

# Project Tracking Database

*Created by:*

*Matt Morneault - Research Associate*

*Miami University*

# Database creation...

- Prior to December '09 – Research tracked daily tasks/projects in an excel sheet
- December '09 – an old tracking database was found (only partially done but had great structure)
- January '10 –the process of converting the partial database into a functional one began.
- March '10 – the database was fully implemented with the entire research staff.

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Home Create External Data Database Tools

User ID login Form

Staff Name:

OPEN  
DATABASE

The database opens with a staff identification screen.

Navigation Pane

Form View Num Lock

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Home Create External Data Database Tools

User ID login Form

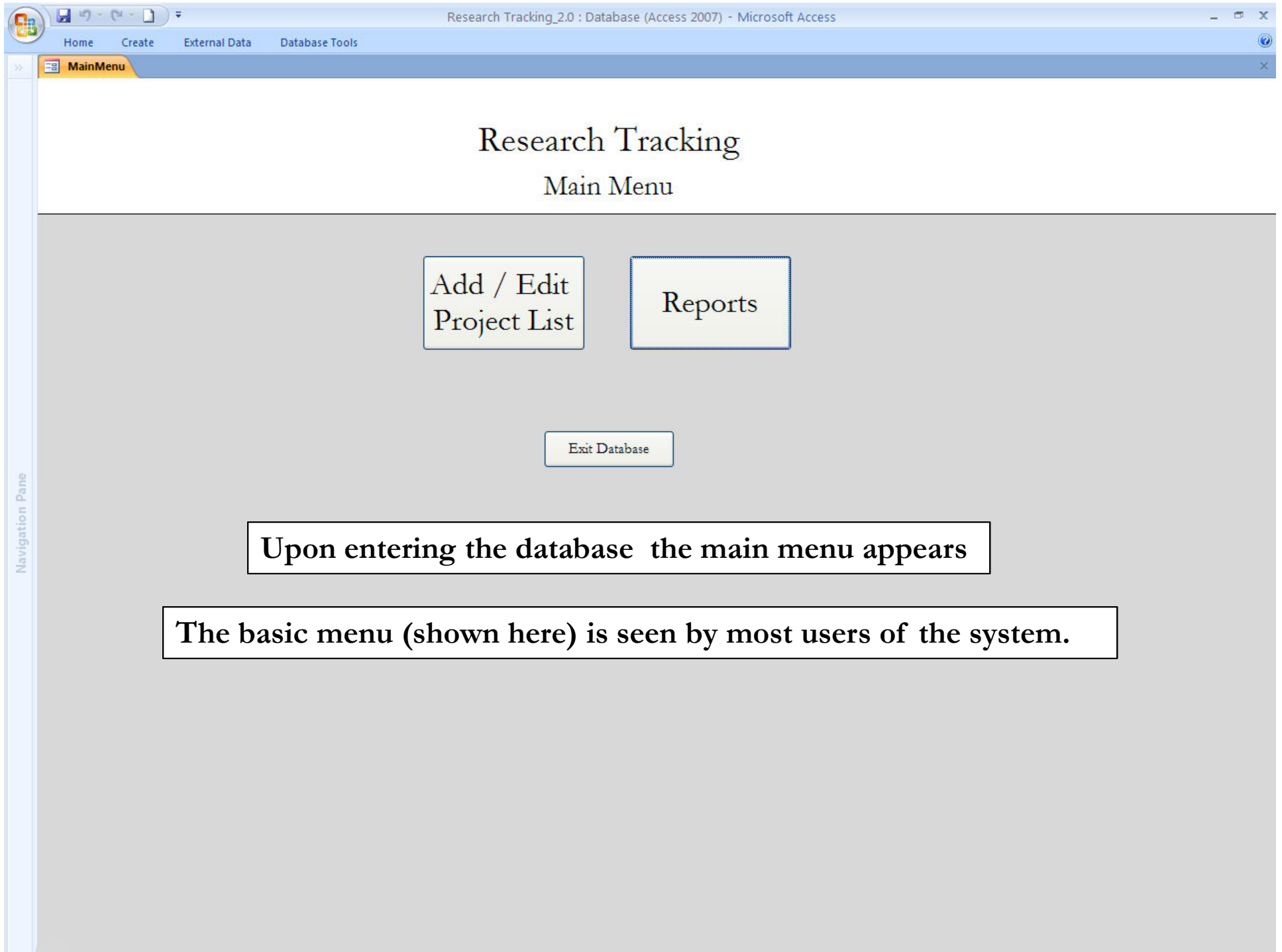
Navigation Pane

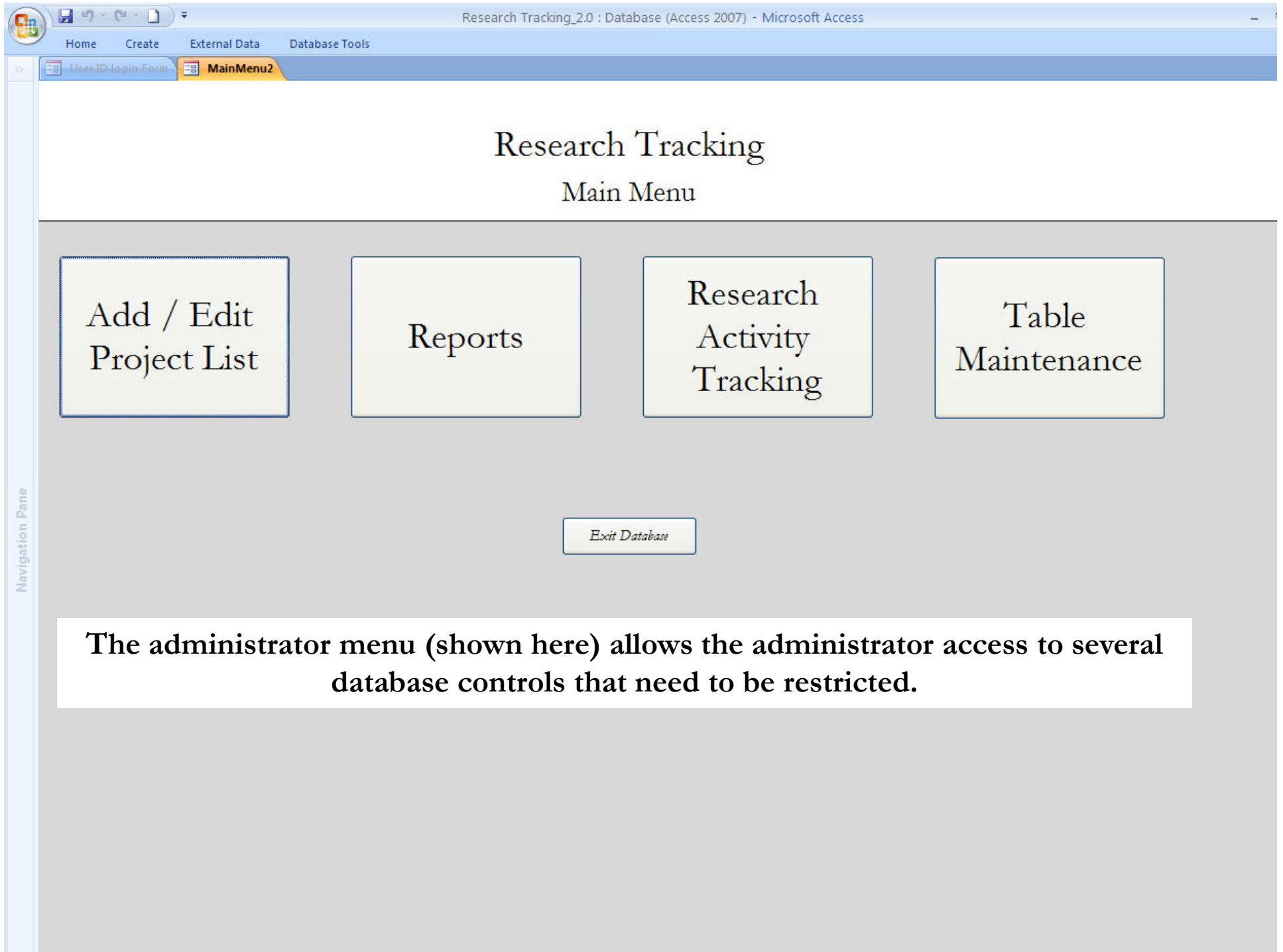
Staff Name:

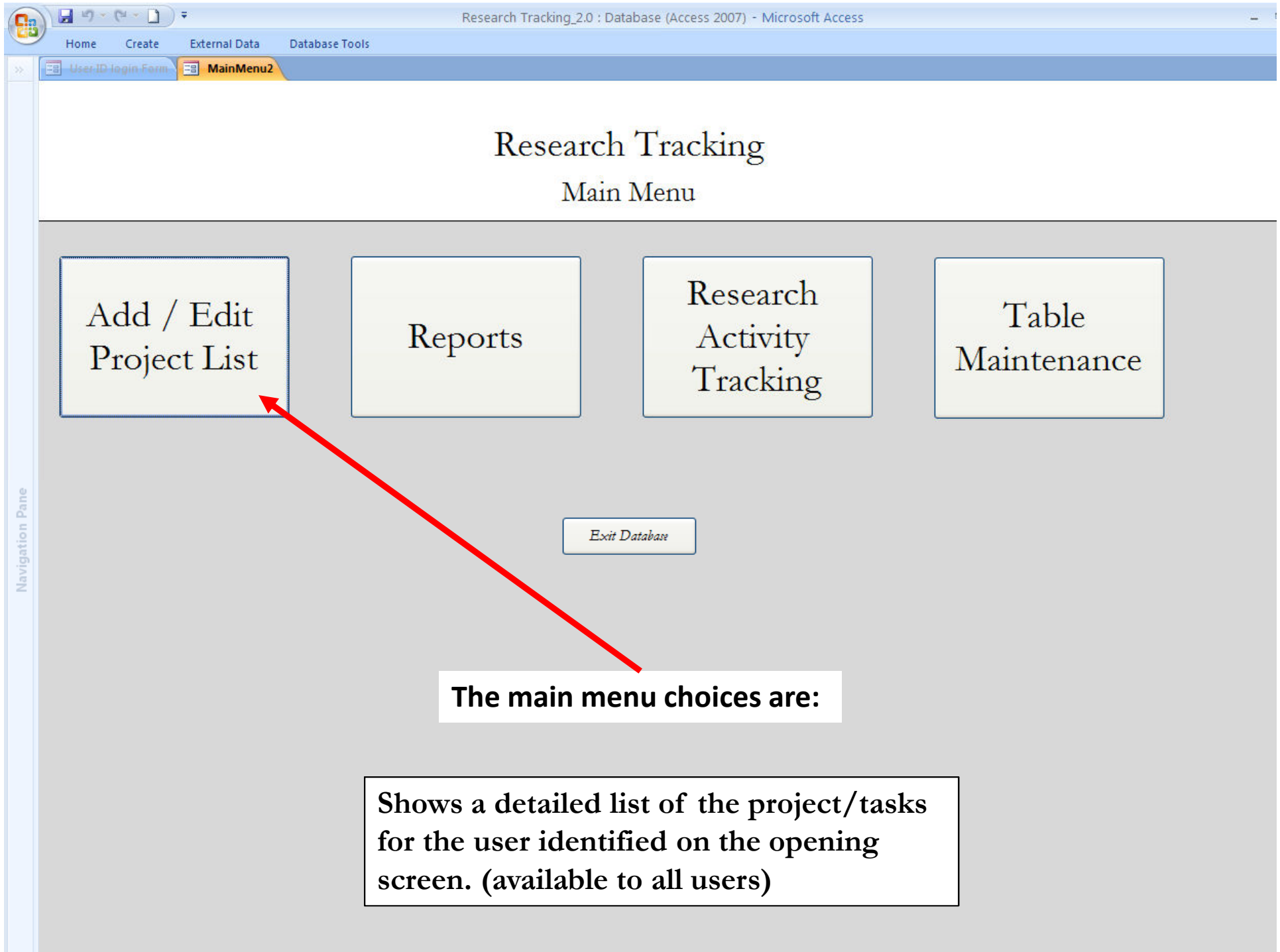
Margaret Donohue  
Matt Morneault  
Madeleine Barilleaux  
Sarah Chernitsky  
Student  
Unassigned

This screen is used as the primary filter for the project list.

Form View Num Lock







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User ID login Form MainMenu2 TaskListFullview

## Research Tracking

### Project/Task List

Task #: 1001 Date Received: 2/17/2010 Date Due: 2/17/2010 Date Started: 2/17/2010 Date Completed: 2/17/2010 Status: Complete

Task Description: Research rationale for prospect clearance Comments: Researched 21 names for Feb. '10 PC meeting...only 6 are viable candidates following research.

Requestor: Madeleine Barilleaux Assigned to: Matt Morneau

Category: Prospect Clearance names added

# of Names: Priority: Low

Time Estimate (hrs): 1 (i.e. - 0.5 = 30 mins; 1 = 1 hr; 1.25 = 1 hr 15 mins)

Time Actual (hrs): 2.75 Calculate

New Record Delete Record Save Record Activity Timer(s)

Date Due	Status	Description	Requestor	Priority
2/17/2010	Complete	Follow up discussion regarding unmanaged prospect committee	Madeleine Barilleaux	
2/17/2010	Complete	Research rationale for prospect clearance	Madeleine Barilleaux	Low
2/17/2010	Complete	Committee meeting - strategy for unmanaged prospects	Madeleine Barilleaux	
2/22/2010	Complete	divisional training session on Banner and how it relates to D.O.'s		
2/23/2010	Complete	Statistical analysis of unmanaged & rated prospects currently in Banner.	Madeleine Barilleaux	High
2/24/2010	Complete	Prospect Clearance research for February	Madeleine Barilleaux	High
2/25/2010	Complete	Phone call discussion with David regarding his research request for alumni info	David Macejko	
2/26/2010	Complete	(R6) of all Western College alumnae in the Sarasota/Bradenton area who would have graduated between 1960-1969.	Heather Kogge	Low
2/26/2010	Complete	(R6) of all Western College alumnae in the Tampa/St. Pete area who would have graduated between 1960-1969.	Heather Kogge	Low
2/26/2010	Complete	all unmanaged prospects with a gift of \$1k (min.) to the campaign since 01/01/02 (cincy region only)	Ayana Blair	Medium

Record: 2 of 86 Unfiltered Search

Form View Num Lock

The project/task list is a split form that shows a detailed view at the top of the page and more of an excel view at the bottom. The page can be further filtered by using the advanced filter function of access to limit what projects/tasks are visible.



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Home Create External Data Database Tools

User ID login Form MainMenu2 TaskListfullview

**This screen is fairly self explanatory but some special features include:**

Task #: 1001 Date Received: 2/17/2010 Date Due: 2/17/2010 Date Started: 2/17/2010 Date Completed: 2/17/2010 Status: Complete

Task Description: Research rationale for prospect clearance Comments: Researched 21 names for Feb. '10 PC meeting...only 6 are viable candidates following research.

Requestor: Madeleine Barilleaux Category: Prospect Clearance names added # of Names: 1 Priority: 1 Time Estimate (hrs): 1 Time Actual (hrs): 2.75 Calculate

**Activity Timer(s)**

**This pop up screen allows for the easy conversion of hour & minutes worked into total hours worked**

Most recent time spent on activity : (hrs) (min)  
Previous time spent on activity : 2.75 (hrs)  
Total : (hrs)

**The activity timers allow the user to accurately monitor their time spent throughout the day and the projects life cycle.**

Date Due	Status	Description	Requestor	Priority
2/17/2010	Complete	Follow up discussion regarding unmanaged prospect committ	Madeleine Barilleaux	
2/17/2010	Complete	Research rationale for prospect clearance	Madeleine Barilleaux	Low
2/17/2010	Complete	Research rationale for prospect clearance	Madeleine Barilleaux	Low
2/17/2010	Complete	Committee meeting - strategy for unmana	Madeleine Barilleaux	
2/17/2010	Comp		Paxton	Low
2/19/2010	Comp		d Macejko	Medium
2/19/2010	Complete	MU alumni in Butler, Warren and Hamilton counties also w/OSU degree	David Macejko	Medium
2/22/2010	Complete	divisional training session on Banner and how it relates to D.O.'s		
2/23/2010	Complete	Statistical analysis of unmanage & rated prospects currently in Banner.	Madeleine Barilleaux	High
2/24/2010	Complete	Prospect Clearance research for February	Madeleine Barilleaux	High
2/25/2010	Complete	Phone call discussion David regarding his research request for alumni info	David Macejko	

StopWatch1 StopWatch2 StopWatch3 StopWatch4

Project/Task Description 00:00:00:00 Start Reset

Record: 2 of 86 Unfiltered Search

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User ID login Form MainMenu2 TaskListfullview

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Requestor: Madeleine Barilleaux Assigned to: Matt Morneau

Category: Prospect Clearance names added

# of Names: Priority: Low

Time Estimate (hrs): 1 (i.e. - 0.5 = 30 mins; 1 = 1 hr; 1.25 = 1 hr 15 mins)

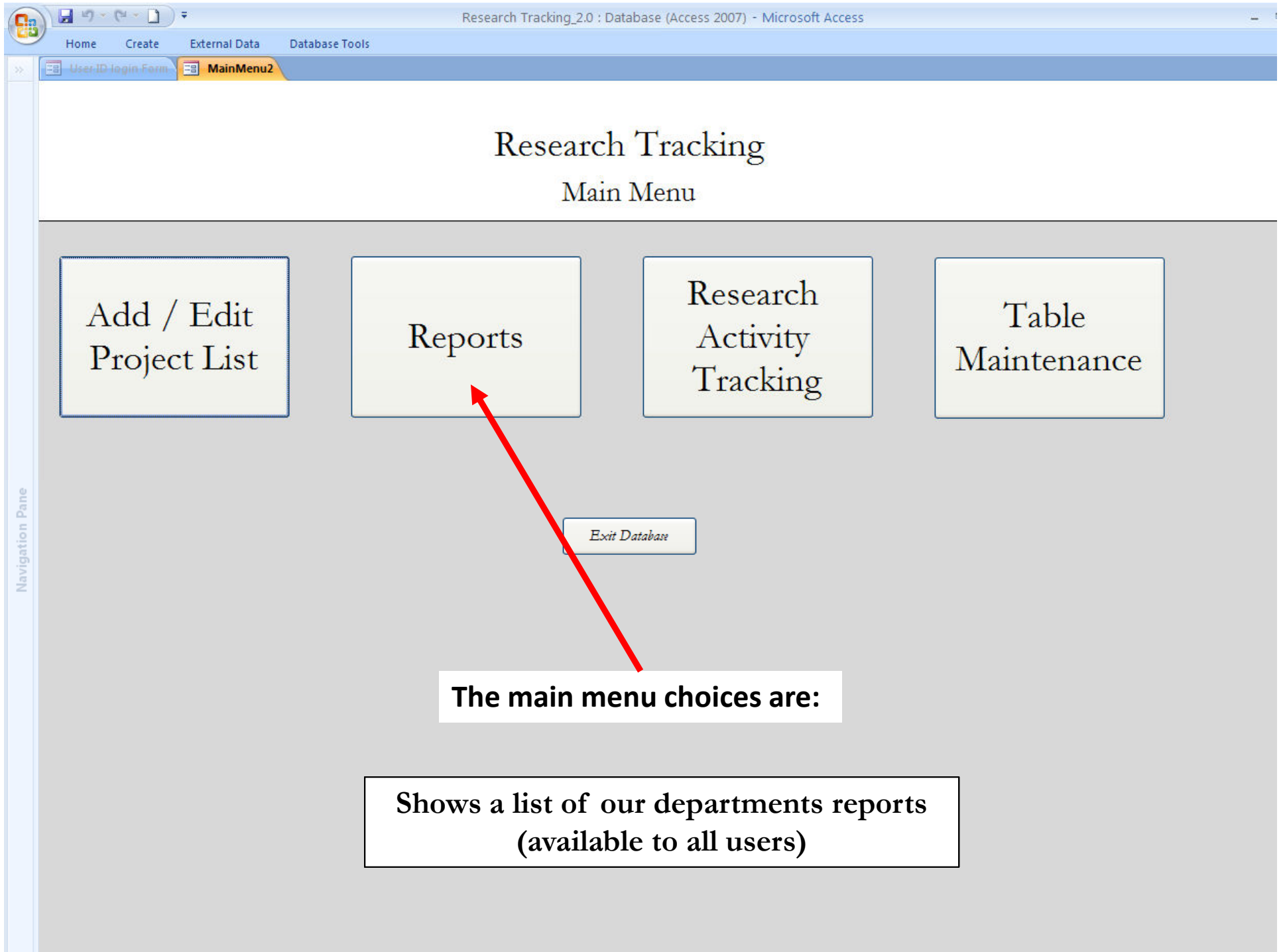
Time Actual (hrs): 2.75 Calculate

New Record Delete Record Save Record Activity Timer(s)

Navigation Pane

Date Due	Status	Description	Requestor	Priority
2/17/2010	Complete	Follow up discussion regarding unmanaged	Madeleine Barilleaux	
2/17/2010	Complete	Research rationale for prospect clearance	Madeleine Barilleaux	Low
2/17/2010	Complete	Committee meeting - strategy for unmanaged prospects	Madeleine Barilleaux	
2/17/2010	Complete	Discussion about IWAVE and Guidstar. How to use and what is the best tool for corporate/foundation information?	Ellen Paxton	Low
2/19/2010	Complete	US Bank employees in Butler, Warren and Hamilton counties	David Macejko	Medium
2/19/2010	Complete	MU alumni in Butler, Warren and Hamilton counties also w/OSU degree	David Macejko	Medium
2/22/2010	Complete	divisional training session on Banner and how it relates to D.O.'s		
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2/26/2010	Complete	all unmanaged prospects with a gift of \$1k (min.) to the campaign since 01/01/02 (cincy region only)	Ayana Blair	Medium

Using the exit screen button allows the user to return to the main menu



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User ID login Form MainMenu2 TaskListFullview ReportMenu

## Research Tracking Report Menu

Enter Report Parameters

Completed Tasks	<i>A detailed report that shows all tasks with a status of "complete" where the date complete field falls within entered date range. (May also be filtered by Development Officer and/or Researcher)</i>
Open Tasks	<i>A detailed report that shows all tasks created during the entered date range with a status other than "complete" or "cancelled". (May also be filtered by Development Officer and/or Researcher)</i>
Overdue Tasks	<i>A detailed report that shows all tasks created during the entered date range with a status of "open" and has a status other than "complete". (May also be filtered by Development Officer and/or Researcher)</i>
New Tasks	<i>A detailed report that shows all tasks created during the entered date range with a status of "new/ not started". (May also be filtered by Development Officer and/or Researcher)</i>
Weekly Metric - Summary	<i>A summary report that shows tasks completed or created during entered date range. (The report is sorted by status, with category totals and task details.)</i>
Project/Task Priority	<i>A summary report showing the top 3 tasks/projects for each research staff member for the upcoming week. (The report is sorted by priority then by due date)</i>
Research Activity	<i>A summary report that shows monthly totals for various tables within the Banner database where research staff members have updated information. (The report is designed to show monthly totals between the date range on the report parameters page)</i>
Development Officer - All Tasks	<i>A detailed report showing all tasks requested by a development officer during the entered date range. (May also be filtered by status, priority and task category.)</i>

Navigation Pane

+



Research Tracking\_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID login Form MainMenu2 TaskListFullview ReportMenu

## Research Tracking Report Menu

Enter Report Parameters

Completed Tasks *A detailed report that shows all tasks with a status of "complete" where the date complete just falls within entered date range.  
(Development Officer and/or Researcher)*

Shows all tasks created during the entered date range  
(Development Officer and/or Researcher)

Shows all tasks with a due date greater than today, due  
(Development Officer and/or Researcher)

Shows all tasks created during the entered date range  
(Development Officer and/or Researcher)

Weekly Metric - Summary *A summary report that shows tasks completed or created during entered date range.  
(The report is sorted by status, with category totals and task details.)*

Project/Task Priority *A summary report showing the top 3 tasks/projects for each research staff member for the upcoming week.  
(The report is sorted by priority then by due date)*

Research Activity *A summary report that shows monthly totals for various tables within the Banner database where research staff members have updated information.  
(The report is designed to show monthly totals between the date range on the report parameters page)*


Development Officer - All Tasks *A detailed report showing all tasks requested by a development officer during the entered date range.  
(May also be filtered by status, priority and task category.)*

Navigation Pane


Users open the report parameters screen to enter and adjust parameters to create their desired report.


## Research Tracking


### Report Parameters


Start Date:  


End Date:

Development Officer:  

Researcher:  

Priority:  

Project Status:  

Category:  

REPORT MENU



The report parameters screen allows users to enter a desired date range for their report. This screen also allows a user to further restrict the report output by selecting a specific development officer or specific priority status or project status, etc.

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Database Tools

review

TaskListfullview

ReportMenu

Report Parameters

login Form

MainMenu2

TaskListfullview

ReportMenu

Report Parameters

Completed Tasks

# Research Tracking

## Report Parameters

Start Date:

End Date:

Development Officer:

Researcher:

Priority:

Project Status:

Category:

REPORT MENU

### COMPLETED TASKS REPORT - Completed Since: January 01, 2010

Task#	Requestor	Date Rec'd	Date Req'd	Date Started	Est.Hrs	Act. Hrs.	Pri
All Completed Tasks		Total # Tasks: 224		Total Est. Hours: 302.53			

#### Report Parameters

Date Range : 1/1/2010 - 4/1/2010

Development Officer :

Research Staff Assigned :

Task Priority :

Task Status :

Task Category :

Tuesday, April 20, 2010

46

No Filter

The data entered on the report parameters screen is also mirrored at the end of nearly every report.


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Home Create External Data Database Tools


User ID login Form MainMenu2 TaskListfullview ReportMenu Report Parameters


## Research Tracking


### Report Parameters


Start Date:  


End Date:


Development Officer:  

Researcher:  

Priority:  

Project Status:  

Category:  



Navigation Pane

Form View Num Lock

Users can click the report menu button to toggle back and forth with the report menu



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Home Create External Data Database Tools

User ID login Form MainMenu2 TaskListFullview ReportMenu

## Research Tracking Report Menu

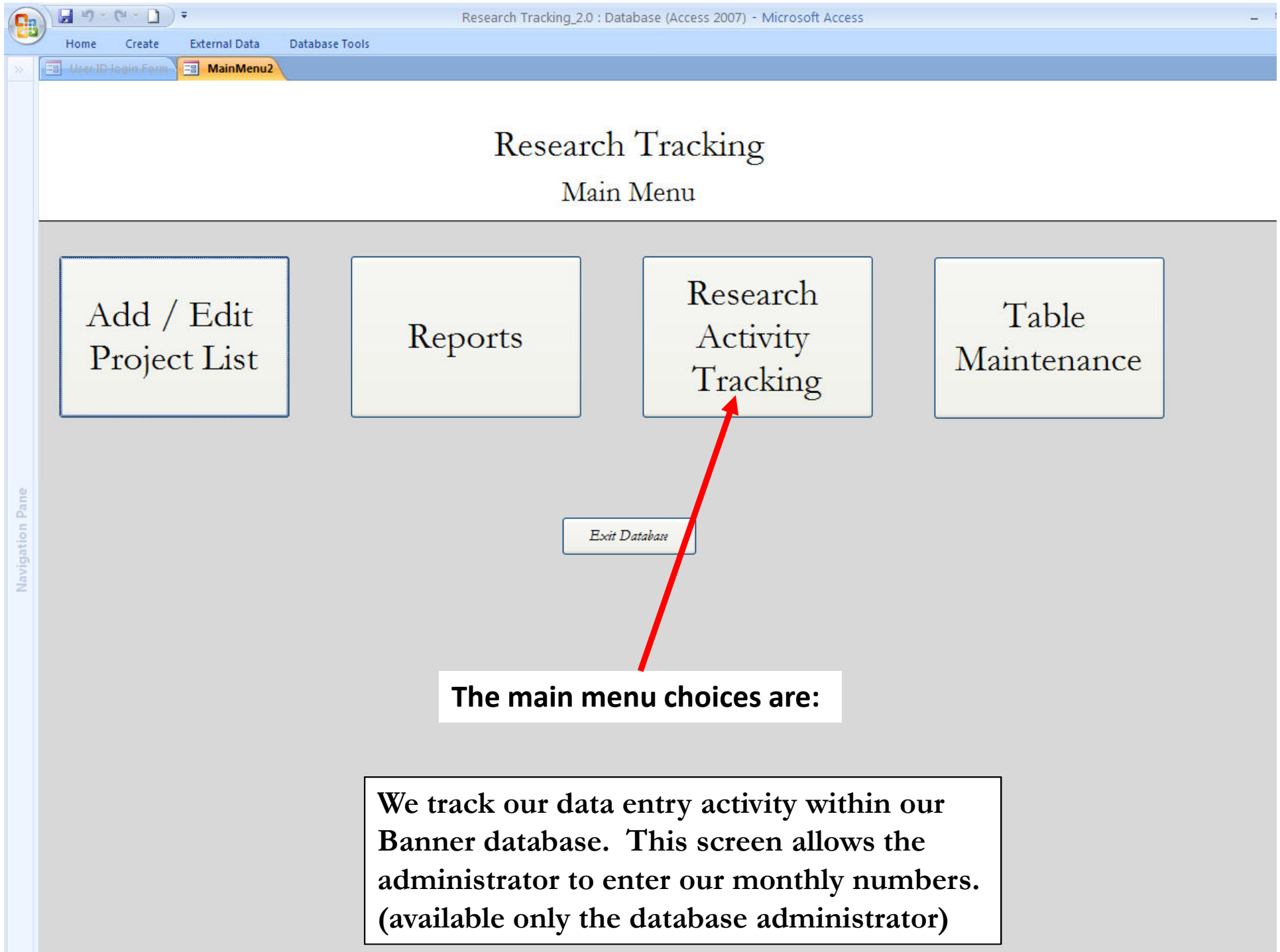
Enter Report Parameters

Completed Tasks	<i>A detailed report that shows all tasks with a status of "complete" where the date complete field falls within entered date range. (May also be filtered by Development Officer and/or Researcher)</i>
Open Tasks	<i>A detailed report that shows all tasks created during the entered date range with a status other than "complete" or "cancelled". (May also be filtered by Development Officer and/or Researcher)</i>
Overdue Tasks	<i>A detailed report that shows all tasks with a due date greater than today, date complete field is empty and has a status other than "complete". (May also be filtered by Development Officer and/or Researcher)</i>
New Tasks	<i>A detailed report that shows all tasks created during the entered date range with a status of "new/ not started". (May also be filtered by Development Officer and/or Researcher)</i>
Weekly Metric - Summary	<i>A summary report that shows tasks completed or created during entered date range. (The report is designed to show monthly totals between the date range on the report parameters page)</i>
Project/Task Priority	<i>A summary report that shows tasks completed or created during entered date range. (The report is designed to show monthly totals between the date range on the report parameters page)</i>
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Development Officer - All Tasks	<i>A detailed report showing all tasks requested by a development officer during the entered date range. (May also be filtered by status, priority and task category)</i>

To close the report menu and return the main menu users can click on the exit button at the bottom of the screen.

Navigation Pane

Exit



# Research Tracking

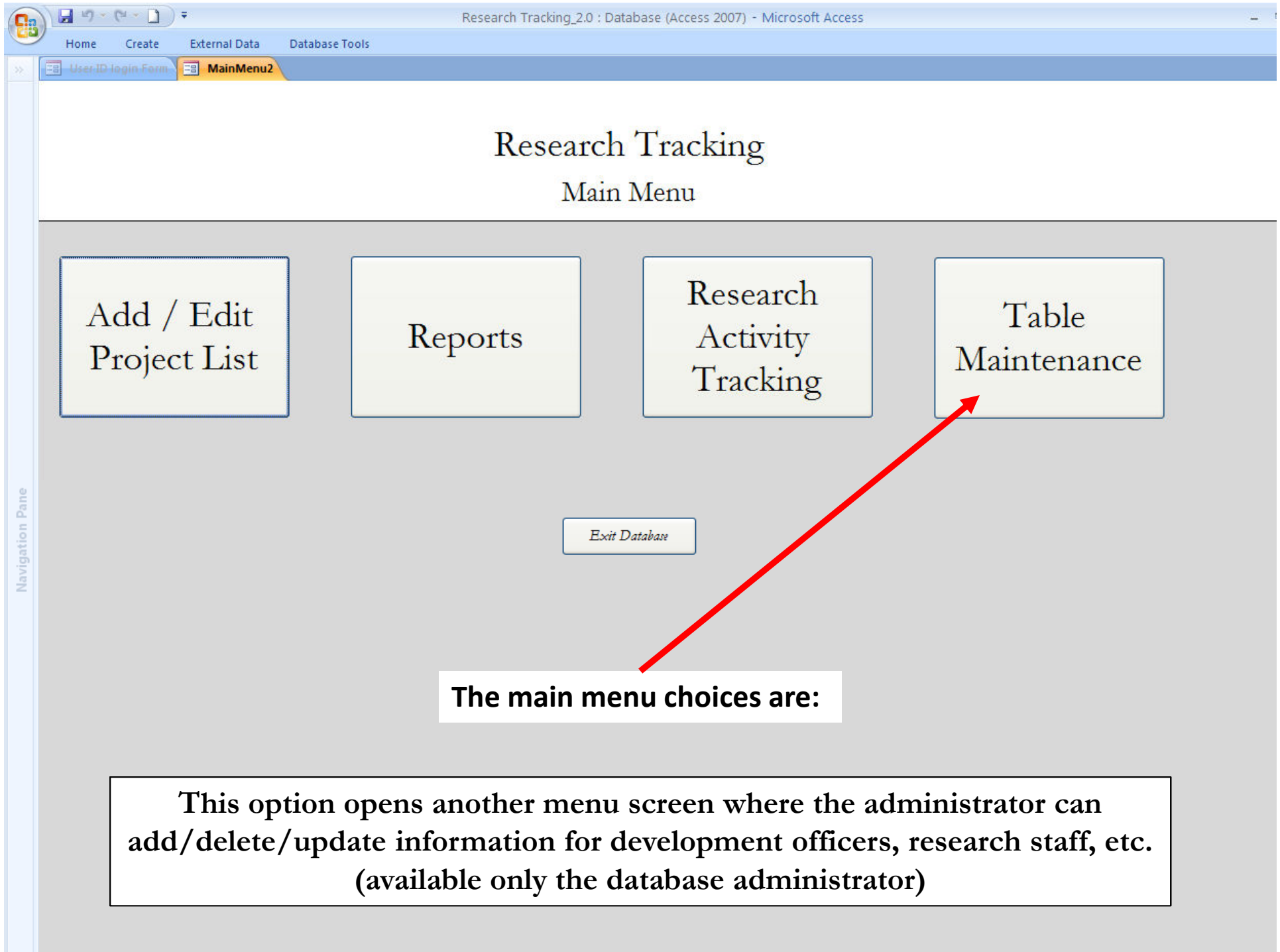
## Research Activity Entry Form

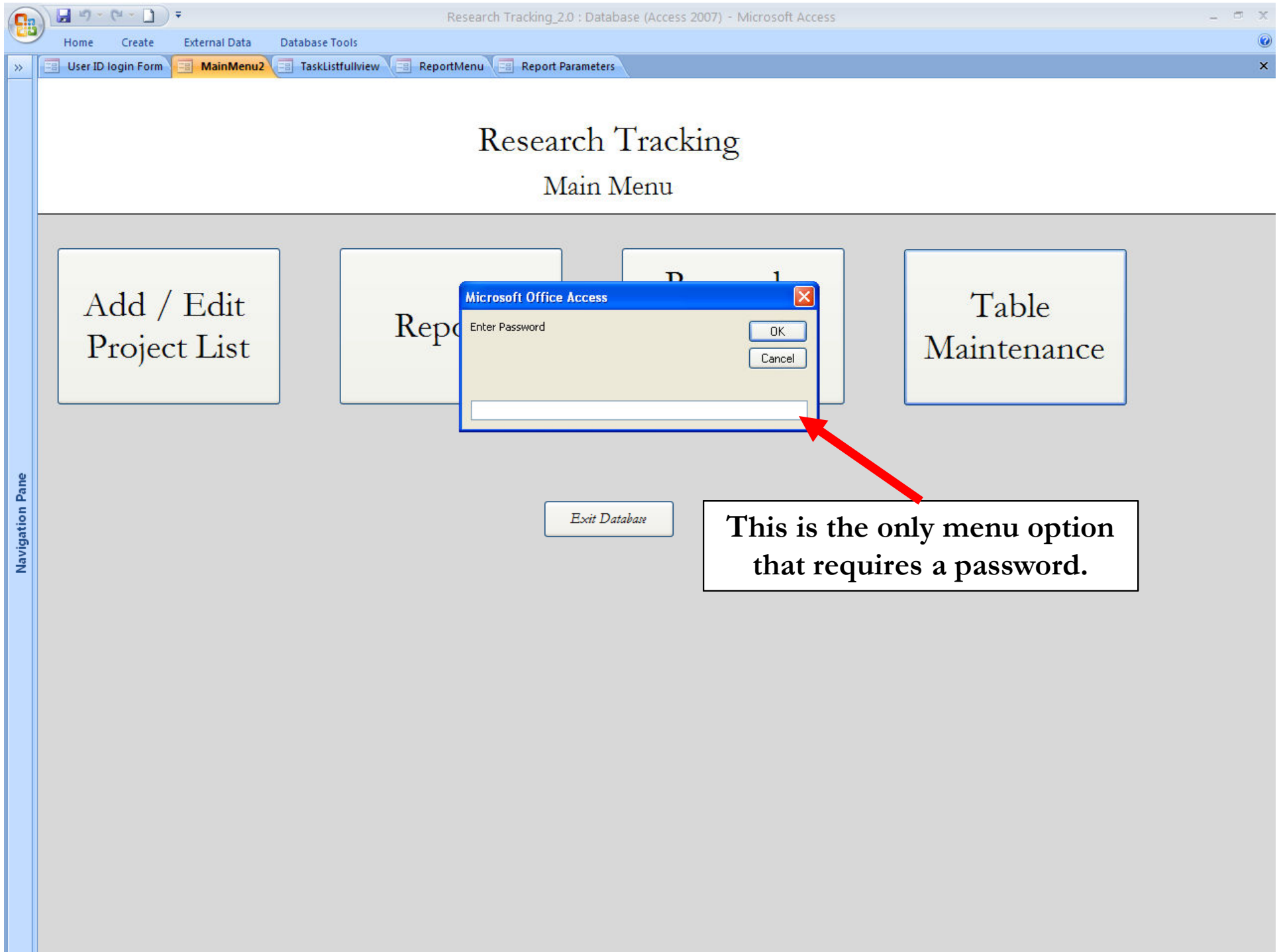
Researcher:    
 Report Date:

Ratings (amainfo):  Contact (amacont):  Proposals (amaprop):    
 Degree (apaadeg):  Employment (apaehis):  Staff (amainfo):    
 Project (amainfo):  Comments (apacomt):  Research (amainfo):    
 Total:  General (amainfo):  ambplan (amaplan):    
 aprxref (apasbio):  apracty (apasbio):

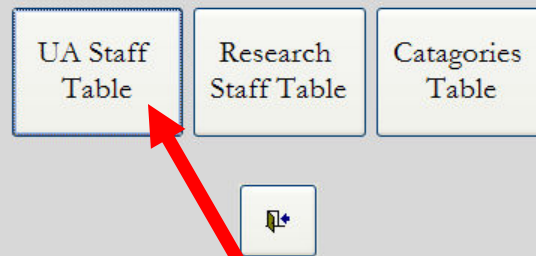
Researcher	Report Date	Rating	Contact	Propos	Degre	Empl	Staff (am	Project (an	Comments	Research (	Total	General (ar	ambplan (a	aprxref (ap	apracty (ap
Matt Morneau	12/1/2009	58	36	0	0	13	1	20	7	35	170	0	0	0	0
Matt Morneau	2/1/2010	160	99	0	0	22	8	58	4	91	442	0	0	0	0
Unassigned	2/1/2010	0	0	0	0	0	0	0	0	0	0	206	281	743	192
Madeleine Barilleaux	3/1/2010	10	163	0	0	76	34	4	61	9	357		0	0	0
Sarah Chernitsky	3/1/2010	46	148	208	0	1	72	414	0	45	934	0	0	0	0
Margaret Donohue	3/1/2010	132	167	0	0	145	23	38	35	241	781	0	0	0	0
Matt Morneau	3/1/2010	106	119	0	0	54	7	46	13	84	429	0	0	0	0
Unassigned	3/1/2010	0	0	0	0	0	0	0	0	0	0	318	385	491	954
Madeleine Barilleaux	7/1/2009	0	26	0	0	2	1	0	1	2	32	0	0	0	0
Sarah Chernitsky	7/1/2009	32	194	101	0	0	8	154	0	30	519	0	0	0	0
Margaret Donohue	7/1/2009	22	22	0	0	226	5	0	42	54	371	0	00	0	0
Matt Morneau	7/1/2009	32	36	0	0	53	26	3	21	69	240	0	0	0	0
Unassigned	7/1/2009	0	0	0	0	0	0	0	0	0	0	163	80	2268	1673
Madeleine Barilleaux	8/1/2009	4	47	1	0	6	6	18	2	6	90	0	0	0	0
Sarah Chernitsky	8/1/2009	79	90	59	0	1	1	81	3	53	367	0	0	0	0
Margaret Donohue	8/1/2009	11	95	0	0	102	10	18	6	44	286	0	0	0	0
Matt Morneau	8/1/2009	19	49	0	0	19	2	12	0	35	136	0	0	0	0
Madeleine Barilleaux	9/1/2009	12	349	12	0	5	26	42	16	22	484	0	0	0	0
Sarah Chernitsky	9/1/2009	22	112	51	0	1	722	132	2	70	1112	0	0	0	0
Margaret Donohue	9/1/2009	34	199	1	0	69	34	51	13	103	504	0	0	0	0

Our IT department created a report that pulls data on all of our data entry activity within the Banner® database. We are then able to capture that information into a dedicated table so that we can store historical data. We also use the data to produce periodic reports to show the amount of work that is being done within the alumni database.



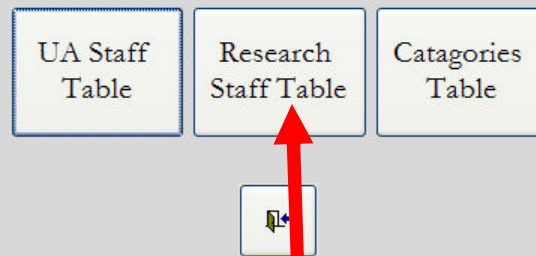


## Research Tracking Table Maintenance Menu



**The UA staff table is a listing of all development office personnel. This list is used for those who request a project/task from research.**

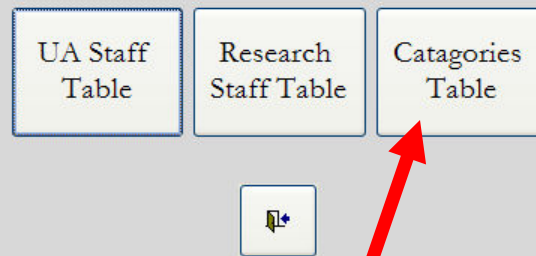
## Research Tracking Table Maintenance Menu



**The research staff table is a listing of  
all research office personnel.**



## Research Tracking Table Maintenance Menu



**The categories table is a listing of the specific task types that research performs on a daily basis.**



## Research Tracking Table Maintenance Menu

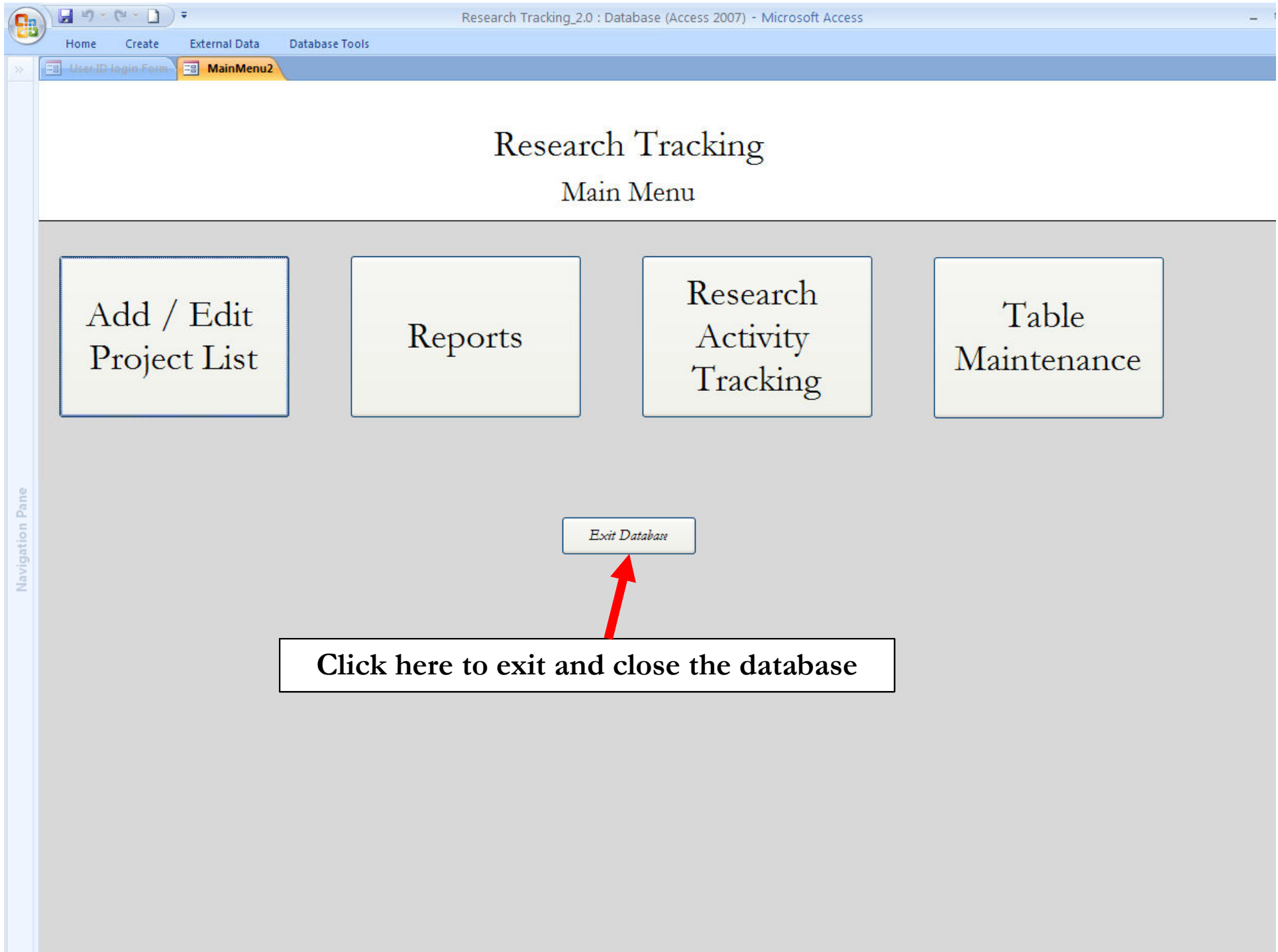
UA Staff  
Table

Research  
Staff Table

Catagories  
Table



**Users can use the exit button to  
return to the main menu screen.**



# Questions / Comments?

- Email : [morneamj@muohio.edu](mailto:morneamj@muohio.edu)