



**CIO  
Simple**

TECHNOLOGY SOLUTIONS

Information Portal

Version 5.00



# INFORMATION PORTAL

## What is iPortal: User Perspective

### What is iPortal from the user perspective:

iPortal (short for Information Portal) is a software solution designed to help you find information. It allows you to search for the following items:

- Reports
  - Employees
  - Offices\Locations
  - Matching screens and edit windows.
  - Work Lists
  - Internet Links
- And much more...

iPortal will be an icon located on the desktop of the computer. Using pass through security, each user is connected to iPortal with their Windows login. The options available in iPortal are based on the security assigned to each user and how they choose to personalize the main screen. For this reason, the look and functionality of the application could be different for every user.



# INFORMATION PORTAL

What is iPortal: Administrator Perspective

## What is iPortal from the Administrator perspective?

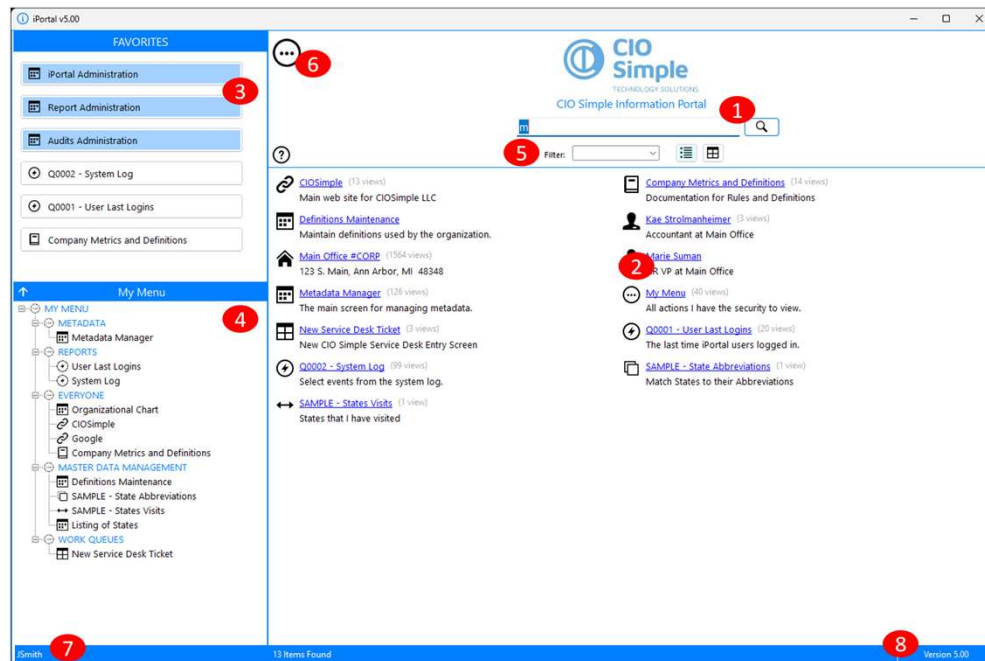
iPortal is used for Data Warehouse Management and provides the following:

- The fastest method possible for writing and distributing raw data reports.
- Simple Data Uploads
  - HR Data, Budgeting, and any other data source without a direct link.
- Data Matching
  - For example, what GL Code does this Location get summarized into?
- Data Inclusions
  - For example, what Region does this Location belong to?
- Data Selectors
  - For example, a new product was found. What type is it?
- Data Audits
  - To make sure your data warehouse stays accurate.
  - For example, are any locations missing a GL code?
- Work Queues
  - To organize and track workloads.



# THE MAIN SCREEN

## Quick Tour



1. This is the search window. Just like Google, type in what you are looking for here. Partial words are ok. Your results are based on the security assigned to you, so you may not see everything that others do.
2. This is the Results Area. What you search for will appear here. Just like on a web page, click on any of the blue highlighted links to access the item.
3. This is your Favorites List. This is custom to the individual, including colors and sort order.
4. Menus can also be added to your Favorites list. These are simply ways to categorize some of the items that can be found within iPortal.
5. This allows you to search for specific types of information. As more information is added to iPortal, lists can get very big, so this will be helpful.
6. This is a helpful menu to show you more options that are available to you. The ability to list all reports or all applications is available here.
7. This is the employee that is currently logged in. Security within iPortal will be based on the rights of this employee. You can click here to find additional employee information.
8. This is the version of iPortal. When required, iPortal will update automatically with no input needed from you. You can click here to upgrade iPortal when it reads "Patch Available".



# REPORT BUILDER

The fastest way to distribute data.

While graphs and charts are pretty, there are countless requirements for fast access to the raw data. Don't have your team spending hours formatting rows and columns when ultimately you just want the data in Excel.

The report builder gives your team the tools to deliver data to end users in minutes.

## STEP 1: Developer Writes a Stored Procedure

```
create proc Q1500_SelectStatesByRegion @Region varchar(100) as
select
  Region,
  Division,
  StateName,
  isnull(Abbreviation, '< N/A >') as Abbreviation,
  iif(VisitedFlag = 1, 'Yes', 'No') as Visited
from
  sample_states
where
  Region = @Region or @Region = '< All >'
order by
  StateName
```

## STEP 2: Create a "Report" in iPortal with a few mouse clicks. Most entry fields have default values.

The screenshot shows the 'Modify Report' window in the iPortal Report Builder. The left sidebar contains buttons for 'Close', 'Save', and 'Run Report'. The main window displays the following fields:

- Connection: iPortal
- Stored Procedure: Q1500\_SelectStatesByRegion
- Name: Select States By Region
- Description: Select the States by Region
- Owner: John Smith
- Long Description: Select the States by Region. This will also include the states that have been visited.
- Parameter Designer tab: Shows a table with 1 parameter.

Parameter	Prompt	Required	Type	Max Length	Lookup	Custom Lookup SQL
@Region	@Region	Yes	Lookup	100	SAMPLE - State Regions	



# REPORT BUILDER

The fastest way to distribute data.

**STEP 4: The Report is available to find in iPortal for all users with the proper access.**

The screenshot shows the CIO Simple Information Portal interface. On the left, there's a 'FAVORITES' sidebar with items like 'iPortal Administration', 'Report Administration', and 'Audits Administration'. Below that is a 'My Menu' section with various navigation options. The main content area displays the report 'Q1500 - Select States By Region' with a search bar and a filter dropdown. A red box highlights the report title in the sidebar. Below the report title, there's a 'Quick Report Viewer' panel with buttons for 'Close', 'Refresh', 'Copy to Clipboard', 'Export to CSV', and 'Run to CSV File'. The report data is displayed in a table with columns: Region, Division, StateName, Abbreviation, and Visited. A context menu is open over the table, showing options like 'Copy All', 'Copy All - No Headers', 'Copy', 'Export to CSV', 'Export to Tab Delimited File', and 'Set Font Size'.

Region	Division	StateName	Abbreviation	Visited
South	East South Central	Alabama	AL	Yes
West	Pacific	Alaska	< N/A >	Yes
West	Mountain	Arizona	AZ	Yes
South	West South Central	Arkansas	AK	No
West	Pacific	California	CA	Yes
West	Mountain	Colorado	CO	Yes
Northeast	New England	Connecticut	CT	Yes
South	South Atlantic	Delaware	< N/A >	Yes
South	South Atlantic	Florida	FL	Yes
South	South Atlantic	Georgia	< N/A >	Yes
West	Pacific	Hawaii	< N/A >	Yes
West	Mountain	Idaho	< N/A >	Yes
Midwest	East North Central	Illinois	< N/A >	Yes
Midwest	East North Central	Indiana	< N/A >	Yes
Midwest	West North Central	Iowa	< N/A >	Yes
Midwest	West North Central	Kansas	< N/A >	Yes
South	East South Central	Kentucky	< N/A >	Yes
South	West South Central	Louisiana	LA	Yes
Northeast	New England	Maine	< N/A >	No
South	South Atlantic	Maryland	< N/A >	No
Northeast	New England	Massachusetts	< N/A >	No
Midwest	East North Central	Michigan	MI	No
Midwest	West North Central	Minnesota	< N/A >	No
South	East South Central	Mississippi	< N/A >	No
Midwest	West North Central	Missouri	< N/A >	No
West	Mountain	Montana	< N/A >	No
Midwest	West North Central	Nebraska	< N/A >	No

**STEP 5: Users can access the data immediately.**

Data can be copy/pasted directly into Excel or written to a file.

It is not uncommon to have data delivered in minutes and put the end user in control of accessing information on their schedule.





# INCLUSIONS

Users decide what should be included.

Do you have Regions that contain locations? Departments that contain people?

iPortal allows the creation of Inclusions, which puts the management of these lists into the hands of those that know it best.

Define the data on the Left List and the data on the Right List. Then define what happens when the arrows are pressed.

Once setup, end users can manage how data should be grouped.

**Data Inclusion**

**Name:** SAMPLE - States Visits **Active:** ☒

**Description:** States that I have visited

**Application:** Master Data Management

**Create Link:** ☒

<input checked="" type="checkbox"/> <b>Primary Drop Down</b> An Optional list of items to be displayed at the top of the Inclusion screen.	<input checked="" type="checkbox"/> <b>Secondary Drop Down</b> An Optional list of items to be displayed at the top of the Inclusion screen.
<input checked="" type="checkbox"/> <b>Left Side</b> The data that will fill the LEFT side in the inclusion.	<input checked="" type="checkbox"/> <b>Right Side</b> The data that will fill the RIGHT side in the inclusion.
<input checked="" type="checkbox"/> <b>Move to Left</b> The action that will happen when the button to move from right to left is pressed.	<input checked="" type="checkbox"/> <b>Move to Right</b> The action that will happen when the button to move from left to right is pressed.

**SAMPLE - States Visits**

States that I have visited

Region:

Division:

States Visited	Not Visited
Alabama	Arkansas
Alaska	Kentucky
Arizona	Louisiana
California	Maine
Colorado	Maryland
Connecticut	Massachusetts
Delaware	Michigan
Florida	Minnesota
Georgia	Mississippi
Hawaii	Missouri
Idaho	Montana
Illinois	Nebraska
Indiana	Nevada
Iowa	New Hampshire
Kansas	
New Jersey	
New Mexico	
New York	
North Carolina	
North Dakota	
Ohio	
Oklahoma	
Oregon	
Pennsylvania	
Rhode Island	
South Carolina	
South Dakota	

36 Records Found.

14 Records Found.



# MATCHES

What data should be matched?

**SAMPLE - State Abbreviations**

Match States to their Abbreviations

Region: < All >   
 Division: Mountain

**States without Abbreviations**

Search:

StateName
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Records: 6

**Unmatched Abbreviations**

Search:  Ignore

Abbreviation
AR
DE
GA
HI
IA
ID
IL
IN
KS
KY
MA
MD
ME
MN
MO
MS
MT
NC
ND
NE
NH
NJ
NM
NV

Records: 41

Match State

Do you have Payroll Locations that need to be aligned with operating locations? Office Managers that need to be matched to Offices?

Create a Match that allows the defining of two data sets and how they need to be related. With the ability to setup Ignoring, you can always make sure that ALL matches have been completed.

The power to manage data can be placed into the hands of your users. All controlled through security.





# SELECTORS

List data objects that need an action taken.

Do you want specific actions taken based on an identified list of items? Use a Selector to provide custom SQL Actions to be taken when an item is selected.

Selectors can also be used to launch any other iPortal object, such as a Report, Inclusion, Table Edit, etc.

The screenshot displays the 'New Employee Assignment' selector configuration and its execution. The configuration window on the left shows the selector's name, description, application, and help text. The execution window on the right shows the selector's instructions, a list of employees, and a list of departments.

**Selector Maintenance**

Name: New Employee Assignment  
Description: Assign a new Employee to a Department  
Application: Master Data Management  
Active: ☐  
Create Link: ☒

Buttons: Close, Save, View Selector

Help Text:  
Select the new employee from the list.  
Choose which Department they belong to.  
You can view the complete list of employees by running the Q1250 Employee Report.

**Primary Drop Down**  
An Optional list of items to be displayed at the top of the Selector screen.

**Secondary Drop Down**  
An Optional list of items to be displayed at the top of the Selector screen.

**Data Selection**  
Define the data that will be selected.

**Button Setup**  
Setup the buttons that will be the actions to take based on the list.

**New Employee Assignment**  
Assign a new Employee to a Department

Instructions: Select the new employee from the list.  
Choose which Department they belong to.  
You can view the complete list of employees by running the Q1250 Employee Report.

**New Employees Found**

FirstName	LastName	Title
Steven	Young	CEO
Sue	Struble	CFO
Kae	Strolmanheimer	Accountant

3 Records Found.

**Departments**

- Executive Management
- Finance
- Information Technology
- Revenue Cycle
- Marketing
- Q1250 - Employee Report



# AUDITS

Make sure your data stays clean!

Audits are the key to keeping your data warehouse accurate.

You will spend a lot of time cleaning, matching, aligning, and organizing your data. Make sure it stays that way!

Audits monitor your data to make sure it stays clean. Use this along with Uploads, Inclusions, Matches, and Selectors to let users know when the data is wrong, and EXACTLY how to fix it.

**This Audit was created to make sure that every state has an abbreviation assigned to it.**

**Instead of relying on a developer to fix this problem in the data warehouse, let a user fix it by sending them an email with instructions on how to correct the problem!**

Add Audit

Close

Save

Visibility

Name: States Missing an Abbreviation

Active: ☒

Category: Data Management

Owner: John Smith

Description: One or More States are Missing an Abbreviation

Notification Email: info@CIOSimple.com (Separate by semi-colons)

How To Resolve: Open iPortal and search for "State Abbreviations". Make sure the list on the left is empty. If not, select the State in the left column, and the matching Abbreviation in the Right column. Press the Match State button. When complete, there should be no states listed in the left column.

SQL Statement:

```
select
  Statename + ' is missing an abbreviation.' as Description,
  StateID as RelatedID
from
  sample_States
where
  abbreviation is null
```

1. SQL Statments must return the following columns ONLY: Description, RelatedID

2. Audits can only be run from the database where iPortal is installed. Please specify the database prefix for executing code in another location.

Test SQL

Test Results

Description	RelatedID
Alaska is missing an abbreviation.	2
Delaware is missing an abbreviation.	8
Georgia is missing an abbreviation.	10
Hawaii is missing an abbreviation.	11
Idaho is missing an abbreviation.	12
Illinois is missing an abbreviation.	13



# AUDITS

Make sure your data stays clean!

**To:** [info@CIOSimple.com](mailto:info@CIOSimple.com)  
**From:** [Notifications@CIOSimple.com](mailto:Notifications@CIOSimple.com)

**Subject:** 6 Audit Violation(s) Found: States Missing an Abbreviation

**Description:** One or More States are Missing an Abbreviation

**How To Resolve:**

Open iPortal and search for "State Abbreviations". Make sure the list on the left is empty. If not, select the State in the left column, and the matching Abbreviation in the Right column. Press the Match State button. When complete, there should be no states listed in the left column.

**Audits Found:**

Alaska is missing an abbreviation.  
Delaware is missing an abbreviation.  
Georgia is missing an abbreviation.  
Hawaii is missing an abbreviation.  
Indiana is missing an abbreviation.  
Wyoming is missing an abbreviation.

< This is an automated message from the Information Portal. For details, please review in the Audits section of Information Portal. >

When an Audit exception is found, the user responsible for correcting the problem is notified with an email.

Complete instructions on how to correct the problem are included in the email.

A log of Audits is kept daily to allow management to monitor audits that are being completed.

iPortal allows the definition of unlimited audits to ensure your data warehouse continues to operate as expected.



# WORK QUEUES

Define a work queue for any purpose.

From a fully functional Help Desk, to a call center work list, Work Queues can handle it all.

Work Queues are defined however you prefer using Ticket Types, Categories and Forms.

A full history is kept for every ticket, and even allows for transfers between users and other work queues.

Support and Project Tickets for CIO Simple [ADMIN]

### CIO Simple Service Desk Queue

Tickets for CIO Simple Services

**FILTER**

☒ Request Date ☐ Close Date

Begin Date: 02/05/2023 End Date: 02/05/2024

Ticket: Title: Status: < Not Closed >

Location: < All > Department: < All > Category: < All >

Assigned To: < All > Requested By: < All >

Clear

New Open Take Action Modify Transfer Tickets: 1

Priority	Status	Type	TicketID	CreateDate	Requester	Title	Category	Location	Assigned To	Department	ClosedDate
9,999	New	General	28	2/5/2024	Sue Struble	Please add Location	General	Main Office	Ken Strohschein	Marketing	

ALL TICKETS

UNASSIGNED TICKETS

GENERAL

PROBLEMS

PROJECTS



# DATA UPLOADS

Load any information into your Data Warehouse

Would you like to have payroll information in your data warehouse, but can't get a direct data feed?

Use a Data Upload as a method of importing data.

The user will be presented with a screen like this to simply paste a spreadsheet. Full instructions are included and can be edited by the user if things change.

This allows a controlled upload of information into the system where it can be processed and reported upon.

Use Audits to make sure data is uploaded frequently, or that data is not missing!

Administrators can create Uploads quickly and easily by simply pasting sample data.

Data Upload: PayCom Upload

PayCom Upload

Close

Upload Data

View Upload Template

PayCom Upload

Instructions:

1. Login to Paycom and download the employee export file
2. Open the document and copy all data as is!
3. With the data copied click the "Paste Data" button on the bottom right side of the window.
4. Click the "Upload Data" button on blue navigation pane on the left.
5. You will be prompted with a successful message if everything uploaded.

Edit

Paste Data

Clear Data

Paste spreadsheet cells above.



# TABLE EDITS

Allow data to be modified, but with control.

**Table Modify**

Application: Master Data Management  
Connection: iPortal  
Table: sample\_States  
Link Name: Edit States  
Link Description: Modify State Definitions  
Create Link: ☒

Optional WHERE Clause:  
Variables  
Full Screen

Columns:

ColumnName	Display Name	Visible	CanModify	Data Type	Length	PrimaryKey
StateID (PK)	StateID	Yes	No	bigint	0	Yes
StateName	StateName	Yes	No	varchar	100	No
Region	Region	Yes	Yes	varchar	100	No
Division	Division	Yes	Yes	varchar	100	No
Abbreviation	Abbreviation	No	No	varchar	100	No
VisitedFlag	VisitedFlag	No	No	boolean	1	No

Refresh from Database

**Table Editor**

Close

Delete Row

Clone Row

Refresh

**Edit States**  
Modify State Definitions

StateID	StateName	Region	Division
1	Alabama	South	East South Central
2	Alaska	West	Pacific
3	Arizona	West	Mountain
4	Arkansas	South	West South Central
5	California	West	Pacific
6	Colorado	West	Mountain
7	Connecticut	Northeast	New England
8	Delaware	South	South Atlantic
9	Florida	South	South Atlantic
10	Georgia	South	South Atlantic
11	Hawaii	West	Pacific

Table Edits put you in control of user modifications.

Force the use of Drop Downs to fill columns.  
Allow or Prevent:

Inserts  
Updates  
Deletes

Limit columns that are visible, and columns that can be edited.

Group and User level security is available for all iPortal objects.





Questions?