

Project Tracking Database

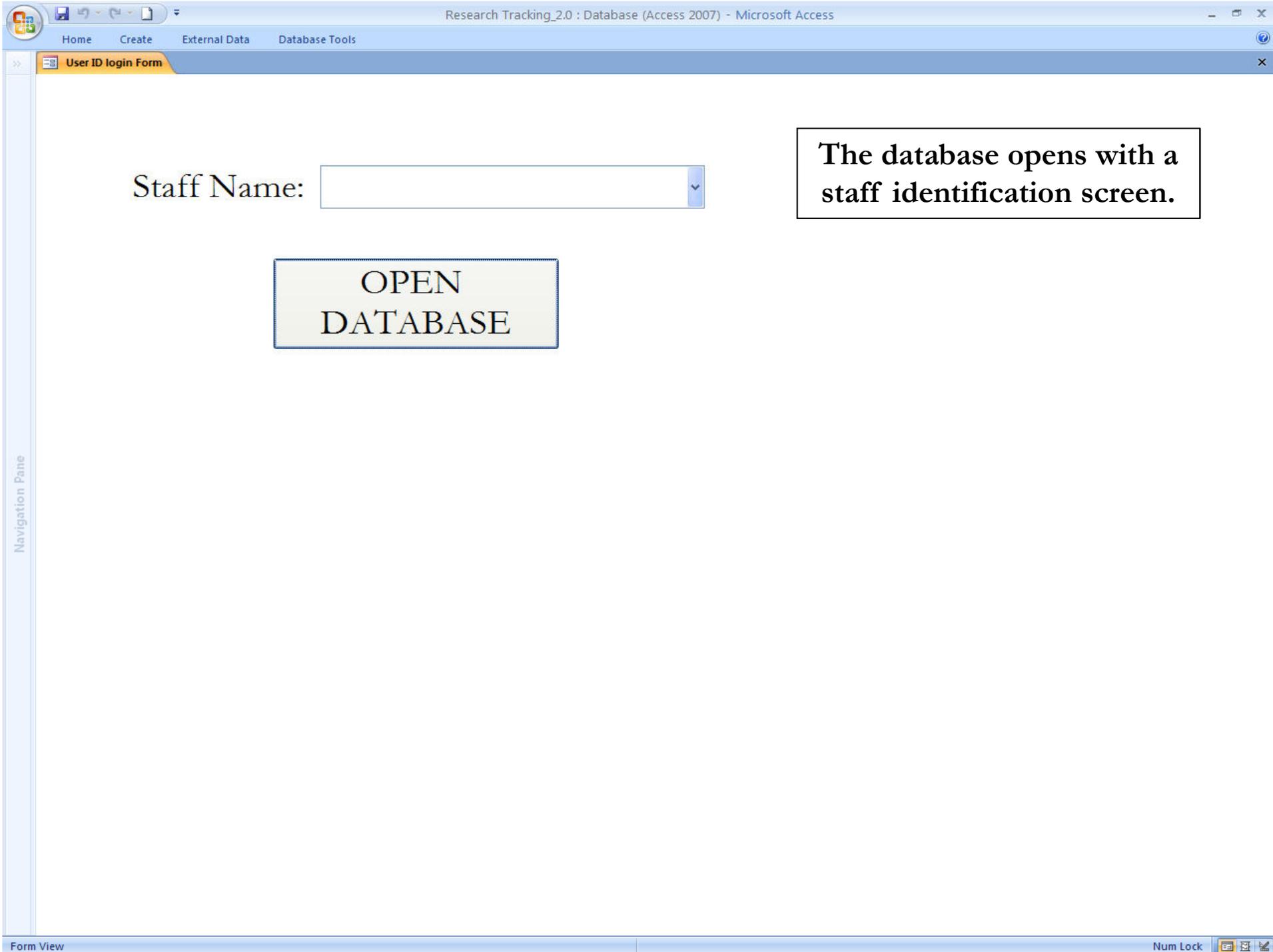
Created by:

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.



Staff Name:

The database opens with a staff identification screen.

OPEN
DATABASE

Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID login Form

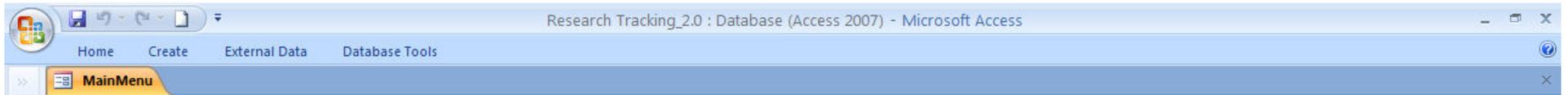
Staff Name:

Margaret Donohue
Matt Morneault
Madeleine Barilleaux
Sarah Chernitsky
Student
Unassigned

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

Navigation Pane

Form View Num Lock



Research Tracking

Main Menu

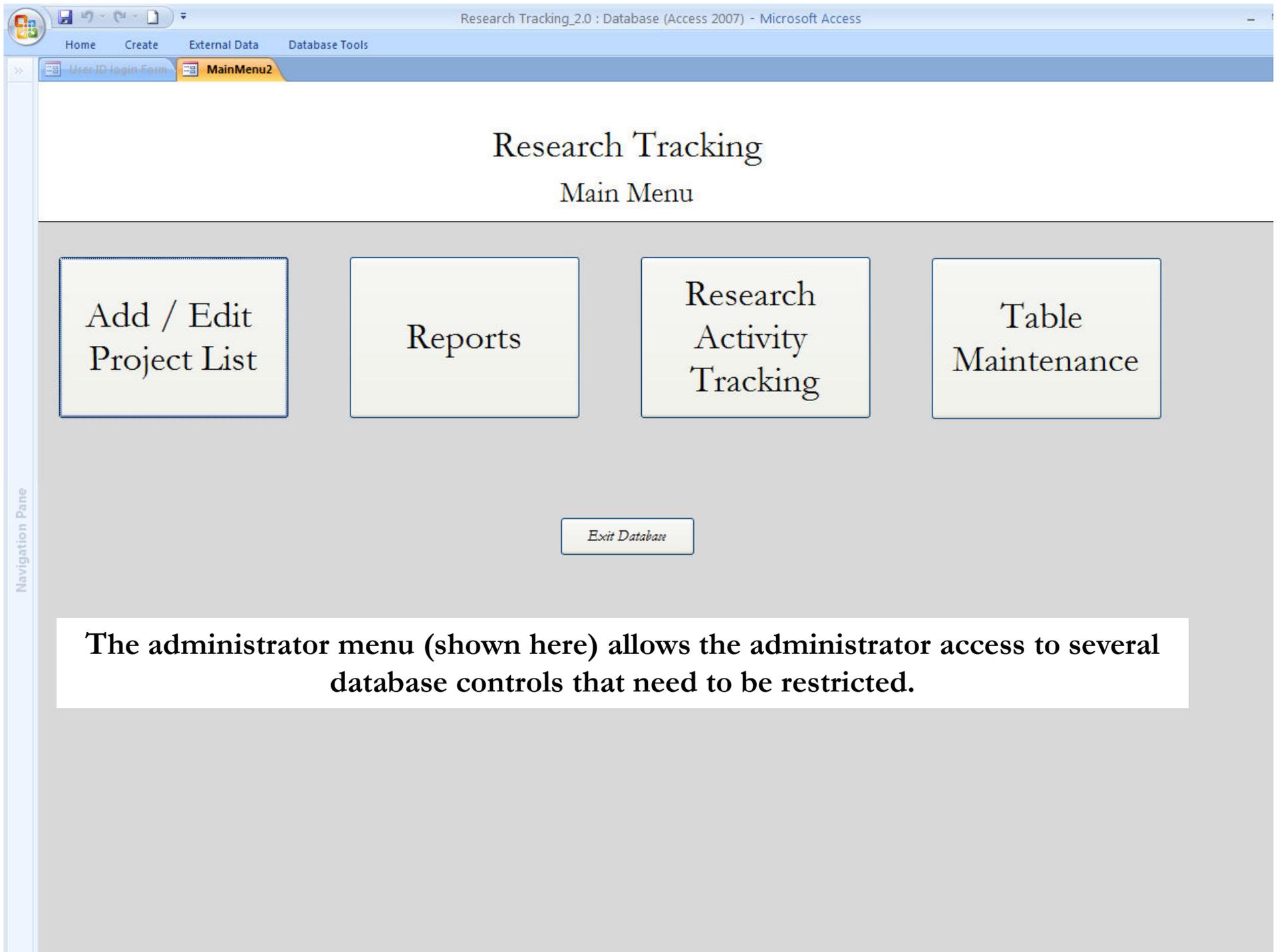
Add / Edit
Project List

Reports

Exit Database

Upon entering the database the main menu appears

The basic menu (shown here) is seen by most users of the system.



Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID login Form MainMenu2

Research Tracking

Main Menu

Add / Edit Project List

Reports

Research Activity Tracking

Table Maintenance

Exit Database

Navigation Pane

The main menu choices are:

Shows a detailed list of the project/tasks for the user identified on the opening screen. (available to all users)

Research Tracking

Project/Task List

Task #: Date Received: Date Due: Date Started: Date Completed: Status:

Task Description: Comments:

Requestor: Assigned to:

Category:

of Names: Priority:

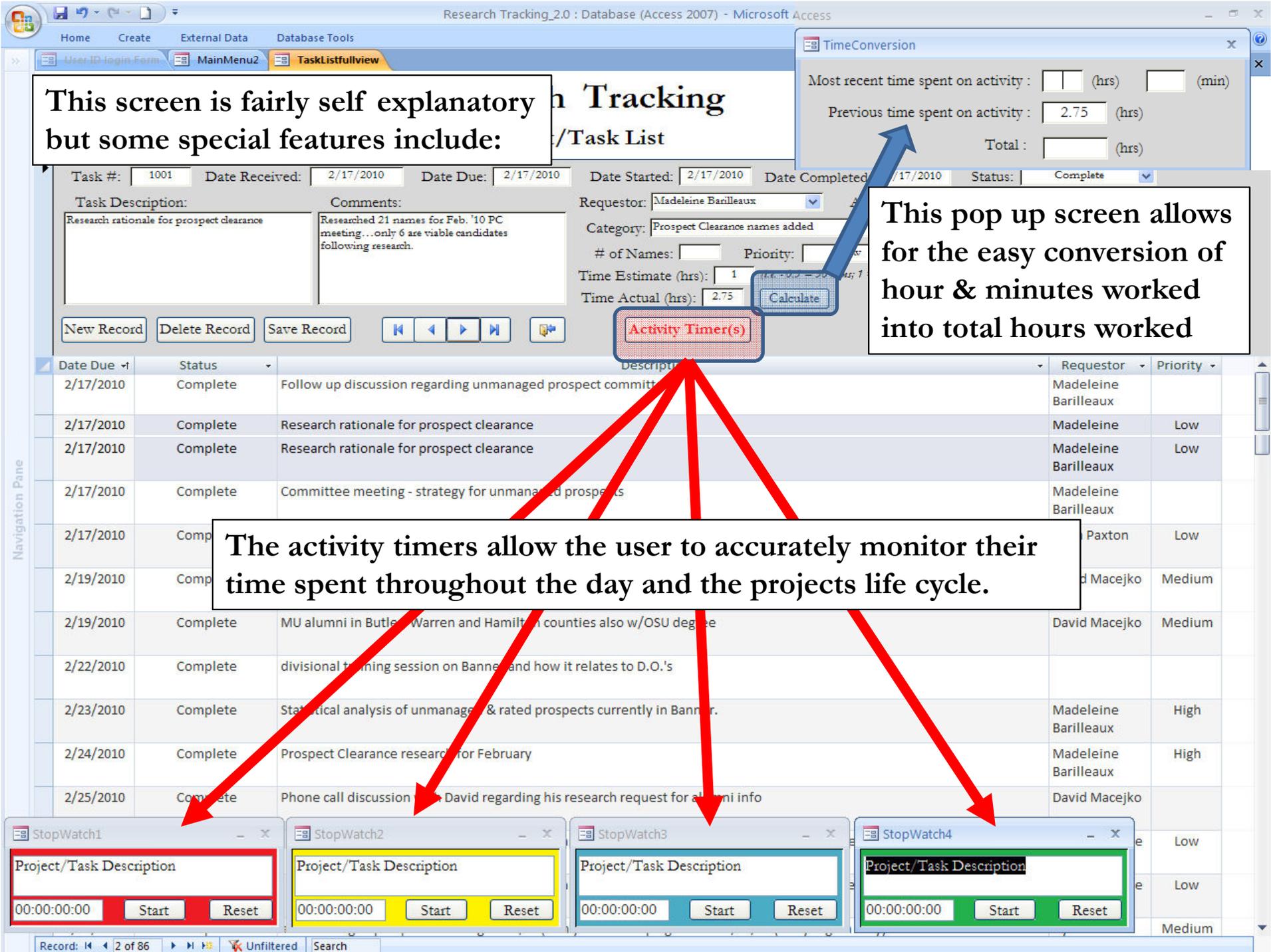
Time Estimate (hrs): (i.e. - 0.5 = 30 mins; 1 = 1 hr; 1.25 = 1 hr 15 mins)

Time Actual (hrs):

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	

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.

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



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

TimeConversion

Most recent time spent on activity : (hrs) (min)

Previous time spent on activity : (hrs)

Total : (hrs)

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

Activity Timer(s)

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

StopWatch1

Project/Task Description

00:00:00:00 Start Reset

StopWatch2

Project/Task Description

00:00:00:00 Start Reset

StopWatch3

Project/Task Description

00:00:00:00 Start Reset

StopWatch4

Project/Task Description

00:00:00:00 Start Reset

Research Tracking

Project/Task List

Task #: Date Received: Date Due: Date Started: Date Completed: Status:

Task Description: Comments:

Requestor: Assigned to:

Category:

of Names: Priority:

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

Time Actual (hrs):

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

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		
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	
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Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID login Form MainMenu2

Research Tracking

Main Menu

Add / Edit Project List

Reports

Research Activity Tracking

Table Maintenance

Exit Database

Navigation Pane

The main menu choices are:

**Shows a list of our departments reports
(available to all users)**

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	<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 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

The report menu gives a detailed description of the various reports

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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, (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

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Many of the reports are date based and have been configured to allow for various parameters to be entered to create a custom report.

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.

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.	Pr
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 :



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

Tuesday, April 20, 2010

Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

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: 

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

Navigation Pane

Form View Num Lock

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	<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 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>
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>

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



Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID Login Form MainMenu2

Research Tracking

Main Menu

Add / Edit Project List

Reports

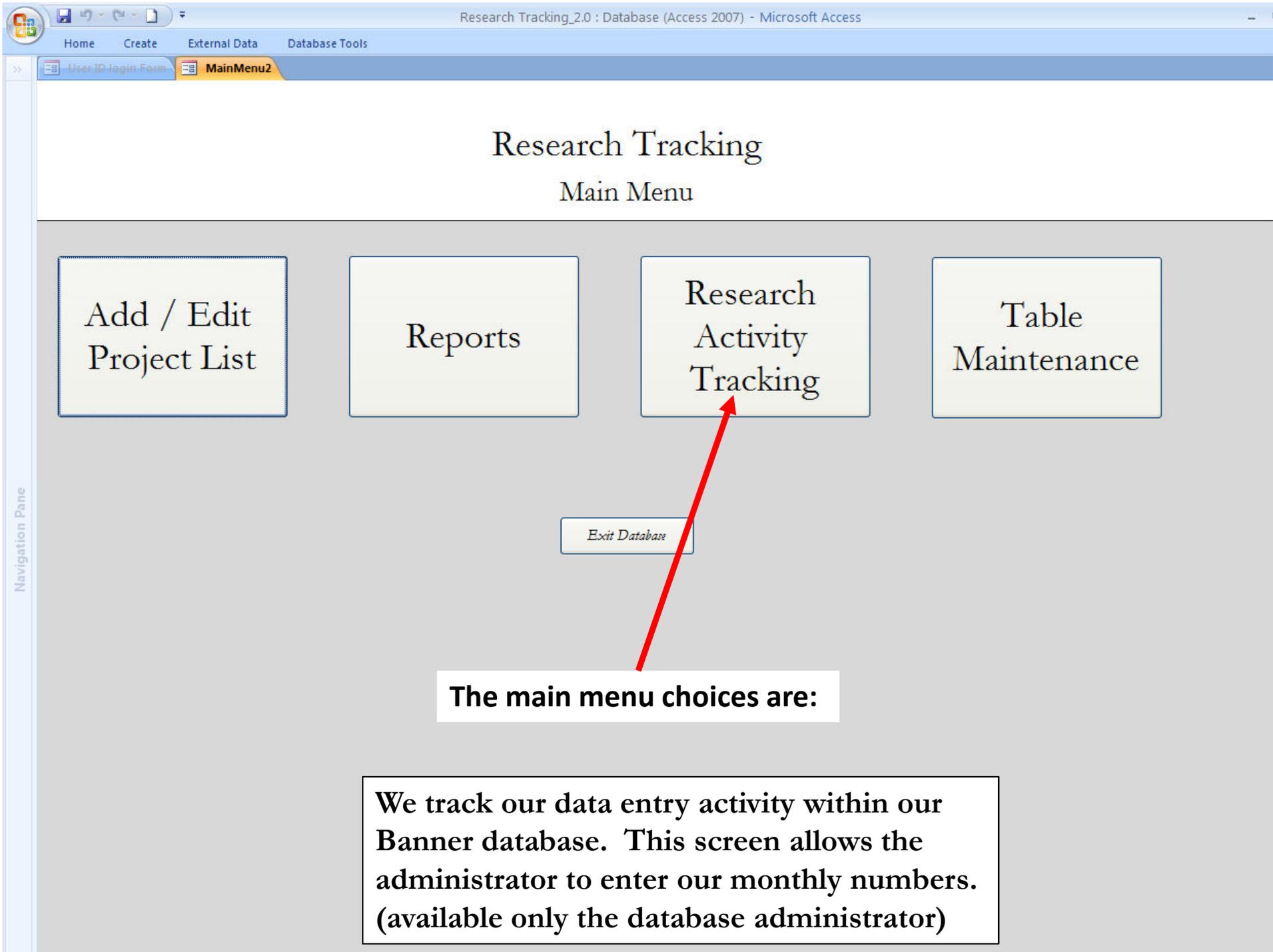
Research Activity Tracking

Table Maintenance

Exit Database

The main menu choices are:

We track our data entry activity within our Banner database. This screen allows the administrator to enter our monthly numbers. (available only the database administrator)



Research Tracking

Research Activity Entry Form

Researcher:
 Report Date:

Ratings (amainfo): <input type="text" value="58"/>	Contact (amacont): <input type="text" value="36"/>	Proposals (amaprop): <input type="text" value="0"/>
Degree (apaadeg): <input type="text" value="0"/>	Employment (apaehis): <input type="text" value="13"/>	Staff (amainfo): <input type="text" value="1"/>
Project (amainfo): <input type="text" value="20"/>	Comments (apacomt): <input type="text" value="7"/>	Research (amainfo): <input type="text" value="35"/>
Total: <input type="text" value="170"/>	General (amainfo): <input type="text" value="0"/>	ambplan (amaplan): <input type="text" value="0"/>
aprxref (apasbio): <input type="text" value="0"/>	apracty (apasbio): <input type="text" value="0"/>	

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

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.

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	8	154	0	30	519	0	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

Research Tracking_2.0 : Database (Access 2007) - Microsoft Access

Home Create External Data Database Tools

User ID login Form MainMenu2

Research Tracking

Main Menu

Add / Edit Project List

Reports

Research Activity Tracking

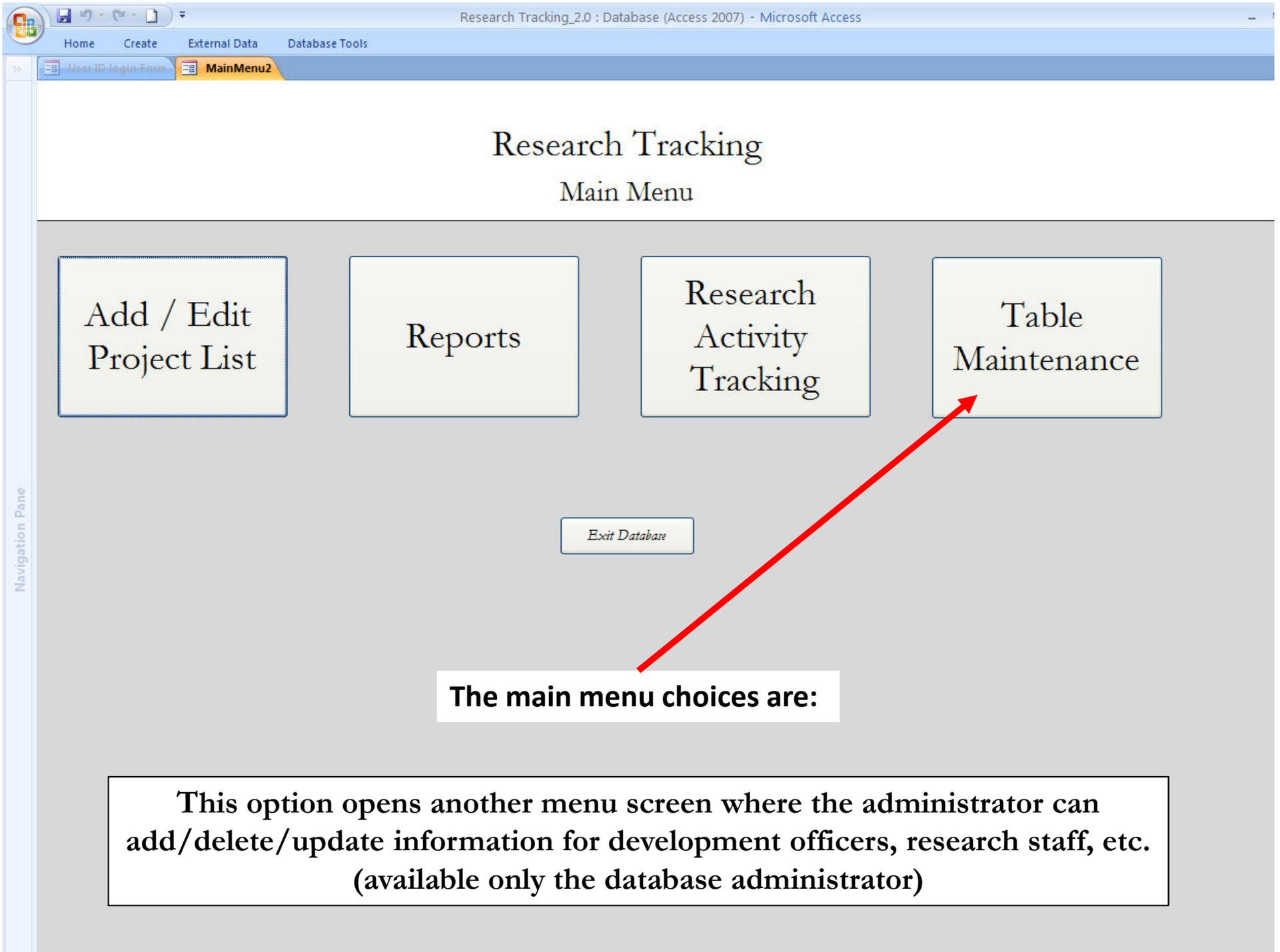
Table Maintenance

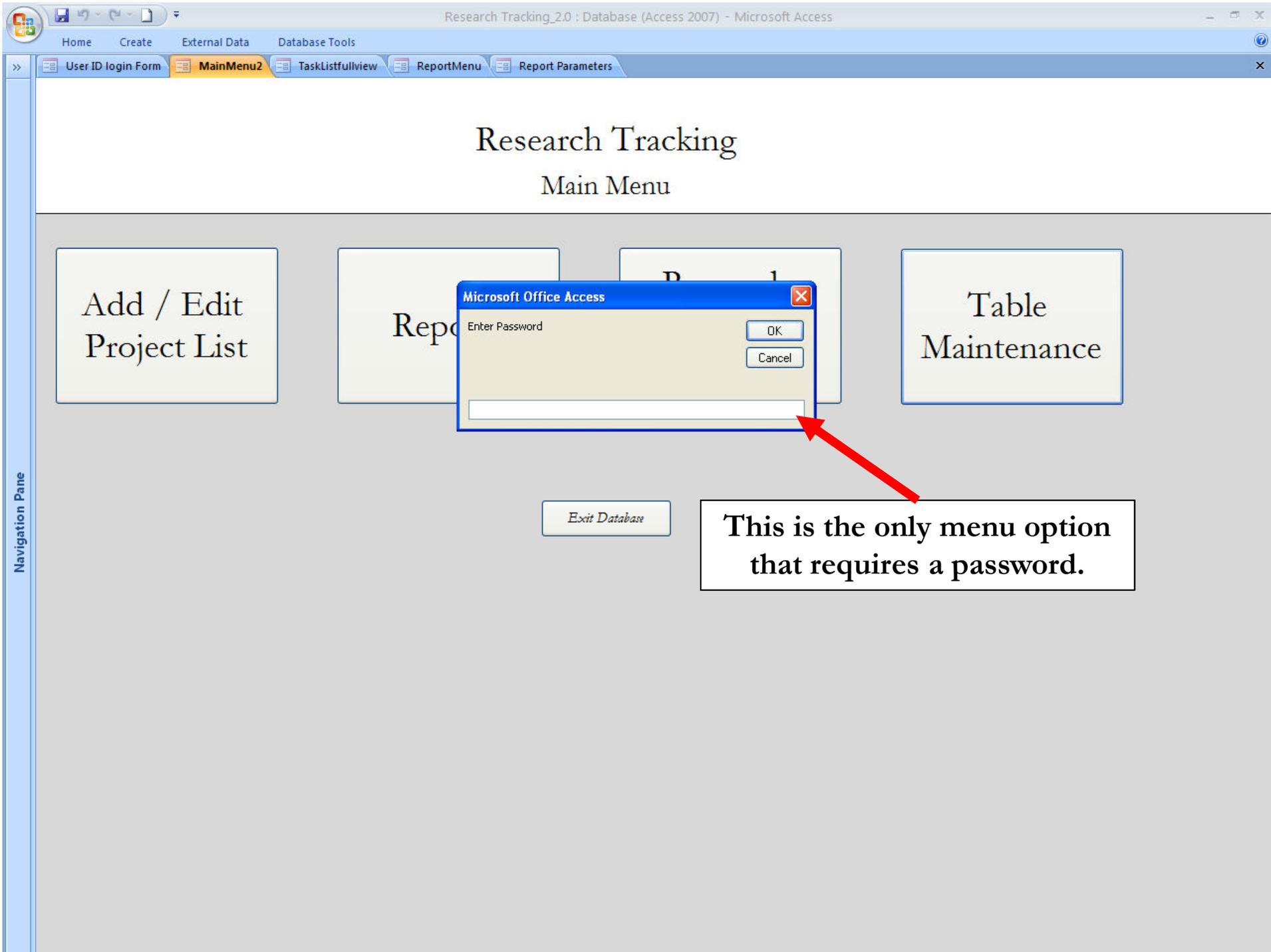
Exit Database

Navigation Pane

The main menu choices are:

This option opens another menu screen where the administrator can add/delete/update information for development officers, research staff, etc. (available only the database administrator)





Research Tracking Main Menu

Add / Edit
Project List

Reports

Table
Maintenance

Exit Database

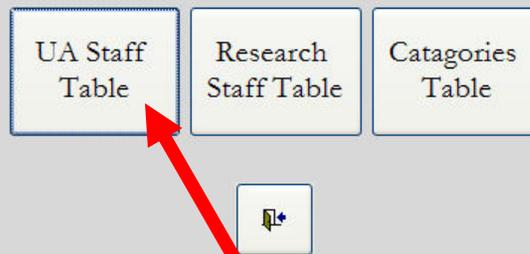
**This is the only menu option
that requires a password.**

Microsoft Office Access

Enter Password

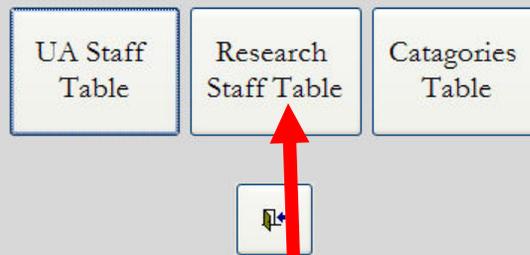
OK
Cancel

Research Tracking Table Maintenance Menu



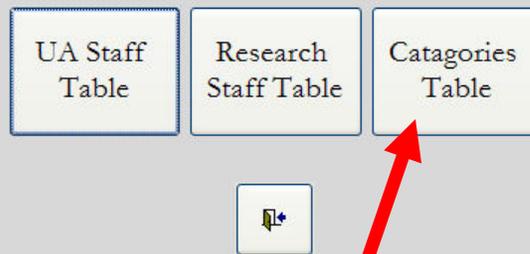
The UA staff table is a listing of all development office personnel. This list is used for those who request a project/task from research.

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.

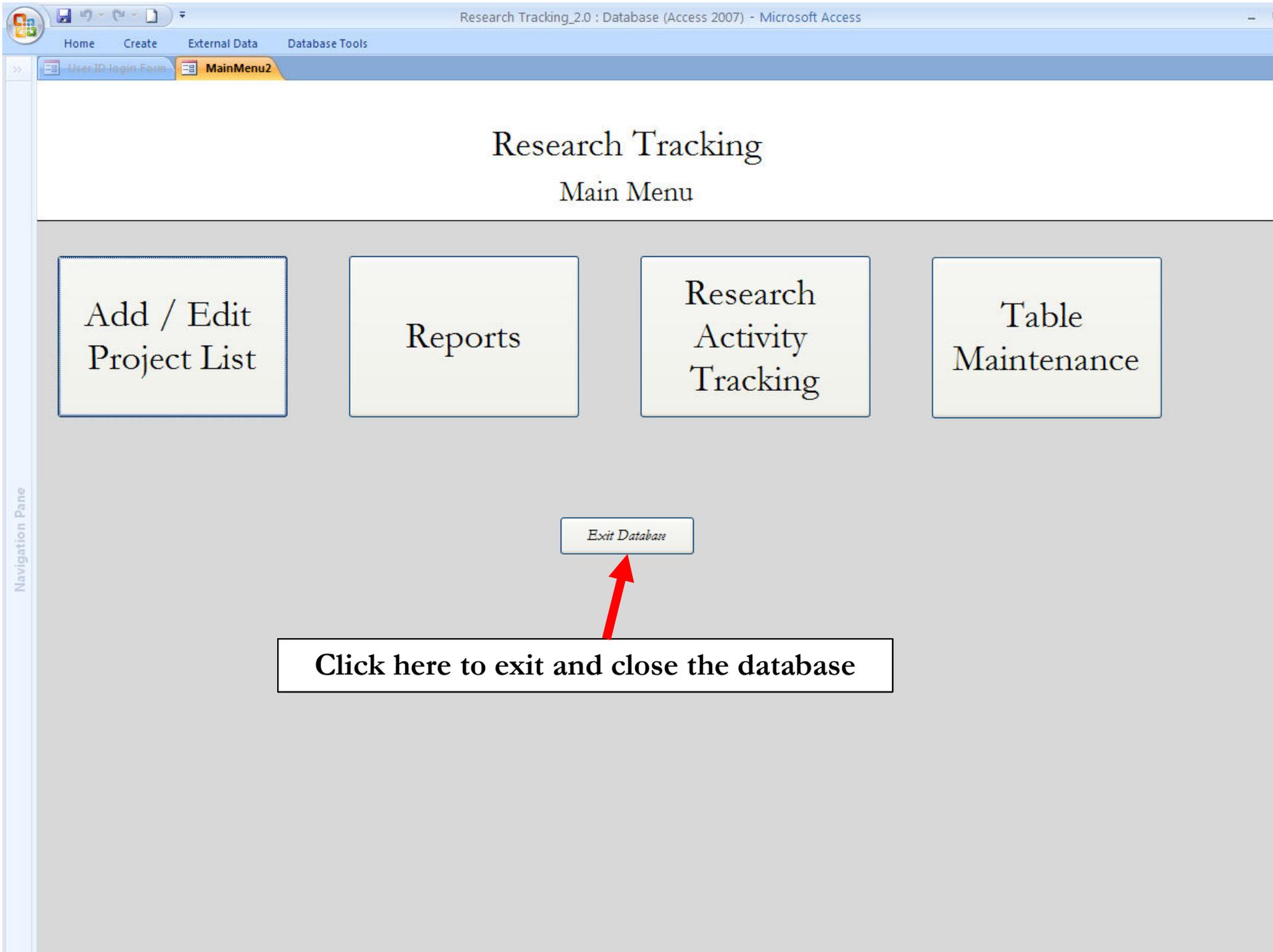
Research Tracking

Table Maintenance Menu

UA Staff Table	Research Staff Table	Catagories Table
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Users can use the exit button to return to the main menu screen.



Questions / Comments?

- Email : morneamj@muohio.edu