

Developing a Project Management Database using Microsoft Access

Lillian A. Marshall, Data Analyst

Blinn College

Brenham, TX



"Good evening. You're probably all wondering why you just walked into this room."

The Request

Proven SUCCESS.

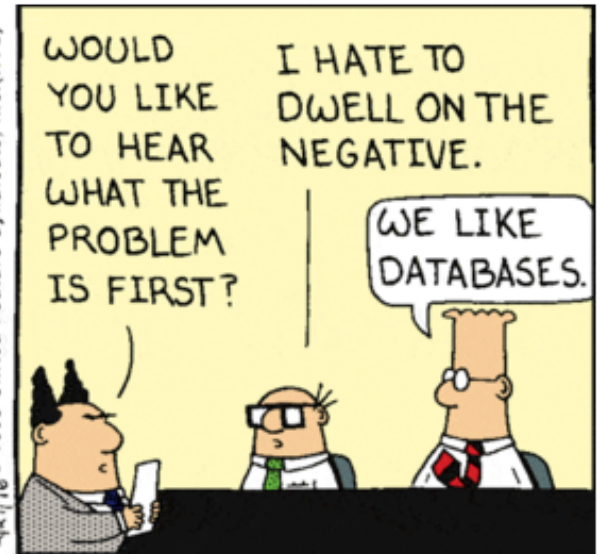
Tuesday February 27, 1996



S. ADAMS E-mail: SCOTTADAMS@AOL.COM



© 1996 United Feature Syndicate, Inc. (NYC)



Our Customers

Requests can be received the following sources:

- Internal customers (Blinn administrators, faculty or staff)
- Open Records Requests from external customers
- State mandated requests (IPEDS, The Coordinating Board, etc.)
- Ad hoc requests

How requests are received

- Phone
- Email
- Online Data Request form

Types of Requests


- General information – enrollment, student demographics,
- Surveys – student/employee satisfaction, facilities usage, food services
- Student Perception of Instruction – course evaluation
- Report requests – lists/tables based on specific criteria

Login

Users

Select a user to login.

lillian.marshall@blinn.edu	Lillian Marshall
casey.ball@blinn.edu	Casey Ball
tony.adam@blinn.edu	Tony Adam
sherry.sandoval@blinn.edu	Sherry Sandoval
joe.baumann@blinn.edu	Joe Baumann
leah.coleman@blinn.edu	Leah Coleman
amanda.clark@blinn.edu	Amanda Clark

 New User

Projects Database

[Open Projects](#) | [Closed Projects](#) | [Users](#) | [Customers](#) | [Report Center](#) | [Getting Started](#)

[Project List](#) | [Tasks](#) | [New Project](#)

ID	Project Name	Customer La	Customer Fi	Priority	Status	Date Reque	Start Date	End Date	Notes	Changed Date	Owner
545	ODS custom views	Clark	Amanda	2 - Medium	Waiting					1/11/2016	Amanda Clark
546	Census Data Freeze	Clark	Amanda	2 - Medium	Waiting					1/11/2016	Amanda Clark
553	Tour Evaluation - Fall 2015	Dippel / Klussn	Myron / Kristin	2 - Medium	In Progress		8/31/2015			2/8/2016	Leah Coleman
554	College and Career Summit - Fall	Dippel / Klussn	Myron / Kristin	2 - Medium	Not Started		8/31/2015			2/8/2016	Leah Coleman
555	Preview Days - Fall 2015	Dippel / Klussn	Myron / Kristin	2 - Medium	In Progress	10/14/2015	8/31/2015			2/8/2016	Leah Coleman
592	Project Management Data Base	Baumann	Joe	2 - Medium	In Progress	9/1/2015	9/1/2015		Follow up cont	11/2/2015	Leah Coleman
611	Gainful Employment Reporting C	Williford	Brent	1 - High	In Progress		11/18/2015		http://ifap.ed.	1/26/2016	Amanda Clark
615	Discoverer Report - FINAID_VSO	Williford	Brent	2 - Medium	Waiting	12/10/2015	12/9/2015		We need to fin	1/25/2016	Lillian Marshall
616	Discoverer Report Adjustments	Williford	Brent	2 - Medium	Waiting	12/10/2015	12/9/2015		FINAID_R2T4_A	1/25/2016	Lillian Marshall
621	Discoverer Workshop	Flores	M.Elia	2 - Medium	Not Started		12/10/2015		Lillian Marshall	12/14/2015	Lillian Marshall
622	Discoverer Training	Schroeder	Jaime	2 - Medium	Not Started		12/14/2015		Lillian Marshall	12/14/2015	Lillian Marshall
626	Petersons' UG Survey	Peterson's		3 - Low	Not Started		12/22/2015		Dear Colleague	1/4/2016	Lillian Marshall
628	Test ODS 8.5	Wied	Christine	1 - High	In Progress	11/30/2015	11/13/2015			1/4/2016	Amanda Clark
488	Prospectus for Hodde Center We	Costanza	Megan	1 - High	In Progress	6/29/2015	6/29/2015		SACSCOC prosp	9/21/2015	Joe Baumann
508	IPEDS Finance	NCES		1 - High	Waiting		12/9/2015		Tom Brazzell to	11/20/2015	Amanda Clark
510	IPEDS Academic Libraries	NCES		1 - High	Waiting		12/9/2015		Linda Flynn to	11/20/2015	Amanda Clark
640	QEP Comparison data-FTIC first g	Coston	Carrie	2 - Medium	In Progress	1/29/2016	1/20/2016		I serve on the A	2/5/2016	Amanda Clark
649	CATEF Requirement	IPEDS		1 - High	Not Started		2/1/2016		Your institutio	2/1/2016	Amanda Clark
650	Custom Questions for PTHA SPO	Gantt	Christy	2 - Medium	In Progress	2/1/2016	2/1/2016		I have attachec	2/2/2016	Amanda Clark
653	Strategic Measurements Update	Baumann	Joseph	2 - Medium	Not Started		2/4/2016			2/4/2016	Lillian Marshall
654	T-STEM recipients by CIP code	McGehee	Michelle	2 - Medium	Waiting		2/4/2016		Is there a repor	2/5/2016	Amanda Clark
*	(New)			2 - Medium	Not Started						

1. Project Name - Title of the project. e.g: Student Survey Request, Financial Aid Discoverer Report, etc. This is a free-form field.
2. Requestor Last name, First name – This is a free-form field.
3. Vice President - this table consists of choices based on the organizational chart. This is a drop down list that cannot be modified.
4. Department - based on which vice president is chosen, this field will populate with the department that falls under the vice president. This field cannot be modified but does contain a 'blank' field if the vice president is the person making the request.

Project Details

Save & New Save & Close

1 Project Name

2 Requestor Last Name First Name

3 Vice President 4 Department

Priority Goal

2 - Medium

Status Assigned To

Not Started

Date Requested Date Needed

Start Date End Date

Form Completed Date (Surveys)

Description

Attachments

Data Resources Strategic Priority

Complexity Repeat

Follow-up

Records: 1 of 1 Unfiltered Search

1. Priority - Low, Medium, High
2. Goal - Internal Report, External Report, Program Review, Continuous Improvement, Planning.
3. Status - Not Started, In Progress, Completed, Dropped, Waiting.
4. Assigned To - limited to staff members of Institutional Effectiveness and Enrollment Management.
5. Attachments - click the paperclip to attach a pdf, jpg, etc. to the project.

Project Details

Save & New Save & Close

Project Name

Requestor Last Name First Name Vice President Department

1 Priority 2 Goal 5 Attachments

2 - Medium

3 Status 4 Assigned To

Not Started

Date Requested Date Needed Data Resources Strategic Priority

Start Date End Date Complexity Repeat

Form Completed Date (Surveys)

Description

Follow-up

Records: 1 of 1 Unfiltered Search

1. Date Requested - this is the date the requestor contacted you.
2. Date Needed - this is the date specified by the requestor.
3. Start Date - date the project is started.
4. End Date - date the project is ended.

Project Details

Save & New Save & Close

Project Name

Requestor Last Name First Name Vice President Department

Priority Goal

2 - Medium

Status Assigned To

Not Started

Attachments

1 Date Requested 2 Date Needed

3 Start Date 4 End Date

Data Resources Strategic Priority

Complexity Repeat

Form Completed Date (Surveys)

Description

Follow-up

Records: 1 of 1 Unfiltered Search

1. Data Resources - tools that will be used to fulfill the request.
2. Strategic Priority - if request falls into one of the four strategic planning categories, select it here. If not, leave blank.
3. Complexity - Routine, Medium, High
4. Repeat - check this box if this project is one that will be repeated.
5. Follow-up – clicking this button opens the follow-up form which is filled out when the requestor is contacted once the project has been completed (see below).

Project Details

Project Name

Requestor Last Name First Name Vice President Department

Priority Goal

Status Assigned To

Date Requested Date Needed

Start Date End Date

Form Completed Date (Surveys)

Description

1 Data Resources 2 Strategic Priority

3 Complexity 4 Repeat 5

Follow-up

Record: 1 of 1 Unfiltered Search

1. Form completed date – for survey use only. This is the date the survey questionnaire is completed.
2. Description - narrative of the information that the requestor is seeking.
3. Save & New vs. Save & Close - if entering multiple projects, click Save & New; otherwise, click Save & Close.

Project Details

Project Name

Requestor Last Name First Name Vice President Department

Priority Goal

Status Assigned To

Date Requested Date Needed Data Resources Strategic Priority

Start Date End Date Complexity Repeat

1 Form Completed Date (Surveys)

2 Description

3 Save & New Save & Close

Follow-up

Record: 1 of 1 Unfiltered Search

Proven SUCCESS.

1. Based on the project selected, the first four fields of this form will be automatically populated.
2. Was it useful? – Very useful, somewhat useful, not very useful, not useful at all.
3. How could it be more useful? – free-form field.
4. What decisions have been made? - free-form field.
5. What decisions were you hoping to make? - free-form field.

The screenshot shows a web form titled "Follow up" with the following fields and annotations:

- 1**: A red bracket groups the first four fields: ID_Projects (622), Project Name (Discoverer Training), Customer FirstName (Jaime), and Customer LastName (Schroeder).
- 2**: A red number next to the "Was it useful?" dropdown menu.
- 3**: A red number next to the "How could it be more useful?" free-form text area.
- 4**: A red number next to the "What decisions have been made?" free-form text area.
- 5**: A red number next to the "What decision were you hoping to make?" free-form text area.

At the bottom of the form, there is a "Save & Close" button and a status bar showing "Record: 1 of 1" and "No Filter Search".

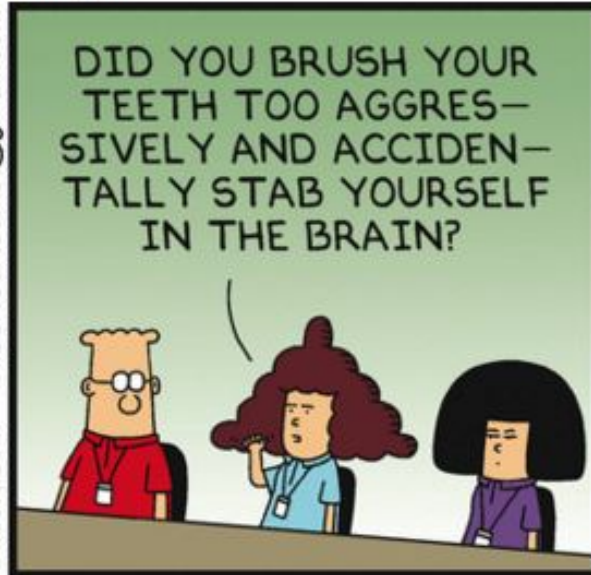
How the PMDB helps our office

- Recurring projects
- Easily track from whom requests are received
- Work distribution
- Centralized location
- Demonstrates productivity to administration
- Weekly updates at staff meeting
- We can tie requests to the strategic plan of the College.

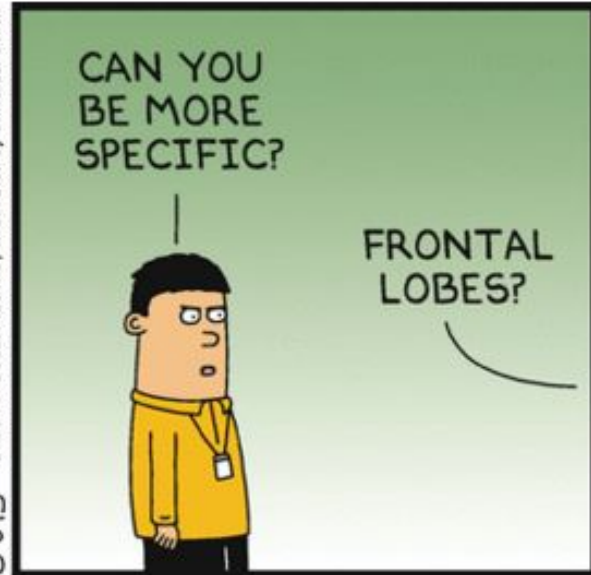
Thursday August 06, 2015 *Teeth Brushing Accident*



Dilbert.com DilbertCartoonist@gmail.com



8-6-15 © 2015 Scott Adams, Inc. /Dist. by Universal Uclick



Proven
SUCCESS.

Questions



Contact Info:

Lillian Marshall

979-830-4311

lillian.marshall@blinn.edu