

WebCATS

Client Activity Tracking System



What is WebCATS?

WebCATS is a Web-based client activity tracking system. Its sophisticated database allows your organization to track not only business outreach efforts, but also the success of those efforts.

Serving all types of outreach programs, WebCATS understands that you need to intelligently summarize your organization's impact on the community. And that's why, using WebCATS' comprehensive data entry modules and unlimited reporting capabilities, you'll always have this crucial impact data at your fingertips.

"WebCATS is outstanding software! The North Texas SBDC began its relationship with OutreachSystems in August 1995 and, since then, they have consistently provided exceptional support and technical expertise."

*-Katrina Wade Miller
North Texas SBDC*

Intuitive Interface

All it takes is a user name and password to access the WebCATS database. Once logged in, you'll find all of your organization's data neatly organized according to record type.

For example, a quick click into client data will show you a listing of all clients serviced by your program. Another click and you're inside one of the listed client records,

where a multitude of business data is stored. Yet another click and you're looking at the details of a recent counseling session your program had with the client, or the details of an important milestone the client achieved. In this way, moving from one relevant record to the next, you'll find yourself easily navigating the WebCATS interface.

WebCATS Client Search: **Go** Recent Visits: **Active Clients (C) (1-100)** **Log Out**

View
MyWebCATS
Clients/Pre-clients
Contacts
Inquiries
Counseling Sessions
Awards
Milestones
Investments
Survey Responses
Narratives
Conferences
Survey Definitions
Counselors
Centers
Worksheets

Add
Client
Contact
Conference

Manage

Resources

Help: **Go**

Ventura Assistance Center (VENTUR) Clients/Pre-clients

Client Views: **Active Clients** **Report** **E-mail** **Client Subset** **Comparative...** **Impact Groupings**

(All) **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 123...**

ID ▲	Company	Primary Contact	Session	Phone	E-mail
VTA	Cats By The Yard	Moore, Darleyne	4/12/2010	(888) 894-1234 (b)	cats@home.com
VTA0011	County Lumber	Smith, James	4/6/2009		
VTA0020	Central Coast Surveillance	Kawamoto, Lester H.	7/16/2009	(805) 555-1212 (b)	kawamoto@ccs.com
VTA0044	Carmen Chocolates	Medina, Carmen	7/10/2009	(787) 763-5108 (b)	carmen243@tech.com
VTA0053	Cookies R US	Mann, Jane		(888) 123-1245 (b)	cookies@cookiescom.com
VTA0067	Chico's Bail Bonds	Man, Chico D.	4/12/2010	(805) 456-7890 (b)	bailmechico@yahoo.com
VTA0102	Colette's Hot Air Balloons	Williams, Colette		(805) 899-2366 (h)	somebody@outreachsystems.com
VTA10012	Carlock, Cheri L.	Carlock, Cheri L.		(270) 781-2323 (b)	cheric333@aol.com
VTA5040	Colette's Coffee Shop	Williams, Colette	5/1/2009	(805) 345-4534 (b)	colw@soft.com
VTA9998	Crazy For 'CATS	Kantner, Michael	7/22/2009	(805) 882-2588 (b)	mika

10 clients matching criteria.

Additional Options: [Reassign Primary Counselor]

Blue hyperlinks are found throughout WebCATS, making it a snap for you to jump from one related record to another.

13 Record Types

There's no way to get good data out of a database unless you have a good way to get it in. WebCATS comes standard with 13 comprehensive data entry modules, each tailored to a specific aspect of your program's activities.

Record Type	Purpose
Client	Stores business information for clients (i.e. businesses) receiving assistance from your program
Contact	Stores individual-specific information such as gender, ethnicity, and veteran status for a client's various contacts
Counseling Session	Tracks consulting assistance provided to client (or non-client) businesses
Inquiry	Tracks consulting assistance given to contacts
Award	Tracks government contracts won by clients
Milestone	Tracks milestone & impact data for clients
Investment	Tracks investments & loans obtained by clients
Survey Definition	Defines survey questions and respondents
Survey Response	Tracks survey responses (e.g. conference, satisfaction, etc.)
Conference	Tracks training sponsored by your program
Center	Stores basic information for a center/program
Counselor	Stores basic information for a counselor
Narrative	Stores center performance narratives

Create an unlimited number of additional data entry forms with the add-on Custom Activity Forms Module!

Client Detail

Client ID: VT40103 Status: Active Client since 3/25/2005

Company Name: Alone Inc. Company Phone: 805-654-7993 Secondary Phone: [Redacted]

Company Fax: 805-799-6543 Company E-mail: alone@only.com

Include on main mailing list? Yes

Company Web Site: [Redacted]

Address: 224 Martin Luther King Blvd Suite A3-1050 (south building), Santa Barbara, CA 93105

Include on main mailing list? Yes Federal District: Santa Barbara State Representative District: [Redacted]

Contacts

Allen, Doug M. Partner (805) 654-7993 (m)

Fowler, Dale Employee (805) 899-3255

Center Information

Dates

Signature Date: 1/21/2008

Follow-up Date/Time: 4/27/2010 12:00 PM with Fowler,

Most Recent Counseling: 3/27/2010

Most Recent Award: 8/27/2009

Most Recent Milestone: 3/20/2010

Most Recent Loan: 1/28/2010

Last Survey Response: 1/28/2010

Last Chronon Response: [Redacted]

Expiration Date: [Redacted]

Business Information

First Start: Start-up (In Bus. < 1 year)

Company Status: In Business since 1/1/2006 (4 years)

Full Time Employees: [Redacted]

Part-Time Employees: [Redacted]

Company Gender: Male/Female: [Redacted]

Company Veteran: Non-veteran

Company Minority: [Redacted]

History of Activity for Alone Inc. (VT40103)

Viewing Dates From 1/1/2000 to 1/25/2010

Center Date	Counselor	Name	Category	Type	Amount
4/8/2010	MAIN M0001	Miller, John C.	Conference	Seminar	0 hours
3/20/2010	MAIN M0001	Miller, John C.	Milestone	Form	0
3/20/2010	MAIN M0001	Miller, John C.	Milestone	Form	0

Client records are the cornerstones of your operations. All other activity records such as counseling session or milestone records are linked to client records, letting you tie assistance efforts to specific clients.

Client Record

Session Detail

Client: Silver Isle Antiques (00CV0004)

Counselor: Miller, John C. (M0001) Prep: 2 Travel: 0.5

Contact Time: 1.5

Session Date: 3/20/2010

Type: Follow-up or Ongoing

Contact Type: Center Site (face-to-face)

SBA Counseling Area: Marketing/Sales

Additional Assistance: Advertising

FEMA/Energy Assistance: (Undefined)

Comments/Summary: Discussed a marketing plan, specifically advertising on local cable channels.

Language Used: English

Funding Source: SBA

Center: Santa Barbara Center (SB)

Notes: Silver Isle Antiques has taken out a few newspaper ads in the past, but their marketing plan has never extended much beyond that. Today, we discussed taking their advertising to cable television, an idea that Rita was excited about. We also talked about setting up a booth at the bi-monthly antique fair here at the local fairgrounds. Rita is going to crunch some numbers and get back to me.

Total # of people (excl. Counselors): 1

Referral To: (Undefined)

Action Item: Financial Statements to be provided

Date to Complete: 5/1/2010

Date Completed: [Redacted]

Reportable? Yes

Entered: 3/20/2010 10:09:28 AM by DIANEK

Last Edited: 3/20/2010 10:09:28 AM by DIANEK

Counseling Session Record

Survey Response Detail

Client: Melvin's Mutt's (EG1046)

Contact: Carson, Melvin K.

Date: 4/8/2010

Center: Santa Barbara Center (SB)

Counselor: Miller, John C. (M0001)

Survey Name: Client Satisfaction Survey

Survey Type: Client

When you contacted our center, did you have a specific question to be addressed?
Yes

If you answered "yes" to the previous question, briefly describe your question: How to expand my business...

Do you anticipate needing additional assistance from our center? Yes

Would you recommend the services of our center to other small businesses? Yes

In general, were the services offered by the center performed to your satisfaction?
Yes

How would you rate the services of our center? Excellent

When may we follow up with you? 6/5/2010

Entered: 4/8/2010 1:50:15 PM by eCenter (m.carson@gmail.com)

Last Edited: 4/8/2010 1:50:15 PM by eCenter (m.carson@gmail.com)

Survey Response Record

Conference Detail

Conference ID: 029712403 SBAS885? Yes

Title: Better Business Practices

Description: Conference covering the basics of good business practices and lawsuit prevention

Training Topic(s): Managing a Business

FEMA/Energy Assistance: (Undefined)

Training Starts: 12/5/2010 Training Ends: 12/5/2010

Date Approved: 12/5/2010 Registration Deadline: 12/5/2010

Total Hours: 0 Number of Sessions: 1

Conference Status: Open Maximum Number of Attendees: 55

Allow Waitlist? Yes

Location of Training: 555 E. Shaw Ave., Santa Barbara, CA 93101 Federal District: SB District

City: Santa Barbara

Instructors/Personnel

Claude Figueroa (805) 669-6969 (n)

Attendee Classifications

Currently In Business: 27

Not Yet In Business: 19

Business Owners: 6

Business Start-ups: 2

People with Disabilities: 7

Women: 30

Total Veterans: 16

Service Disabled vets: 3

Reservist/National Guard: 10

Total Minorities: 17

African American: 2

Black/African American: 3

Native American: 5

Hawaiian/Pacific Islander: 2

Hispanic/Latino: 11

Total Attendees: 46

Total "no shows": 2

Attendee List

Name	Phone	E-mail	Entered	Status
Adler, Joe	(805) 838-2129 (n)	jadler92@cox.net	12/05/2010 8:47:40 AM	Registered
Arvin, Clyde	(805) 465-1233 (n)	arvin@battermanterrace.com	12/05/2010 8:47:40 AM	Prospective

By linking attendee lists, which are made up of contact records, to your conference records, WebCATS is able to automatically calculate attendee classifications and fees for the conference.

Conference Record

DLA & SBA Compliance

Because the requirements set for by the Defense Logistics Agency (DLA) and Small Business Association (SBA) are so consistent and specific, and because many outreach programs in the United States are funded by one or both of these federal agencies, WebCATS is able to cater to the commonalities that exist among programs reporting to DLA and SBA.

DLA Reporting Requirements

DLA is concerned with your center's counseling activity, general outreach, and the government contracts awarded to your clients, among other things. DLA collects this information via the DLA 1806 Report, which is easily generated from WebCATS.

SBA Reporting Requirements

SBA is concerned with your center's counseling activity, training events, economic impact, and general outreach, among other things. SBA collects this information via quarterly EDMIS uploads, which you'll perform right from WebCATS via the extensive EDMISRX add-on component. In addition to EDMIS uploads, WebCATS also generates the SBA641 (Parts I/II/III), SBA Economic Impact Report, SBA Training Report, SBA888, SBA 2226, and SBA Case Report.

Not funded by DLA or SBA? WebCATS has your unique requirements covered via its add-on Custom Activity Forms Module.



Creating Record Subsets

Perhaps the single most important tool WebCATS has to offer is its subset feature. Subsets are used to organize a group of records based on common criteria. The more criteria you string together, the more specific your subset results will be. For example, a subset can be as simple as finding all counseling sessions provided under the topic of customer relations. Or, a subset can be as sophisticated as finding all woman-owned businesses located in Santa Barbara county that have a Web site and three or more employees.

This subset criteria will find all woman-owned businesses located in Santa Barbara county that have a Web site and three or more employees.

Client/Pre-client Subset

This feature allows you to create a subset of the Client/Pre-client data based on any criteria you choose. Please enter the search criteria below.

Field Search:

Specify Criteria

Vital:

Client/Pre-Client Type Client ID Client Activated/Inactivated On

SBA Client Type

Company Information:

Company Name Company E-mail Address Company Website

Company Phone Company Secondary Phone Company Fax

Company Street Address Company City Company State

Company Zip Code Company County Company Federal Congressional District

Company State Representative District Company State Senate/Assy. District Company to receive mailings?

Company to receive e-mailings? HUBZone HUBZone Certification Date

Business Online? Home-based Business? Distressed Area?

Company Gender Company Veteran Status Business Size

Disadvantage Status Disadvantage Certification Date Business Type

Organization Type State of Incorporation Initial Company Status

Current Company Status International Trade? Date Company Established

Full-time Employees Part-time Employees * Total Employees

Federal ID DUNS Number CAGE Code

Gross Revenue/Sales Gross Revenue/Sales Date Gross Profits/Losses

Gross Profits/Losses Date

Company Product:

Product Codes, SIC Product Codes, PSC Product Codes, NAICS

Primary SIC Primary PSC Primary NAICS

Product or Service Description

Primary Contact Information:

Primary Contact Salutation Primary Contact First Name Primary Contact Middle Initial

Primary Contact Last Name Primary Contact Position Primary Contact Home Phone

Primary Contact Work Phone Primary Contact Fax Number Primary Contact Mobile Phone

Step 1: Choose the fields to include in the subset

Client/Pre-client Subset

This feature allows you to create a subset of the Client/Pre-client data based on any criteria you choose. Please enter the search criteria below.

Center(s): MAIN

Client/Pre-Client Type: Active Client Inactive Client Pre-client

Company County: (Undefined) Alameda Alpine

Kern Kings Los Angeles

Merced Nevada Orange

San Francisco San Jose San Luis Obispo

Santa Barbara Santa Clara Santa Cruz

Sonoma Stanislaus Ventura

Business Online?

Company Gender: (Undefined) Choose not to respond Female (>50% woman-owned)

Male Male/Female

Full-time Employees: to Select *non-matching* records?

Save Subset for future use? Name:

Step 2: Identify the criteria for the chosen fields

Creating Subsets | Putting Subsets to Work

Intuitive Interface

13 Record Types

DLA & SBA Compliance

Subsets

Reports

Scorecards

Countless Customizations

Extras

Santa Barbara EDC (SBEDC) Clients/Pre-clients

Client Views: WO in SB County Report **E-mail** Client Subset Comparative... Impact Groupings

(All) A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 123...

Status	ID	Company	Primary Contact			
●	MSBC.SFT9539	Aurora Property Management	Stratton, Sharon			594@mail.wvu...
●	MSBC.SFT0124	AAA Hardware and Garden	Armstrong, Sally			hardware.com
●	MSBC.SFT9492	ABC, Inc	Miller, Michael A.			8@pcrcorp.com
●	CVSBDC.00CV4488	Acme Casket Company	Doe, Mike	6/24/2009	(805) 888-9999 (b)	sallys966@acmecasket.com
●	MSBC.SFT9549	ABC Construction	Gomez, Maria	2/23/2011	(956) 655-9999 (b)	mariagomez729@utpa.com
●	VPAC.VTA1338	Afterglow Antiques	Davenport, Duane F.		(505) 720-4860 (b)	lookup444572@yahoo.com
●	EG1032	AeroteK Inc	Barlow, Kali	4/6/2011	(805) 123-2818 (b)	kbarlow336@aeroteK.com
●	VPAC.VTA0104	Alpha Omega	Batista, Juan T.	10/9/2009	805-989-1234 (b)	juanb181@aol.com
●	MSBC.WHG3683	Alina's Dance Studio	Schramm, Jourdan	4/4/2011	(304) 455-1111 (b)	jschramm672@hotmail.com
●	VPAC.VTA10000	Alexander, Shemi	Alexander, Shemi		(123) 456-8521 (b)	jamese411@softshare.com
●	VPAC.VTA5573	ArmorTech	Quintilus, Kyle	4/1/2011	805-727-2000 (b)	jamese@outreachsystems.com

If you click the "E-mail" button while a subset is displayed...

...WebCATS generates an e-mail addressed only to the members of the subset.

Send message to clients?

From: "Santa Barbara EDC" <sbcdc@sbcdc.org>

Reply To: sbcdc@sbcdc.org

To:

Cc:

Bcc: 2farsouth864@yahoo.com; arehab967@comcast.com; a1waste704@hotmail.com; a848@yu.com; Aaron.brown777@hawaii-sbcdc.com; abc35@abc.com; abc436@readforfun.com; abc509@abc.com; abc595@hotmail.com; acalverton662@mac.com; access2334@lamps.com; acox242@tman.com; adamston6@abc123.com; adavis785@vedc.com; adjlfdj620@aol.com; adjlfdj638@aol.com; aen845@sbdc.com; aerades958@hotmail.com; ago846@html.com; agraeioo680@yahoo.com; ajakary030@gmail.com; al614@hotmail.com; alane650@verizon.net; alefiore788@mdptap.com; allen753@softsahre.com;

Subject: Attention Women-Owned Businesses!

Message: We have exciting news for women-owned businesses in Santa Barbara county. The local economic development program is offering FREE search engine optimization classes just for you! Contact us today at 805-965-2918 for more information!

Best regards,
Santa Barbara EDC

Putting Subsets to Work

Once you generate a subset, you can:

- Send an e-mail to the subset's members
- Generate reports that are limited to the data in the subset
- Generate scorecards that are limited to the data in the subset
- Save and share the subset with other WebCATS' users

The ability to perform these actions upon a specific set of records is extremely powerful.

Creating Subsets | **Putting Subsets to Work**

Intuitive Interface

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Built-In Reports

You'll easily organize your client data with the more than 100 management reports that are built into WebCATS. Every record type has specialized reports associated with it. For example, you could run a mailing label report for client records, an attendee list report for conference records, an action items report for counseling records, or even generate a mass e-mail for a listing of client or contact records.

To suit your specific reporting needs, a variety of report criteria such as date range, center, and funding source are available. You decide the report's output format too. Reports can be generated as attractive HTML documents or exported as comma-delimited files for import into other applications such as Microsoft Excel or Word.

Counseling Session Reports

Report Criteria: From 1/13/2010 to 4/13/2010, Reportable Only

Selected Center(s): VENTUR

Select Report: Reports Custom Reports My Favorites Network Favorites

- Counseling Sessions Data Entry Audit
- Summary of Counseling by Center
- Summary of Counseling by Center/Counselor (Client Hours)
- Summary of Counseling by Center/Counselor (Actual Hours)
- Summary of Counseling by Center/Client
- Summary of Counseling by Counselor/Client
- Summary of Counseling by SBA Area
- Summary of Counseling by SBA Additional Area

Sort By: Counselor ID/Client ID

Subtitle: From 1/13/2010 to 4/13/2010, Reportable Only

Output Format: Normal Export Format (comma delimited)

Include Comments? Include Notes?

Prepend Center IDs? Enable Record Links?

[Generate Report](#) ?

Report Criteria for Counseling Session Records

Summary of Counseling by Counselor/Client
From 1/13/2010 to 4/13/2010, Reportable Only

000001 -- Jones, Charlotte
Ventura, CA
Resource: Employee

CLIENT ID	CLIENT NAME	# SESSIONS	PREP	TRAVEL	CONTACT	TOTAL
SFT9213	Kat's Cats	1	0.50	0.25	1.00	1.75
SFT9273	Frizlicious	1	1.00	0.00	1.00	2.00
SFT9310	Werkin, Ivan B.	1	0.00	0.00	0.50	0.50
CLIENTS: 3		3	1.50	0.25	2.50	4.25

000002 -- Berton, Bart
Ventura, CA
Resource: Employee

CLIENT ID	CLIENT NAME	# SESSIONS	PREP	TRAVEL	CONTACT	TOTAL
SFT8346	ABC Welding Ilc	1	0.25	0.00	1.00	1.25
SFT9310	Werkin, Ivan B.	1	0.00	0.00	0.50	0.50
CLIENTS: 2		2	0.25	0.00	1.50	1.75

000003 -- Kerns, Bobby
Santa Barbara, CA 93101
Resource: Consultant

CLIENT ID	CLIENT NAME	# SESSIONS	PREP	TRAVEL	CONTACT	TOTAL
SFT0124	AAA Hardware and Garden	1	0.25	0.00	1.00	1.25
SFT0209	Allied Surplus Distribution	1	1.00	6.00	1.00	8.00
SFT9310	Werkin, Ivan B.	1	0.00	0.00	0.50	0.50
SFT9389	Len's Trainers	1	2.00	0.50	1.50	4.00
CLIENTS: 4		4	3.25	6.50	4.00	13.75

Subsequent Report Output

Built-In Reports | Custom Reports | Scheduled Reports

Intuitive Interface

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Custom Reports

In addition to the more than 100 built-in reports that WebCATS features to account for common reporting scenarios, WebCATS also features a custom reports module. Whether you're just looking to make minor changes to a built-in report or you're looking to create a brand new report that doesn't resemble anything currently available, the custom reports module allows you to design reports to your exact specifications.

◀ Previous Next ▶ ?

Welcome to the Custom Report Merlin!

Using this Merlin, you can design a custom report that displays data from as many fields as you want, in any arrangement you want.

To get started, you can either click the Next button to design your custom report from scratch, or you can choose to base your report on an existing custom report template. Any custom reports that you have created in the past are available as templates. In addition, OutreachSystems has created several sample templates that mimic some of WebCATS' existing built-in reports. Please refer to [WebCATS Help](#) for additional information about the Custom Report Merlin.

Report Template:

Select the fields to include in the report ◀ Previous Next ▶ ?

Field Search: Show only selected fields?

- Session Date
- SBA Counseling Area
- Preparation Time
- Language Used
- Client Name/ID
- Session Type
- Travel Time
- Center ID

Specify the order of the fields ◀ Previous Next ▶ ?

Language Used

Session Date

Session Type

SBA Counseling Area

Preparation Time

Travel Time

Contact Time

Center ID

Client Name/ID

Step 1: Selecting and ordering report fields

Report Layout ◀ Previous Next ▶ ?

The current layout of your custom report is displayed below. To change the appearance of a report element, please click on it.

	1	2	3	4	5	6	7	8
GH 1	Counseling by Language [Report Subtitle]							
GH 2	Language Used: [LANGUAGE]							
GH 3	DATE	TYPE	SBA AREA	PREP	TRAVEL	CONTACT	CENTER	CLIENT
D 1	[DATE]	[TYPE]	[SBA AREA]	[PREP TIME]	[TRAVEL TIME]	[CONTACT TIME]	[CENTER ID]	[CLIENT]
COUNSELING SESSIONS:		[Count of Records]	[Sum of PREP]	[Sum of TRAVEL]	[Sum of CONTACT]			
GRAND TOTALS:		[Grand Total Count of Records]	[Grand Total PREP]	[Grand Total TRAVEL]	[Grand Total CONTACT]			

Overall Report Options

Report Title

Grouping/Sorting
 Group records by: Order:
 Display summary information only?

Primary detail sort: Order:
 Secondary detail sort: Order:
 Tertiary detail sort: Order:

Include Horizontal Lines
 After report header? After group header?
 Between detail records?
 Before group footer? Before report footer?

[Add Column Header](#)

Step 2: Formatting report layout

Built-In Reports | **Custom Reports** | Scheduled Reports

Intuitive Interface

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Scheduled Report Detail Cancel Add

Enabled?

Center:

Schedule:

Days: 1 2 3 4 5 6 7
 8 9 10 11 12 13 14
 15 16 17 18 19 20 21
 22 23 24 25 26 27 Last Day

Report Type:

Report:

Subset Criteria:

Subset Centers: SB

Output Format: Normal Export Format (comma delimited)

Sort By:

Prepend Center IDs?

Include Comments?

Include Notes?

Worksheet Mode:

Send To:

Message Subject:

Message Text:

Cancel Add

Scheduled Report Criteria

Scheduled Reports

All WebCATS reports and scorecards can be scheduled to run on a recurring basis. The results of scheduled reports are then e-mailed to the recipients of your choosing.

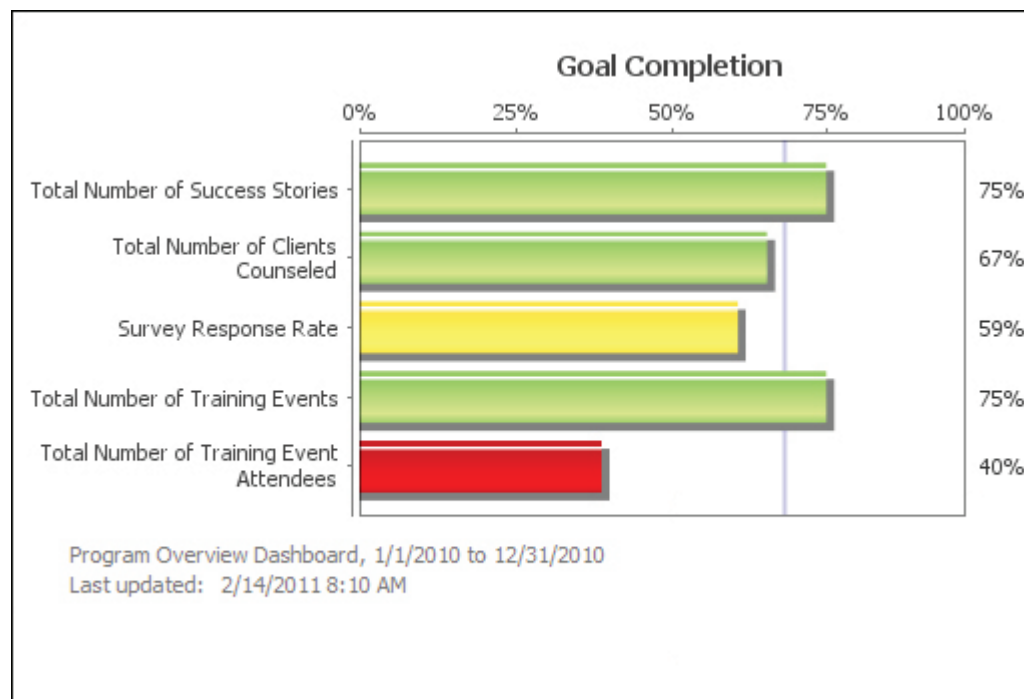
See WebCATS in action! Call us for a guest account user name and password.



Measure Performance with Scorecards

Developed in the 1990s, scorecards are a performance measurement tool that provide immediate and focused insight into organizational performance. Scorecards are used extensively by business, government, and nonprofit organizations worldwide to monitor organizational performance against strategic goals.

WebCATS supports the concept of scorecards by allowing you to design your own performance metrics and goals. Once designed, scorecards can be set up to display immediately upon login to WebCATS, allowing real-time evaluation of performance—on a per-counselor, per-center, or program-wide basis.



Sample Scorecard

Countless Customizations

A software application should accommodate your way of doing things—not the other way around. For this reason, there are countless customization options in WebCATS so that you can tailor its operations to those of your program's.

Custom Menu Links

WebCATS' navigation menu supports up to 21 custom hyperlinks that can link to Web pages external to WebCATS. For each link, you'll configure the link title and underlying URL.

Field Customizations

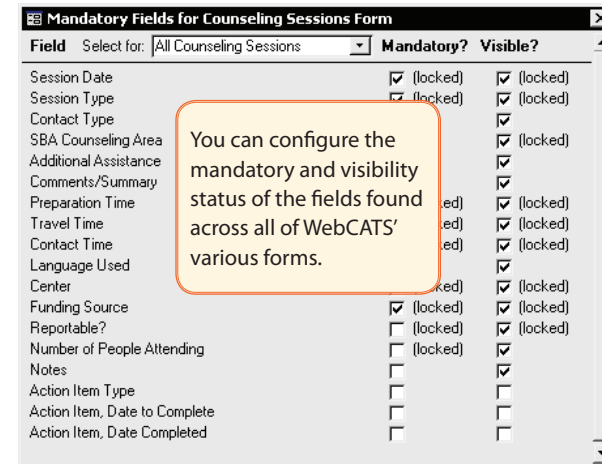
You can make fields invisible or mandatory, set default values for fields, add custom values to field menus, and even create your own user-defined fields across WebCATS' various record types. With the addition of the Custom Activity Forms Module, you can take it a step further and create your own data entry forms from scratch.

User Notices

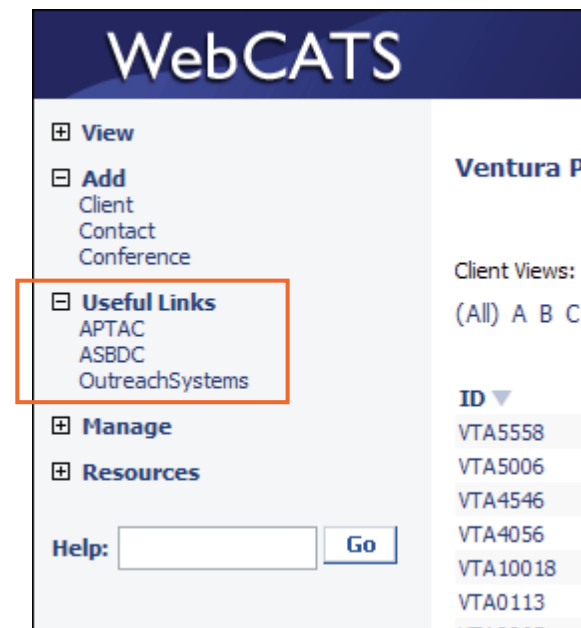
You can create custom text notices that display when a user logs into WebCATS. These notices are a great way to alert counselors of an important event, procedure change, and so on. Custom notices can be set up for users across your entire program, or for just those users associated with a particular center.

And Hundreds More!

We've only highlighted a handful of WebCATS' customization options. You'll discover hundreds more as you begin using the product.



Making Fields Mandatory or Invisible



Custom Menu Links in WebCATS

Those Little Extras

WebCATS is chocked full of those little extras that will make your client activity tracking operations easier than ever.

Document Attachments

Every WebCATS database is provided with 500MB of attached document storage capacity. Documents can be attached to client or center records. For example, you might attach a client's business plan to their client record and a conference's PowerPoint presentation to its conference record.

Automated Mapping of Districts & Counties

You'll never need to assign a federal congressional district, state congressional district, or county to an address again! Why not? Because WebCATS does it for you via current third-party mapping tables.

MyWebCATS

MyWebCATS is a pop-up window that displays a listing of timely events that are relevant to the counselor who is currently logged into WebCATS. These events include scheduled client follow-ups that are due, clients that haven't been counseled in the last 90 days, upcoming conferences that the counselor is teaching, and recently-made edits to records that the counselor initially created.

Data Entry Merlins

WebCATS walks you through the creation of new client, contact, and counseling session activity records. Called the Client Merlin and Session Merlin respectively, these tools prompt you, step-by-step, for the fields required to complete one or more new records.

Duplicate Checking

Before creating a new client or contact record, use the duplicate-check feature to make sure the record doesn't already exist in your WebCATS database. You'll never have duplicate records again.

And Many More!

We've only highlighted a handful of WebCATS' little extras. You'll discover many more as you begin using the product.

Welcome Rachel! Your items of interest are listed below:

- Client Follow-ups: Follow-up date from 10/27/2010 to 11/2/2010, Primary Counselor: Serrilison, Rachelle P. (50017)
- Clients Not Counseled: In last 90 days, Primary Counselor: Serrilison, Rachelle P. (50017)
- Upcoming Conferences: Date from 10/30/2010 to 11/5/2010, Instructor: Serrilison, Rachelle P. (50017)
- New eCenter Requests/Submissions: Entry date from 10/24/2010 to 10/30/2010, Center: Softshare's Main Center
- Recent Database Changes: Date from 10/24/2010 to 10/30/2010, Created by rachellep, Altered by anyone besides rachellep

Client ID	Company	Follow-up Contact	Phone	Counselor	Follow-up Date/Time
SFT0046	Cavalier Chemical	Cavalier, Quincen T.	(805) 882-2588	Serrilison, Rachelle P.	10/29/2010 1:00 PM

Client ID	Company	Primary Contact	Phone	Counselor	Most Recent Session Date
SFT0200	Trivett's Kitchen Supply	Trivett, Anatoli	(805) 555-5789	Serrilison, Rachelle P.	4/27/2010
SFT0111	Felton Raingear	Felton, Harmon	(805) 555-0393	Serrilison, Rachelle P.	2/17/2010

Start Date	Title	Instructor	Total Attendees	Pending Requests
11/1/2010	Accounting 101	Serrilison, Rachelle P.	34	0

Change Date	User	Action	Record
10/30/2010	grant	Edited Company	Kermil's Playland

MyWebCATS

General Information

*Company: Wilkinson & Callender (VTAS559)

*Date: 4/13/2010

Comments/Summary:

*Center: Santa Barbara Center

*Counselor: Rodriguez, Joseph

*Funding Source: Other

Reportable?

What types of records do you want to create for this client?

Counseling Session

Award

Milestone

Investment/Loan

Counseling Session Information

*Session Type: Follow-up or Ongoing

Contact Type: Phone

SBA Counseling Area: Human Resources/Managing Employees

Additional Assistance: BA Certification

Preparation Time: 0.25

Travel Time:

Contact Time:

Milestone Information

*Milestone Type: Change in Staff

Jobs: 3

Initial Date: 12/15/2008

Initial Job: 2

Session Merlin

Add-on Components for WebCATS

eCenter Direct

eCenter Direct is an add-on WebCATS component that lets clients and prospective clients of your program request counseling services, register for training events, and complete satisfaction surveys online. The information collected by eCenter is integrated with your WebCATS database, which means less data entry for you.



Custom Activity Forms Module

For every one thing your program has in common with fellow outreach programs, there are probably ten things that you don't have in common. Differing internal operating procedures, activity under different grants or contracts, local government programs, or even pet projects can all contribute to the need for performance tracking that is unique to your program.

This add-on WebCATS component lets you build your own custom forms to track any type of specialized assistance your center provide to its clients—or the resulting impact of that assistance. For example, you may want to track counseling you provide as it specifically relates to environmental issues, tourism, or homeland security.



Bid Match Program

Especially popular among PTACs, WebCATS' Bid Match Program has everything your center needs to keep its clients alerted to relevant bid opportunities. Notice how we call it a program and not a module or a utility or a feature. That's because the Bid Match Program is so much more than a bundle of software code. It's an entire service, backed by a dedicated OutreachSystems bid match team, that brings you (1) the most comprehensive database of bid opportunities on the market, (2) the most sophisticated tools available for filtering those bid opportunities, and (3) a Web-based delivery system that brings bid opportunities right to your clients' desktops.



EDMISRX

OutreachSystems is no stranger to EDMIS. As an original member of the EDMIS committee, we played a role in the system's testing and development. The result of all this hard work is a fully EDMIS-compliant component called EDMISRX. The core feature of EDMISRX is its export module which generates the quarterly EDMIS upload file, but it also has many other bells and whistles to ensure a healthy, EDMIS-compliant database.

System Requirements

WebCATS is a client/server application that runs on a Microsoft SQL Server platform. OutreachSystems hosts your WebCATS database and URL at our facilities. You choose the number of concurrent client licenses in which to access the central WebCATS database.

All you need to access WebCATS is an Internet Service Provider and Web browser. The following Web browsers are supported: Microsoft Internet Explorer (version 6.0 or better), Mozilla Firefox (version 3.5 or better), Apple Safari (version 5.0 or better), and Google Chrome (version 9.0 or better).

See WebCATS in action! Call us for a guest account user name and password.

