

Whitemarsh
Information Systems Corporation

Whitemarsh Metabase Documents and Forms Users Guide

March 2011

Whitemarsh Information Systems Corporation
2008 Althea Lane
Bowie, Maryland 20716
Tele: 301-249-1142
Email: whitemarsh@wiscorp.com
Web: www.wiscorp.com

Table of Contents

1	Introduction	1
2	Software Installation	2
3	Database Design	2
4	Operation	5
5	Process Model	7
5.1	Menu Structure	7
5.2	Document Processes	9
5.2.1	Document	9
5.2.1.1	Document	10
5.2.1.2	Document Structure	12
5.2.1.3	Document Structure Type	15
5.2.4	Document Section	17
5.2.5	Document Section Cells	19
5.2.6	Document Section Cell View Column Assignment	21
5.2.7	Document Section Mission Organization Function Assignment	22
5.3	Form Processes	23
5.3.1	Forms	23
5.3.1.1	Form	23
5.3.1.2	Form Structure	26
5.3.1.3	Form Structure Type	29
5.3.4	Form Section	31
5.3.5	Form Section Cells	33
5.3.6	Form Cell View Column Assignment	35
5.3.7	Form Section Mission Organization Function Assignment	36
5.4	Reports	37



List of Figures

Figure 1. Documents and Form Data Model.	3
Figure 2. Documents and Forms DBMS Selection Screen.	5
Figure 3. User Name and Password login screen.	7
Figure 4. Menu structure for Document & Form.	9
Figure 6. Document update screen.	11
Figure 7. Explosion of Document Structures.	12
Figure 8. Inserting a Document into a Document Structure.	13
Figure 9. Implosion of Document Structures.	14
Figure 10. Document Structure Types screen.	15
Figure 12. Document Sections.	17
Figure 13. Document Section Update.	18
Figure 14. Document Section Cells.	19
Figure 15. Document Section Cell update.	20
Figure 16. Document Cells and View Column Assignments.	21
Figure 17. Document Section Mission Organization Function Assignment.	22
Figure 18. List of Forms.	24
Figure 19. Form update.	25
Figure 20. Explosion of Form Structures.	26
Figure 21. Form Structure Insert/Update screen.	27
Figure 22. Form Structure Implosions.	28
Figure 23. Form Structure Types.	29
Figure 24. Form Structure Type update.	30
Figure 25. Form Sections.	31
Figure 26. Form Section Update Screen.	32
Figure 27. Form Section Cells.	33
Figure 28. Form Cell Update Screen.	34
Figure 29. Form Section Cell View Column Assignment.	35
Figure 30. Form Section Mission Organization Function Assignment.	36



1 Introduction

The purpose of the database application, Documents and Forms is to provide:

- Identification and description of documents and forms.
- Interrelationship among different documents and forms.
- Relationship between documents and forms and other metadata artifacts.
- Identification and description of document and form subsections
- Interrelationships between document and form sections and Mission-Organization-Functions
- Interrelationships between document fact cells and form fact cells and view columns

The documents and forms permits recording of the characteristics of the documents and forms associated with the enterprise. Each document and form can be described, interrelated with other documents and forms, and subdivided into document and form sections. Each section can then have business fact cells identified and mapped onto view columns. Once document and form sections are identified and described, can be allocated to the various mission-organization-functions. This permits enterprises to know the documents and forms needed by whom within the different organizations in the performance enterprise missions, and also what enterprise information contained by these documents.

Presumed Knowledge

This user guide, and all the other metabase user guides presume that the reader has read and is completely familiar with the following documents: Metabase Common Processes, and Metabase Bill of Materials and Single File Recursion (BOM/SFR Guide). These two documents serve as metabase teaching guides for processes that commonly occur throughout the metabase system.

F7 invokes automatic spell checking on all text fields like names and descriptions.

Metabase Example

The metabase example, Movies, is a complete example of a business which is available from the Whitemarsh website. The Movies Rental Corporation was modeled after the largest movies rental corporation in the United States. As such, the example has national, regional, and retail outlets. There are two data models, one for an original data capture, store based system, and another which is a data warehouse for rented movies.



2 Software Installation

Metabase installation is explained in the Metabase Administrators Guide.

3 Database Design

The documents and form data is represented in 14 different tables in this metabase database application. The tables are:

- Document
- Document Structure
- Document Structure Type
- Document Section
- Document Cell
- Document Cell and View Column
- Document Section and Mission Organization Function
- Form
- Form Structure
- Form Structure Type
- Form Section
- Form Cell
- Form Cell and View Column
- Form Section and Mission Organization Function

There are nine additional entities in the database. These are:

- View Column
- Mission
- Organization
- Function
- Mission Organization
- Business Event
- Mission Organization Function
- View
- View Column

These entities are shaded because they are read-only within this module. They are created/updated in the following modules:

- Mission Organization Function Position Assignment
- View

Figure 1 presents the overall data model.



The design permits the creation of specifications, descriptions, and interrelationships among one or more documents and or forms. Once the documents and forms are specified, they

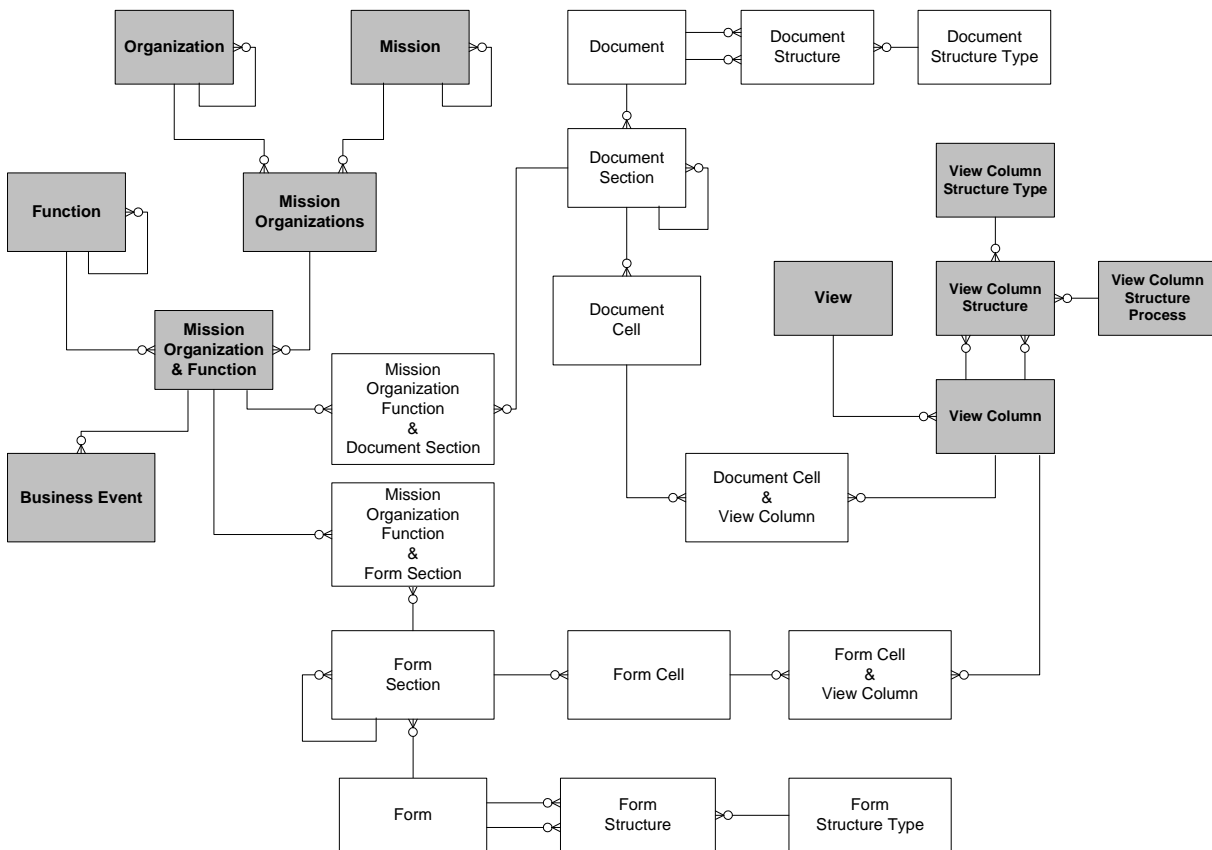


Figure 1. Documents and Form Data Model.

can be related to either 1) functions accomplished by organizations within missions, or 2) view columns within views. The definition for each entity is as follows:

Document. A document is the identification and description of a structured set of textual material that relates to some aspect of the enterprise. In short, the document's metadata. Included as well is the ability to include a URL to the described document. If the URL should be to a website that contains, for example, a dated list of such documents, that's acceptable too. Examples of documents might be Movies Rental Corporation Strategic Plan.

Document Structure: A Document Structure is a collection of documents, for example, Movies Rental Corporation Strategic Plan may also consist of a Financing Long Range Plan, Facilities Long Range Plan, Marketing Long Range Plan, and Human Resources Long Range Plan.

Document Structure Type. A document structure type is a classification of a collection of documents. For example, Long Range Plans, Annual Plans, and Strategic Plans.



Document Section. A document section is a contained subordinate section of a document. These can be hierarchically organization. This the first section might be the Front Matter, which in turn contains Introduction, Chapters, and back matter. Chapters might contain subsections as well. Each section can contain an abstract of the material represented.

Document Cell. A Document Cell is a name and description of an information component that is contained in a specific document section. For example, Document Date, Document Id, Document URL, Document Name, Document Revision Date. Some document cells that map to a View Column if that document cell is related to a database.

Document Cell and View Column. A Document Cell and View column is the association of a Document cell with a view column.

Document Section and Mission Organization Function. A Document Section and Mission Organization Function is the association of a document's section with an instance of Mission-Organization-Function. This implies that the section of the document is relevant to that specific Mission-Organization-Function.

Form. A form is a structured set of information that contains descriptive information and formatted structured information. In short, the form's metadata. Included as well is the ability to include a URL to the described form. If the URL should be to a website that contains, for example, a dated list of such forms, that's acceptable too. An example might be the Membership Form for a Movies Rental Membership application.

Form Structure. A Form Structure is a collection of forms, for example, the Movie Rental Membership application may consist of other types of forms that would be related to the Movie Rental Membership application form such as an approval form, a review form, or a rejection form.

Form Structure Type. A form structure type is a classification of a collection of forms. For example, all the forms that contain name and address information, forms that need review, and the like.

Form Section. A form section is a contained subordinate section of a form. These can be hierarchically organization. This the first section might be the Membership Application Header, which in turn contains applicant information, applicant address, application credit card information, and applicant authorized rental person information. Each section can contain an abstract of the material represented.

Form Cell. A Form Cell is a name and description of an information component that is contained in a specific form section. For example, Applicant First, Middle, and Last Name, Applicant address components, and the like. Some form cells can map to a View Column if that form cell is related to a database.



Form Cell and View Column. A Form Cell and View column is the association of a Form cell with a view column.

Form Section and Mission Organization Function. A Form Section and Mission Organization Function is the association of a form's section with an instance of Mission-Organization-Function. This implies that the section of the form is relevant to that specific Mission-Organization-Function.

4 Operation

Once the application is installed it is ready to use. Just invoke the software from the metabase program. The application is a traditional windows application. Metabase reports are accomplished through any ODBC class report writer such as Crystal Reports.

4.1 Log In Process

Figure 2 shows the log-in screen that appears immediately after the application is started. Choose the specific DBMS that is to be accessed and then press the Close button.

Figure 3 shows the screen that appears after the DBMS is chosen. Enter your user name and your password. These are created by the Metabase Administrator through the metabase administration module. Please contact your metabase administrator to set up your user name and password. Once a user name and password is established, all the user's information can be changed by the user through a restricted use version of the administrator software. Once the send button is pressed the specific metabase database instances that can be accessed by the user is presented. The metabase is such that users are allowed to use specific metabase instances and specific metabase modules.

In this particular example, the user, once they sent their user name and password are shown the metabase database that they can access, that is, Movies. Highlight the choice and press the Select button. Once that is done then the metabase name, Movies, is shown as the data set that is being accessed.



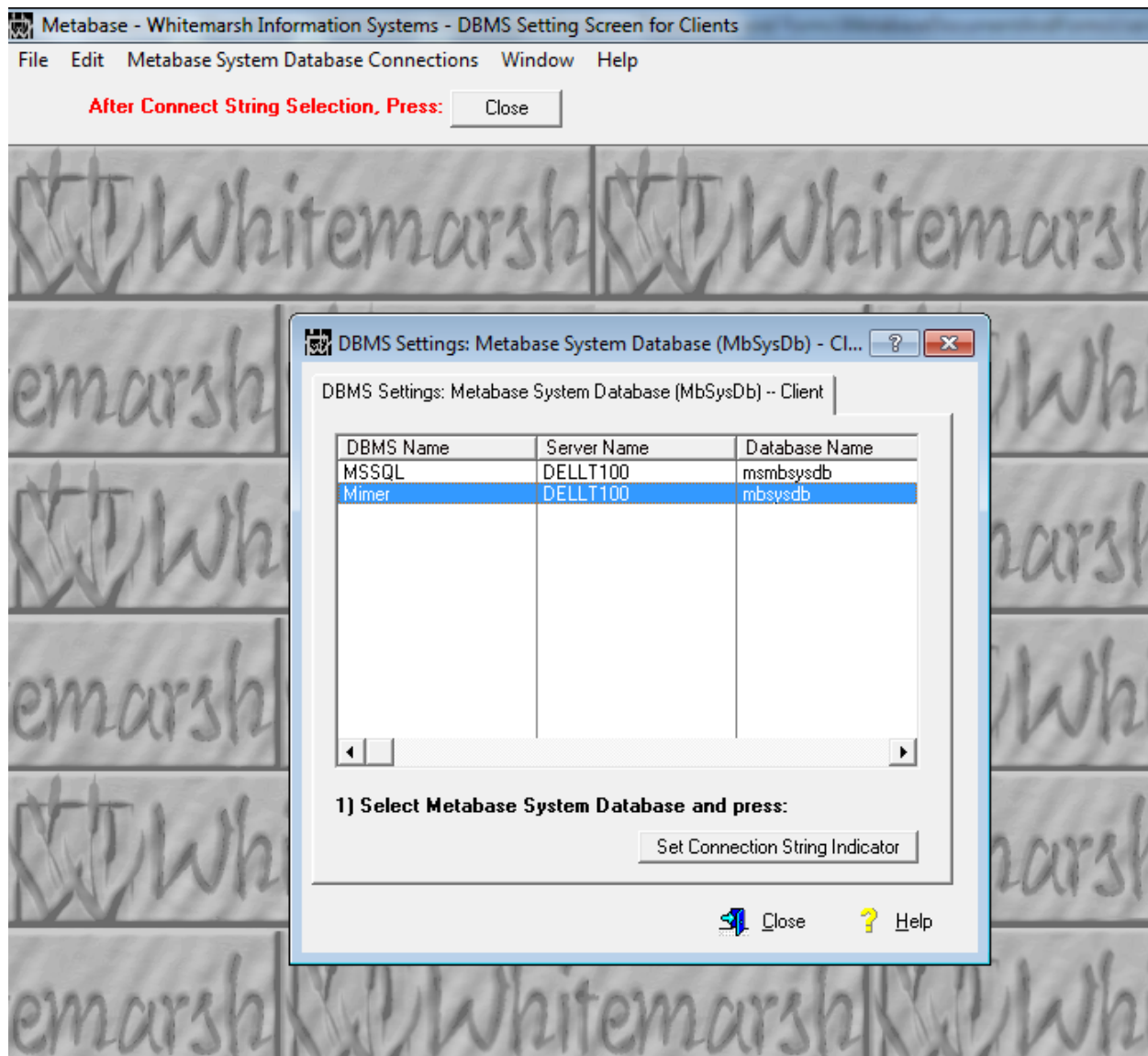


Figure 2. Documents and Forms DBMS Selection Screen.



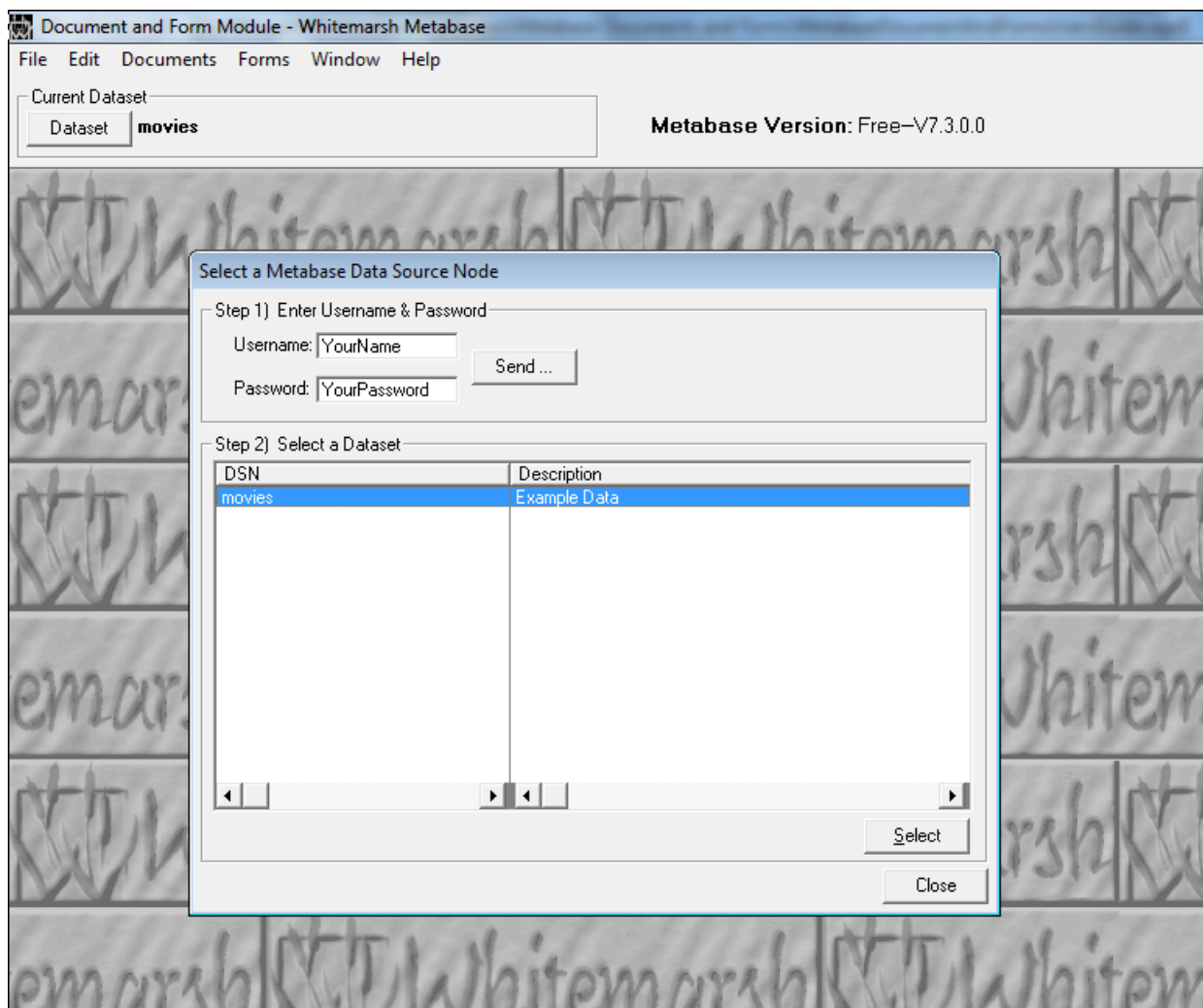


Figure 3. User Name and Password login screen.

5 Process Model

5.1 Menu Structure

The top level of the Documents and Forms module includes the following:

- Documents— defines the specific documents including documents, document structures, document structure types, document sections, document section cells, and relationships between document sections and missions-organizations-function, and document section cells to view columns.



- Forms— defines the specific forms including forms, form structures, form structure types, form sections, form section cells, and relationships between form sections and missions-organizations-function, and form section cells to view columns.

A complete menu is provided in the table that follows:

Menu for Document and Form	
-- Documents	
-- Document	
-- Document Structure	
-- Document Structure Type	
-- Document Section	
-- Document Section Cells	
-- Document Cell View Column Assignment	
-- Document Section Mission Organization Function Assignment	
-- Forms	
-- Form	
-- Form Structure	
-- Form Structure Type	
-- Form Section	
-- Form Section Cells	
-- Form Cell View Column Assignment	
-- Form Section Mission Organization Function Assignment	

Figure 4 shows an example of navigating the menu structure.



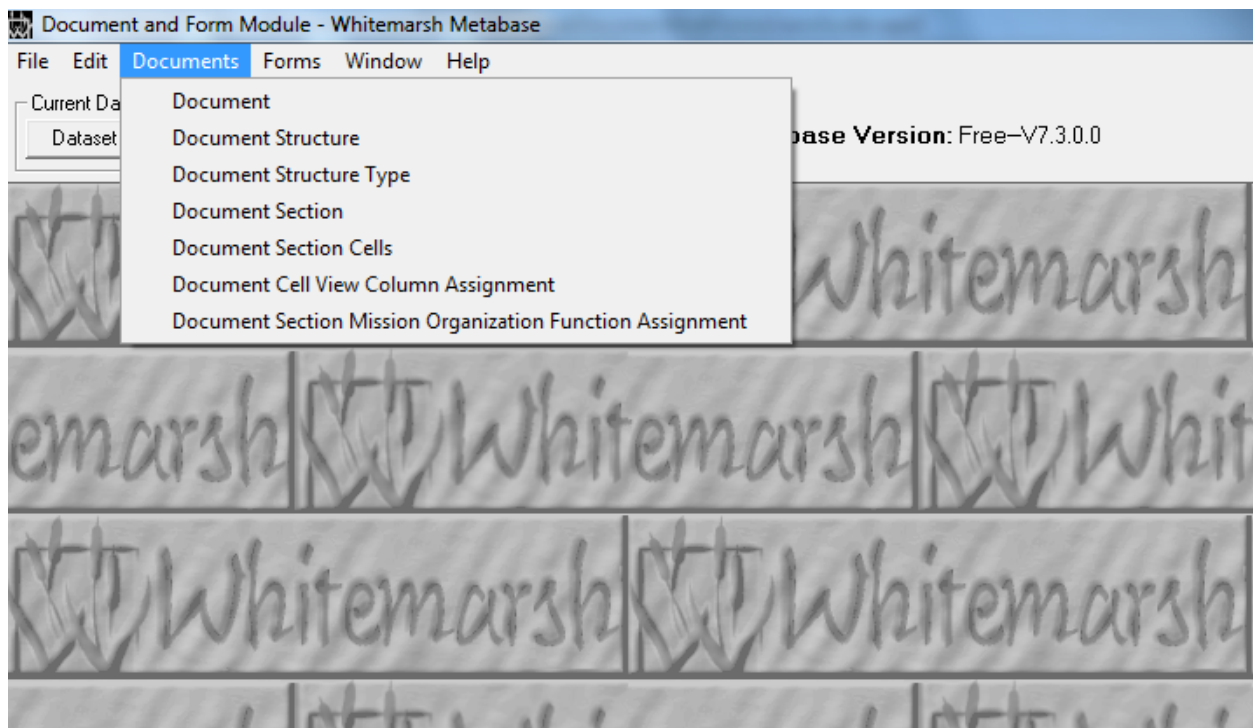


Figure 4. Menu structure for Document & Form.

5.2 Document Processes

The processes necessary to define and interrelate document data are:

- Document
- Document Structure
- Document Structure Type
- Document Section
- Document Section Cells
- Document Cell View Column Assignment
- Document Section Mission Organization Function Assignment

5.2.1 Document

Documents consist of three tables:

- Document
- Document Structure
- Document Structure Type



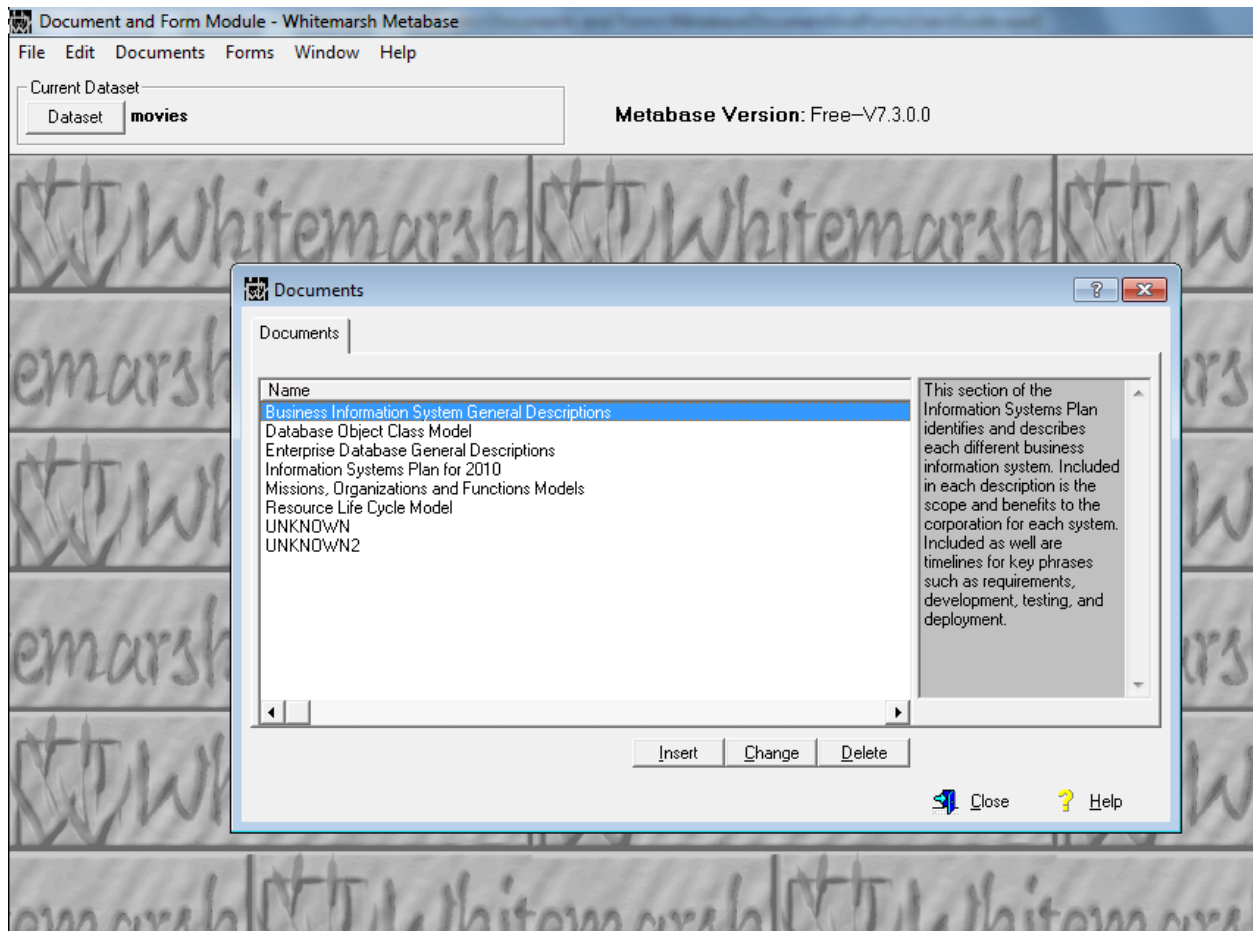


Figure 5. Listing of Documents.

5.2.1.1 Document

Figure 5 provides a list of documents that are currently stored in the metabase. Since Documents do not exist in isolation, it is also subject to DELETE referential integrity rules. In this case, a document may be allocated to one or more document sections, or document structures. These relationships are shown in Figure 1. Regardless of the cause of the attachment, the effects are felt in this module. If a document deletion is attempted, the deletion will be rejected if there is an attached document section or document structure.

Figure 6 presents the update screen for a document.



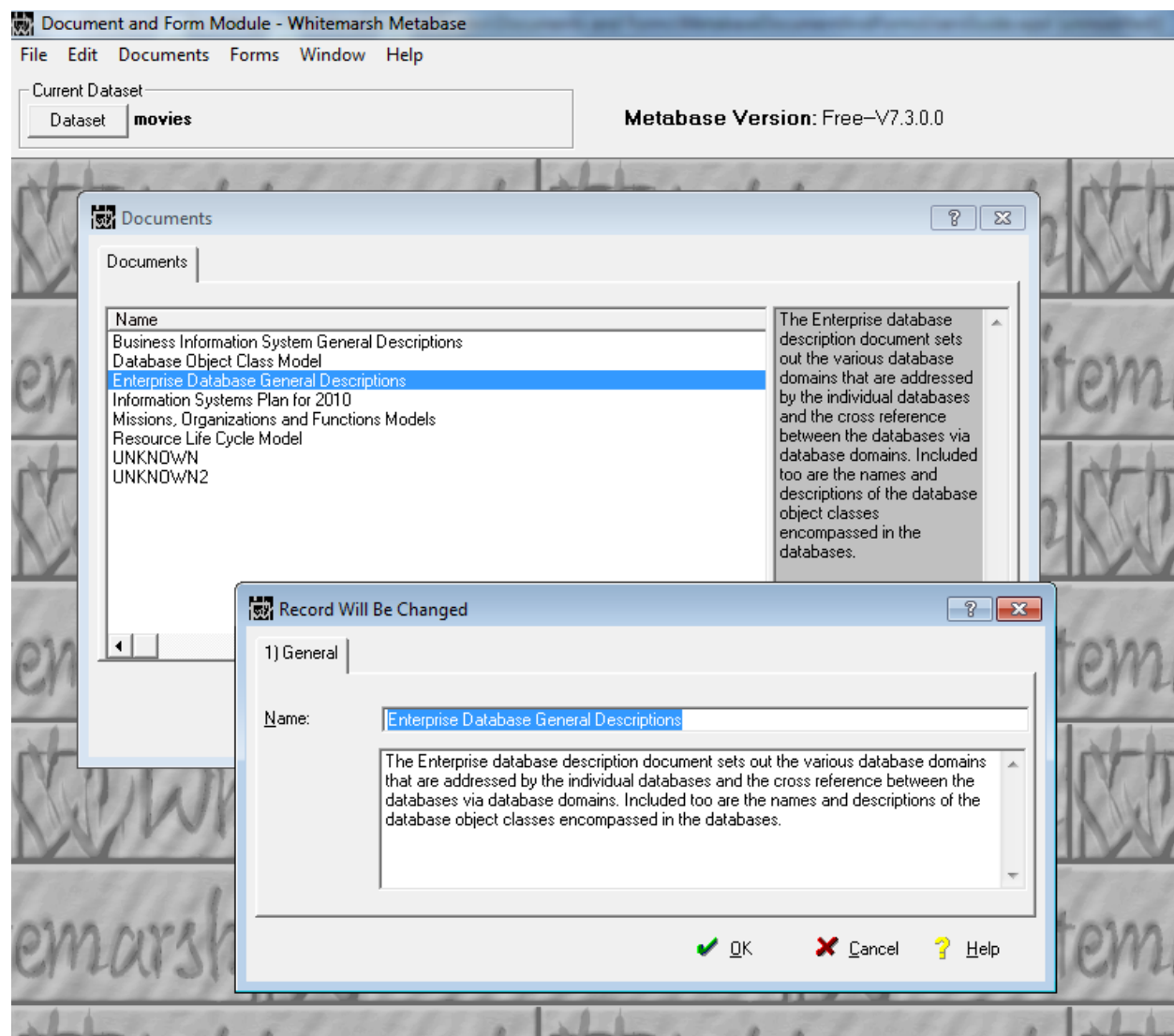


Figure 6. Document update screen.



5.2.1.2 Document Structure

Figure 7 provides a list of document structures that are currently stored in the metabase. Documents can exist singly or in hierarchies, or networks. In the last case, Documents form a traditional bill of materials data structure.

From above, Figure 6 presents a set of documents. These documents are not displayed within structures, that is, Business Information System General Descriptions within Information Systems Plan for 2010. To create a structure among a collection of Documents, select the menu item, Document Structure. Figure 7 presents the current set of Document Structures. If, after highlighting the appropriate Document Structure Type row, there are no acceptable document structures, press the Insert button so that Figure 8 is then presented.

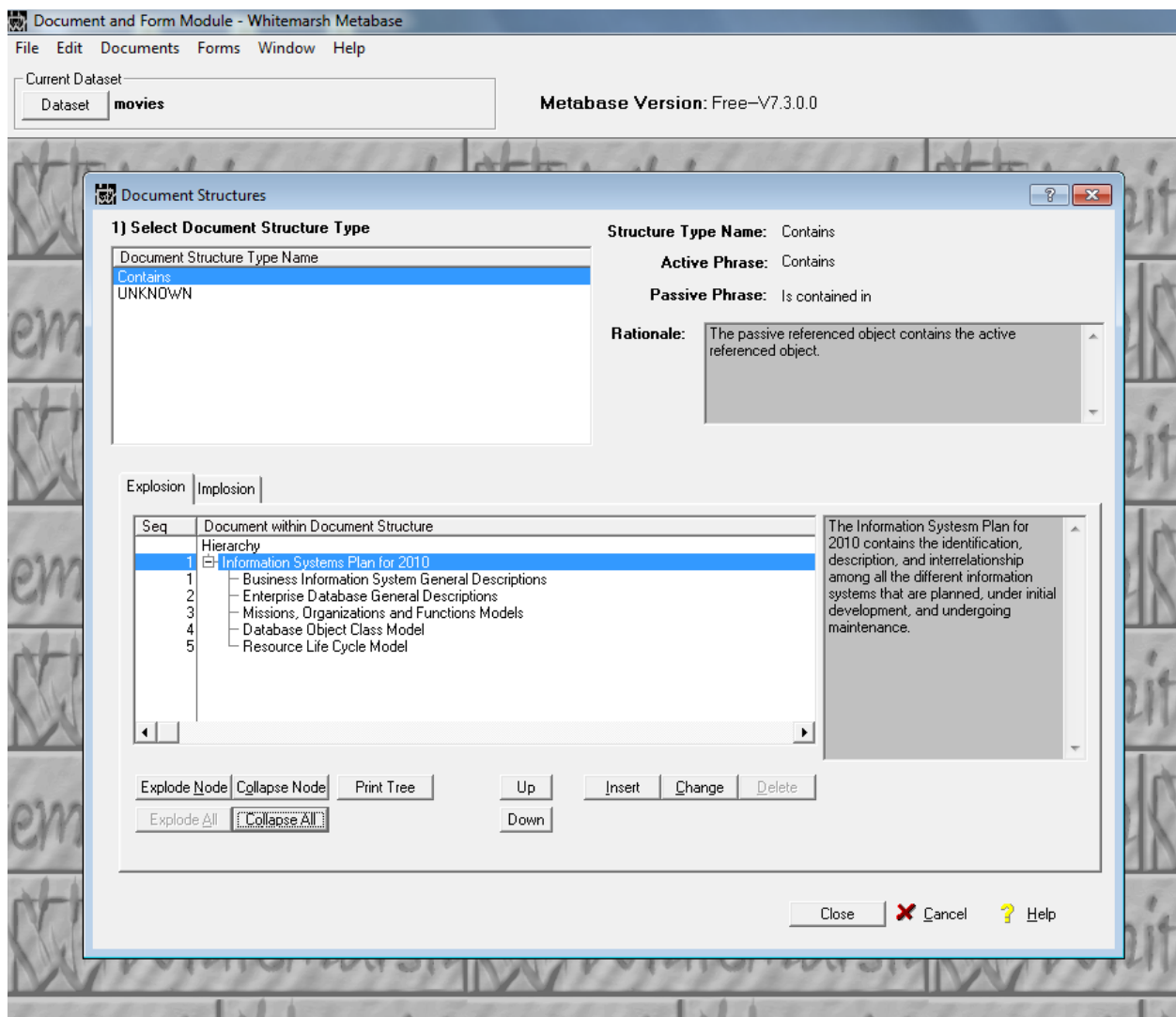


Figure 7. Explosion of Document Structures.



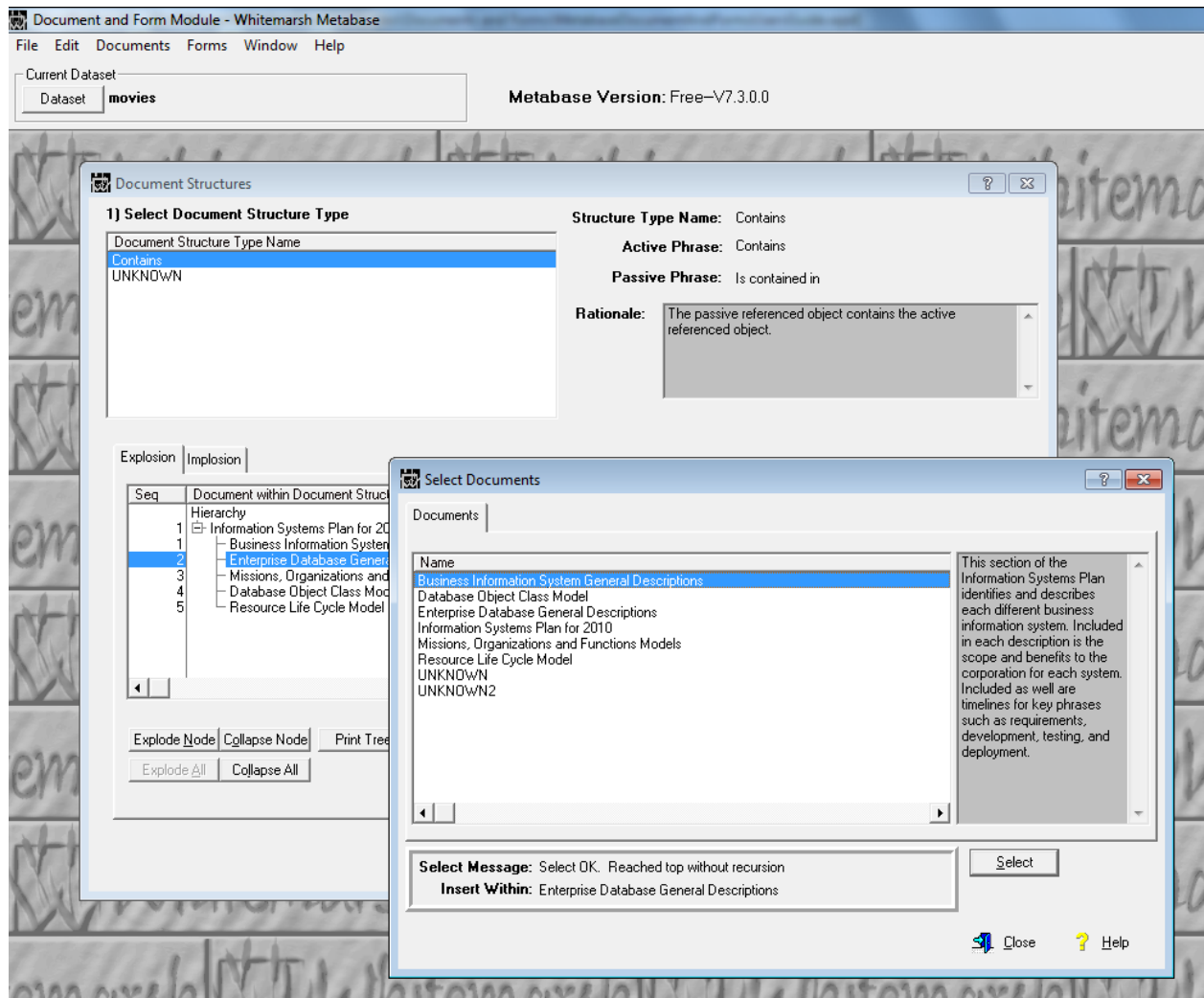


Figure 8. Inserting a Document into a Document Structure.

On Figure 7, there are two tabs. Explosion and Implosion. An explosion is a collection of “active tense” relationships, Information Systems Plan for 2010 contains Business Information System General Descriptions.

Implosion is the reverse. Figure 9 shows a existing set of Document Structure inversions. In this example, Business Information System General Descriptions is contained within Information Systems Plan for 2010.



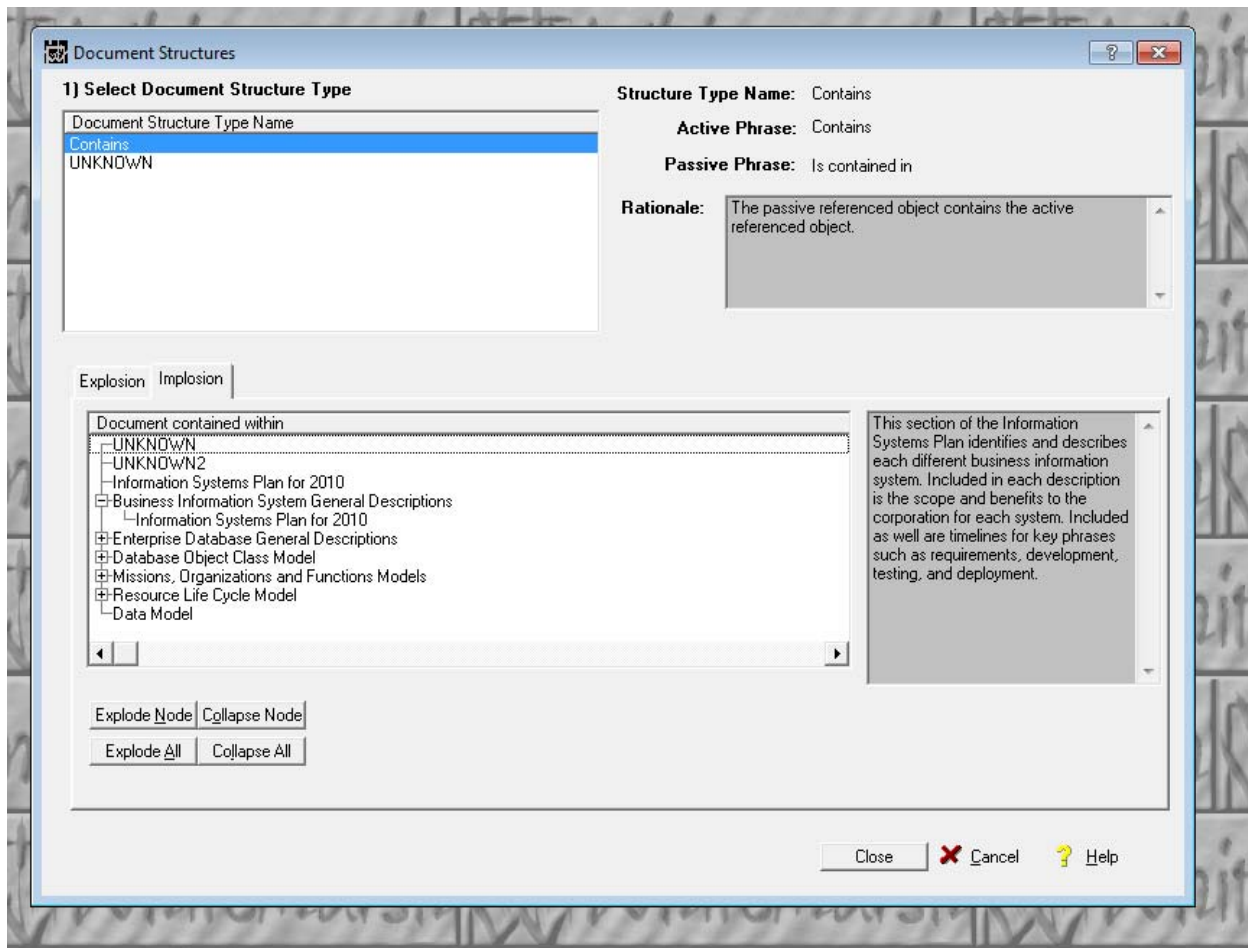


Figure 9. Implosion of Document Structures.

When a new Document is to be inserted within an existing Document Structure, the name is highlighted and the Insert button is pressed, a screen like Figure 8 is presented. The specific Document that is desired as the containing Document is highlighted and the select button is pressed. In this particular example, (as shown in Figure 8), Information Systems Plan for 2010 was highlighted as the parent, and Business Information System General Description was inserted as the child. The message at the bottom of the Select window indicated that the insert process is not acceptable because that record is already within the structure. At that point, press the Select button. The three cases that are automatically screened out are presented in the BOM/SFR user guide.



5.2.1.3 Document Structure Type

The Document Structure type is a way of distinguishing one collection of document structures from another. Figure 10 presents the current list. If two different classification hierarchies are interconnected, it may be that the intersection is distinguished from the others by means of a different Document structure type.

Figure 11 presents the Document structure type update form. Not only is the name and description of the Document structure type provided, so too is the active phrase and the passive phrase. The active phrase is employed by the Whitemarsh metabase system when a down-ward structure is presented. For example, <parent> contains <child 1>, <child 2>, ..., <child n>. The passive phrase enables the reverse phrases to be presented. That is, <child 2> is contained in <parent>.

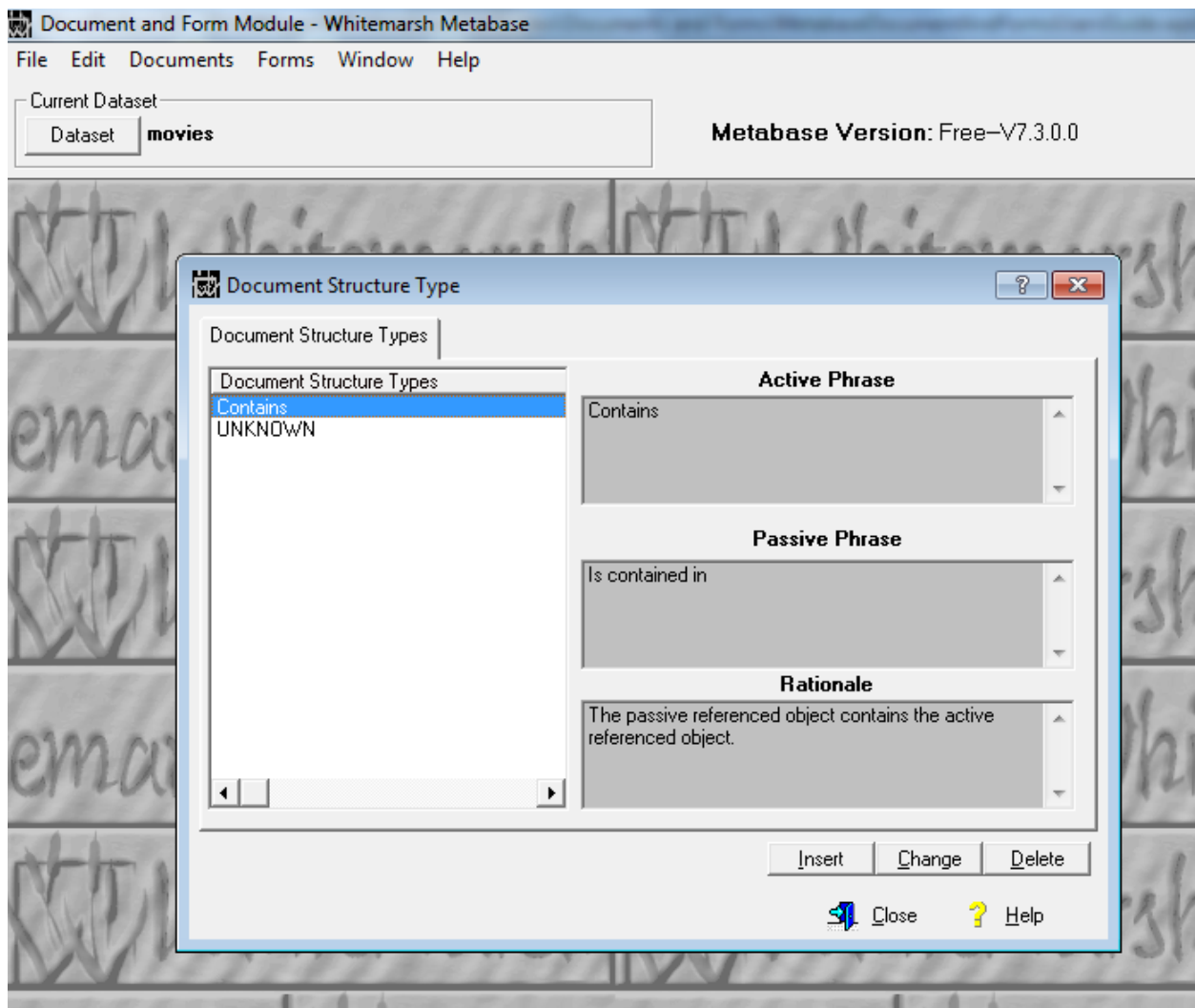


Figure 10. Document Structure Types screen.



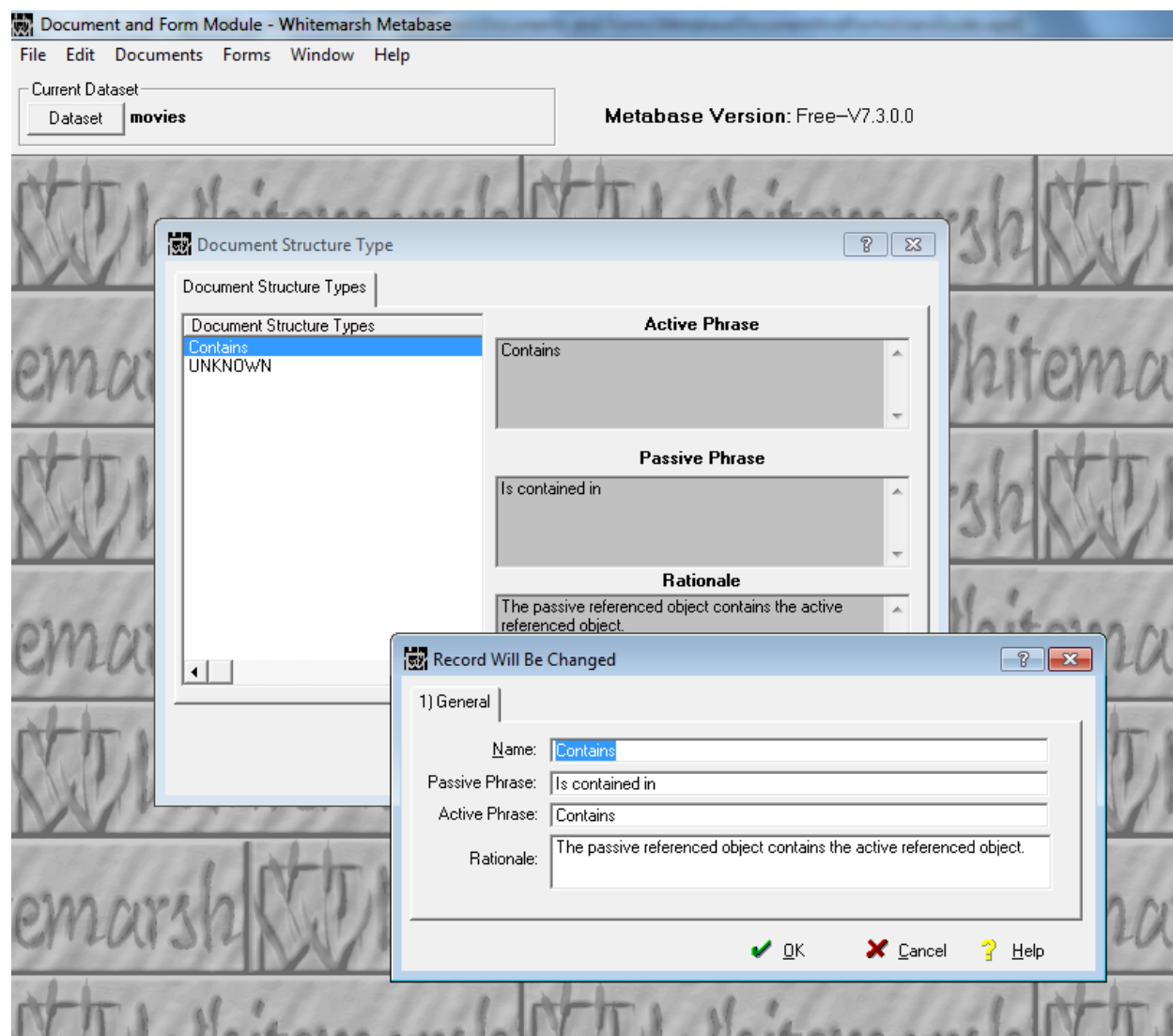


Figure 11. Document Structure Type Update screen.



5.2.4 Document Section

Document sections are the identified sections of a document. Document sections can be recursive. That is, hierarchical. Figure 12 lists the document sections under the document, Mission, Organization, and Function Models. There are three sections, Mission Model Section, Organizations Model Sections, and Function Models. Inserting a new root section, select the string, Hierarchy, and press Insert.

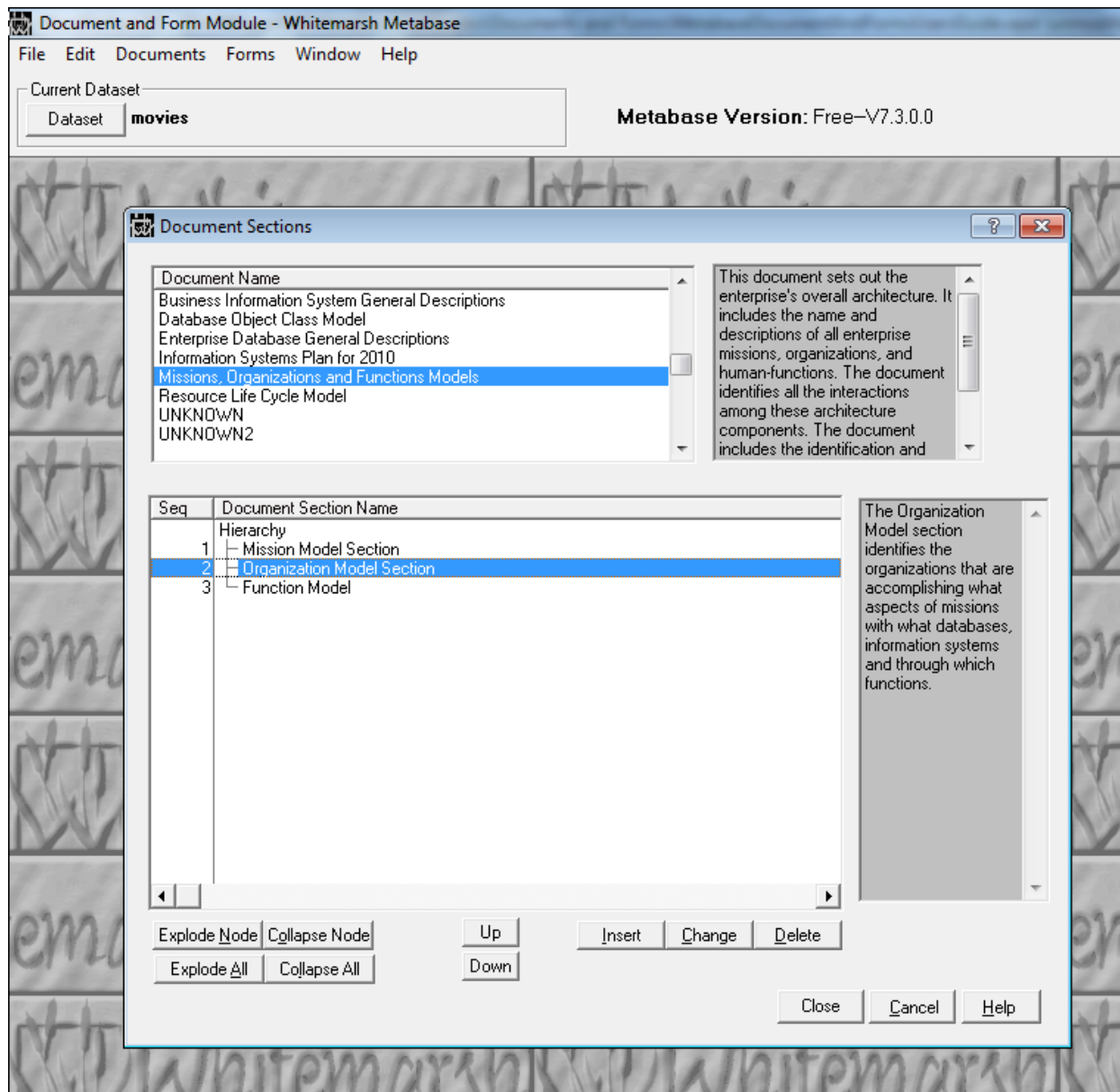


Figure 12. Document Sections.



Figure 13 shows the update screen. Add the document section name, and its description. The sequence field is automatically computed and skipped.

To add a document section within another document section, select the parent document section and press Insert. The insert screen is the same as shown on Figure 13.

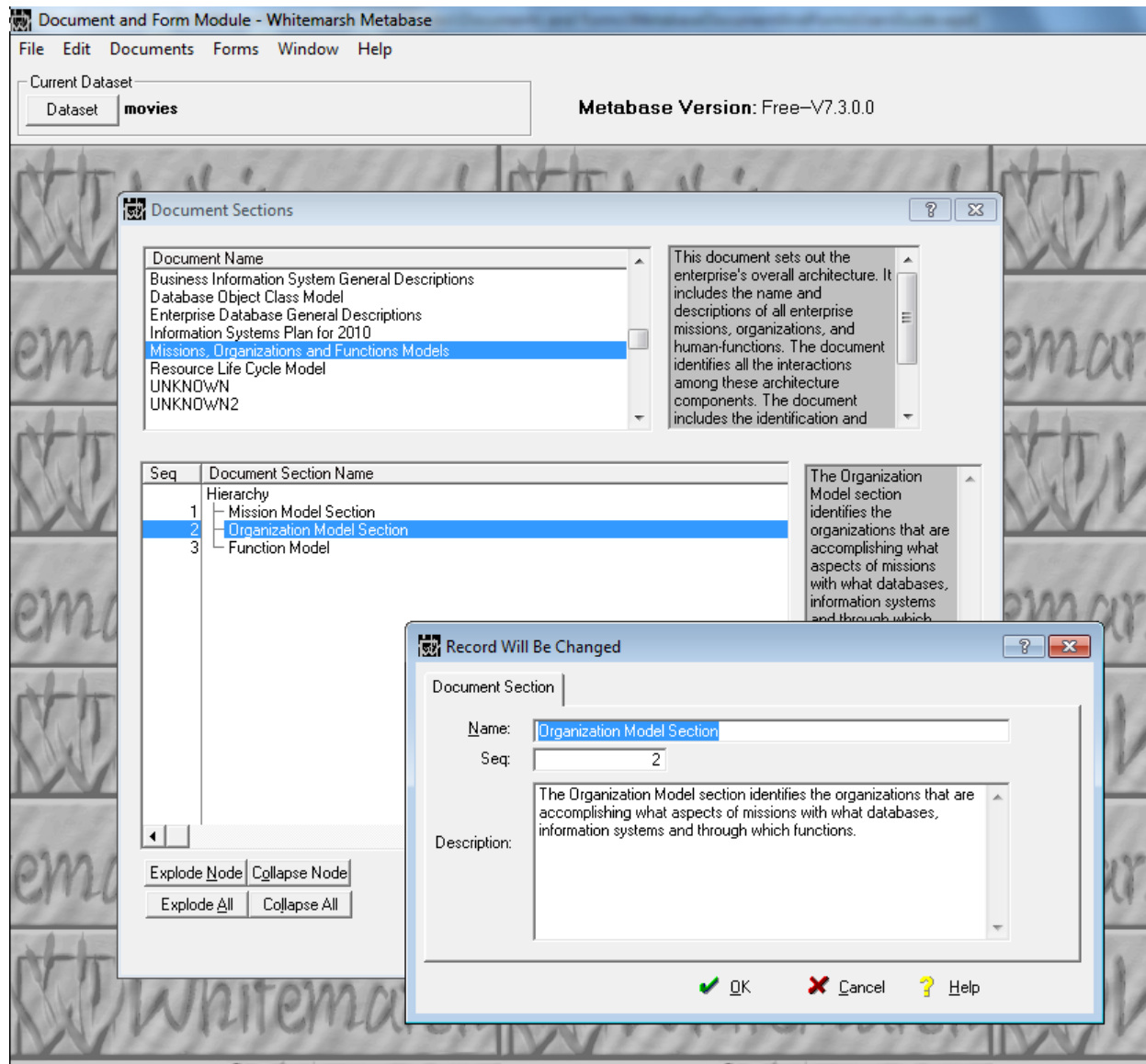


Figure 13. Document Section Update.



5.2.5 Document Section Cells

Document Section Cells are structured and formatted data components that are contained in document sections. Figure 14 sets out the typical cells for a specific section of a strategic marketing plan. Figure 15 shows the update screen for inserting, modifying, or deleting a document section cell.

Document Section Cells

Document

- Operational Marketing Plan
- Resource Life Cycle Model
- Strategic Marketing Plan**
- Tactical Marketing Plan
- UNKNOWN

The strategic marketing plan is a multi-year plan for rolling out and monitoring the different movie rentals programs for the enterprise.

Seq Document Sections

- 1 **Strategic Goals and Objectives**
- 2 Strategic Milestones
- 3 Strategic Work Plan

The strategic goals and objectives for the strategic marketing plan are set out so that they can be monitored yearly and monthly within each year.

Explode Node Collapse Node Explode All Collapse All

Document Section Cells

Document Cell	Common Business Name	User Set Name	Precision	Scale	Null
Goal Description	Goal Description	Goal Description	255	0	No
Goal Measurable Objective	Goal Measurable Objective	Goal Measurable Objective	60	0	No
Goal Name	Goal Name	Goal Name	60	0	No

Insert Change Delete

Close Help

Figure 14. Document Section Cells.



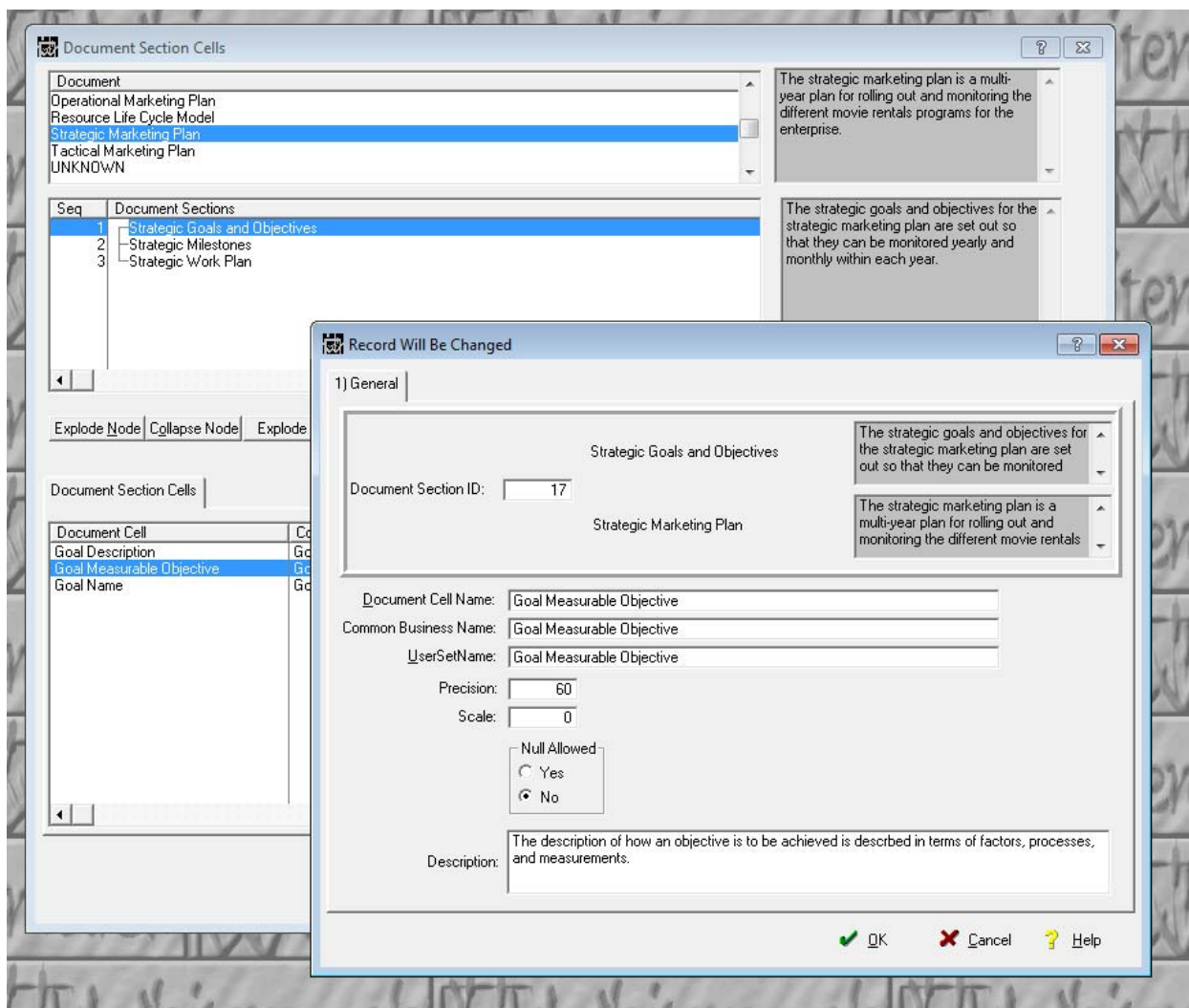


Figure 15. Document Section Cell update.



5.2.6 Document Section Cell View Column Assignment

Document Section Cells can be assigned to View Columns if the data in these document cells are to be obtained from a database. The assignment process consists of selecting and tagging one Document Section Cell and then one or more View Columns. Thus, if a Document Section Cell is, for example, Person Full Name which consists of First, Middle, and Last, then three View Columns would be tagged and assigned. Once tagged, the Build Association button is pressed. If an association is to be deleted, it is selected and the delete button is pressed.

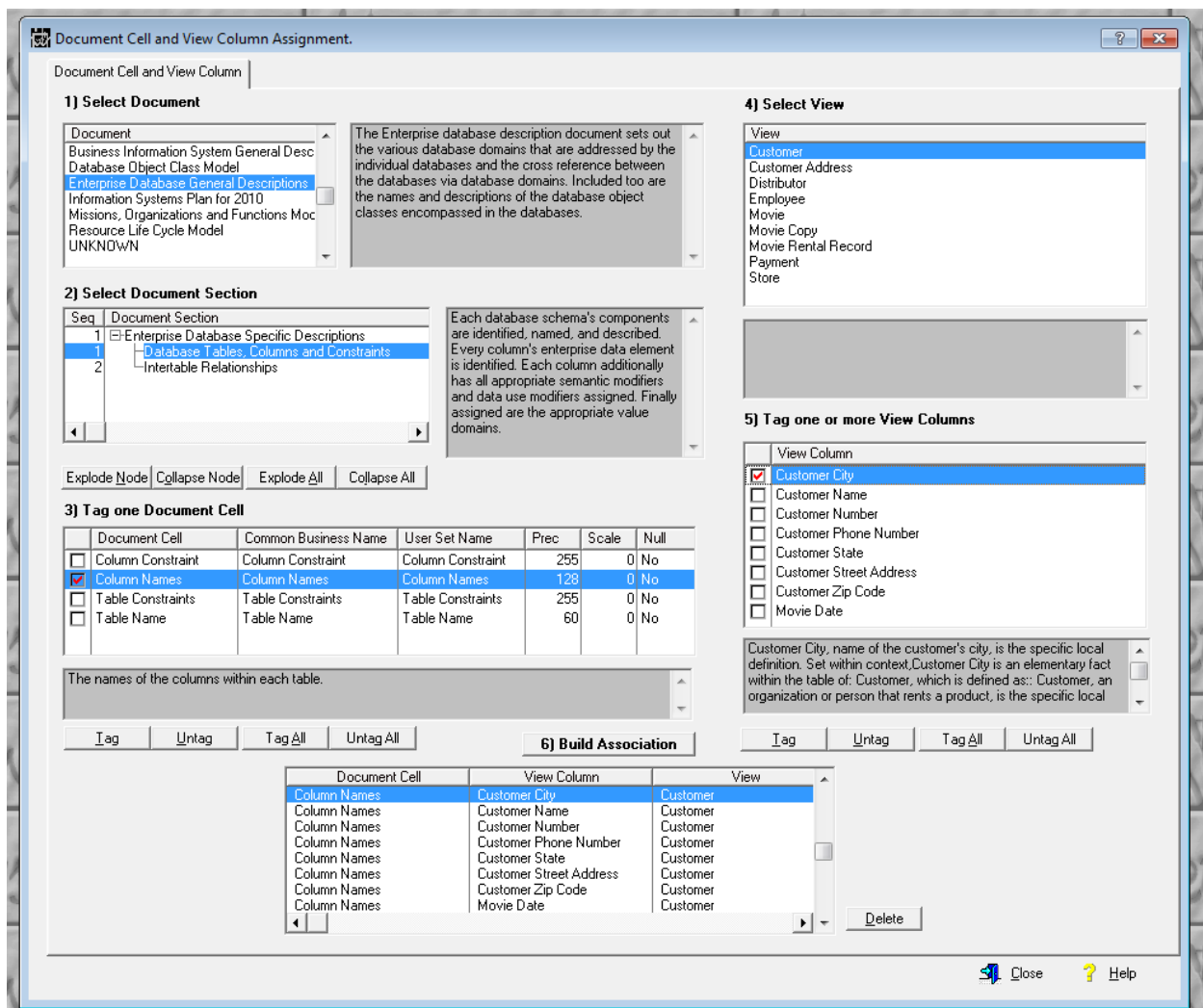


Figure 16. Document Cells and View Column Assignments.



5.2.7 Document Section Mission Organization Function Assignment

Document Sections can be assigned to Mission-Organization-Functions as a way to identify those functions performed by certain organizations as they achieve enterprise missions. The assignment process consists of selecting and tagging one Document Section and then one or more Mission-Organization-Functions. Thus, if a Document Section is, for example, Strategic Marketing Plan, the functions within the organizations that achieve this enterprise mission are tagged and then, via the Build Association button assigned. If an association is to be deleted, it is selected and the delete button is pressed.

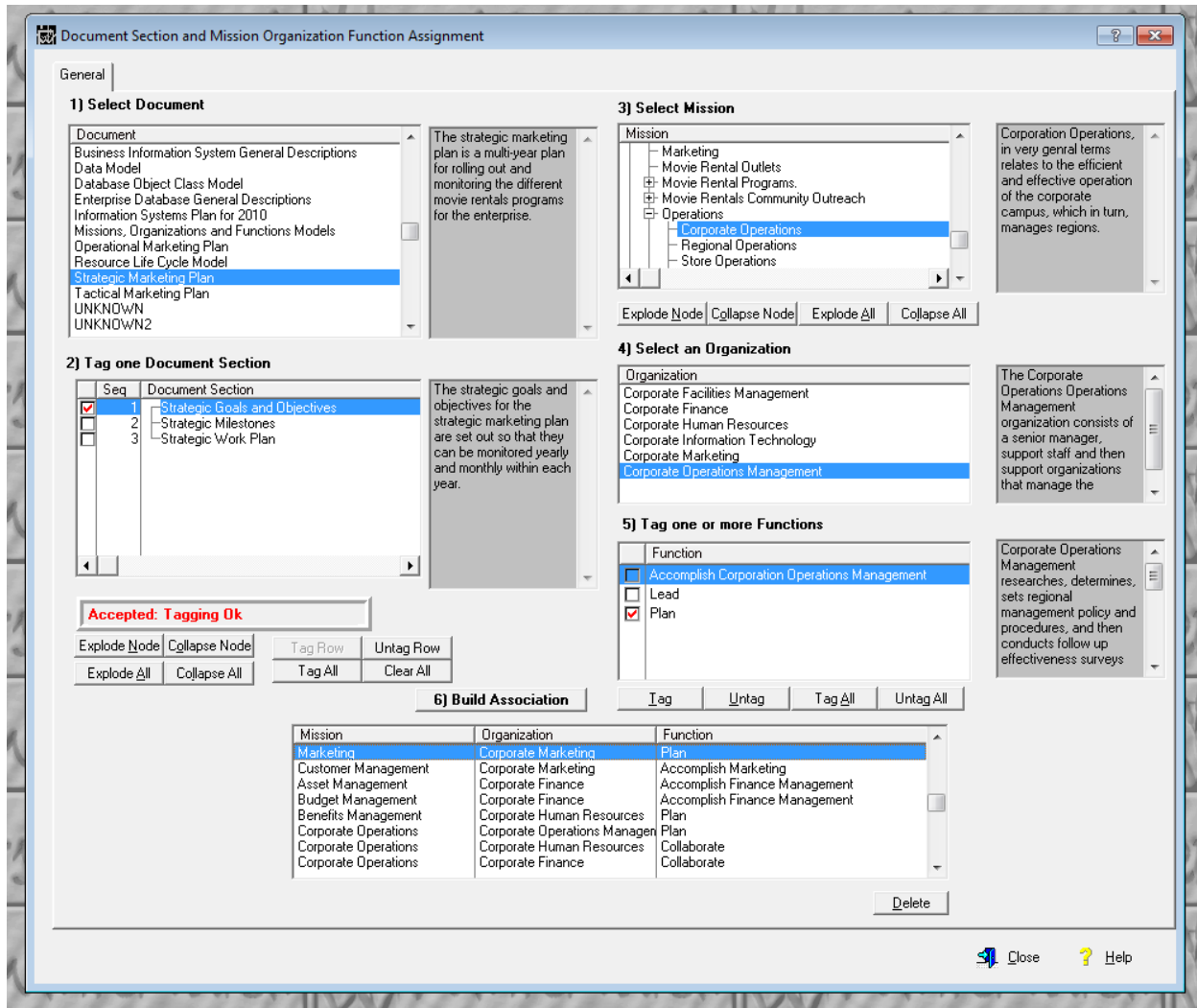


Figure 17. Document Section Mission Organization Function Assignment.



5.3 Form Processes

The processes necessary to define and interrelate form data are:

- Form
- Form Structure
- Form Structure Type
- Form Section
- Form Section Cells
- Form Cell View Column Assignment
- Form Section Mission Organization Function Assignment

5.3.1 Forms

Forms consist of three tables:

- Form
- Form Structure
- Form Structure Type

5.3.1.1 Form

Figure 18 provides a list of Forms that are currently stored in the metabase. Since Forms do not exist in isolation, it is also subject to DELETE referential integrity rules. In this case, a Form may be allocated to one or more Form sections, or Form structures. These relationships are shown in Figure 1. Regardless of the cause of the attachment, the effects are felt in this module. If a Form deletion is attempted, the deletion will be rejected if there is an attached Form section or Form structure.



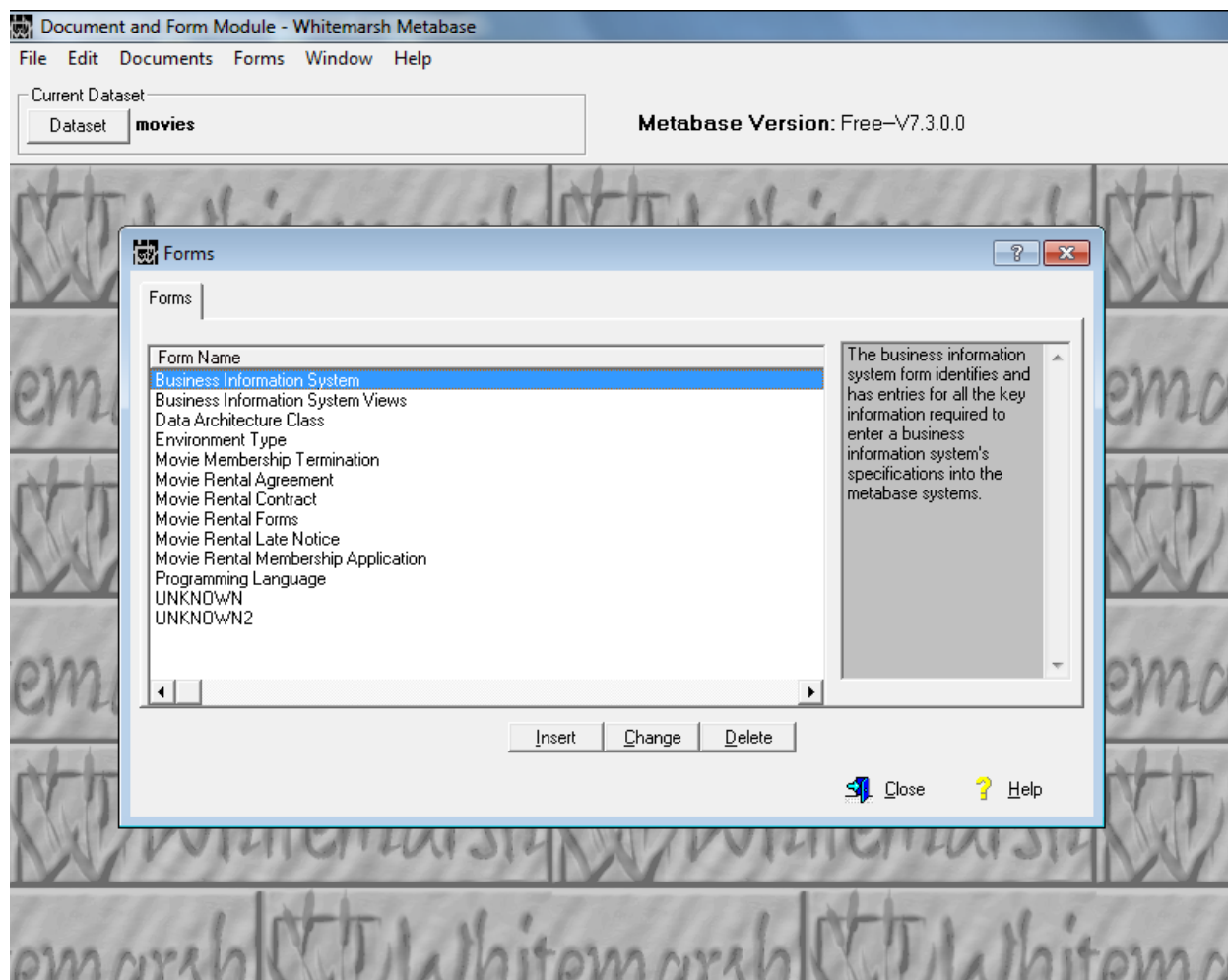


Figure 18. List of Forms.



Figure 19 presents the update screen for a Form. In this example, the form, Movie Rental Agreement is being updated.

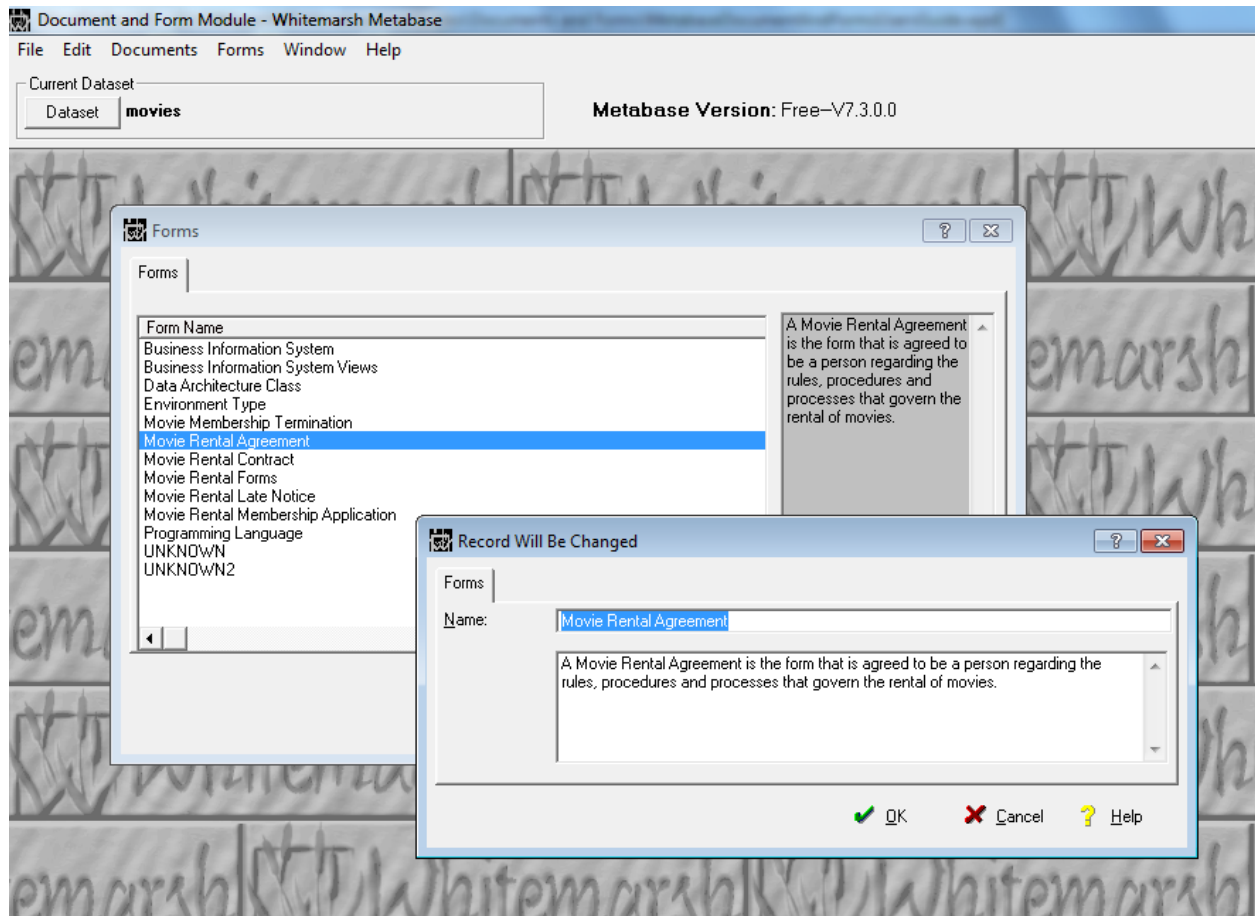


Figure 19. Form update.



5.3.1.2 Form Structure

Figure 20 provides a list of Form structures that are currently stored in the metabase. Forms can exist singly or in hierarchies, or networks. In the last case, Forms form a traditional bill of materials data structure.

From above, Figure 19 presents a set of Forms. These Forms are not displayed within structures, that is, Movie Rental Membership Application within Movie Rental Forms. To create a structure among a collection of Forms, select the menu item, Form Structure. Figure 20 presents the current set of Form Structures. If, after highlighting the appropriate Form Structure Type row, there are no acceptable Form structures, press the Insert button so that Figure 21 is then presented.

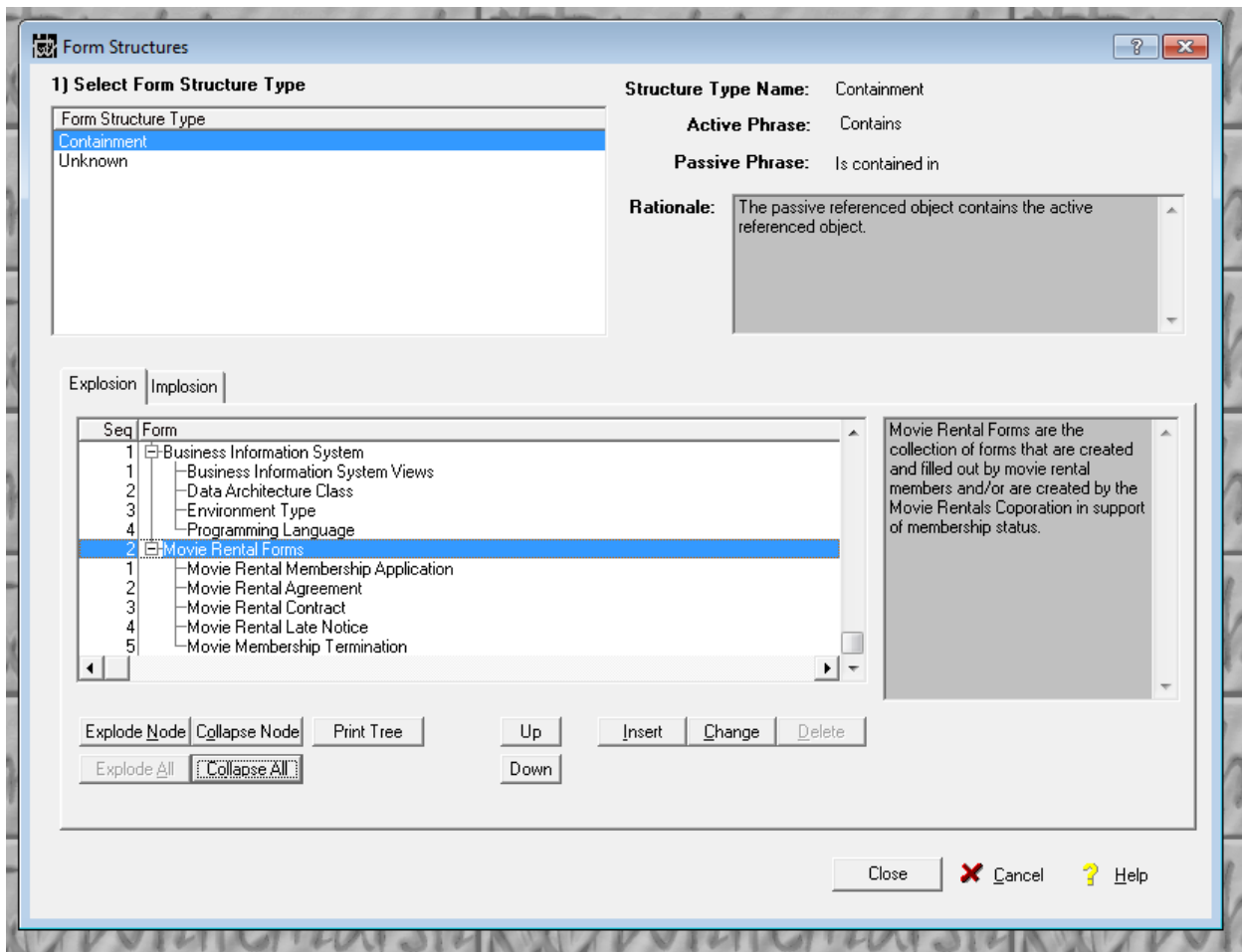


Figure 20. Explosion of Form Structures.



When a new Form is to be inserted within an existing Form Structure, the name is highlighted and the Insert button is pressed, a screen like Figure 21 is presented. The specific Form that is desired as the containing Form is highlighted and the select button is pressed. In this particular example, (as shown in Figure 20), Movie Rental Forms was highlighted as the parent, and Movie Rental Agreement was inserted as the child. The message at the bottom of the Select window indicated that the insert process is not acceptable because that record is already within the structure. At that point, press the Select button. The three cases that are automatically screened out are presented in the BOM/SFR user guide.

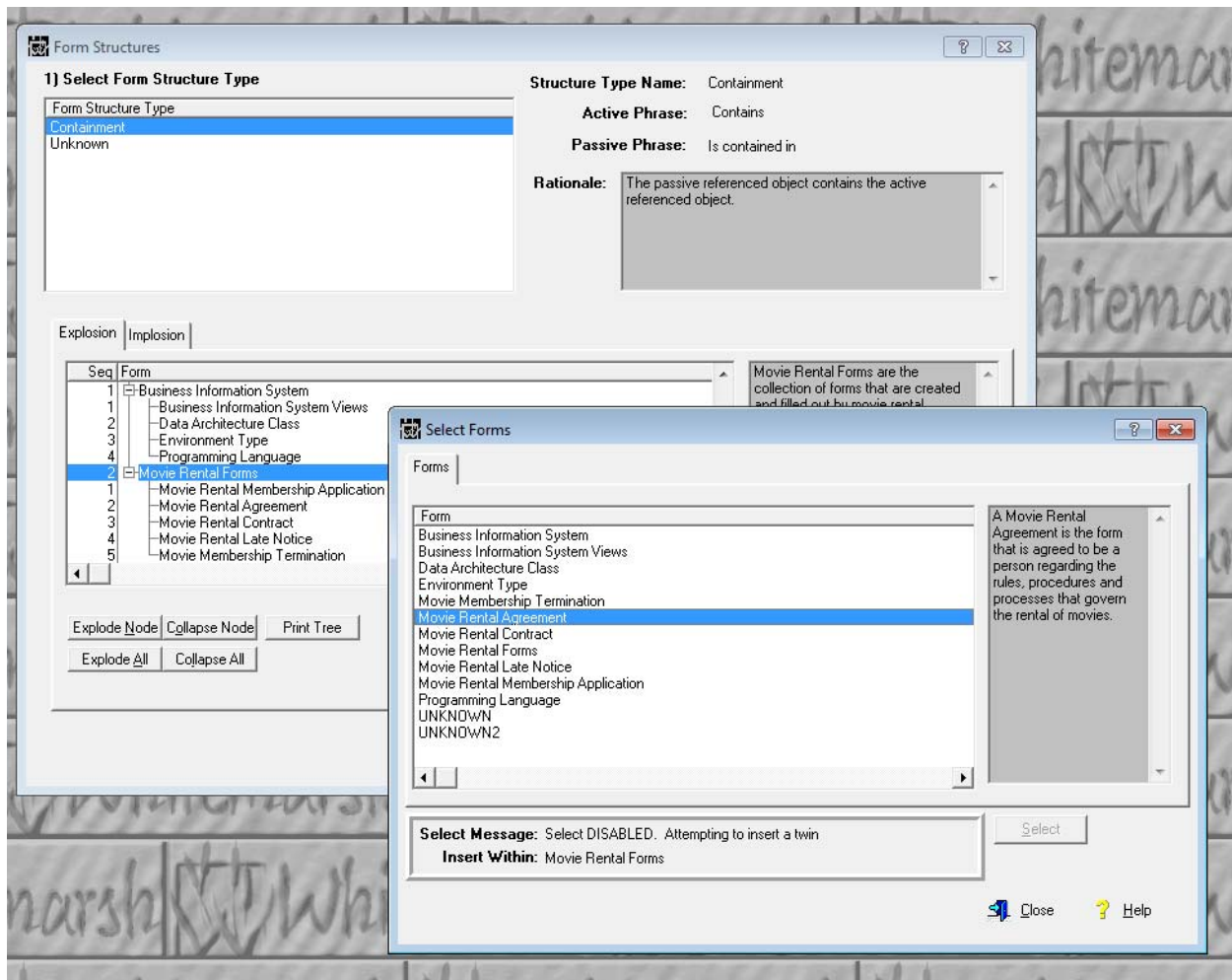


Figure 21. Form Structure Insert/Update screen.



On Figure 20, there are two tabs. Explosion and Implosion. An explosion is a collection of “active tense” relationships, Movie Rental Forms contains Movie Rental Membership Application, Movie Rental Agreement, and the like.

Implosion is the reverse. Figure 22 shows a existing set of Form Structure inversions. In this example, Business Information System General Descriptions is contained within Information Systems Plan for 2010.

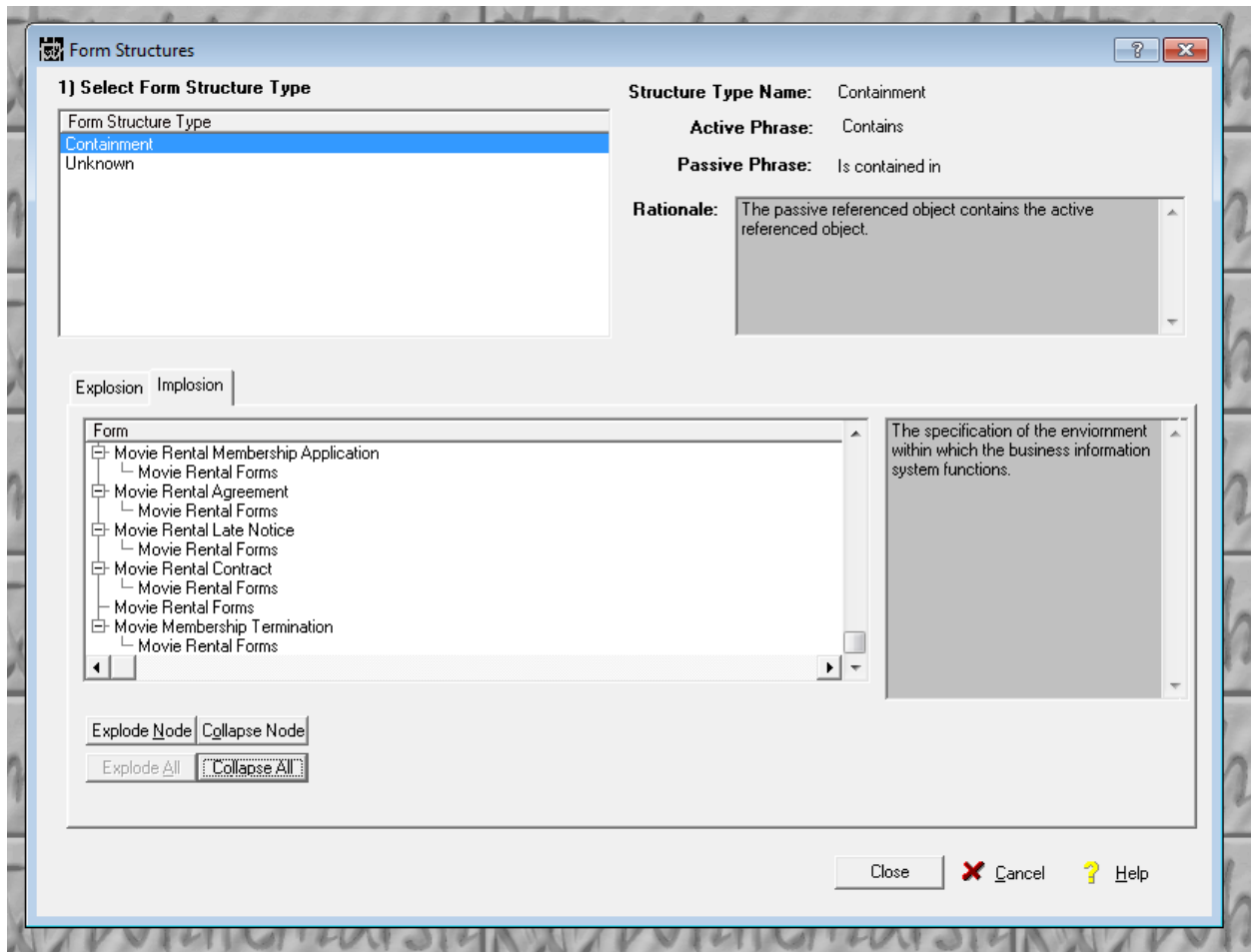


Figure 22. Form Structure Implosions.



5.3.1.3 Form Structure Type

The Form Structure type is a way of distinguishing one collection of Form structures from another. Figure 23 presents the current list. If two different classification hierarchies are interconnected, it may be that the intersection is distinguished from the others by means of a different Form structure type.

Figure 24 presents the Form structure type update form. Not only is the name and description of the Form structure type provided, so too is the active phrase and the passive phrase. The active phrase is employed by the Whitemarsh metabase system when a down-ward structure is presented. For example, <parent> contains <child 1>, <child 2>, ..., <child n>. The passive phrase enables the reverse phrases to be presented. That is, <child 2> is contained in <parent>.

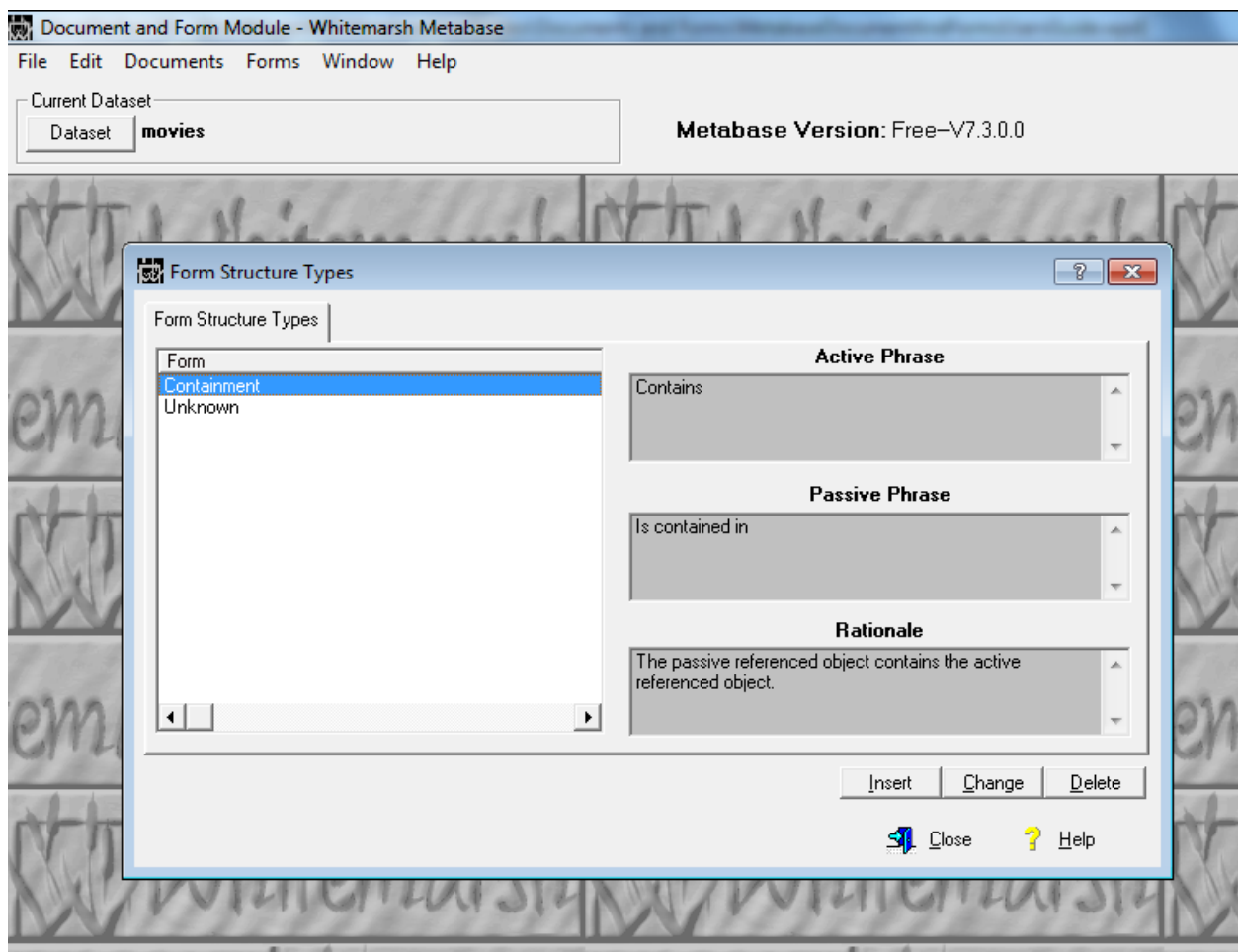


Figure 23. Form Structure Types.



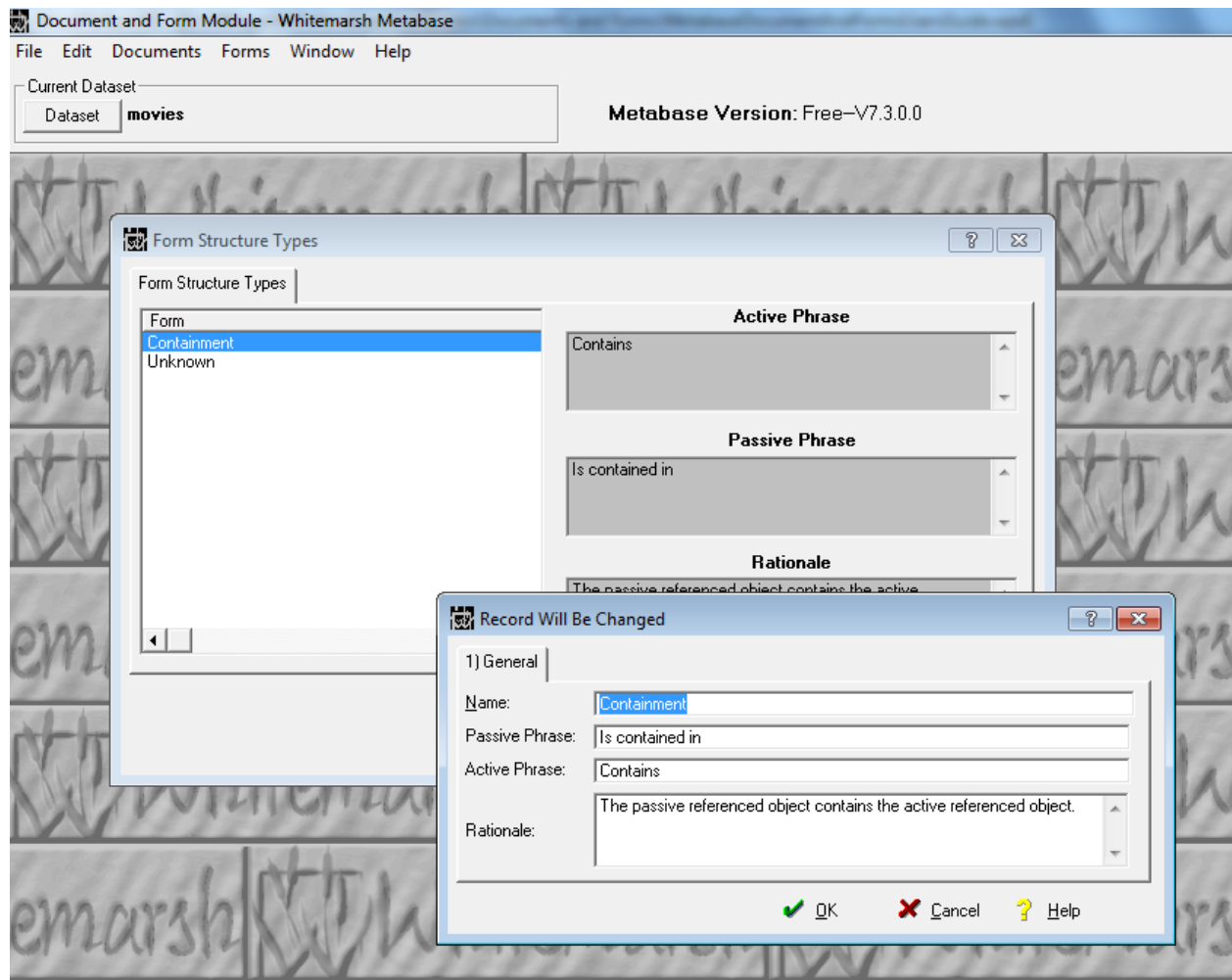


Figure 24. Form Structure Type update.



5.3.4 Form Section

Form sections are the identified sections of a Form. Form sections can be recursive. That is, hierarchical. Figure 25 lists the Form sections under the Movie Rental Agreement. There are three sections, Movie Rental Agreement Header, Movie Rental Agreement Detail, and Movie Rental Agreement Footer. Inserting a new root section, select the string, Hierarchy, and press Insert.

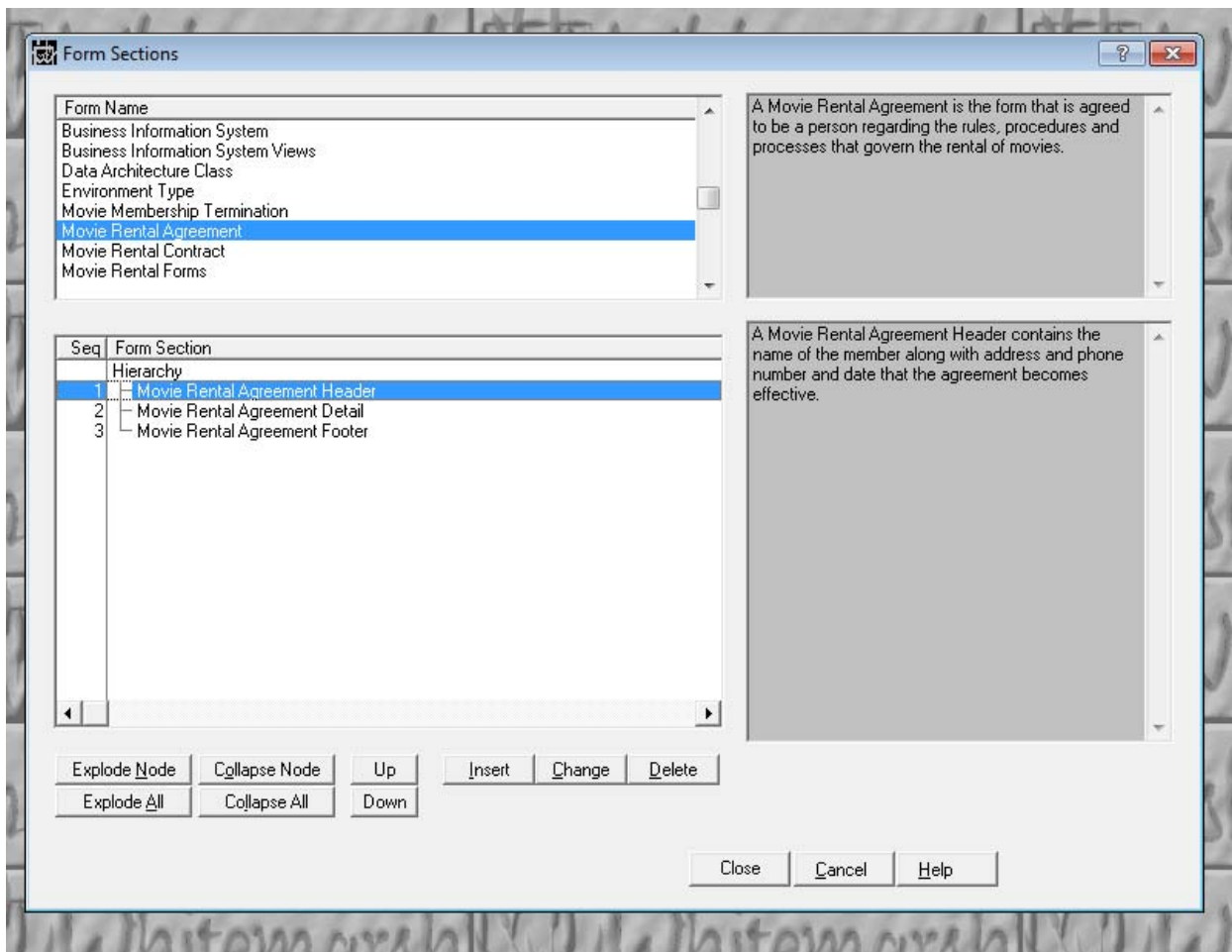


Figure 25. Form Sections.



Figure 26 shows the update screen. Add the Form section name, and its description. The sequence field is automatically computed and skipped.

To add a Form section within another Form section, select the parent Form section and press Insert. The insert screen is the same as shown on Figure 26.

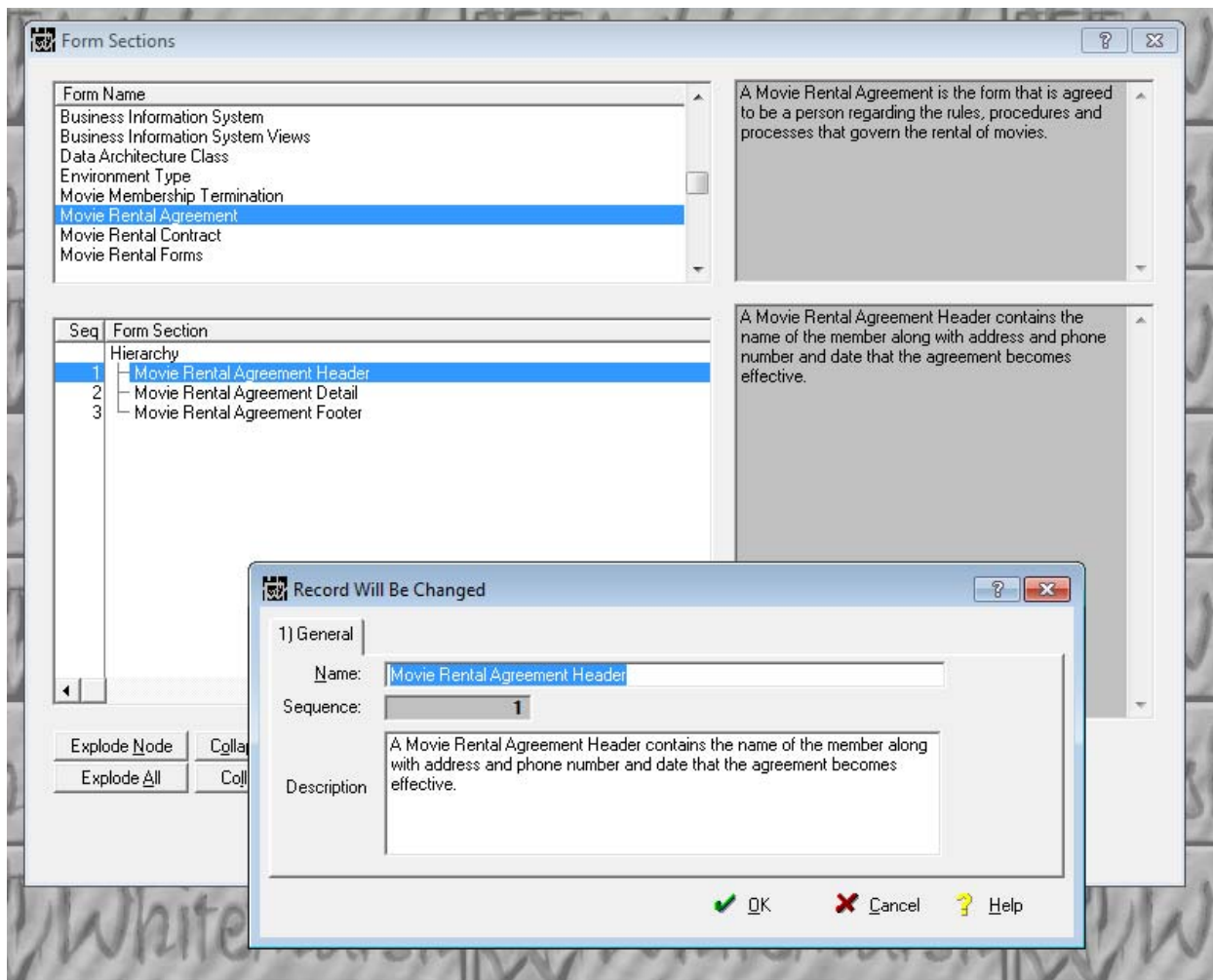


Figure 26. Form Section Update Screen.



5.3.5 Form Section Cells

Form Section Cells are structured and formatted data components that are contained in Form sections. Figure 27 sets out the typical cells for a specific section of a Movie Rental Agreement, Movie Rental Agreement Header. Figure 28 shows the update screen for inserting, modifying, or deleting a Form section cell.

The screenshot shows a window titled "Form Section Cells" with a tree view on the left and a table of form cells at the bottom. The tree view shows the hierarchy of form sections for a "Movie Rental Agreement". The table lists the form cells for the "Movie Rental Agreement Header" section, including fields like "Address Line 1", "Address Line 2", "Member Address City", "Member Address Postal Code", "Member Address State", "Member First Name", "Member Last Name", and "Member Phone Number".

Form Cell	Common Business Name	User Set Name	Precision	Scale	Null
Address Line 1	Address Line 1	Address Line 1	60	0	No
Address Line 2	Address Line 2	Address Line 2	60	0	No
Member Address City	Member Address City	Member Address City	30	0	No
Member Address Postal Code	Member Address Postal Code	Member Address Postal Code	15	0	No
Member Address State	Member Address State	Member Address State	30	0	No
Member First Name	Member First Name	Member First Name	60	0	No
Member Last Name	Member Last Name	Member Last Name	60	0	No
Member Phone Number	Member Phone Number	Member Phone Number	20	0	No

Figure 27. Form Section Cells.



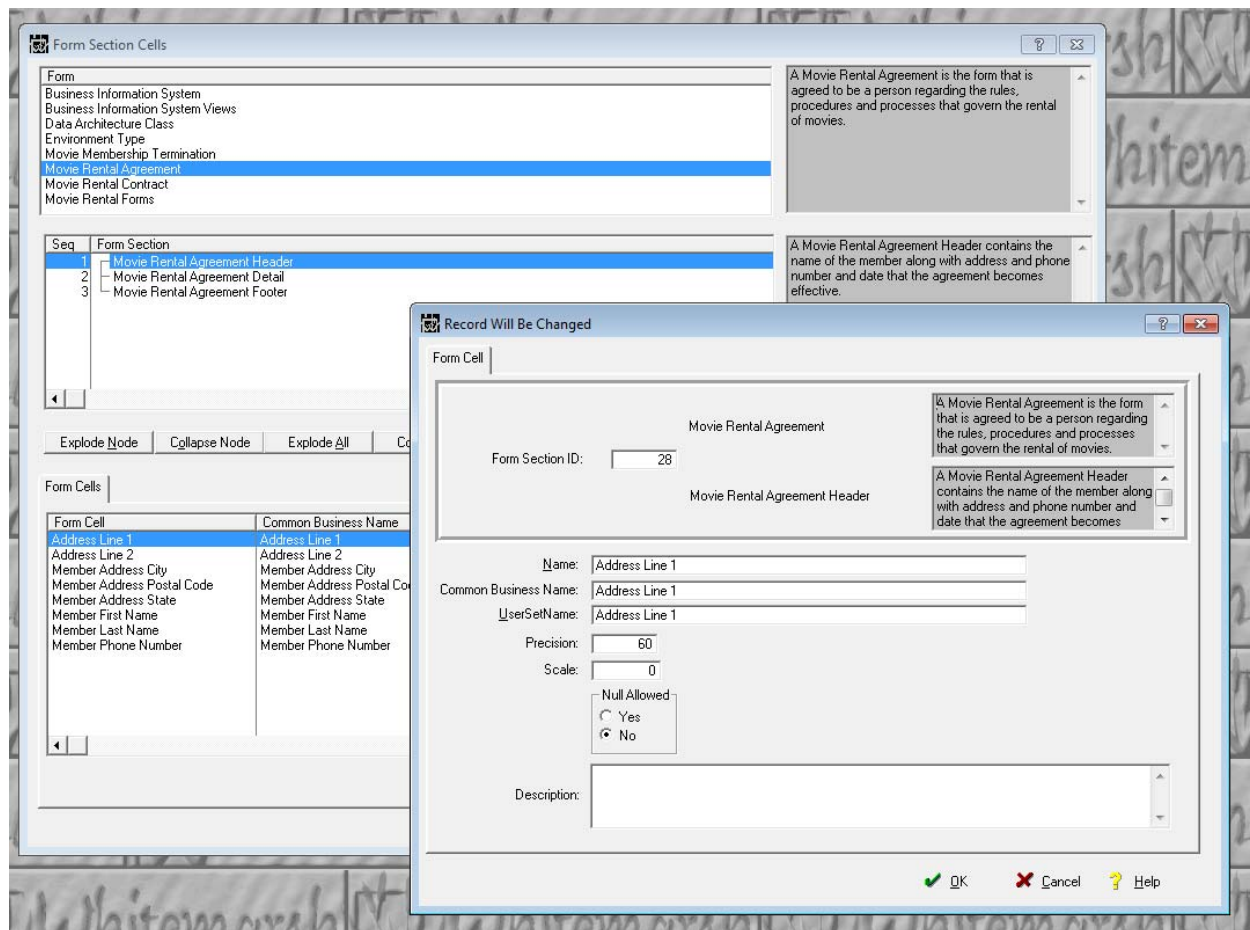


Figure 28. Form Cell Update Screen.



5.3.6 Form Cell View Column Assignment

Form Section Cells can be assigned to View Columns if the data in these Form cells are to be obtained from a database. The assignment process consists of selecting and tagging one Form Section Cell and then one or more View Columns. Thus, if a Form Section Cell is, for example, Address Line 1 is assigned to Customer Address Line 1. Once tagged, the Build Association button is pressed. If an association is to be deleted, it is selected and the delete button is pressed.

Form Cell and View Column Assignment.

Form Cell and View Column

1) Select Form

Form: Business Information System, Business Information System Views, Data Architecture Class, Environment Type, Movie Membership Termination, **Movie Rental Agreement**, Movie Rental Contract

A Movie Rental Agreement is the form that is agreed to be a person regarding the rules, procedures and processes that govern the rental of movies.

2) Select Form Section

Seq	Form Section
1	Movie Rental Agreement Header
2	Movie Rental Agreement Detail
3	Movie Rental Agreement Footer

Explode Node Collapse Node Explode All Collapse All

3) Tag one Form Cell

Name	Common Business Name	User Set Name	Prec	Scale	Null
<input checked="" type="checkbox"/> Address Line 1	Address Line 1	Address Line 1	60	0	No
<input type="checkbox"/> Address Line 2	Address Line 2	Address Line 2	60	0	No
<input type="checkbox"/> Member Address City	Member Address City	Member Address City	30	0	No
<input type="checkbox"/> Member Address Postal	Member Address Postal	Member Address Postal	15	0	No
<input type="checkbox"/> Member Address State	Member Address State	Member Address State	30	0	No

Tag Untag Tag All Untag All

4) Select View

View: Customer, Customer Address, Distributor, Employee, Movie, Movie Copy, Movie Rental Record, Payment, Store

5) Tag one or more View Columns

View Column
<input checked="" type="checkbox"/> Customer City
<input type="checkbox"/> Customer Name
<input type="checkbox"/> Customer Number
<input type="checkbox"/> Customer Phone Number
<input type="checkbox"/> Customer State
<input type="checkbox"/> Customer Street Address
<input type="checkbox"/> Customer Zip Code
<input type="checkbox"/> Movie Date

Customer City, name of the customer's city, is the specific local definition. Set within context, Customer City is an elementary fact within the table of: Customer, which is defined as: Customer, an organization or person that rents a product, is the specific local

6) Build Association

Form Cell	View Column	View
Address Line 1	Customer Address Line 1	Customer Address

Delete

Close Help

Figure 29. Form Section Cell View Column Assignment.



5.3.7 Form Section Mission Organization Function Assignment

Form Sections can be assigned to Mission-Organization-Functions as a way to identify those functions performed by certain organizations as they achieve enterprise missions. The assignment process consists of selecting and tagging one Form Section and then one or more Mission-Organization-Functions. Thus, if a Form Section is, for example, Membership Agreement Header, the function(s) within the organization that achieve this enterprise mission are tagged and then, via the Build Association button assigned. If an association is to be deleted, it is selected and the delete button is pressed.

Form Section and Mission Organization Function Assignment

General

1) Select Form

Form: **Movie Rental Agreement**

A Movie Rental Agreement is the form that is agreed to be a person regarding the rules, procedures and processes that govern the rental of movies.

2) Tag one Form Section

Seq	Form Section
<input checked="" type="checkbox"/>	1 Movie Rental Agreement Header
<input type="checkbox"/>	2 Movie Rental Agreement Detail
<input type="checkbox"/>	3 Movie Rental Agreement Footer

A Movie Rental Agreement Header contains the name of the member along with address and phone number and date that the agreement becomes effective.

3) Select Mission

Mission: **Store Operations**

Store operations, in very general terms relate to the efficient and effective operation of the stores that vend products to the ultimate end customer of the organization.

4) Select an Organization

Organization: **Store Operations Management**

The Store Operations Management organization consists of a manager and support staff that manages all the operations at the store.

5) Tag one or more Functions

Function: **Accomplish customer account management**

Establish new customer accounts with all the necessary information to then effectively manage the account. Ensure that customers receive timely reminders of any products that are late.

6) Build Association

Mission	Organization	Function
Store Operations	Store Operations Management	Accomplish customer account management

Accepted: Tagging Ok

Tag Row Untag Row

Tag All Clear All

Exploade Node Collapse Node

Exploade All Collapse All

Delete

Close Help

Figure 30. Form Section Mission Organization Function Assignment.



5.4 Reports

Reports are accomplished through access to a particular metabase database instance through commercial report writers such as Crystal Reports. Whitemarsh provides about 100 such report templates for Crystal Report access from the Whitemarsh website.

