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
I just got our consultant's report. He's identified our biggest problem.

I recommend that we build a tracking database.

We can put it on the network.

Would you like to hear what the problem is first?

I hate to dwell on the negative.

We like databases.
Our Customers

Requests can be received from 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
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
<table>
<thead>
<tr>
<th>ID</th>
<th>Project Name</th>
<th>Customer Ls</th>
<th>Customer Fi</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
<th>Changed Date</th>
<th>Owner</th>
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</thead>
<tbody>
<tr>
<td>545</td>
<td>ODS custom views</td>
<td>Clark</td>
<td>Amanda</td>
<td>2 - Medium</td>
<td>Waiting</td>
<td>1/11/2016</td>
<td></td>
<td></td>
<td>1/11/2016</td>
<td>Amanda Clark</td>
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<tr>
<td>546</td>
<td>Census Data Freeze</td>
<td>Clark</td>
<td>Amanda</td>
<td>2 - Medium</td>
<td>Waiting</td>
<td>1/11/2016</td>
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<td>1/11/2016</td>
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<tr>
<td>553</td>
<td>Tour Evaluation - Fall 2015</td>
<td>Dippel / Kluss</td>
<td>Myron / Kristin</td>
<td>2 - Medium</td>
<td>In Progress</td>
<td>8/31/2015</td>
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<td>2/8/2016</td>
<td>Leah Coleman</td>
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<td>554</td>
<td>College and Career Summit - Fall 2015</td>
<td>Dippel / Kluss</td>
<td>Myron / Kristin</td>
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<td>Not Started</td>
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<td>Preview Days - Fall 2015</td>
<td>Dippel / Kluss</td>
<td>Myron / Kristin</td>
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<td>In Progress</td>
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<td>Joe</td>
<td>2 - Medium</td>
<td>In Progress</td>
<td>9/1/2015</td>
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<td>Follow up cont</td>
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<td>Williford</td>
<td>Brent</td>
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<tr>
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<td>Dear Colleague</td>
<td>1/4/2016</td>
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<td>Test ODS 8.5</td>
<td>Wied</td>
<td>Christine</td>
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<td>Costanza</td>
<td>Megan</td>
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<td>6/29/2015</td>
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<td>NCES</td>
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<td>In Progress</td>
<td>1/29/2016</td>
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<td>Your institution</td>
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<tr>
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<td>Custom Questions for PTHA SPO</td>
<td>Gantt</td>
<td>Christy</td>
<td>2 - Medium</td>
<td>Not Started</td>
<td>2/1/2016</td>
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<td>I have attached</td>
<td>2/2/2016</td>
<td>Amanda Clark</td>
</tr>
</tbody>
</table>
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.
1. Priority - Low, Medium, High
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.
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.
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).
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.
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.
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

ARE THERE ANY QUESTIONS ABOUT MY PRESENTATION?

YES.

DID YOU BRUSH YOUR TEETH TOO AGGRESSIVELY AND ACCIDENTALLY STAB YOURSELF IN THE BRAIN?

CAN YOU BE MORE SPECIFIC?

FRONTAL LOBES?
Questions
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lillian.marshall@blinn.edu