Project Database

1 License

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2 Revision History

The following table lists all revisions (including the original document) to this procedure, the date, and the reason for the revision.

Rev.	Rev. Date	Description of Change
00	2/10/07	Original issue – Version 1.0

2.1 Discussion

Many organizations have projects that are a result of operational necessity but are limited in scope and time and do not warrant a fully-developed project plan. Even when formal project plans exist, there are subordinate tasks that must be assigned and tracked.

This database tracks these tasks with better flexibility than spreadsheets and other methods.

2.2 Database Setup

The database is a stand-alone database. Download it to any appropriate directory and rename it as desired.

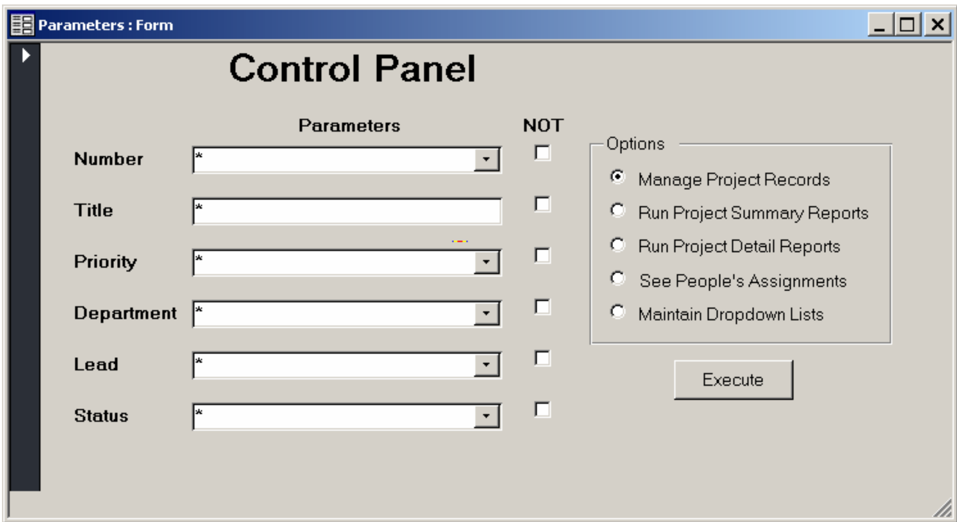
3 Use of the Database

Opening the database launches the main control panel, through which all functions are accessed.

3.1 Main Control Panel

The Main Control Panel contains a parameters section that limits the data displayed, and an Options section to select functions.

Figure 1 – Main Control Panel



Note: When first using the database, it is recommended that the dropdown lists associated with the project be properly populated before adding tasks. See section 4.3.

The Control Panel Form opens with defaults set to get all data in the database. All text field boxes and combo boxes are populated with asterisks and all check boxes are unchecked.

Selecting different parameters limits the scope of the records selected. Wildcard characters may be used. Data entry is not limited to the values on the dropdown list, but null or blank values will most likely yield no records found.

The Control Panel Form also allows for filtering data that explicitly does not meet a specified criterion.

3.1.1 Parameter Definitions

Table 1 – Control Panel Parameter Values

Field	Description
Number	Use the dropdown list to select a specific task number to be reported or type in a value on which to search.
Title	Type in the title of the project to be searched.

Field	Description
Priority	Use the dropdown list to select the priority of tasks to be presented or type in a value on which to search.
Department	Use the dropdown list to select the department for tasks to be presented or type in a value on which to search.
Lead	Use the dropdown list to select the lead associated with tasks to be presented or type in a value on which to search.
Status	Use the dropdown list to select the status of the tasks to be presented or type in a value on which to search.

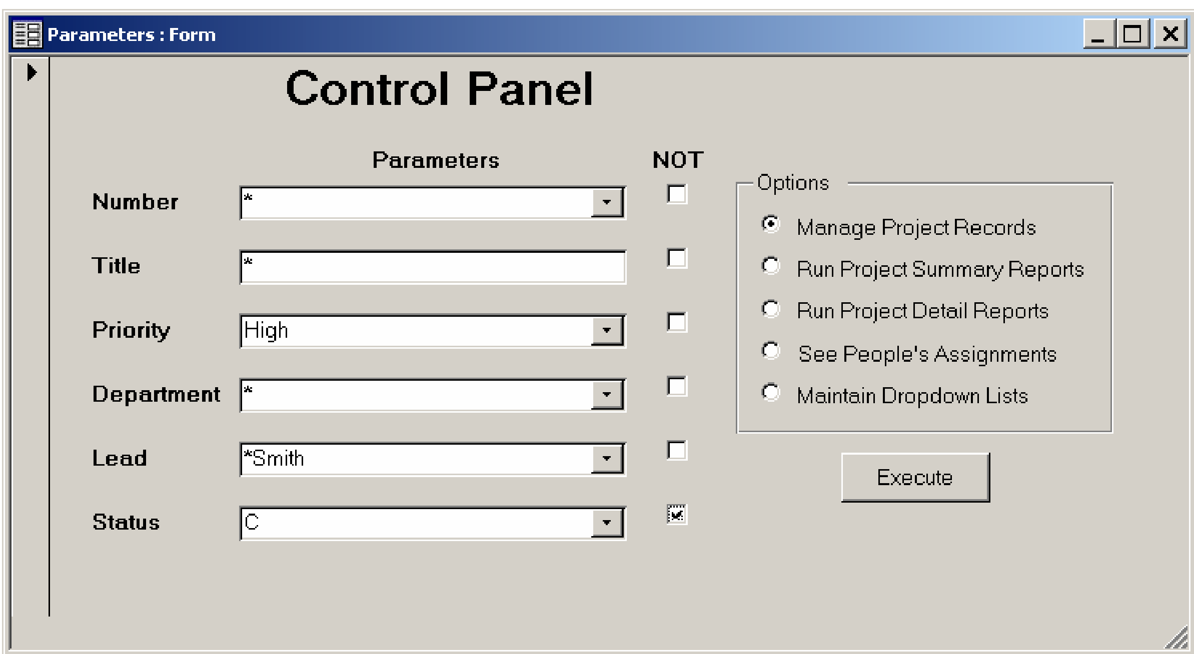
Selected values filter the report using an "and" condition. For example, a search can be conducted for records where the department is set to a specific department name, and the status is active.

Putting a check into a box next to a parameter invokes a NOT condition for that parameter

3.1.2 Parameter Example

The following shows a Control Panel parameter set invoking wildcards, a specific selection and a not condition.

Figure 2 – Reports Parameter Example



In this example, the records that will be selected will be for high priority tasks that are not complete (C) and whose lead's last name is Smith.

4 Launching Applications.

To launch an application, select the associated radio button in the options section and click on the Execute Button.

- To Add or Edit Data, select Manage Project Records. Only those records that meet the specified parameters will be available for edit.
- To Run a Summary Report, select Run Project Summary Report. Only those records that meet the specified parameters will be displayed.
- To Run a Detailed Report, select Run Project Detail Report. Only those records that meet the specified parameters will be displayed.
- To See People's Assignments, select See People's Assignments. Only those records that meet the specified parameters will be displayed.
- To Maintain Dropdown Lists, select Maintain Dropdown Lists. The parameter settings do not affect this selection.

4.1 Managing Project Records

Selecting Manage Project Records from the Control Panel launches the Quick View Form which displays records consistent with the parameters set on the Control Panel Form.

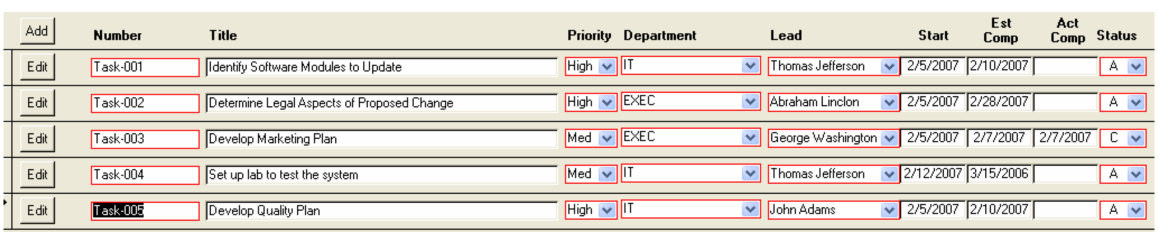
4.1.1 Quick View Form

The Quick View Form provides an "at a glance" view of the tasks. This form can be used to change the displayed items directly or to bring up the detail form for additional data entry.

Add a new task: click on the Add Button at the top of the form.

Edit an existing task: click on the Edit Button adjacent to the task to be edited.

Figure 3 – Quick View Form



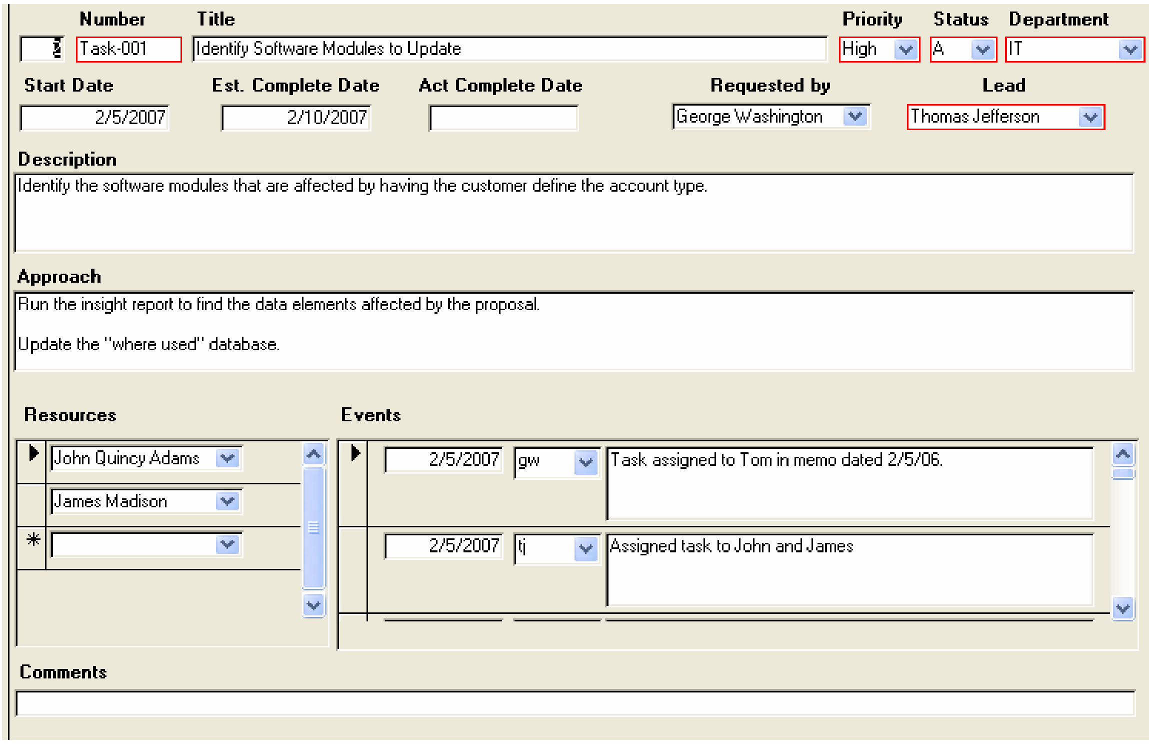
Add	Number	Title	Priority	Department	Lead	Start	Est Comp	Act Comp	Status
Edit	Task-001	Identify Software Modules to Update	High	IT	Thomas Jefferson	2/5/2007	2/10/2007		A
Edit	Task-002	Determine Legal Aspects of Proposed Change	High	EXEC	Abraham Linclon	2/5/2007	2/28/2007		A
Edit	Task-003	Develop Marketing Plan	Med	EXEC	George Washington	2/5/2007	2/7/2007	2/7/2007	C
Edit	Task-004	Set up lab to test the system	Med	IT	Thomas Jefferson	2/12/2007	3/15/2006		A
Edit	Task-005	Develop Quality Plan	High	IT	John Adams	2/5/2007	2/10/2007		A

- Clicking on the Edit or Add Button will bring up the Project Detail Form.
- Clicking on Edit brings up the form with existing information already filled in.
- Clicking on Add brings up the form with blank fields or default values filled in.

4.1.2 Project Detail Form

The Project Detail Form is used to manage information about the task.

Figure 4 – Project Detail Form



Fields outlined in red are mandatory data entries.

Table 2 – Detail Form Data Values

Field	Description
Number	Task number. This is a free-form entry field. Use whatever numbering convention is suitable for the program. Mandatory Field
Title	Task title. This is a short one-line description of the task.
Priority	Task priority. The priorities are presented as options from a drop down list. The list is generated from a user-definable priorities table (See section 4.3.2). The values that come with the default database are: • High • Medium • Low. Entry in this field is not limited to the items on the list. Mandatory Field

Field	Description
Status	Task status. The statuses are presented as options from a drop down list. The list is generated from a user-definable status table (See section 4.3.3). The values that come with the default database are • A – Active • C – Complete • F – Future Consideration • H – On Hold • N – No Resources Available • U – Unscheduled • W – Waiting Input/Approval Entry in this field is not limited to the items on the list. Mandatory Field
Department	Task department. The departments are presented as options from a drop down list. The list is generated from a user-definable resource table (See section 0). The values that come with the default database are: • EXEC – Executive • IT – Information Technology • MFG – Manufacturing • ENGR - Engineering These entries can be deleted and replaced with those that reflect the using organization.
Start Date	Task start date is the date on which the task is to start. By default, the value is the current date, but this value may be overwritten.
Est Complete Date	Task estimated completion date is the date on which the task is estimated to be completed.
Act. Complete Date	Task actual completion date is the date on which the task is actually completed.
Requested by	Requested by refers to the person or agency requesting the task. Tasks could be directed internally or externally. The requested by items are presented as options from a drop down list. The list is generated from a user-definable personnel table (See section 4.3.1). Entry in this field is optional, and is not limited to the items on the list.
Lead	Task lead is the single person responsible for the completion of the task. The leads are presented as options from a drop down list. The list is generated from a user-definable personnel table (See section 4.3.1). Entry in this field is not limited to the items on the list. Mandatory Field

Field	Description
Description	Task description is the detailed task description. This field is a memo-type field and will apply line breaks where required. Line breaks can be entered by pressing the <ENTER> key. To move to the next field, press the <TAB> key or click in it with the mouse. The field is essentially limitless.
Approach	Task approach is a detail of how the problem is to be addressed. This field is also a memo field.
Resources	Task assignees are additional people who are assigned to the task in addition to the task lead. The leads are presented as options from a drop down list. The list is generated from a user-definable personnel table (See section 4.3.1). Entry in this field is optional, and is not limited to the items on the list. There can be more than one person assigned to a task.
Events	Task events are used to track progress as events on the task are accomplished. There are three pieces to an event. Date – the date on which the event occurred. By default, this is the current date, but this value may be overwritten. Person – the initials of the person reporting the activity. Initials are presented as options from a drop down list. The list is generated from a user-definable personnel table (See section 4.3.1). Event – the description of the activity. This field is a memo field.

4.2 Reports

There are three reports in the database:

- Project Summary Report contains the basic data similar to the Quick View Form
- Project Detail Report contains the detail data similar to the Project Detail Form
- See People's Assignments contains a list of people who have assignments, and the list of tasks on which those people are working.

4.2.1 Project Summary Report

Selecting Run Project Summary Report from the Control Panel launches the Project Summary Report displaying records consistent with the parameters set on the Control Panel Form.

Figure 5 – Project Summary Report Sample

Task ID	Status	Priority	Date Inititated	Requested by	Action / Task	Comments	Assigned to * Task Lead	Target Date	Date Resolved
Task-001	A	High	02/05/07	George Washington	Identify Software Modules to Update	gw 2/5/2007 Task assigned to Tom in memo dated 2/5/06. tj 2/5/2007 Assigned task to John and James jqa 2/6/2007 Ran the insight report and found 13 modules affected by the change.	*Thomas Jefferson James Madison John Quincy Adams	02/10/07	
Task-002	A	High	02/05/07	George Washington	Determine Legal Aspects of Proposed Change		*Abraham Linclon John Adams	02/28/07	
Task-003	C	Med	02/05/07	George Washington	Develop Marketing Plan	gw 2/7/2007 Completed template.	*George Washington Abraham Linclon	02/07/07	02/07/07
Task-004	A	Med	02/12/07	George Washington	Set up lab to test the system	tj 2/5/2007 Sent notification to Project Q Manager that we will be taking over the lab	*Thomas Jefferson James Madison John Quincy Adams	03/15/06	
Task-005	A	High	02/05/07	George Washington	Develop Quality Plan	tj 2/5/2007 Contacted Test-R-US al 2/7/2007 Signed contract with Test-R-US	*John Adams John Quincy Adams	02/10/07	

4.2.2 Project Detail Report

Selecting Run Project Detail Report from the Control Panel launches the Project Detail Report displaying records consistent with the parameters set on the Control Panel Form.

Figure 6 –Project Detail Report Sample

Number	Pri	Status	Resource	Requested by	Lead
Task-001	High	A	IT	George Washington	Thomas Jefferson

Title Identify Software Modules to Update

Start Date	Est Comp Date	Act Comp Date
2/5/2007	2/10/2007	

Description

Identify the software modules that are affected by having the customer define the account type.

Approach

Run the insight report to find the data elements affected by the proposal.

Update the "where used" database.

Assigned to	Events		
John Quincy Adam	gw	2/5/2007	Task assigned to Tom in memo dated 2/5/06.
James Madison	tj	2/5/2007	Assigned task to John and James
	jqa	2/6/2007	Ran the insight report and found 13 modules affected by the change.

4.2.3 Due Date Report

Selecting Due Date Report from the Control Panel launches the Due Date Report. Competed tasks do not show on this report. The tasks are sorted by date of estimated completion.

Figure 7 - Due Date Report

Due Dates

no star = due greater than 30 days / * = due within 30 days / ** - due within 7 days / *** - overdue

ID	Action / Task	Lead	Status	Pri	Due Date	
Task-004	Set up lab to test the system	Thomas Jefferson	A	Med	3/15/2006	***
Task-001	Identify Software Modules to Update	Thomas Jefferson	A	High	2/10/2007	**
Task-005	Develop Quality Plan	John Adams	A	High	2/10/2007	**
Task-002	Determine Legal Aspects of Proposed Change	Abraham Linclon	A	High	2/28/2007	*

4.2.4 See People's Assignments

Selecting See People's Assignments from the Control Panel launches the See People's Assignment report displaying records consistent with the parameters set on the Control Panel Form.

Figure 8 – See People's Assignments Sample Report

As of 2/5/2007 10:04 PM

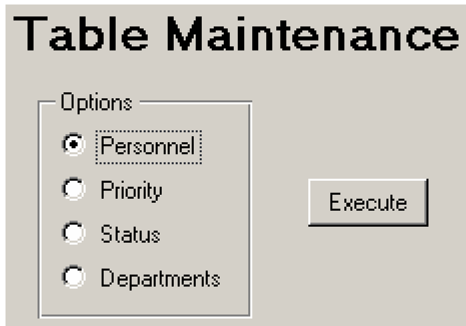
* Asterisk means person is lead for the task

John Adams	Title	Prority	Start Date	End Date	Status
Task-002	Determine Legal Aspects of Proposed Change	High	2/5/2007	2/28/2007	A
Task-005*	Develop Quality Plan	High	2/5/2007	2/10/2007	A
John Quincy Ada	**Title**	**Prority**	**Start Date**	**End Date**	**Status**
Task-001	Identify Software Modules to Update	High	2/5/2007	2/10/2007	A
Task-004	Set up lab to test the system	Med	2/12/2007	3/15/2006	A
Task-005	Develop Quality Plan	High	2/5/2007	2/10/2007	A
Thomas Jefferson	**Title**	**Prority**	**Start Date**	**End Date**	**Status**
Task-001*	Identify Software Modules to Update	High	2/5/2007	2/10/2007	A
Task-004*	Set up lab to test the system	Med	2/12/2007	3/15/2006	A
Abraham Linclon	**Title**	**Prority**	**Start Date**	**End Date**	**Status**
Task-002*	Determine Legal Aspects of Proposed Change	High	2/5/2007	2/28/2007	A
Task-003	Develop Marketing Plan	Med	2/5/2007	2/7/2007	C
James Madison	**Title**	**Prority**	**Start Date**	**End Date**	**Status**
Task-001	Identify Software Modules to Update	High	2/5/2007	2/10/2007	A
Task-004	Set up lab to test the system	Med	2/12/2007	3/15/2006	A
George Washingt	**Title**	**Prority**	**Start Date**	**End Date**	**Status**
Task-003*	Develop Marketing Plan	Med	2/5/2007	2/7/2007	C

4.3 Maintenance Forms

There are four maintenance forms to set the Personnel, Priority, Status and Departments for the Project. Selecting Table Maintenance from the Control Panel brings up the Table Maintenance from. This form is used to maintain the various lookup tables.

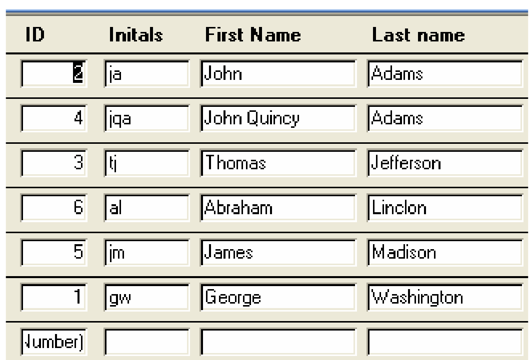
Figure 9 – Table Maintenance Form



4.3.1 Personnel

Selecting Personnel from the Table Maintenance Form brings up the Personnel Maintenance From. Existing names appear on the form. To add a new name, simply add it on the blank line on the bottom of the form.

Figure 10 – Personnel Maintenance Form



ID	Initals	First Name	Last name
2	ja	John	Adams
4	jqa	John Quincy	Adams
3	tj	Thomas	Jefferson
6	al	Abraham	Linclon
5	jm	James	Madison
1	gw	George	Washington
lumber)			

Table 3 – Personnel Maintenance Data Values

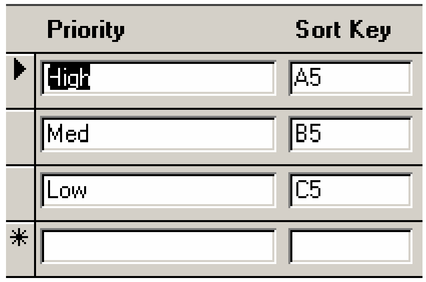
Field	**Description**
ID	The ID field is filled in automatically.
Initials	Manually fill in the initials of the person. The initials must be unique within the database. There is no limit on how many letters can be in an initial, but it is recommended to keep them to four or fewer characters.
First Name	Enter the person's first name
Last Name	Enter the person's last name

The form will automatically calculate the person's full name and a key to sort it properly alphabetically "behind the scenes."

4.3.2 Priority

Selecting Priority from the Table Maintenance Form brings up the Priority Maintenance Form.

Figure 11 – Priority Maintenance Form



Priority	Sort Key
High	A5
Med	B5
Low	C5

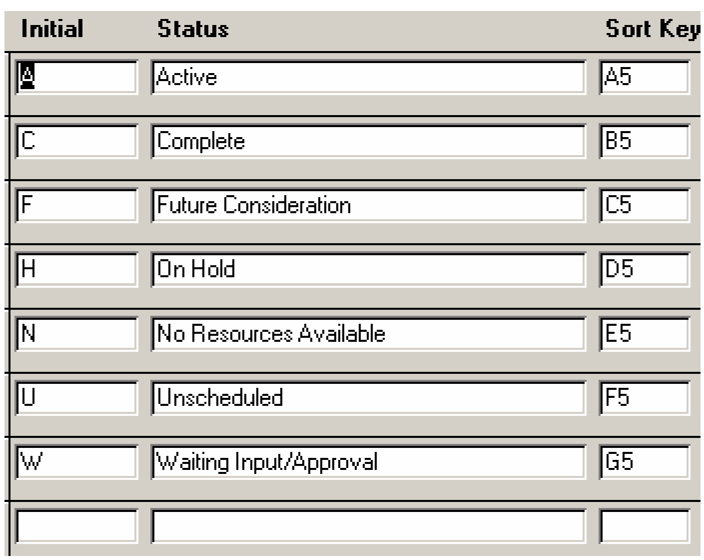
Table 4 – Priority Maintenance Data Values

Field	Description
Priority	Enter in the Priority Value to be displayed.
Sort Key	Enter in a two-character value to determine the order in which the priorities will be presented in the drop down list.

4.3.3 Status

Selecting Status from the Table Maintenance From brings up the Status Maintenance Form.

Figure 12 – Status Maintenance Form



Initial	Status	Sort Key
A	Active	A5
C	Complete	B5
F	Future Consideration	C5
H	On Hold	D5
N	No Resources Available	E5
U	Unscheduled	F5
W	Waiting Input/Approval	G5

Table 5 – Status Maintenance Data Values

Field	**Description**
Initial	Enter an initial to indicate the status.
Status	Enter in the full name of the Status Value to be displayed.
Sort Key	Enter in a two-character value to determine the order in which the statuses will be presented in the drop down list.

4.3.4 Departments

Selecting Departments from the Table Maintenance From brings up the Departments Maintenance Form.

Figure 13 – Departments Maintenance Form

Short Name	Long Name	Sort Key
OPS	Operations	A5
IT	Information Technology	B5
Plan	Planning & Forecasting	C5
LCM	Life Cylce Management	D5
Ship/Recv	Shipping/Receiving	E5

Table 6 – Department Maintenance Data Values

Field	**Description**
Initial	Enter an initial to indicate the status.
Status	Enter in the full name of the Status Value to be displayed.
Sort Key	Enter in a two-character value to determine the order in which the statuses will be presented in the drop down list.