97d741c4-e0de-4b11-8333-59069ec51c19
74-859d-0514124351f	Nkyensenkrom (AS13-06-46)	OPPING DAVID	1543.5 af1a41fb-e526-40e2-ac44-8aafccad58dc
4f-b5e1-4e3040ac5481	Nkyensenkrom (AS13-06-46)	ANKONIA JOSHUA	250 617d0268-3025-464a-e53c-71885867dcd2
175-a9e6-367178099923	Nkyensenkrom (AS13-06-46)	KWAKU ALFRED	250 4ad4d921-a74b-4017-8a3a-62dffa03cf45
45-a85e-f41e3f3767e	Nkyensenkrom (AS13-06-46)	AKOSUA KOMENA	900.5 2f814181-7bf9-44e9-b9c8-13a04790c752
561-9901-28bc1d32f882	Nkyensenkrom (AS13-06-46)	AUKUA TUROYAANO	140.5 47dd75dd-c0a1-4500-b4f5-b002caa4bccd4
12c-a506-d8ca6a288e61	Nkyensenkrom (AS13-06-46)	KWADWO AYISI	140 f1caa60-7a65-4d4e-9812-373c3c625c0
105-8a10-23a719f06088	Nkyensenkrom (AS13-06-46)	KWADWO YOMBOR	200 4af8a118-38f7-4414-7ab-11f43e77bc8e
34-84d0-a4a11b38e6d0	Nkyensenkrom (AS13-06-46)	MERCY AGYEWA	250 839ee89-4df9-4017-a64a-f862ab96dccc
44-8cae-eb0476c92d6c	Nkyensenkrom (AS13-06-46)	STEPHEN BEA	125 259166cb-def8-4f34-bd3b-9eb2fb49e2f5
320-b82f-1b8a53d75611	Boboso (AS13-06-20)	YAW BOAHEN	250 e55407c0-8854-4992-9749-d5ea89c2f424
76-8c15-cb586b5f6b7f	Boboso (AS13-06-20)	KOJO LAAR	250 e15a0a84-293d-42c3-a4aa-d0be9997a6d
166-bc19-05990d13072d	Boboso (AS13-06-20)	KOJO LAAR	375 e15a0a84-293d-42c3-a4aa-d0be9997a6d
168-980-dc269c19e3c3	Boboso (AS13-06-20)	KOJO LAAR	117.5 e15a0a84-293d-42c3-a4aa-d0be9997a6d
55-9f94-cb4ac38079e	Boboso (AS13-06-20)	PAUL OBENG AGYEMAN	250 18484b9d-da3c-438f-b69f-9fc5ce313ee
ec5-8e6f-78097d42202	Boboso (AS13-06-20)	MENU LAAR	500 92e062f5-43ed-42ec-922e-6b5ab440f205
10e-990a-0e29a8a6906	Boboso (AS13-06-20)	AMOAKO LAAR	750 b565c093-6b14-477d-a2cb-b92e06e11f35
aa-8cb2-1e4235a718d4	Boboso (AS13-06-20)	AMOAKO LAAR	750 b565c093-6b14-477d-a2cb-b92e06e11f35
c7-a8e5-41e9173ba937	Boboso (AS13-06-20)	AMOAKO LAAR	750 b565c093-6b14-477d-a2cb-b92e06e11f35
1c7-820e-38e52955757	Boboso (AS13-06-20)	AGNES AWUA	250 ec658c2b-77f9-4dec-842f-4e994e4b0f17
19-880b-b0b2b0b0d4ed	Boboso (AS13-06-20)	SAMUEL MENSAH	375 afcb3607-b5af-4c35-9fe8-7fc6fce6b0fe0
co-b028-d22a49c5d5d5	Boboso (AS13-06-20)	SAMUEL MENSAH	1375 73ca80af-d6a8-405d-a808-d1cc91ea5e6f
33-926f-f9a5b1ec5985	Boboso (AS13-06-20)	SAMUEL MENSAH	1250 73ca80af-d6a8-405d-a808-d1cc91ea5e6f
99-9f16-20f87645121	Boboso (AS13-06-20)	SAMUEL MENSAH	812.5 73ca80af-d6a8-405d-a808-d1cc91ea5e6f
195-a06-fe5d9776d487	Boboso (AS13-06-20)	MARY DONKOR	2187.5 82278783-01e8-4106-86c1-9ea8d0833a2
10d-a92b-b2f67f8f312	Boboso (AS13-06-20)	AMA ATIIA	1000 8ecb06ba-52cb-4399-b86e-6008f4f61ca
1ad-a7a7-3af046096a1f	Boboso (AS13-06-20)	KONLAN MOKTOKA	375 afcb3607-b5af-4c35-9fe8-7fc6fce6b0fe0
563-8a4-9cb59e15a419	Boboso (AS13-06-20)	KONLAN MOKTOKA	437.5 afcb3607-b5af-4c35-9fe8-7fc6fce6b0fe0
1e-98ad-12b725ce3c81	Boboso (AS13-06-20)	AMANKWAA JOE	375 cc2d9031-6372-4033-9da4-319f3bb36063
185-a6da-969a0d75ea	Boboso (AS13-06-20)	MENU FAUSTINA AFIA	562.5 fd30e5a5-c845-49b3-9611-1321cfa6600c
105-86df-892bd28d49a0	Boboso (AS13-06-20)	SUSUANA DWUMAHAH	1375 0520eda7-dfa3-4dbf-ac54-df0b0e519a6e
29-b0da-fda9fccc89c5	Boboso (AS13-06-20)	ACHEAMPONG GEORGINA	500 1455857c-310a-44b8-82fa-5f25d668e51d
1a8-8d15-a0c46e5a61d	Boboso (AS13-06-20)	ALICE DUFIE	937.5 0993202c-2eed-47bf-aad4-7ee6b5e5b19e
40e-80d3-1141d9c60052	Boboso (AS13-06-20)	KWAKU ALFRED	1625 1fc77e4c-4df7-4e9f-92a8-1e11d28ed2c6
11f-a531-6380080d6f29	Boboso (AS13-06-20)	ANANE DWUMAHAH	1062.5 7f4f4adc-a578-4793-b88c-c36dce187a91
fa-af4d-75-af7118176	Boboso (AS13-06-20)	APPIAH TWUMASI	500 ad7687b9-73ea-428f-8bc8-8b6f05f37b5
section_0	farm_details_1	caretaker_info_2	

Farm-Details Sheet GlobalID

On the farm-details sheet there is a "ParentGlobalID" column.

This column contains a "GUID" (Global Unique ID) which is the same as a GUID on the Inspections sheet.

Orixia will use these 2 UID columns to link the data when it is imported.

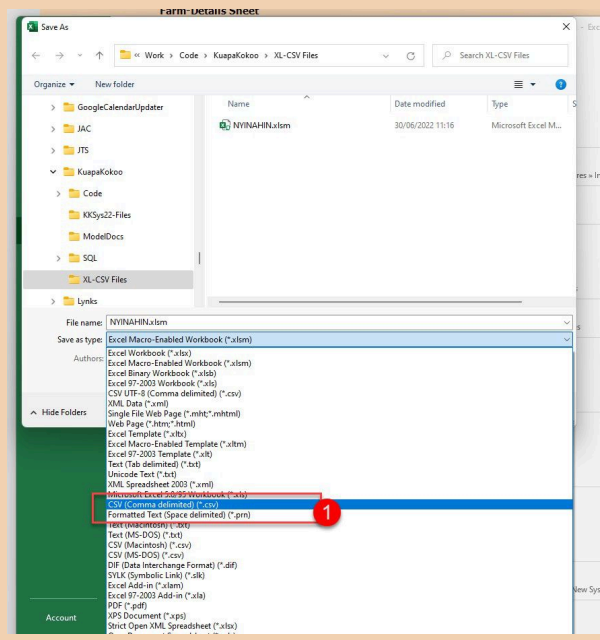


Deleting un-needed Columns in Excel

The user should delete rows which are not needed, and then save each sheet.

For simple jobs with just a few spreadsheets this can be done manually.

1. Select one or more column-headings.
2. Right click on the heading and select "Delete"



Then save the edited sheet as a CSV File.

Note that there are several different CSV options. Take care to save as "CSV" not as "CSV UTF-8" or "CSV Apple Mac" etc.

VBA Scripts to automate preparation of the files with column-removal, row removal and automated saving

For KKSys literally thousands of Excel files will have to be imported. This means that it will be too slow to manually remove the columns for every importation process.

Because of this, it is suggested that a VBA script is used to automate the process.

As mentioned above, a brief document explaining how to do this can be found here: [Programmatic manipulation of Excel Files](#)

Script to delete the columns and first row and "SaveAs"

```
Sub DeleteColsAndSaveAsCSV()
    Dim sh As Worksheet
    'deleting should be done "backwards", from right to left
    Set wrk = ActiveWorkbook.ActiveSheet
    wrk.Columns("CJ:CK").Delete
    wrk.Columns("AC:CG").Delete
    wrk.Columns("M:Q").Delete
    wrk.Columns("H").Delete
    wrk.Columns("D").Delete
    wrk.Columns("C").Delete
    wrk.Columns("A").Delete
    wrk.Rows("1").Delete
    ActiveWorkbook.SaveAs Filename:="C:\ServerStorePath\AddFileName-Inspection.csv",
FileFormat:=xlCSV
End Sub
```

Script to delete the first row and "SaveAs"

```
Sub DeleteColsAndSaveAsCSV()
    Dim wrk As Worksheet
    'deleting should be done "backwards", from right to left
    Set sh = ActiveWorkbook.ActiveSheet

    wrk.Rows("1").Delete
    ActiveWorkbook.SaveAs Filename:="C:\ServerStorePath\AddFileName-FD.csv",
FileFormat:=xlCSV
End Sub
```

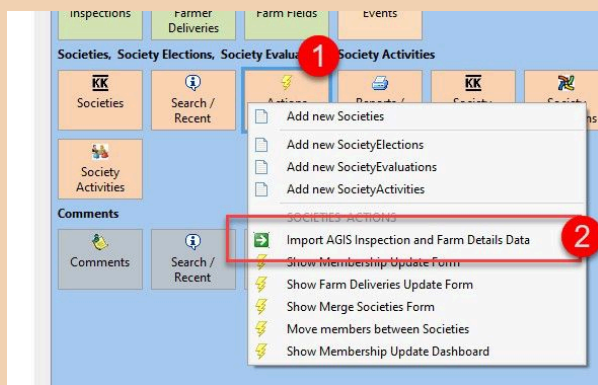
NOTE:

Filename(s) must be changed prior to each use of the script.

Also: It is possible to change the script to delete different columns and rows if the column-layout of the source Excel file is updated or changes.

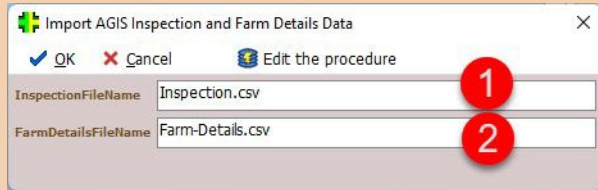
Using the "Import AGIS Inspection and Farm Details Data" Action in KKSys

A System Procedure has been written to automate the first step of data-importation. In this step CSV file data is imported into temporary "importation" data-tables in KKSys. This allows it to be carefully checked and verified prior to full importation into the main database.



Import AGIS Inspection and Farm Details Data

1. On the System Entities Screen, click the "Societies" Actions.
2. In the list that appears click on the "Import AGIS ..." item



Import Inspection / Farm Details data Procedure

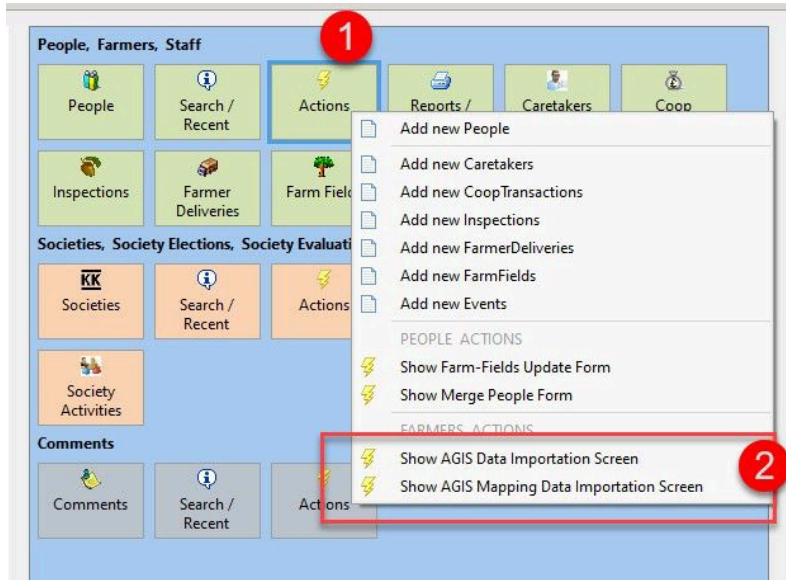
A form will open in which the name of the CSV files to be imported can be added. **Note that both files should already be saved in the "Imports" store on the server.**

1. Type the file-name of the CSV file for newly imported Inspection data.
2. Type the file-name of the CSL file for newly imported Farm-Details data

NOTE: You do not need to import BOTH Inspection and FarmDetails records every time the Import AGIS Data procedure is run. If one of the File-Names is left blank, KKSys will not try to import data for that table.

Working with the "Import AGIS Data" Screen

Once data has been imported from the CSV files into the "importation" data-tables, users can open a Rapid Entry Grid screen to process and import the data into the main database. This step is added to allow some cross-checking and updating to be done prior to the importation process.



Accessing the AGIS Importation screen

1. Find the "People, Farmers, Staff" Business Object, and click on the "Actions" tab.
2. In the list that appears, select "Show AGIS Importation Screen" or "Show AGIS Mapping Data Importation Screen".

The AGIS Data Importation Screen (Rapid Entry Grid)

The screenshot shows a window titled 'Import AGIS' with a data table. The table has columns: ID, Name, Society, Station, First Name, Last Name, First Surname, Middle Name, Zulu Name, Date of Birth, NIA, Moshelane, Gender, Household Size, Count Farms, Count House Societies. A red circle '3' highlights the 'Import' button in the top right. Below the table is a 'Raw Data' section with columns: ID, Name, Latitude, Longitude, Average. A red circle '2' highlights this section.

ID	Name	Society	Station	First Name	Last Name	First Surname	Middle Name	Zulu Name	Date of Birth	NIA	Moshelane	Gender	Household Size	Count Farms	Count House Societies	
82021	0.4513-06-25-126	KK Farmer	KWELU	KWELU	KWELU			Junction	6/12/1976	GH4-	024794112	male	3	1	0	2079
82022	0.4513-06-26-207	Farmer Not Found	STEPHEN	BEA				Myemseboom	6/11/1984	GH4-0	028641299	male	7	1	0	23000717
82023	0.4513-06-25-030	Farmer Not Found	Albana	Manu				Albana #	2/25/1983	GH4-000		female	1	0	0	23000714
82024	0.4513-06-26-030	Farmer Not Found	DWISIZI	ANDHEER				Myemseboom	5/12/1987	GH4-	020759960	male	7	1	0	23000717
82025	0.4513-06-26-032	Farmer Not Found	ISCOMON	SPREY				Myemseboom	12/3/1988	GH4-0	055132041	male	2	1	0	23000717
82026	0.4513-06-25-133	Farmer Not Found	ISSABU	AYABABA				Junction	2/16/1995	GH4-	721131224	male	8	1	0	2079
82027	0.4513-06-25-133	Farmer Not Found	KWABENLA	VERBIA				Myemseboom	9/6/1982	GH4-0	03028993	male	4	1	0	23000717
82028	0.4513-06-25-147	Farmer Not Found	Albanoon	Domenico				Albana #	10/11/1980	GH4-000		male	2	0	0	23000714
82029	3807199	1.4513-06-24-190	ABENA MANU	Albana	Manu			Albana #	11/14/1987	GH4-000		female	1	0	0	35281179
82030	5040889	1.4513-06-24-190	ADWOLA DUFEE	Adwola	Dufee			Albana #	7/15/1987	GH4-005564253	026739516	female	4	2	0	35281179
82031	5040856	1.4513-06-27-066	ADWOLA MAMA	Adwola	Amanobuh			Oxouaboom	6/17/1985	GH4-005481038-6	024757029	female	6	2	0	3528
82032	1932530	1.4513-06-24-171	AFULA BORBUMBAH	Afula	Mkuzuh			Albana #	6/19/1982	GH4-000		female	1	0	0	35281179
82033	382781	1.4513-06-20-290	AGNES AWULA	AGNES	AWULA			Boboso	7/15/1980	GH4-7248742375		female	4	1	0	2674
82034	3004008	1.4513-06-24-190	AGYA ABUSU	Agya	Abusya			Albana #	9/20/1980	GH4-00		male	3	1	0	35281179
82035	1932547	2.4513-06-24-190	AGYEBUSU	Agye	Abusya			Albana #	6/11/1988	GH4-000		female	1	0	0	35281179
82036	1932548	1.4513-06-28-033	AGYEBUSU	Agye	Abusya			Boboso	10/11/1979	GH4-0		female	9	1	0	2674
82037	8400190	1.4513-06-26-079	JAMBOJOLA JOE	JAMBOJOLA	JOE			Boboso	10/15/1984	GH4-0		male	9	1	0	2674
82038	1946442	1.4513-06-26-103	AMAKOJOLA LARI	AMAKOJOLA	LARI			Boboso	10/11/1982	GH4-726739723		male	6	3	0	2674
82039	1932549	1.4513-06-26-109	ANANE	ANANE	DWABAMBA			Boboso	5/15/1987	GH4-0		male	9	1	0	2674
82040	6204247	1.4513-06-26-013	ANOKHA ANOKHA	ANOKHA	ANOKHA			Myemseboom	4/11/1980	GH4-0	026794058	male	2	1	0	23000717
82041	3807191	1.4513-06-24-141	ASAMBA ANESE	Asamba	Anese			Albana #	6/19/1985	GH4-00		male	2	0	0	35281179
82042	9440352	1.4513-06-27-033	ASHEBISI SIBISI	Sibisi	Ashebe			Oxouaboom	7/15/1982	GH4-717796802-1		female	11	1	1	3528
82043	170904	1.4513-06-26-030	ATA MOKOZI	ATA	Mokozi			Boboso	4/16/1976	GH4-0		male	4	1	0	3524

AGIS Data Importation Screen

Note that only data in the Raw-data tables which contain **valid Society-Station-Marks** will be shown in the screen. If data has been imported for farmers and their society is **not yet** imported, they will be left in the Raw-data table, until the next time the Importation process is run.

1. The main grid. This contains **all** records in the "ImportIntensions" KKSys data-table which have been imported from AGIS in a "raw data format" and have **not** yet been imported into the KKSys database.

- As the user selects one farmer from the upper grid, that farmer's farm-fields are displayed. The farm-fields grid draws its data from the "ImportedFarmFields" KKSys data-table. These records have been imported in a raw data format and have not yet been imported into the KKSys database.
- The "Post" toolbutton on the main toolbar of the Rapid Entry Grid will iterate through the whole grid and add **all the records**.

Steps in checking the AGIS data

ID	Inp	PID	FarmerEi	KKID	KK-Farmer	FirstName	LastName
62003955	<input type="checkbox"/>		0	AS13-06-46-010	-Farmer Not Found-	KWABENA	YEBOAH
62003954	<input type="checkbox"/>		0	AS13-06-45-147	-Farmer Not Found-	Abraham	Dommoro
62004034	<input type="checkbox"/>	36017999	1	AS13-06-41-157	ABENA MANU	Abena	Manu
62004054	<input type="checkbox"/>	5016593	1	AS13-06-41-087	ADWOA DUFIÉ	Adwoa	Difie
62003976	<input type="checkbox"/>	5018556	1	AS13-06-37-066	ADWOA MAMA	Adwoa	Amankwah
62004039	<input type="checkbox"/>	13053504	1	AS13-06-41-171	AFUA NKURUMAH	Afua	Nkrumah
62004058	<input type="checkbox"/>	163763	1	AS13-06-41-150	AGNES AWUA	AGNES	AWUA

Attempt to locate farmer

When the Rapid Entry Grid opens, KKSys will attempt to link records to existing farmers in KKSys.

If none is found the Grid will show "-Farmer Not Found-" in the "KK-Farmer" column.

When a farmer is found, (as at 1., in the image) the grid will show the ID of this farmer, and their name as it is stored in KKSys.

This matching is done using the KKIDNum. If the KKIDNum is entered incorrectly, a farmer may end up entered into KKSys twice, with 2 different KKIDNums.

KKID	KK-Farmer	FirstName	LastName	FarmersMatch
0 AS13-06-46-010	-Farmer Not Found-	KWABENA	YEBOAH	<input type="checkbox"/>
0 AS13-06-45-147	-Farmer Not Found-	Abraham	Dommoro	<input type="checkbox"/>
1 AS13-06-41-157	ABENA MANU	Abena	Manu	<input checked="" type="checkbox"/>
1 AS13-06-41-087	ADWOA DUFIÉ	Adwoa	Difie	<input type="checkbox"/>
1 AS13-06-37-066	ADWOA MAMA	Adwoa	Amankwah	<input type="checkbox"/>
1 AS13-06-41-171	AFUA NKURUMAH	Afua	Nkrumah	<input checked="" type="checkbox"/>

Checking farmer's names match

There can also be cases where KKSys finds a farmer, but the **names** do not match. This can be due to spelling errors, small changes in how people record names, or because of a mistake.

If the "FarmersMatch" column (shown at 1., in the image) shows a tick, then the KKIDNum **and** name of the farmer are both the same.

At this step, users of KKSys should check that the non-matching farmers have not been entered wrongly. The data in the grid can be edited if needed.

DateOfBirth	NIA	MobileNum	Gender	HouseholdSize	CountFarms	CountWorkers
6/6/1962	GHA-0	024526993	male	4	1	0
10/17/1980	GHA-000		male		2	0
11/14/1987	GHA-000		female		1	0
7/1/1967	GHA-0035604253	0245736516	female	4	2	0
1/1/1965	GHA-003481039-6	0547576203	female	6	2	0
6/19/1992	GHA-000		female		1	0
1/1/1980	GHA-7248742875		female	4	1	0
9/22/1960	GHA-00		male		3	1
1/1/1988	GHA-000		female		1	0
10/11/1973	GHA-0		female	8	1	0

Farmers and Inspections Data Importation

Imported data

The importation process will also import date-of-birth, Ghana ID Card Number, a farmer's mobile phone number and gender. (1., in the image)

The Household Size, count of number of farms and count of number of workers (2., in the image) will be imported into the KKSys "Inspections" data-table, and linked to the current farmer.

ID	KKID	Latitude	Longitude	Acreege
62004215	AS13-06-53-082			3
62004214	AS13-06-53-082			3
62004213	AS13-06-53-082			4
62004212	AS13-06-53-082	-2.044561667	6.445413333	6

Farmer's Acreege and Lat/Long

Farm-field data

If any farm-fields data is present for a given farmer, it will also be imported.

How the importation process works

Once the user has checked and edited the data as needed, they click "post". KKSys then works through the whole list of imported records and adds them to the database.

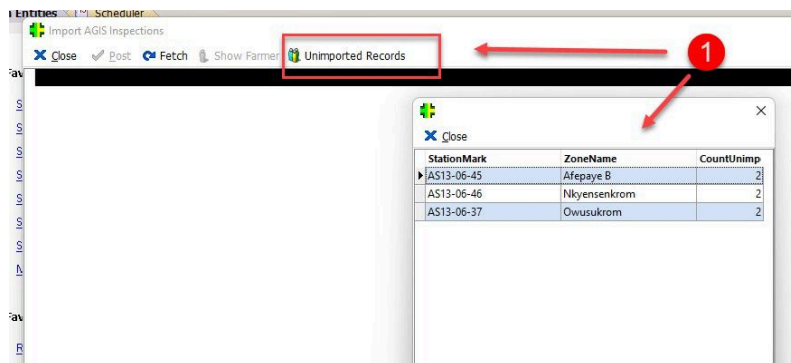
1. If Imported raw-data includes details of a society which is **not yet present** in KKSys, this data will not be shown during importation. It will be held in the raw-data table and accessed again the next time the importation process is run. Users should review the "Unimported Records" (details below) to assess Societies listed in the raw-data which are not present in KKSys and consider adding them.
2. If no Farmer is found on the KKSys side, a new farmer record will be added into KKSys.
3. For farmer names, date of birth and gender new data always updates old data. For all other fields new data is added as new records. If a farmer already has a phone number in KKSys the data is first checked. If the AGIS number is the same nothing is done, if the AGIS number is different a **new record** is added with the new phone number. This allows farmers to have more than one phone number.
4. For "Inspection" data (Household-size etc.) a new record is always added. This allows KKSys to track a farmer over time and see how their social setting changes and improves.
5. For Farm-fields KKSys checks whether a field with the same latitude and longitude already exists. If it does, the record is **updated** in the database. Otherwise a new field is added.
6. Once a record has been imported, it is marked "Imported" in the ImportInspections and "ImportFarmFields" raw-data tables. Records in this table are not deleted. This ensures that a record of the data is maintained, but it is not repeatedly imported.

Unimported Records

When the list of records to import is displayed, not all records are shown. Only those with a "SocietyStationMark" which matches a Society in KKSys are shown.

This is done to avoid the risk / possibility of importing data and adding farmers who are "orphans" without links to a Society.

KKSys makes it possible to review the list of these Societies, which are present in the raw-data, but not present in KKSys.



AGIS "Unimported Records" Grid

1. In the AGIS Importation screen, click the "Unimported Records" button, a grid will open showing the list of "Zone" societies which are not present in KKSys, but are listed in the raw-data. Note that the "CountUnimported" column shows the **number** of farmers for each of these orphan Societies.

To Fix this situation, simply ADD NEW societies with the Name and StationMark identical to those listed in the Unimported Records grid. OR edit the data in the raw-data grid to change Station-Marks to match societies which are already present.

AGIS Mapping Importation Screen (Rapid Entry Grid)

As well as the AGIS Inspection Importation Screen, KKSys also has the "Mapping" Importation screen, for times when mapping data is returned without linked Inspections data. This screen is shown below, loaded with test data. Its layout and function are very similar to the operation of the Inspection Importation screen, but it only imports data from the ImportFieldDetails Raw-data table, which contain latitude, longitude and acreages for the farmer's farms.

As with the Inspections importation process, if a row in the Raw-data table does not contain a link to a recognised record, the row will not be imported, but will be left until the farmer's details (KKIDNum) are added to KKSys.

ID	Latitude	Longitude	Acreage	KK-Farmer	Society	PID	SocietiesID
62004224	AS13-06-41-087	0	2	ADWOA DUFIE	Afepaye (AS13-06-41)	5016593	58501179
62004217	AS13-06-37-053	-2.1025933	6.5265033	17	THOMAS ATA	Ovusukrom (AS13-06-37)	94000367
62004216	AS13-06-20-050	-2.1174016	6.6299255	1	AGNES AWUA	Boboso (AS13-06-20)	163763
62004211	AS13-06-37-069	-2.104248	6.530399	9	OSEI KWADWO	Ovusukrom (AS13-06-37)	5018571
62004207	AS13-06-20-107	0	4	KOJO LAAR	Boboso (AS13-06-20)	36016109	2674
62004206	AS13-06-20-107	0	2	KOJO LAAR	Boboso (AS13-06-20)	36016109	2674
62004205	AS13-06-20-107	-2.118345	6.6353	3	KOJO LAAR	Boboso (AS13-06-20)	36016109
62004204	AS13-06-41-135	-2.049651667	6.431166667	10	NANA ACHEAMPONG	Afepaye (AS13-06-41)	36017889
62004202	AS13-06-20-079	-2.1121783	6.6357283	2	AMANKWAA JOE	Boboso (AS13-06-20)	94001592
62004200	AS13-06-37-001	-2.104535	6.5281333	7	YAKUBU MAHAME	Ovusukrom (AS13-06-37)	182178
62004199	AS13-06-20-030	-2.1255383	6.6389583	10	ATTIA KWASI	Boboso (AS13-06-20)	156656
62004197	AS13-06-20-011	0	2	MENAMA LAAR	Boboso (AS13-06-20)	156636	2674
62004196	AS13-06-20-011	-2.1161897	6.6427784	4	MENAMA LAAR	Boboso (AS13-06-20)	156636
62004195	AS13-06-41-173	0	2	KOJO ANABA	Afepaye (AS13-06-41)	13053526	58501179
62004194	AS13-06-41-173	-2.049666667	6.431153333	4	KOJO ANABA	Afepaye (AS13-06-41)	13053526
62004191	AS13-06-37-038	-2.1041667	6.5268367	6	MADAM MONICA TUFFOUR	Ovusukrom (AS13-06-37)	94000337
62004190	AS13-06-41-166	0	3	YAW OKRA II	Afepaye (AS13-06-41)	36018044	58501179
62004189	AS13-06-41-166	-2.04966	6.431185	2	YAW OKRA II	Afepaye (AS13-06-41)	36018044
62004187	AS13-06-41-171	-2.049635	6.431183333	5	AFUA NKURUMAH	Afepaye (AS13-06-41)	13053504
62004183	AS13-06-20-015	0	4	AMOAKO LAAR	Boboso (AS13-06-20)	156640	2674
62004182	AS13-06-20-015	0	5	AMOAKO LAAR	Boboso (AS13-06-20)	156640	2674
62004181	AS13-06-20-015	-2.11836	6.631985	2	AMOAKO LAAR	Boboso (AS13-06-20)	156640
62004179	AS13-06-20-084	0	2	KONLAN MOKTOKA	Boboso (AS13-06-20)	94001602	2674
62004178	AS13-06-20-084	-2.1132783	6.6327167	2	KONLAN MOKTOKA	Boboso (AS13-06-20)	94001602
62004174	AS13-06-20-098	-2.1188875	6.6436521	5	DANIEL GASESE	Boboso (AS13-06-20)	36016064
62004168	AS13-06-20-004	0	2	MANU LAAR	Boboso (AS13-06-20)	156629	2674
62004167	AS13-06-20-004	-2.1174633	6.6328933	2	MANU LAAR	Boboso (AS13-06-20)	156629
62004165	AS13-06-41-157	-2.049645	6.431133333	4	ABENA MANU	Afepaye (AS13-06-41)	36017999
62004163	AS13-06-41-172	0	2	SAWABATO K	Afepaye (AS13-06-41)	13053515	58501179
62004162	AS13-06-41-172	-2.049648333	6.43114	3	SAWABATO K	Afepaye (AS13-06-41)	13053515
62004158	AS13-06-20-083	-2.1178457	6.6453955	6	BENNARD OWUSU ANSAH	Boboso (AS13-06-20)	94001600
62004157	AS13-06-41-003	0	2	AWUNI KUSASE	Afepaye (AS13-06-41)	5010879	58501179
62004156	AS13-06-41-003	-2.049678333	6.431166667	3	AWUNI KUSASE	Afepaye (AS13-06-41)	5010879
62004154	AS13-06-37-037	-2.1039667	6.5260188	20	ISAKA SFIDU	Ovusukrom (AS13-06-37)	94000351

KKSys AGIS Mapping Importation Screen

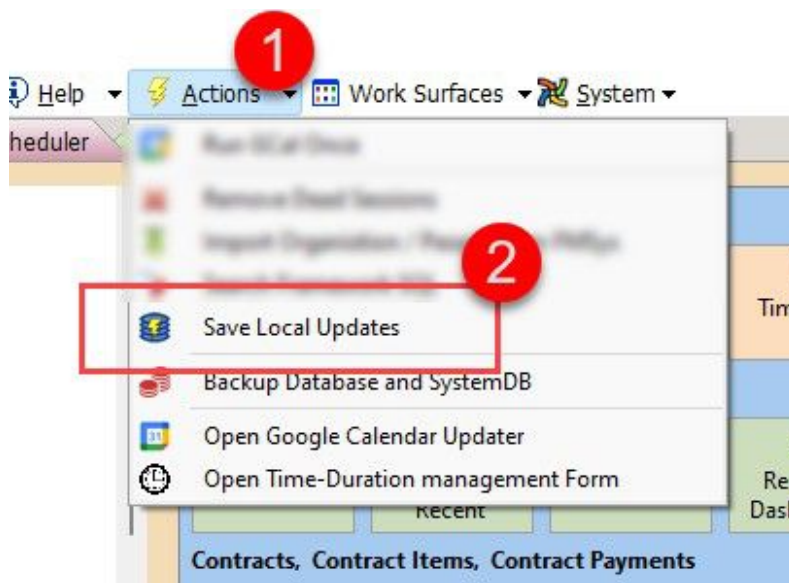
1. The grid will fill with data from the "ImportationsFieldDetails" raw-data that has been imported into KKSys.
2. Clicking "Post" will automatically transfer the data into the database "FieldDetails" data-table. The data will be linked to the farmer with the KKIDNum laid out in the table.

Save Local Updates Procedure

Laptop Users may want to save updates they have made at times when they are not connected to the KKSys server. Doing this provides the security that their changes have been saved and will not be lost if there is an issue with their computer.

The update files can be emailed to the main office at any convenient time and there they can be applied to the main system by the KKSys admin staff.

Using "Save Local Updates"

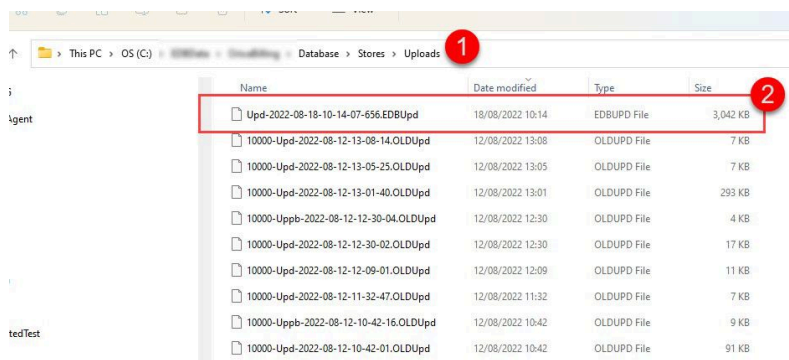


Save Local Updates Procedure

1. Find the "Actions" menu.
2. Click on the "Save Local Updates" procedure. Say "Yes" when asked.

What happens when Save Local Updates is run

All the changes you have made to the database since you last called "Save Local Updates" are collated by KKSys, and put together into a single file. This file is saved to a folder on-disk set by your Administrator.



Local Updates file saved to disk

1. After the Save Local Updates procedure is run, a file will be saved into your "Uploads" store folder. This is usually in the path: C:\KKSys\Database\Stores\Uploads.

2. Note the form of the file-name: It includes the exact date and time that the update was run in the form YEAR-MONTH-DAY-HOUR-MINUTE-SECOND followed by a 3 digit random number.

What to do with the updates file

You can keep as many updates files as you want on your local computer. If you want to provide your updates to the main office, simply write an email and add **all** your new updates as attachments.

Remember: after you have emailed these updates, rename those files you have sent "OLD" so that you do not send them twice. This is important as if updates are applied twice it may cause issues for your administrators.

Coping with issues and errors in Update Files

Please consult the following page:

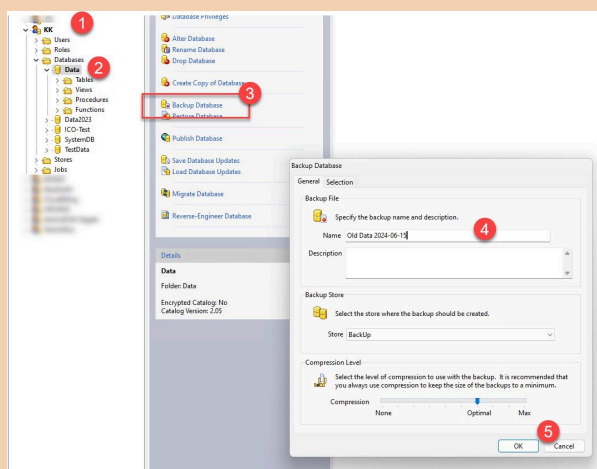
[Issues with Replication and Update Files in Orixa \(www.orixa.co.uk/194037\)](http://www.orixa.co.uk/194037)

Incorporating data from the 2023 KKFU database into the 2024 version

KKFU Field officers can work with the new 2024 version of the KKICO System. However some are still working with the older 2023 version. Users of the 2023 version provide data which is added to the 2023 database, which has version differences with the 2024 version.

Updates from the 2023 version cannot be incorporated directly into the 2024 version. Instead the updates are loaded to the main 2023 database. Then a procedure is run to load the data from the 2023 version into the 2024 version.

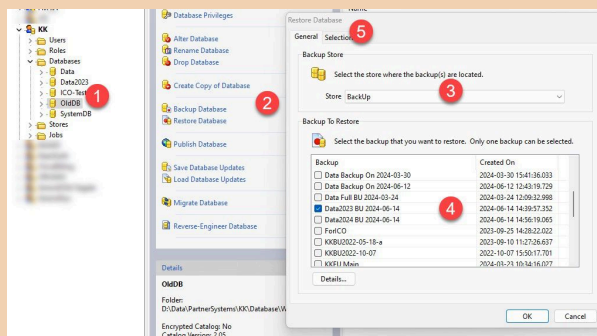
Steps needed to load 2023 data into the 2024 server



Backup Database

On the 2023 server, apply all updates from ICO Officers, and then backup the database

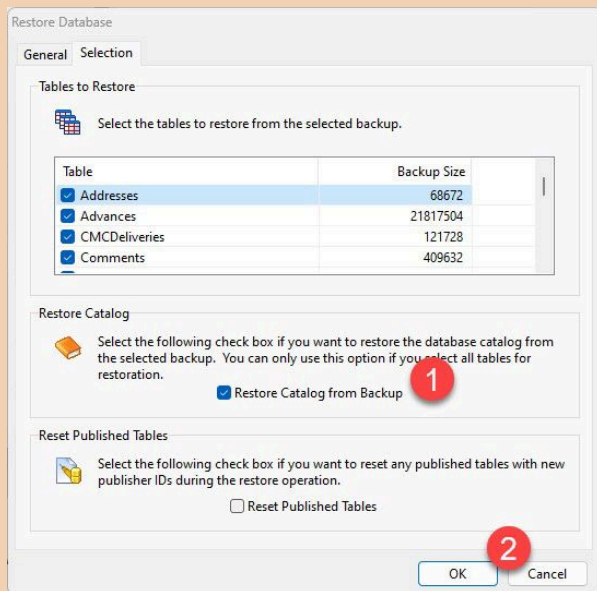
1. In EDB Manager, find the "KK" database-session.
2. Open the "Data" database.
3. Click on "Backup Database"
4. Enter a name for the backup file.
5. Click OK



Restore Database

On the 2024 server, copy the backup file into the Backup folder, then Restore the "OldDB" database using this backup file.

1. Select the "OldDB" on the new server.
2. Click on "Restore Database".
3. Ensure that the "Backup" Store is selected (where the backup file has been copied).
4. Select this file.
5. Click on the "Selection" tab to go to the next step.

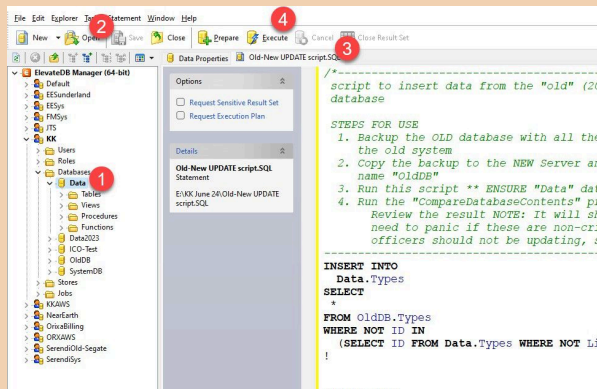


Restore database "Selection" tab

On the "Selection" tab of the Restore database dialogue

1. Ensure that the "Restore Catalog from Backup" check-box is ticked.
2. Click "OK" to restore the database.

NOTE: Take care during the "Restore" phase that you restore the "OldDB", if you restore the "Data" database by accident, you will overwrite the 2024 system.



Run the "Old-New UPDATE script.SQL"

Run the "Old-New UPDATE Script" to incorporate the data from the 2023 version into the 2024 version

1. Ensure that the "Data" database is selected.
2. Open the SQL file from disk.
3. Review the contents of the file.
4. Click "Execute" to run the script.

Notes on the UPDATE process

- The update process is slow. Running it in June 2024 required about 2 hours of time. This is because for every update/insert the procedure must test for the presence of the row in the destination database before adding it. For this reason it is best to run the process at a time when the database is not active.
- The update process captures changes made by ICO Officers to their core tables in the database. The tables for which updates are captured are: **Societies, People, Farmers, Staff, Phones, CoopTransactions, FarmFields, FarmerDeliveries, MembershipDetails, EditHistory**. Other tables are not touched by the update process.
- The update process should not result in data being lost from "data clashes", but this cannot be guaranteed. Usually different ICO officers enter data for different farmers. However it is possible that one ICO Officer working with the 2024 system has gathered data for the same farmer as an officer working on the 2023 system. In most cases this would **not** be a problem. Data from both ICO officers would be added and saved. However, this could result in farmers having unusual number of records, for example duplicate **Phones** or **FarmerDelivery** data. If both officers edit the same data record (for example both edit the farmer's date-of-birth) then one update and over-write another.

Problem solving: Clearing / Removing Temporary Files created by the database, AKA: What to do if your App fails to open with a "Cannot lock database" Error

The Orix Database is very robust and reliable, but in certain circumstances such as unplanned shut down temporary files used by the database may not be deleted. If large numbers of these files build up Orix can have problems trying to start a new instance of your App.

An error will show "Cannot lock the database for shared access". If you simply try to start your App again it will usually open. But the temporary files will persist and continue to cause this issue.

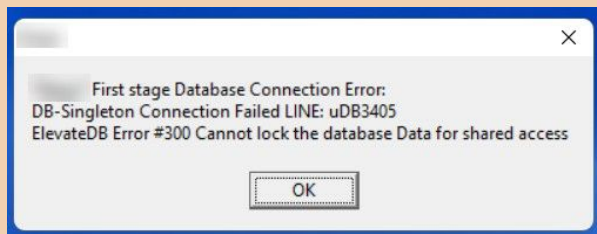
To resolve the issue they should be deleted.

If the issue occurs it may be sensible to program a procedure into your App to automate the removal of these files.

NOTE: You cannot do any damage to your system by trying to delete these files. If a file is in use you will see a "cannot delete" message, and you will have to leave this file. It can be deleted later, for example after you have restarted your system, or after enough time has passed to allow the file to become unlocked.

Also the presence of these files is perfectly normal. In a large system each user can create hundreds of Temp-files, so it is normal for this folder to contain hundreds or thousands of temp files.

What to do if your Orix App shows "Cannot lock the database" error on Start-up

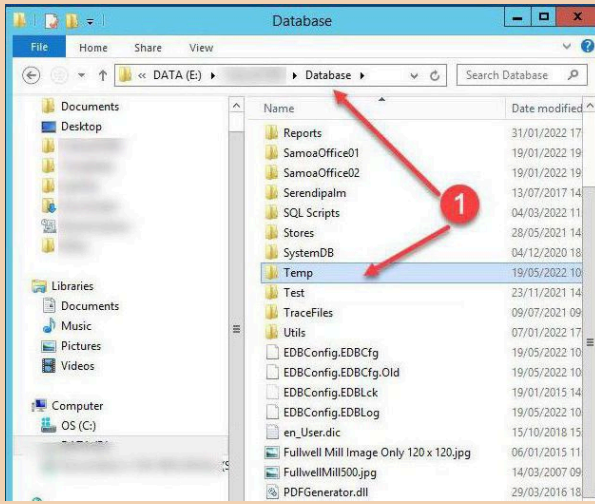


Error: Cannot lock the database Data for shared access

To fix this problem usually all that is needed is to delete some or all of the temporary files created by your App.

How to delete temporary files created by your App

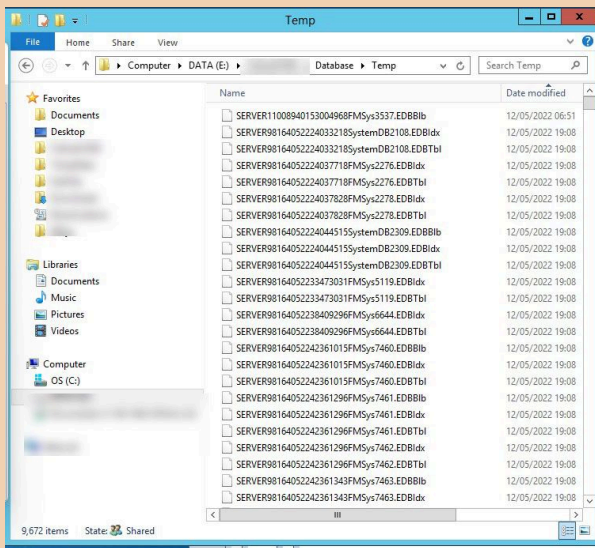
It is best to restart your computer prior to this step, restarting will "unlock" any Temp files which are still being held by a database process. Restarting may also cause some of the excess files to be deleted by the database itself as it shuts down.



Locating the "Temp" folder for your App Database

Find the folder which contains the files

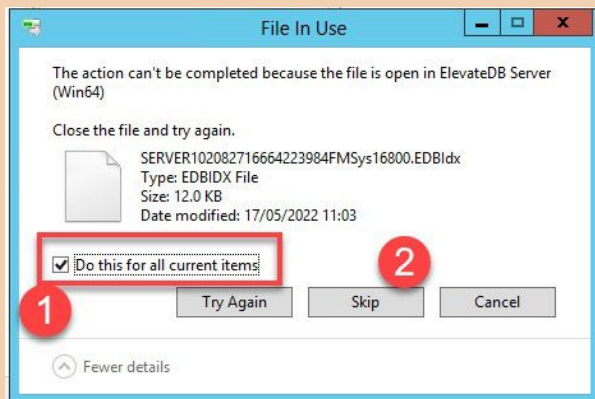
1. Open Windows explorer. Find the "Temp" folder for your system. This is usually in the following location:
C:<My App Name>\Database\Temp



Temp Files

The Temp folder will usually show a long list of files with file extensions ".EDBBlb", ".EDBIdx" and other similar names.

Click on one of these files and press [CONTROL] + A. This will select all the files in the folder. Now press Delete to start the deletion process.



Deleting Temporary Files, "File in Use" Message

If a file is still locked, either by an active session of the database, or by a "hanging" lock from a session which is actually shut down, the "File In Use" message will show, as in the image on the left.

1. Tick the "Do this for all current items" tick-box.
2. Click "Skip".

It should be possible to delete these files later, for example after a full system restart.

Usually once the temporary files are wholly or partially deleted your App should start without issues. The "Cannot lock database" error is not a critical error indicating a big problem, it results from your computer having problems processing the large numbers of files in the Temporary Files folder if a large number have built up over time.