Grover Park Consulting's *Work Tracking* Database

The Work Tracking database is offered to you as a fully functioning database. You may use it "as-is" to:

- Define Deliverables, Milestones and Next Steps for small projects and on-going responsibilities
- Assign Staff to small projects and on-going responsibilities
- Monitor Status, Priority and Work Effort for small projects and on-going responsibilities
- Record Daily Work done on each small project and on-going responsibility
- Print reports of Active and Completed Projects, Pending Next Steps, and Time Spent on Projects and Responsibilities

Work Tracking was created using MS Access 2002©. If you have an earlier version of MS Access and would like to try out this database, please contact us at 1-425-697-5819 or ghepworth@gpcdata.com.

Work Tracking is not secured; you have access to everything "under the hood". If you want to look around and see how it's done—or even try your hand at adding a new report—you can. You'll find directions for opening the database for editing a little later in this document. Just remember to make a back up copy before you begin.

Installing *Work Tracking*

If you don't already have a copy of *WinZip* or a similar program, you will need to download and install it first. (WinZip is free to try and inexpensive to register if you decide to keep it.)

Step One: Create a folder on your hard drive where you will save the database. For example, "c:\WorkTracking".

Step Two: Go to our website and click on the MS Access© icon labeled "*Work Effort*" to start the download. You will have the choice to open the file, or save it to your hard drive. We recommend you save it to the folder you just created and open it from there. The compressed file is about 1.25 MB in size. Depending on your internet connection speed, it may take a few minutes to download.

Step Three: Open the compressed file by double-clicking on it. You'll see the compressed database in the display window. Double-click to extract it.

Step Four: The database ready to use. You can double-click on it to open it with MS Access.

Using with *Working Tracking*

Work Tracking opens to display the Home Page. On the left side of the screen you'll see the menu choices. Clicking on one of them will load the appropriate form into the workspace.

Figure 1. Home Page

Let’s start by setting up a new project. Click on “Projects and Responsibilities” in the menu.

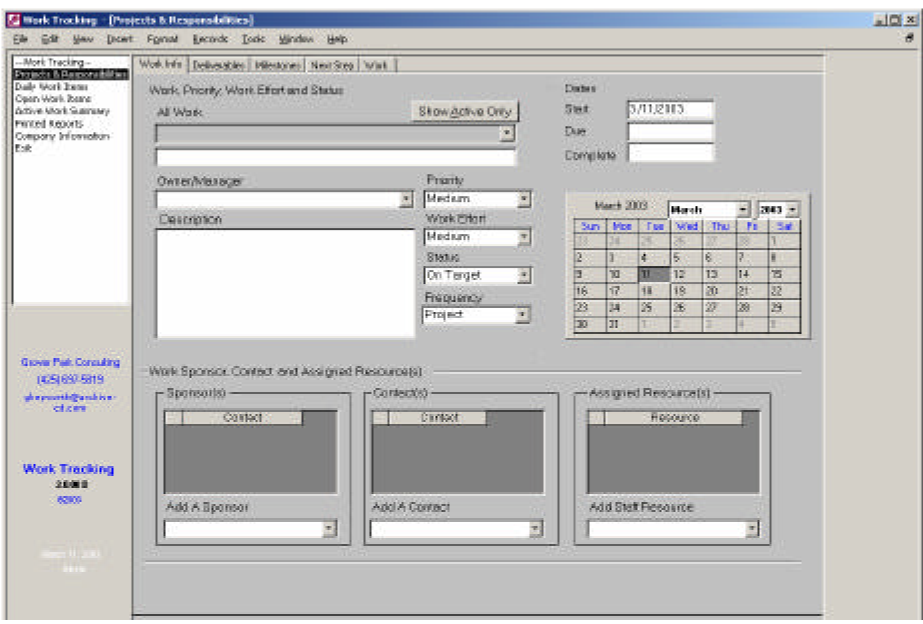

Figure 2. Managing Work

From this workspace you can set up projects and responsibilities, assign sponsors, contacts and resources, specify due dates and rank each project by its priority, work effort and status.

Adding a New Project: You may be wondering how you are going to add a new project—there doesn’t seem to anything in the workspace to let you do that. The answer is really quite simple. Just start typing a new name into the drop-down box labeled “All Work”. Let’s call our new project, “Learning to Use Work Effort”. Type that into the drop-down and press the tab key, or use your mouse to click on the next field. A pop-up message will ask you if this is a new project you want to add. Click “Yes” to add it.

Adding a New Project Owner: The new project will be added to the database, ready for you to assign project owner, project sponsor, etc. Note that the default project owner is George Hepworth, owner of Grover Park Consulting. You can change that to your own name now. Again, just type the name in the drop down list. If it is a new name, one that hasn’t been added before, a pop up message will ask you if you want to add it.

Check your Spelling. Before clicking “Yes”, make sure the name is spelled the way you want it. Once it’s added, it can’t be changed.

Complete the remaining fields by selecting from the drop down lists. The values for “Priority”, “Status”, “Work Effort” and “Frequency” are pre-set and can’t be changed from this workspace.

Add a description, up to 65,535 characters. That should be more than enough.

Adding a New Project Sponsor, Staff and Contacts: In the three drop down lists at the bottom of the workspace, add one or more sponsors, one or more contacts and one or more staff people. As you did with the Project Name and Project Owner, just type in the names and click “Yes” if you need to add new names to the list. Once they have been added, they’ll be available for future assignments.

Adding Deliverables: Click on the tab labeled “Deliverables” at the top of the workspace. You can one of more deliverables for each project or responsibility, along with the due date and delivered date for each.

External Notes: The field labeled “External Notes” is set up to accept hyperlinks to documents, spreadsheets or other files outside of the database. To add a hyperlink,

1. Right mouse click in the field to open the hyperlink editing menu.

2. Select Hyperlink → Edit Hyperlink.

3. When the dialog box opens, select “Link to Existing File or Web Page”, and navigate to the file you want to link. Click to select it and type in a friendly name for the link in the “Text to Display” box. Click “Ok” and the link is set.

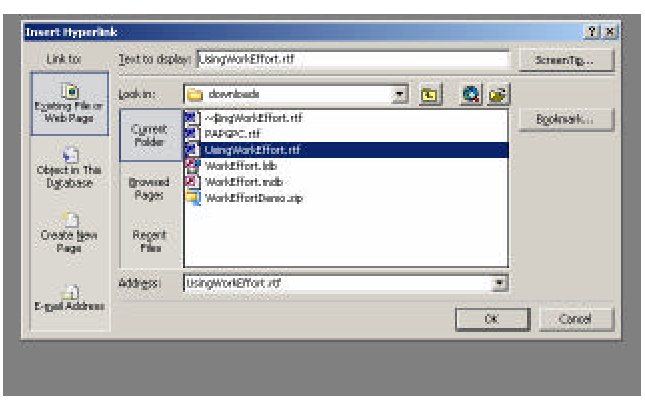

Figure 3 Hyperlink Dialog Box

Adding a Milestones, Next Steps and Work Effort: Click on the other tabs to see the workspaces for Milestones, Next Steps and Work. You'll update these areas as work progresses on a project. Set Next Steps for your project staff to work on and add new Milestones when the project staff reaches them.

Record daily work effort on each project by adding the start and finish times along with a short description of the work accomplished.

Using Other Functions: Other menu choices allow you to look at work completed on a given date, any open work items and a summary of all active projects and responsibilities. Click each menu item to see how it displays in the workspace.

Printing Reports: The Work Effort database includes six standard reports. They all require date parameters; that is, they report activities between dates selected in the "Date From" and "Date To" fields on the report workspace. Select a report and a date range, then click "Preview" or "Print".

Changing Company Information: If you wish, you can replace the default information with your company's name and other information.

Modifying the database

If you wish to modify any part of the database, feel free to do so. For example, you may wish to add additional reports, or change the appearance of any of the standard reports. Just be sure to make a backup copy before changing anything.

Additional Features:

The database, as it currently exists, does not directly capture the identity of staff members who perform any of the work items recorded for any project. This limits the database to a single user (unless you assign different projects to different people). Of course, in a small organization, you could also give each person a copy of Work Tracking, allowing each person to track his or her own work individually. Another alternative is to add the ability to assign work effort to individuals.

Again, if you want to make this addition yourself, go ahead and do so (after making your backup copy). Or, if you prefer, you can contact us for an estimate of the cost of having Grover Park Consulting create a custom Smart Tool, based on Work Tracking, for your organization. For example, you might want us to add a time and attendance module. Let us know what you want, and we'll make it happen.

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Looking "Under the Hood": When Work Tracking opens, the database container is hidden. Only the workspace is visible. To get to the database container so that you can see how the database is put together and try your hand at modifications, press the F11 key.