

Project Tracker

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**Courtesy of Coastal Bend Bays & Estuaries Program
Corpus Christi, Texas**

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PROJECT TRACKER

January 18, 2011

Requirements:

The Project Tracker (PT) program requires:

- MS Office Professional (2003, 2007 or 2010), which includes MS Access installed on all computers accessing the program.
- All computers accessing the program must be on the same network.
- One networked computer functions as the “Server” (can be a separate computer storing the entire database), one as the “Database Manager”, and all others simply provide “User” access to the Project Tracker program. The “Database Manager” and all “User” computers must see the “Server” on the network.
- MS Access requires Processor 500 MHz +; Memory 586 MB Ram; 2 GB Hard drive space. The Server should have another 3 GB available and the computers with the PMT NOFE should have 600 MB.
- The PMT NOFE, PMT Email FE and the PMT BE files can be installed on the same computer for one user use.

Installation:

The Project Tracker program disk contains 4 files:

1. Project Tracker Manual. (PDF document)
2. PMT NOFE (MS Access database – “front end” of the database for data entry)
3. PMT BE (MS Access database – “back end” of the database, where data is stored)
4. PMT Email FE (MS Access database – uses Microsoft Outlook)

First, create a folder named “Project Tracker” on all computers requiring access to the program. Copy the following files to the specified computers, in order:

1. PMT BE – Copy to “Project Tracker” folder only on “Server” computer.
2. PMT Email FE – Copy to “Project Tracker” folder only on “Server” computer.
3. PMT NOFE – Copy to “Project Tracker” folder only on “Database Manager” computer.

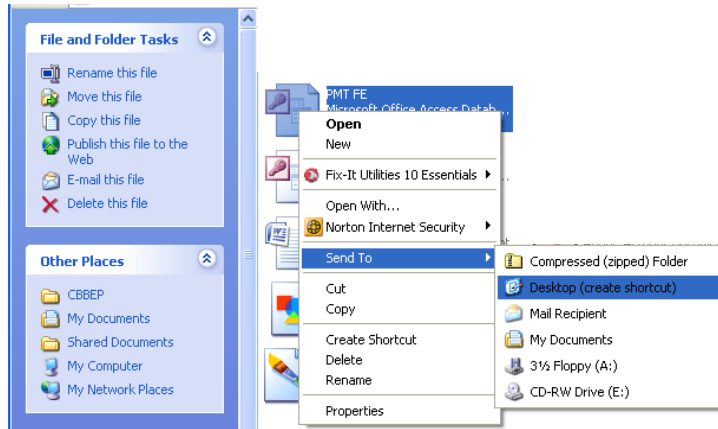
Initial Setup of the PMT NOFE:

Setting up the “Database Manager’s” computer:

The “Database Manager’s” computer has full input access to all components of the program. Limited users may view all information, but their input capabilities are restricted.

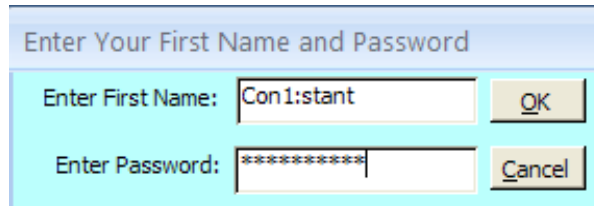
Once the PMT NOFE database file is copied to the Project Tracker folder on the “Database Manager’s” computer, create a shortcut to the PMT NOFE database from the Desktop:

1. Click “Start” on the Task bar
2. Click “My Computer.”
3. Open the “Project Tracker” folder where the PMT NOFE program was saved.
4. Right click the database program “PMT NOFE.”
5. Click “Send To.”
6. Click “Desktop (create shortcut)”
7. Close all windows to return to the Desktop. (From the Desktop, the shortcut icon’s name may be changed, if desired, by highlighting and typing the new name.)



Configuring the Project Tracker program for “Database Manager”:

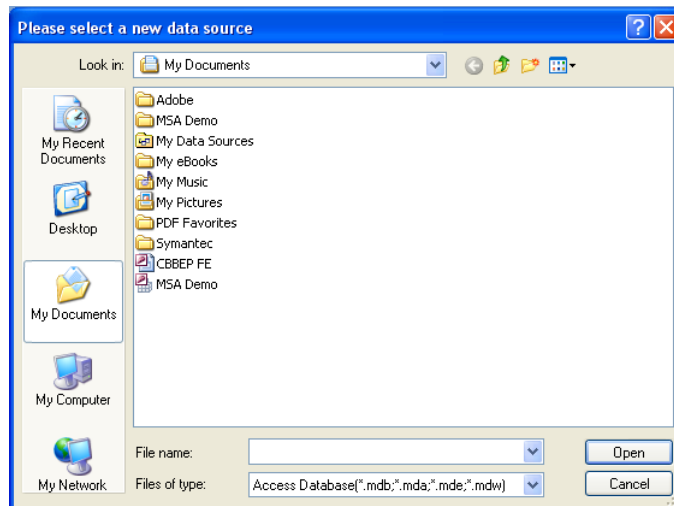
1. Double-click the PT shortcut icon to open the password dialog box.
 - Type: “Con1:stant” in the “Enter First Name” box; press “Enter”
 - Type: “Con1:stant” in the “Enter Password” box. (Later this password will be changed.)
 - Click the “OK” button. (The “Cancel” button closes the program.)



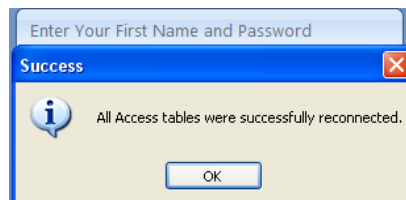
- The next dialog box opens asking to specify the data source. This dialog box will be used only during the setup process.



- Click “Yes” and the “Please select a new data source” dialog box opens. Again, locate the “Server” computer on your Network, open the “Project Tracker” folder and select the “PMT BE” file. (Clicking “No” closes the program.)



- The dialog box below verifies that the tables are successfully reconnected to the PMT NOFE database.



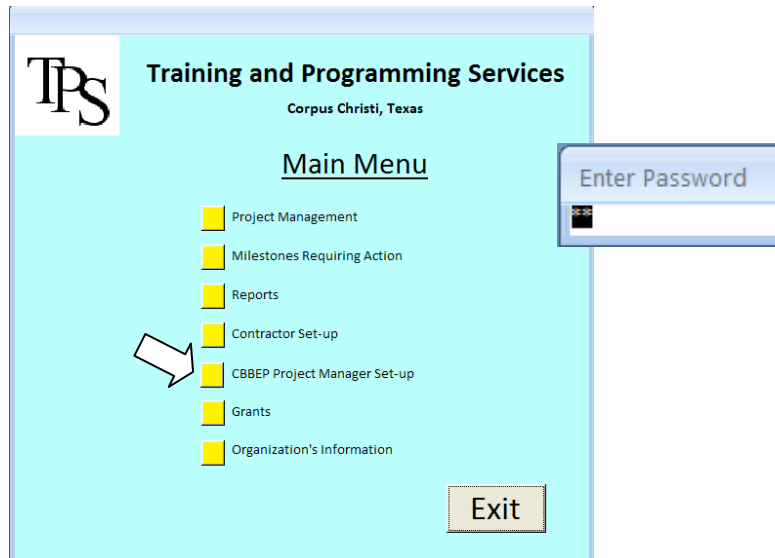
Click the “OK” button and the “Main Switchboard” opens.

NOTE: Always close each screen using the “Exit”, “Close”, “OK”, or “Continue” buttons at the bottom of each screen. This ensures that information input is retained.

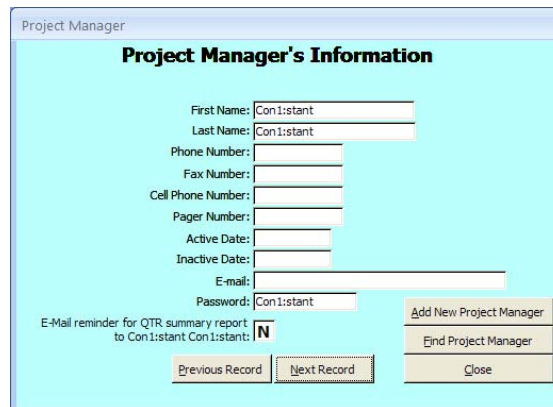
At this time, the password “Con1:stant” must be changed. The new password (master password) allows “Database Manager” and selected users full input access to the database.

Changing the password “Con1:stant”:

1. Click “CBBEP Project Manager Set-up”. A dialog box opens requesting a password. The sub master password shall be entered by the “Database Manager” or designated person responsible for passwords. The sub password will be e-mailed to the designated employee



2. Keep the sub master password in a secured place.
3. Type the sub master password and press “Enter.” The “Project Manager’s Information” screen opens.

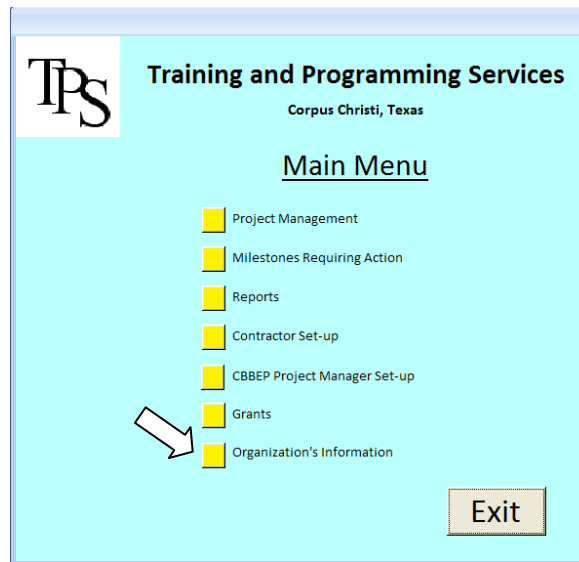


4. (If “Con1:stant” is not displayed as the First Name, use the “Previous Record” or “Next Record” buttons until “Con1:stant” is displayed.) Create a new password for First Name Con1:stant. Create a Project Manager record for each “Limited User” with limited input access and “Full Users” requiring **full input access** to the database, this includes the Database Manager. **Keep the master password in a secure place.**

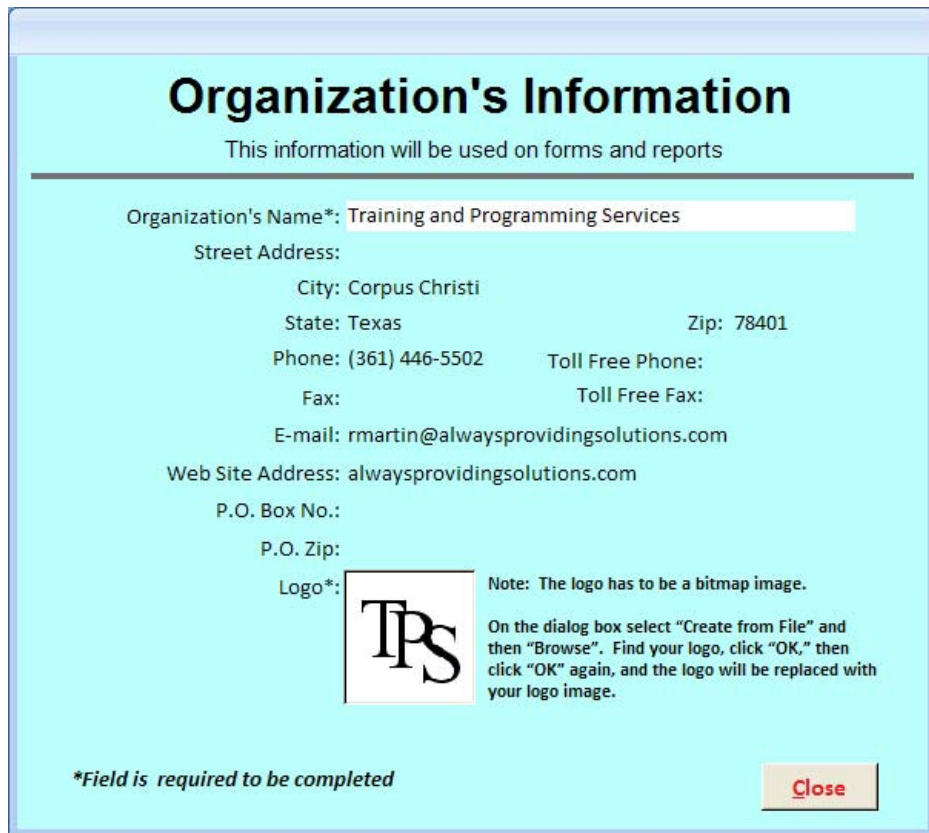
- a. Click the “Add New Project Manager” button to set up the Database Manager’s information. Repeat for each employee using the PT.
 - b. First Name
 - c. Last Name
 - d. Phone Number (land line)
 - e. Fax Number
 - f. Cell Phone Number
 - g. Pager Number (only if the person has one)
 - h. Active Date (Hire date)
 - i. Inactive Date (Separation date)
 - j. E-mail address
 - k. Password (Limited User – create individual passwords. Full Users – use the master password)
 - l. E-Mail reminder for QTR summary report to “selected person.” (The report is automatically emailed to the selected person after all reminders are e-mail. The default is “**N**” for NO. Click the “**N**” and it will change to a “**Y**” for YES. The program allows only one person to receive this report. If there is another person receiving this report, the program tells who it is and the “**Y**” changes back to an “**N**”. To change the person who receives the report, change the current person to “**N**” and then change the new person to “**Y**”.)
5. Click “Close” and the “Project Maintenance” switchboard opens.

Set up the Organization's Information:

1. Click "Organization's Information" to open the "Organization's Information" screen.



2. Replace the default information with your organization's information. The various reports generated by the PT program require your Organization's Name and Logo. If there is no logo, simply delete the default TPS logo.



Organization's Information

This information will be used on forms and reports

Organization's Name*: Training and Programming Services

Street Address:

City: Corpus Christi

State: Texas Zip: 78401

Phone: (361) 446-5502 Toll Free Phone:


Fax: Toll Free Fax:

E-mail: rmartin@alwaysprovidingsolutions.com

Web Site Address: alwaysprovidingsolutions.com

P.O. Box No.:

P.O. Zip:

Logo*:  Note: The logo has to be a bitmap image.
On the dialog box select "Create from File" and then "Browse". Find your logo, click "OK," then click "OK" again, and the logo will be replaced with your logo image.

**Field is required to be completed*

Close

This completes set up of the "Database Manager" computer.

The final phase of PT program installation involves providing each “User” computer with access to the database.

- Verify that each “User” computer can see the “Server” in the Network.
- Copy the “PMT NOFE (MS Access database)” file from the Database Manager’s computer to the Project Tracker folder previously created (see pg.3).
- Follow steps 1-8 on pg. 4 to create a desktop shortcut on each “User” computer.
- Provide each User with their assigned password information (see pg. 7, step 5)

Responsibilities:

The Project Manager is responsible for:

1. Input of all Project Contractor information.
2. Creation of Project records and initial input of all project-specific information, excluding funding and invoices.
3. Updating of all project-specific information, excluding funding and invoices.

The Database Manager is responsible for:

1. Allocating grant monies to each project, after the Project Manager creates the project record.
2. Adjusting monies for a project as required.
3. Attaching invoices to project records.
4. Printing grant reports as required.
5. Maintaining the “Project Manager’s Information” records and passwords.

Opening the Project Tracker:

1. Double-click the PT shortcut icon on your Desktop
 - a. The password dialog box opens. Enter your first name and assigned password (provided by Database Manager), then click “OK”. In a few seconds, your logo appears. When it closes, the “List of Milestones due today” screen opens.
2. List of Milestones Due
 - a. This screen lists all milestones due today, in the next seven days, and those that are overdue. The number of milestones is included in the header for each group. (There are 29 milestones in the overdue group.)
 - b. At the bottom of the screen, click “Preview Milestone Reports” to preview and print the milestone status.

List of Milestones due today, due within the next 7 days, or are overdue.

No Milestones are Due Today 3/12/2011

Project Manager	Project #	Milestones	Type	Due Date

1 Milestone is Due From 3/13/2011 To 3/19/2011

Project Manager	Project #	Milestones	Type	Due Date
Dustin Cravey	1024	March 2011 QTR Rept. Review & Submit to Bus Mgr.	QTR Review	3/15/2011

31 Milestones are OverDue

Project Manager	Project #	Milestones	Type	Due Date
Dustin Cravey	0541	December 2010 QTR Rept. Review & Submit to Bus Mgr.	QTR Review	12/15/2010
Dustin Cravey	0541	December 2010 Quarterly Report	QTR Report	12/10/2010
Dustin Cravey	0541	Draft Summary Report	Report	9/30/2010

The following Projects, QAPPs, and Grants Require Action within 90 days. Click the Project # to see the details.

1 Project.			No QAPPs			No Grants		
Project Mgr	Project #	Contract End Date	Project Mgr	Project #	Renewal End Date	Project Mgr	Project #	Grant End Date
Dustin Cravey	1022	3/15/2011						

To preview and print Projects, QAPP, or Grant Reports, click in the Project # column.

3. The bottom three boxes: Project, QAPPs, and Grants, display the projects that require action within 90 days. If no projects end in 90 days, “No” prefixes the title. If there are projects ending in 90 days, then the number of projects appears before the title.

- To review and print a summary of the selected project, double-click the project #, in this case “1022”, and a report will be displayed.

<u>Projects</u>			
<u>Project Mgr.</u>	<u>Project No</u>	<u>Project's Name</u>	<u>Contract End Date</u>
Dustin Cravey	1022	Up2U Clean Rivers - Clean Bays Educ	3/15/2011

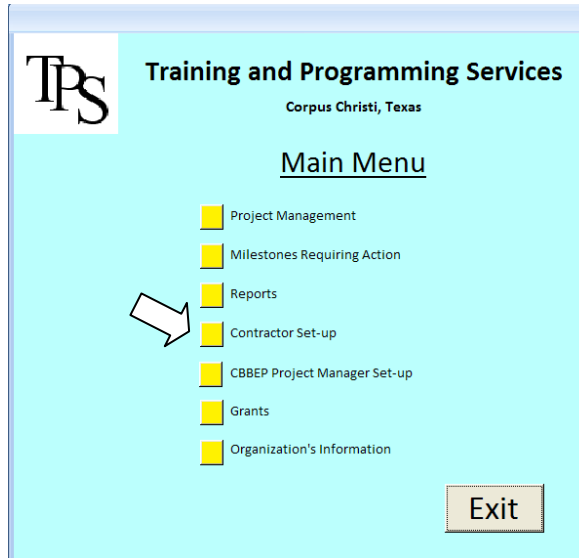
- Click “Close” and the “Main Switchboard” screen opens.

Project Maintenance:

1. Create Contract Organization Information

(This step must be completed before project record creation):

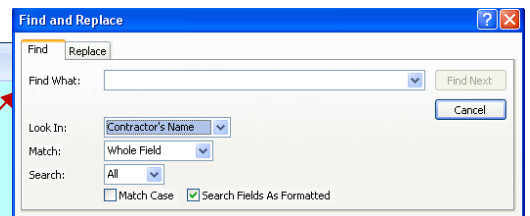
a. Click “Contractor Set-up.”



b. On the Contractor Set-up screen, first Click on the “Contract Organization’s Information” button. (This has to be completed before Contractor’s Point of Contact is set-up) and the Contractor’s Information screen opens.



The screenshot shows the 'CONTRACTOR'S INFORMATION' form with the following fields: VendorCode, Contractor's Name, Address, Address2, City, State, Zip, Phone, and Fax. At the bottom, there are buttons for Previous Record, Next Record, Find Contractor, Add Contractor, and Save & Close.

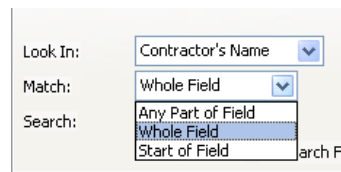


The first time this screen opens, all the fields are blank. If any fields contain information, click the “Add Contractor” button and a new record is opened. Provide all requested information. (Address2 is for supplemental information such as suite number.)

If the contractor’s information requires updating, click “Find Contractor” to open the “Find and Replace” dialog box.

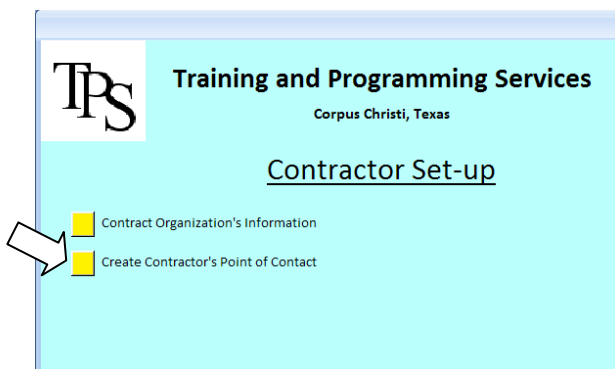
Using the default “Find” tab does the following:

- Find What: Enter the contractor’s full name, or any part of the name.
- Look In: The default is “Contractor’s Name.” **Do not change this.**
- Match: The default is “Whole Field.” Select “Any Part of Field” from the drop-down menu. This allows any part of the name to be entered for the match.
- Search: The default is “All” (all contractors). The entire Contractor’s list will be searched.
- Match Case: Check this to match case: “The” instead of “the.”
- Search Fields As Formatted: If checked, the search can find formatted dates, such as 02/11/11.



d. When information input or update is complete, click “Save & Close.” The “Project Maintenance” screen opens.

2. Create Contractor Point of Contact:



- a. Click “Create Contractor Point of Contact.”

CONTACT PERSON'S INFORMATION

Contractor's Name:

First Name:

Last Name:

Phone: Ext:

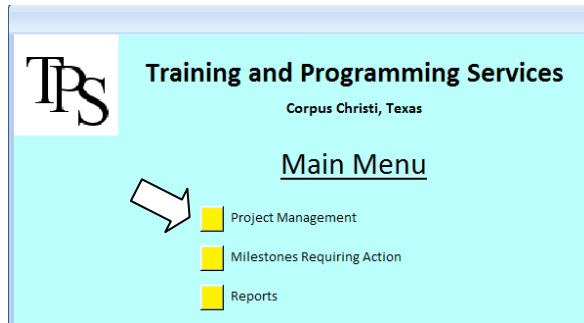
Fax:

Cell:

Email:

- b. This record connects a contact person to a specific contractor. Contractor's Name (from the drop-down menu), Contact's first and last names, and email are all required information. Multiple points of contact may be affiliated with a single Contractor.
- c. Save the record by clicking “Close” and the “Project Maintenance” screen opens.
- d. Click “Return to Main Menu.”

Create a Project:



e. Click “Project Management” to open the “Main Project Form.”

Project Description

Select Project Number: Project Name:

Project Manager: Project Goal:

QAPP Required?

Show Projected Dates

Contract Start Date: Project Amount: \$0.00

Contract End Date: Spent To-Date: \$0.00

Revised End Date: Project Balance: \$0.00

% Complete: Proj. Status: Comp./Cancel Date:

Project Activity

Contractor Milestones Project Status Inhouse Reviews and Notes Project Cost Invoices

Select Contractor by Vendor Code:

Point of Contact

Point of Contact Information:

Phone:

Cell:

Fax:

E-Mail: ← (double click to e-mail)

Main Control Buttons

Create New Project Save New Project Update Preview Summary Report

f. All projects are created and maintained using the “Main Project Form” (which opens in “maintenance” mode.). The “Main Project Form” consists of three sections:

- Project Description
- Project Activity
- Main Control Buttons

Project Description:

- g. Click “Create New Project.” The “Main Project Form” switches to “restricted input” mode and highlights only the Project Description and Main Control Buttons sections. (Tab from one input field to the next.)

The screenshot shows a web-based form for creating a new project. The form is titled "Create New Project No.:" and includes a "Cancel Create" button. The form is divided into several sections:

- Project Manager:** A dropdown menu showing "Dustin Cravey".
- Project Name:** A text input field.
- Project Goal:** A text input field.
- QAPP Required?:** A dropdown menu showing "No".
- Contract Dates:** A section with three input fields: "Contract Start Date:", "Contract End Date:", and "Revised End Date:". A "Show Projected Dates" button is located to the left of these fields.
- Financials:** A table with two columns: "Project Amount:" and "Spent To-Date:". Both fields show "\$0.00". Below this is "Project Balance:" showing "\$0.00".
- % Complete:** A dropdown menu showing "0%".
- Proj. Status:** A dropdown menu showing "On Track".
- Comp./Cancel Date:** A text input field.

At the bottom of the form, there are several buttons: "Create New Project", "Save New Project", "Update", "Preview Summary Report", and "Return to Main Menu".

- h. Input to create a new project:

Create New Project No.: The project number can be a combination of numbers and letters. **Note:** the program will not accept duplicate project numbers.

“Cancel Create” button: Cancels the creation of a new project and defaults back to the previous “maintenance” mode. Any data input is lost.

Project Manager: This field automatically imports the Project Manager’s name.

Project Name: Enter the name of the project

Project Goal: Enter the description of the project’s goal.

QAPP Required?:

The default is “No.” If yes, select “Yes” in the drop-down box. The QAPP requirements will be displayed.

A screenshot of a form section titled "QAPP Required?". It features a dropdown menu currently set to "Yes". To the right of the dropdown are three text input fields: "Due Date:", "Date Received by Project Manager:", and "Date Submitted for Agency Review:". Below these fields are four links: "Approval Date", "Dist. List", "Renewal Date", and "Expiration Date".

Enter the due date. The other text boxes will be completed later.

Save the new project:

Click “Save New Project.” The Project Activity section of the form opens.

3. Complete Created Project:

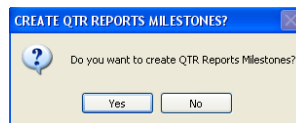
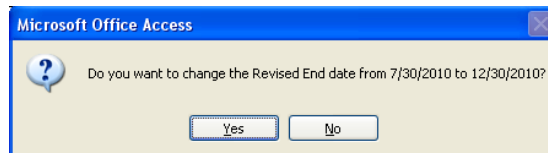
A screenshot of the Project Tracker form with three sections annotated by brackets on the left:

- Project Description:** Includes fields for "Select Project Number:" (with a dropdown and "Select All" button), "Project Manager:" (dropdown), "Project Name:" (text box), "Project Goal:" (text box), "QAPP Required?" (dropdown), "Show Projected Dates" (button), "Contract Start Date:", "Contract End Date:", "Revised End Date:", "Project Amount: \$0.00", "Spent To-Date: \$0.00", "Project Balance: \$0.00", "% Complete:" (dropdown), "Proj. Status:" (dropdown), and "Comp./Cancel Date:".
- Project Activity:** Includes a "Contractor" tab, "Select Contractor by Vendor Code:" (dropdown), "Point of Contact" (dropdown), "Point of Contact Information:" section with "Phone:", "Cell:", "Fax:", and "E-Mail:" (with a "(double click to e-mail)" note), and a "Contractor" tab.
- Main Control Buttons:** Includes buttons for "Create New Project", "Save New Project", "Update", "Preview Summary Report", and "Return to Main Menu".

- Select the new Project Number from the drop-down box. The data used when creating the project will populate the Project Description section of the screen.
- Click the “Show Projected Dates” button to see projected start and end dates. Input the estimated start and end dates.

A screenshot of a form section titled "Show Contract Dates". It contains two text input fields: "Projected Start Date:" and "Projected End Date:".

- c. Click “Show Contract Dates” to input the contract start and end dates when the contract is signed.
 - i. Enter the contract start date
 - ii. Enter the contract end date.
 - iii. The “CREATE QTR REPORTS MILESTONES?” popup opens. If “No,” quarterly report due dates are not created. If “Yes,” quarterly report due dates are automatically created between the contract start and end dates. These quarterly report milestones are viewed on the “Milestones” tab.
 - iv. After entering the contract start and end dates, the Project Manager may **not** change either date. The Project Manager must e-mail the Database Manager with a date change request and explanation. If the dates cannot be changed, the Database Manager will inform the Project Manager as to why the request was denied.
 - v. If all parties agree to the revised end date, the Database Manager must enter the new date in the “Revised End Date” text box.
 1. A popup asks if the revised end date should be changed. If “No,” the popup closes and the revised end date reverts to the original date. If “Yes,” the “CREATE QTR REPORTS MILESTONES” popup opens. If “No,” no new QTR report due dates are created. If “Yes,” QTR report due dates are updated on the “Milestones” and the “AMENDMENTS TO REVISED END DATE” screen appears. If “No,” the popup closes and the program returns to the “Main Project Form.”



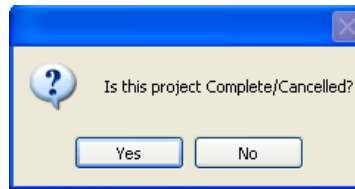
2. The Date of Revision, Old Date, and Revise Date To are automatically populated.
 3. Input the Reason for Revision in the text box.
 4. Click “Save and Close” to return to the “Main Project Form.”
- d. Project Amount, Spent to Date, and Project Balance **cannot** be entered, or changed, by the Project Manager. The Database Manager enters these amounts.
- e. % Complete and Proj. Status:
- i. The % Complete always begins at 0.00%. The Project Manager updates using the drop-down list.

- ii. The Project Status always begins “On Track.” Each status is color coded as follows:

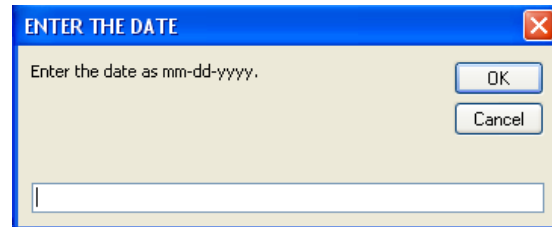
On Track	Minor Delays	Major Delays
Completed	Cancelled	

The Project Manager updates using the drop-down list as the project proceeds, or fails to proceed, to completion.

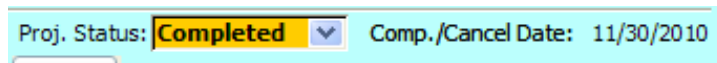
- iii. When the completed, or cancelled, project status is selected, the following popup appears:



Click “Yes” and the following popup appears:



Enter the date the project was completed, or cancelled, and click the “OK” button. The popup closes and the “Main Project Form” is updated.

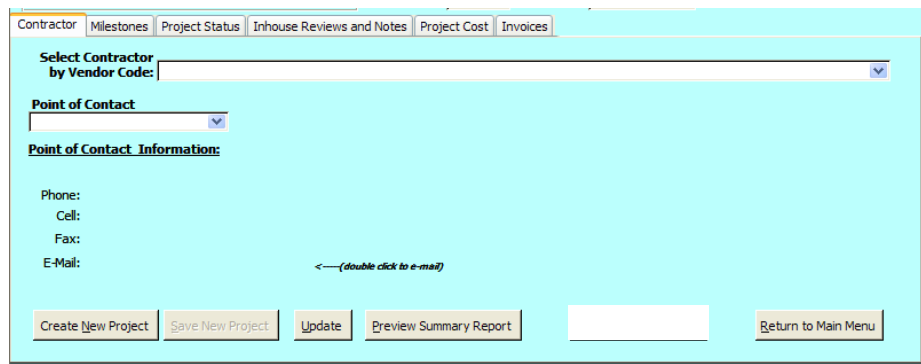


Project Activity:

1. “Contractor” Tab:

Once a project record is created, the contractor and point of contact must be tied to the project.

- Use the drop-down menu to “Select Contractor by Vendor Code,” or type the Vendor Code in the text box. The vendor will be displayed.
- Use the drop-down menu to select the “Point of Contact”. The phone, cell, fax, and e-mail information will automatically populate.



Note: Only the point of contact(s) tied to the selected contractor will display. If no point of contact displays, one must be created. Click “Update” to

close and save the “Main Project Form.” Click “Return to Main Menu” to open the “Main Switchboard.” Follow steps 1 and 2 (pgs. [13-15](#)) under the “Creating Projects” section in this manual.

Re-open the “Main Project Form” by selecting “Project Management” on the “Main Switchboard.” Select the current project number from the drop-down box.

Repeat steps 1a. and 1b. on the previous page to complete the Contractor and/or the Point of Contact.

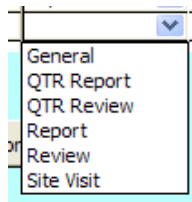
2. “Milestones” Tab:

Milestone “QTR Report Due Dates” and “QTR Rept. Review & Submit to Bus Manager Due Dates,” if any, were created when the contract start and end dates were input. (These milestone due dates can only be changed in the “Project Description” section of the “Main Project Form” and must be changed by the Database Manager. See pg.18, c.v.)

Description	Type of Milestone	Milestone Dates			Comments <i>(Click to enlarge)</i>
		Due	Revised	Completed	
▶ December 2006 Quarterly Report	QTR Report	12/10/2006		12/20/2006	
December 2006 QTR Rept. Review & Submit to Bus M	QTR Reveiw	12/15/2006		12/20/2006	
March 2007 QR	QTR Report	3/10/2007		3/20/2007	
March 2007 QR Review & Submit to Bus Mgr	QTR Review	3/15/2007		3/20/2007	
June 2007 Quarterly Report	QTR Report	6/10/2007		8/15/2007	2007-06-21 (dkc): reque
June 2007 QTR Rept. Review & Submit to Bus Mgr.	QTR Reveiw	6/15/2007		8/15/2007	

a. Other milestones may be entered on “Milestones” Tab as follows:

- i. Scroll to the bottom of the “Description” list to a blank cell.
- ii. Enter a description of the additional milestone.
- iii. Select the “Type of Milestone” from the drop-down box.

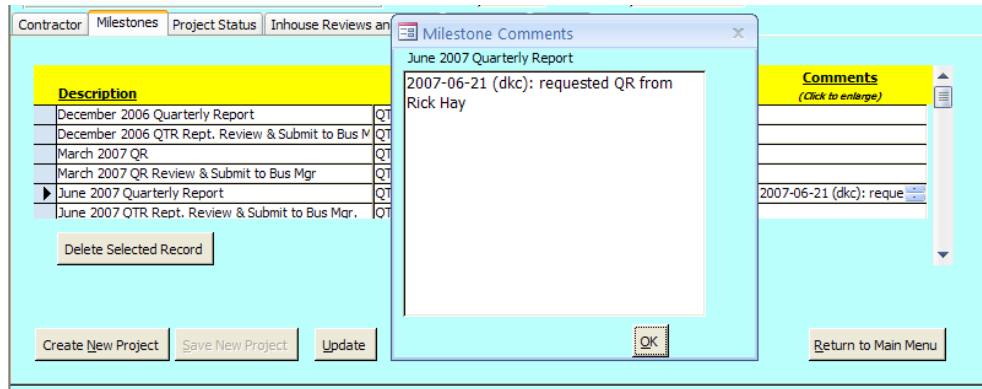


iv. Enter a “Milestone Due Date.”

b. If a milestone due date is revised (**other than Qtr Report or QTR Review Due Dates**), enter the revised date in the “Revised” column.

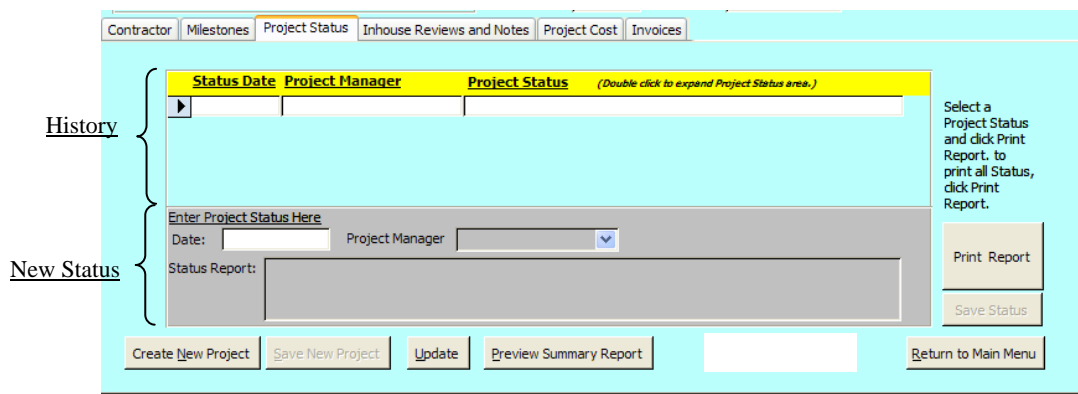
c. When the milestone is completed, enter the completion date in the “Completed” column.

- d. Comments may also be entered and edited. Click on the corresponding “Comments” text cell to add a comment. The comment cell opens to allow easier input.



- e. The header for the “Milestone Comment” is the same as the “Description”.
- f. To create a new paragraph within a comment cell, press “Ctrl+Enter” simultaneously.
- g. When editing is complete, click “OK” to save the comment.
- h. The “Delete Selected Record” button is used to delete a record. Select the record to be deleted and then click “Delete Selected Record.” There will be one opportunity to reverse this decision with a yes/no question.
- i. The “Print Milestone Report” button produces a report which may be viewed and/or printed.
3. “Project Status” Tab:

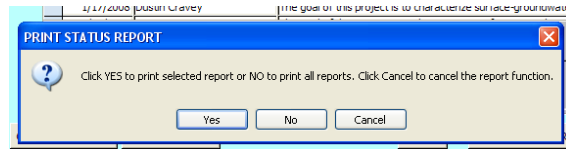
The “Project Status” tab allows the Project Manager to enter status notes as the project progresses toward completion. There are two sections to this screen: the top contains a history of all project status notes, the bottom provides the opportunity to enter a new status note.



- a. Enter a New Status:
- i. Enter the Date, select Project Manager, and enter the new status report information. Click “Save Status” to save the status report created. The current status report now appears in the “History” section.

b. Print a Status Report:

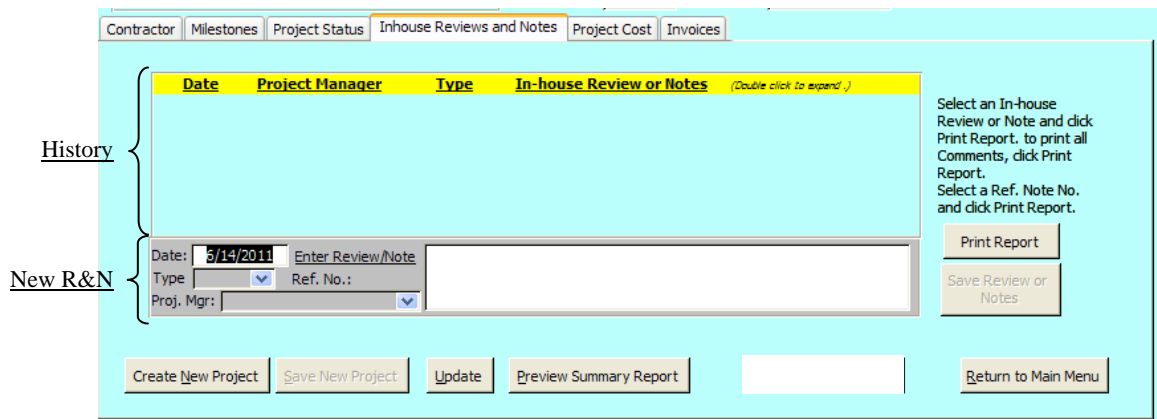
- i. Click the desired report's "Status Date" in the History section, then click "Print Report" which opens the "PRINT STATUS REPORT" popup. Click "Yes" to view the selected status report, or "No" to view all status reports. "Cancel" will stop the report process and returns to the "Project Status" Tab.



- ii. After viewing the report, the report may be closed or printed. The report closes and control is returned to the "Project Status" Tab.

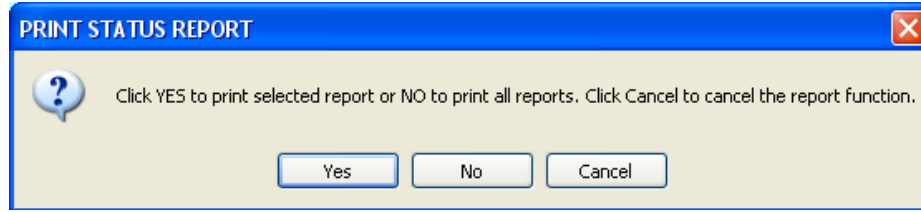
4. "In-house Reviews and Notes" Tab:

The "In-house Reviews and Notes" (R&N) Tab functions exactly like the "Project Status" Tab outlined above; however, its purpose is to record the Project Manager's thoughts and notes-to-self on a project.



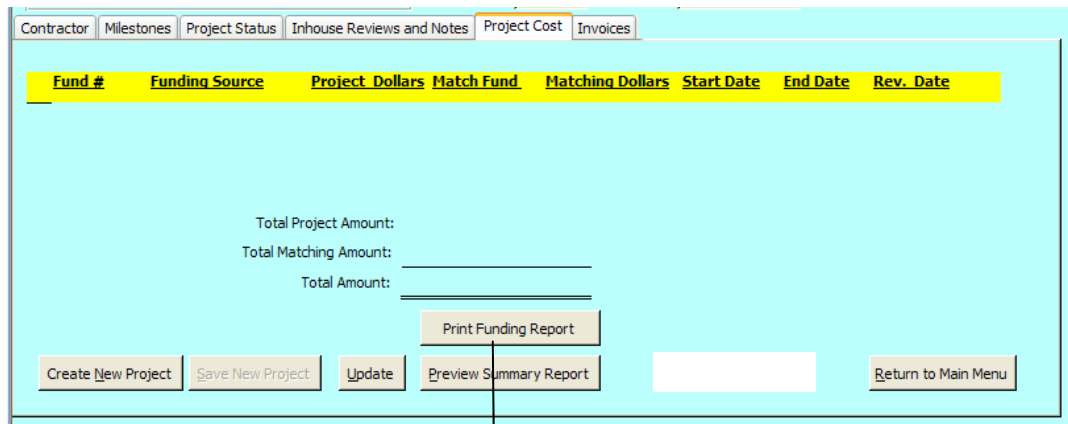
- Date – Click the "Date" cell to automatically populate.
- Type – Select "Note" or "Review."
- Ref No. – The Ref No. is used to tie the current note to one in "History." To use this feature, double-click the "Ref. Note No." in "History." The reference number will be placed in the "New R&N Ref. No.'s" space.
- Proj. Mgr. – Select a Project Manager from the drop-down list.
- Enter Review/Note text in the box.
- The "Save Review or Notes" button is now highlighted. Click the button and the new R&N is saved into "History." Notice that the new R&N is placed at the top of the list.
- Print Report – To print an R&N in the "History" section, select the desired report and click "Print Report." If an R&N is not selected, a popup will ask you to select one.

When a report is selected and the “Print Report” button is clicked, the “PRINT STATUS REPORT” popup will prompt you to select “Yes” to print the report, “No” to print all the reports, or “Cancel” to cancel the report function.



5. “Project Cost” Tab:

The “Project Cost” tab is for viewing funding source and dollars allocated to the project. The “Print Funding Report” button shows all the funding. **Reminder: Only the Database Manager may input “Project Cost” and “Invoice” information.**



January 11, 2011

<u>Fund #</u>	<u>Funding Source</u>	<u>Project Dollars</u>	<u>Fund Match</u>	<u>Matching Dollars</u>	<u>Start Date</u>	<u>End Date</u>	<u>Rev. Date</u>
209	TCEQ	\$76,025.00		\$0.00	9/1/2008	6/30/2012	
207	TCEQ 07	\$16,038.52		\$0.00	8/23/2005	6/30/2009	
Total Project Amount:		\$92,063.52					
Total Matching Amount:		\$0.00					
Total Amount:		\$92,063.52					

6. "Invoices" Tab:

The "Invoices" tab is for viewing the dollars spent on the project. The "Print Budget Report" button shows all the dollars spent from the project's allocated funds.

Fund #	Name of Contractor	Invoice No	Invoice Dates			Dollar Amount
			Invoice	From	To	
207	Texas A&M University - Corpus Christi	10255	3/28/2007			\$1,272.15
207	Texas A&M University - Corpus Christi		4/30/2007			\$7,991.14

Total Invoice Dollars: \$9,263.29

Buttons: Create New Project, Save New Project, Update, Print Budget Report, Preview Summary Report, Return to Main Menu

Contractors
Texas A&M University-Corpus Christi
February 01, 2011

Fund #	Name of Contractor	Invoice No	Invoice Dates			Invoice Amount
			Invoice	From	To	
207			4/30/2007			\$7,991.14
207		10255	3/28/2007			\$1,272.15

Project Amount: \$92,063.52
Spent to Date: \$9,263.29
Project Balance: \$82,800.23

The last three buttons on the bottom of the “Main Project Form” are:

- Update – Saves all updates to the “Main Project Form.” **Warning: Failure to click “Update” voids all input to the “Main Project Form” during current input session.**
- Preview Summary Report – Previews the project.
- Return to Main Menu – Returns control to the “Main Switchboard.”



Preview Summary Report

TPS Training and Programming Services

Project #: 0541
Project On Track

Project Name: Oso Groundwater Characterization
Project Manager: Dustin Cravey

February 01, 2011

Project Goal
The goal of this project is to characterize surface-groundwater interaction in the Oso Watershed, with emphasis on assessing agricultural pollutants.

Contractors		Contract Dates		Summary of Project Cost		
Texas A&M University-Corpus Christi	Start: 2/16/2006 End: 8/31/2007 Revised End: 6/30/2010	Project Amount	Spent To-Date	Project Balance		
		\$92,063.52	\$92,063.52	\$0.00		

Funding by Source				
Funding Source	Project Dollars	Match Fund	Match Dollars	Expire Date
TCEQ	\$76,025.00		\$0.00	6/30/2012
TCEQ 07	\$16,038.52		\$0.00	6/30/2009
Project Dollars:		\$92,063.52		
Match Dollars:		\$0.00		
Total Dollars:		\$92,063.52		

Project's Milestones

Milestone	Type	Milestone Dates		Comments
		Target	Complete	
December 2006 Quarterly Report	QTR Report	12/10/2006	12/20/2006	
December 2006 QTR Rept. Review & Submit to Bus Mgr	QTR Review	12/15/2006	12/20/2006	
June 2007 Quarterly Report	QTR Report	6/10/2007	8/15/2007	2007-06-21 (dkc) requested QR from Rick Hay
June 2007 QTR Rept. Review & Submit to Bus Mgr	QTR Review	6/15/2007	8/15/2007	
March 2007 QR	QTR Report	3/10/2007	3/20/2007	
March 2007 QTR Rept. Review & Submit to Bus Mgr	QTR Review	3/15/2007	3/20/2007	
September 2007 Quarterly Report	QTR Report	9/10/2007	9/20/2007	
September 2007 QTR Rept. Review & Submit to Bus Mgr	QTR Review	9/15/2007	9/20/2007	
December 2008 Quarterly Report	QTR Report	12/10/2008	12/10/2008	
December 2008 QTR Rept. Review & Submit to Bus Mgr	QTR Review	12/15/2008	12/15/2008	
December 2009 Quarterly Report	QTR Report	12/10/2009	12/15/2009	
December 2009 QTR Rept. Review & Submit to Bus Mgr	QTR Review	12/15/2009	12/15/2009	
December 2010 Quarterly Report	QTR Report	12/10/2010		
December 2010 QTR Rept. Review & Submit to Bus Mgr	QTR Review	12/15/2010		
Draft Summary Report	Report	9/30/2010		
Final Summary Report	Report	6/30/2010		
QA Field Visit	Site Visit	5/7/2010		2010-05-10 (dkc) QA field visit scheduled for third week of May 2010.
June 2010 Quarterly Report	QTR Report	6/10/2010		
June 2010 QTR Rept. Review & Submit to Bus Mgr	QTR Review	6/15/2010		

Project's Status Reports

Status Date Project Status:
3/24/2010 The goal of this project is to characterize surface-groundwater interaction in the Oso Watershed, with emphasis on assessing agricultural pollutants. The GAPP has been approved and installation of monitoring wells is complete. Pumping tests and sampling are 90% complete and ongoing. Model development and analysis are 25% complete and ongoing.

Amendments for Projects Revised End Dates and Funding						
Date Made	Type of Amendment	Reason	Old Date	Rev. Date	Old Budget	New Budget
4/27/2010	Revised End Date		6/1/2009	6/30/2010	\$0.00	\$0.00
3/25/2010	Revised End Date	extension	6/1/2009	6/30/2010	\$0.00	\$0.00
3/27/2009	Revised End Date		12/31/2008	6/1/2009	\$0.00	\$0.00
11/30/2007	Revised End Date			12/31/2008	\$0.00	\$0.00

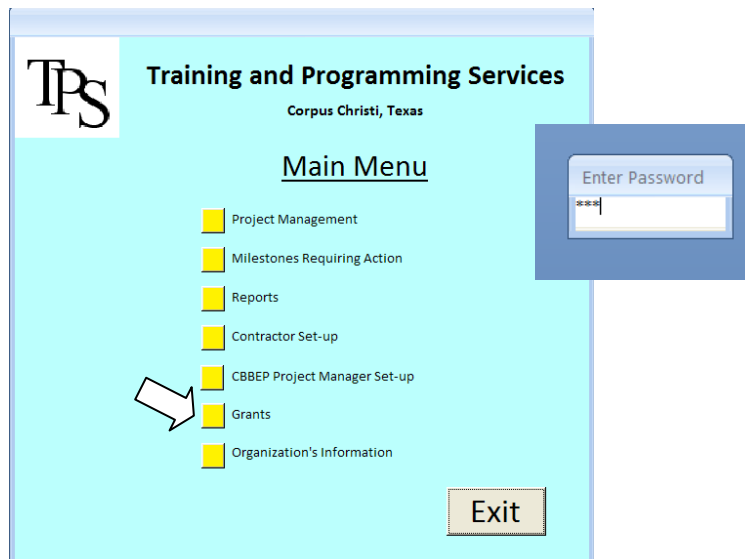
Milestones Requiring Action

1. Provides the same screen as “Opening the Project Tracker”, step 3. “List of Milestones Due (page 12).

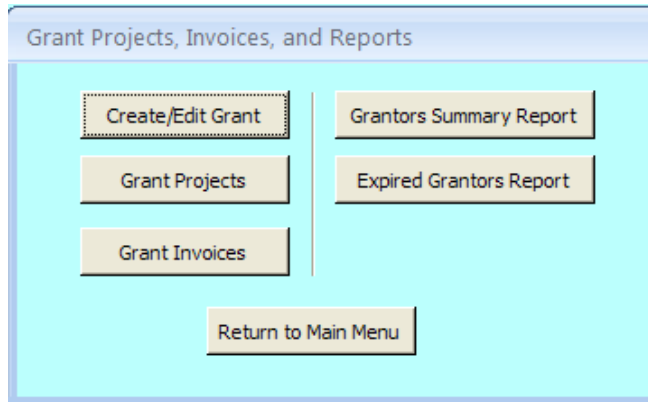


Grants (to be completed by the Database Manager):

1. At “Main Switchboard,” click “Grant.”
 - a. The “Enter Password” dialog box opens. Type the master password and press “Enter .”



- b. The “Grant Projects, Invoices, and Reports” screen appears.



2. "Create/Edit Grant":
 - a. Opens the "Build the Grantor's Data" screen. This information must be completed before allocating funds to a project.

A screenshot of a software window titled "Build the Grantor's Data". The window has a light blue background and contains a form with the following fields: "Fund No:", "Grantor:", "Original Amount:" (with a value of "\$0.00"), "Grant Start Date:", "Grant Stop Date:", "Grant Revised Date:", "Grant Number:", "Grant Payment:", "Grant budget:", "Transfer Limit:" (with a value of "\$0.00"), "Report Period:", "Final Report:", "Other Reports:", and "Comments:". To the right of the form are five buttons: "Find Grantor", "Next Record", "Previous Record", "Add New Record", and "Return to Main Menu".

3. Grant Projects

1. Clicking “Grant Projects” opens the “Grantor Worksheet”:

- a. Select a “Grantor” from the drop-down menu. This populates the “Grantor Worksheet.”
 - i. Total Grant: – Total grant dollars.
 - ii. Allocated: – Total grant monies applied to projects.
 - iii. Un-Allocated: – Total monies available for additional projects.
 - iv. Spent-to-Date: – Total invoices applied to grant.

Grantor Worksheet

Grantor: 107

Total Grant: \$61,000
Allocated: \$72,822
Un-Allocated: -\$11,822
Spent-to-Date: \$46,662

Grantor: CBBEP
Grant #: Local
Grant Period: - 8/31/2007
Revision:

ALLOCATE FUNDS					
Project # and Name	Funding Dollars	End Date	Fund Match	Matching Dollars	
0723 - Digital Elevation Model of the Nueces Delta	\$0	2/29/2008			\$0
0709 - CBBEP Nueces Delta Preserve Management	\$12,897	8/31/2007			\$0
0717 - Fish Pass Road Improvements at Mustang Isl.	\$0				\$0
0719 - Nueces Delta Preserve Conservation Science	\$1,525				\$0
0716 - Restoration of Public Boat Ramps along the JI	\$50,000				\$0
0620 - Kaufer Hubert Park Shoreline Enhancement	\$520	6/30/2008			\$0
	\$0				\$0
0516 - CBBEEP Bav Area Map/Users Guide	\$0				\$0
Totals:	\$72,822				\$0

Preview Report Return to Main Menu

- v. “Project # and Name” – Either select a project from the dropdown list, or input a valid Project #. The project name and end date will auto-populate.
- vi. “Funding Dollars” – Enter the grant dollars allocated to this project. If the amount entered causes the total “Allocated” to be greater than the “Total Grant” dollars, the “Allocated” dollars will turn red.
- vii. “Fund Match” and “Matching Dollars” - Input amounts if there is fund match applied to this project.
- viii. “Preview Report”– Displays the report for the selected “Grantor.” This report may then be printed.

4. “Grant Invoices”:

- a. Click “Grant Invoice” to open the “Invoice Worksheet.”
- b. Select, or input, the Project # in the “Pick Project” drop-down box. The Project Name and all previously input Invoices will display.
- c. To input a new invoice, click on a blank cell at the bottom of the “Name of Fund” column and to the right of the asterisk.
 - i. Select the “Name of Fund” from the drop down box. The selected fund will appear at the top of the list.

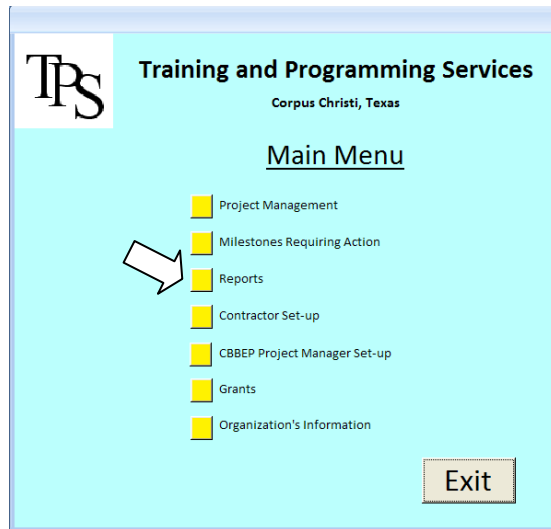
Name of Fund	Contractor	Invoice No.	Invoice Dates			Amount
			Invoice	From	To	
107 - CBBEP						\$0.00
107 - CBBEP	CBBEP	supplies, etc.	7/31/2007		7/31/2007	\$273.11
107 - CBBEP	CBBEP			9/26/2006	5/9/2007	\$12,623.42
*						\$0.00

Spent to Date: \$12,896.53

- ii. Select a Contractor from the drop-down menu in the “Contractor” column.
- iii. Input the invoice number, or what the invoice is for, in the “Invoice No.” column.
- iv. Input the Invoice Dates:
 - a. “Invoice” – Date the invoice was received.
 - b. “From” – Start date for the period covered.
 - c. “To” – End date for the period covered.
- v. Enter the amount of the invoice in the “Amount” column.
- vi. “Preview Report” displays a report of all invoices and projected cost of the project.

Reports

There are nine reports available in Reports. Click the Reports button and the Report Menu screen opens.



Initial Set Up of the PMT Email FE (PEF):

Requirements:

1. Microsoft Office 2007 installed on Server.
2. Click/Yes Software installed on Computer (only if the e-mails are run automatically – ContextMagic.com cost about \$39.90).
3. Server connection to the Internet.

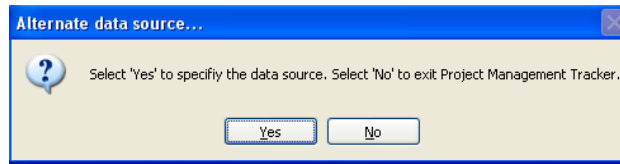
Purpose:

The PEF e-mails all contractors' project managers a reminder that their quarterly report is due. The PEF is located on the Server and can run manual or automatically.

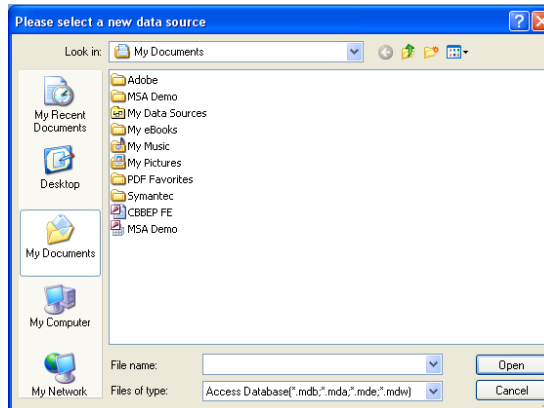
Set Up:

After the PEF is copied to the Server, it has to be linked to the PMT BE database located on the Server.

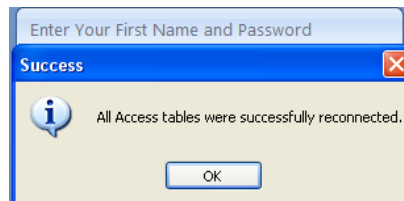
- Locate the "Project Tracker" folder on the Server and double click the PMT Email FE database.
- The "Alternate data source..." dialog box opens asking to specify the data source. This dialog box will be used only during the setup process.



- Click “Yes” and the “Please select a new data source” dialog box opens. Again, locate the “Server” computer on your Network, open the “Project Tracker” folder and select the “PMT BE” file. (Clicking “No” closes the program.)



- The dialog box below verifies that the tables are successfully reconnected to the PMT NOFE database.



- Click the “OK” button and the dialog box and PEF closes.

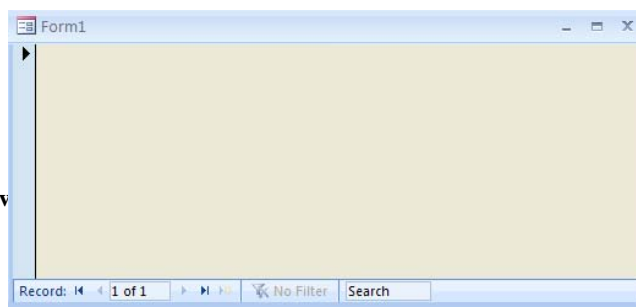
Using the PEF:

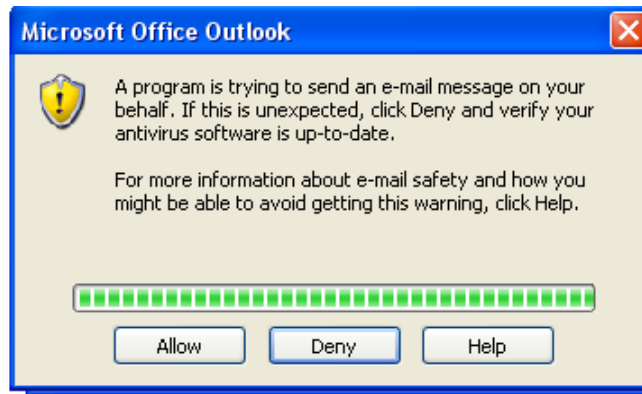
The PEF can be used in the manual or auto mode

Manual Mode:

The manual mode requires the e-mails to be sent out one at the time using an operator to send them.

1. Open the “Project Tracker” folder on the server or where the PEF reside.
2. Double click PMT Email FE database and the following two dialog boxes open.
 - a. The first dialog box just helps with the e-mailing.
 - b. The second dialog box “Microsoft Office Outlook” sends the e-mail to Outlook’s Outbox for sending.





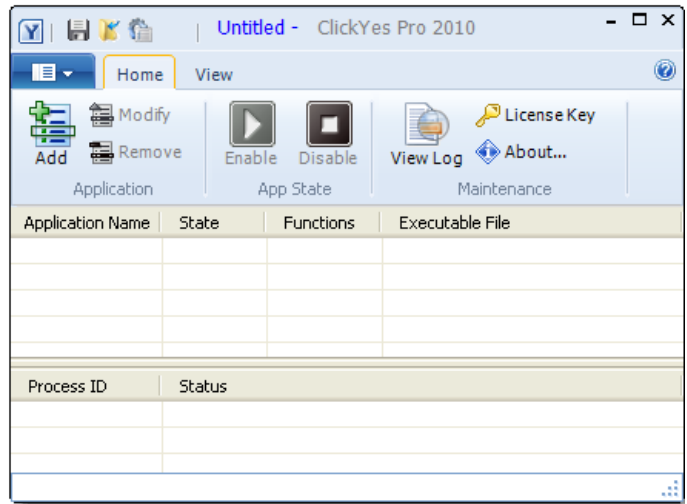
- c. Click on the “Allow” button and the e-mail is sent to Outlook’s Outbox.
- d. This process of clicking the “Allow” will be repeated over and over until all e-mails are in the Outlook’s Outbox.
- e. If Outlook is open, the e-mails will be sent out as soon as they appear in the Outbox. If Outlook is not open, the e-mails will remain in the Outbox until Outlook is opened in the send mode.

Automatic Mode:

In the automatic mode, e-mails can be scheduled to be sent when it best suits the organization. The Click/Yes Pro 2010 program bypasses the “Microsoft Office Outlook” dialog box. A recommended time would be late at night after the backups are complete.

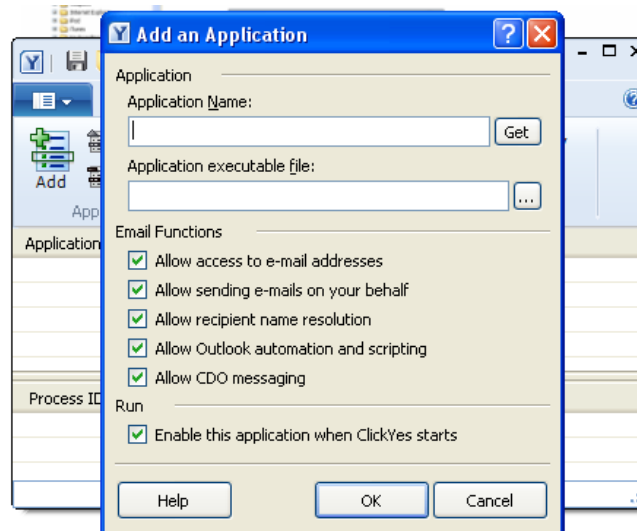
Setup ClickYes Pro 2010

- a. The ClickYes Pro 2010 program is down loaded from the WEB and then installed on the Server.
- b. If the below dialog box does not open after installing the ClickYes Pro 2010 program, click the “Start” button on the Task bar, then “All programs / ClickYes Pro / ClickYes Pro 2010.” The below dialog box opens.

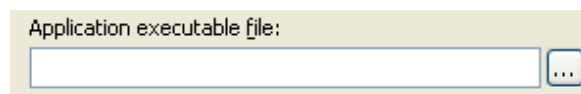


- c. Note: For Access 2003 the ClickYes program is downloaded for free. The free version cannot be used for 2007 or 2010.

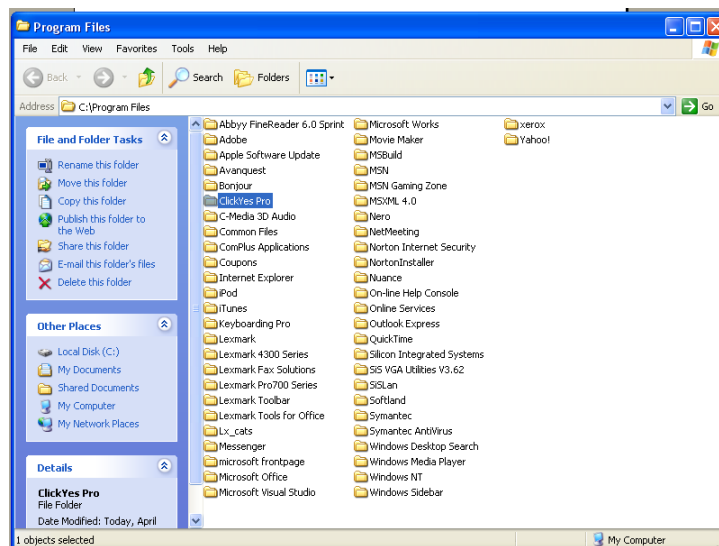
Before ClickYes will work the path to MS Access.exe has to be created. This is a simple process. Click the Add button to open the next dialog box, Add an Application.



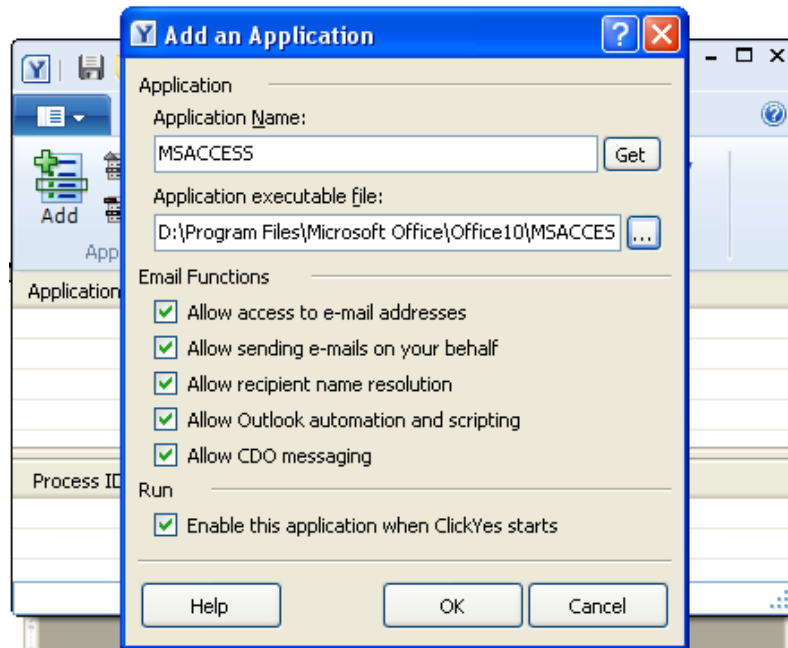
- d. Click on the  of the “Application executable file:” text box.



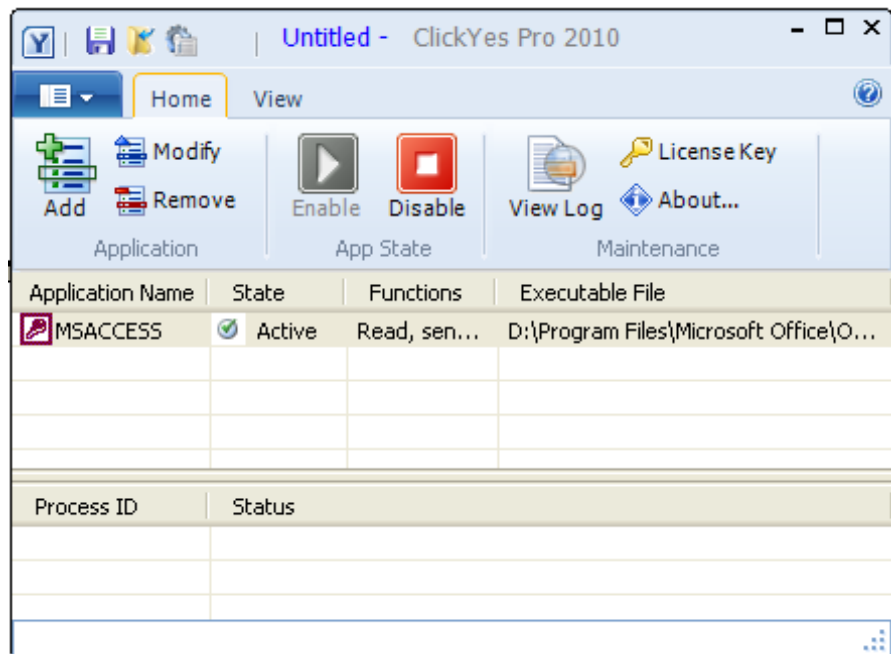
- e. The Program Files dialog box opens. If it opens the C:\ dialog box, then select the Program Files folder.



- f. The path to MS Access.exe is C:\program files\Microsoft Office\Office12\MS Access.exe. Click the “Open” button and the path is placed in the “Application executable file:” text box.



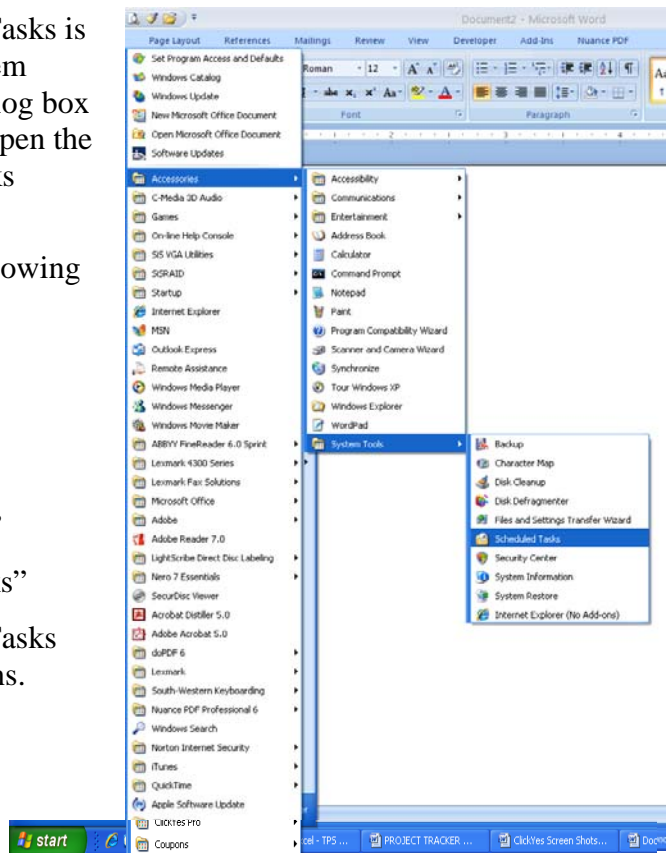
- g. Click the “OK” button and control is returned to the ClickYes Pro 2010 dialog box.



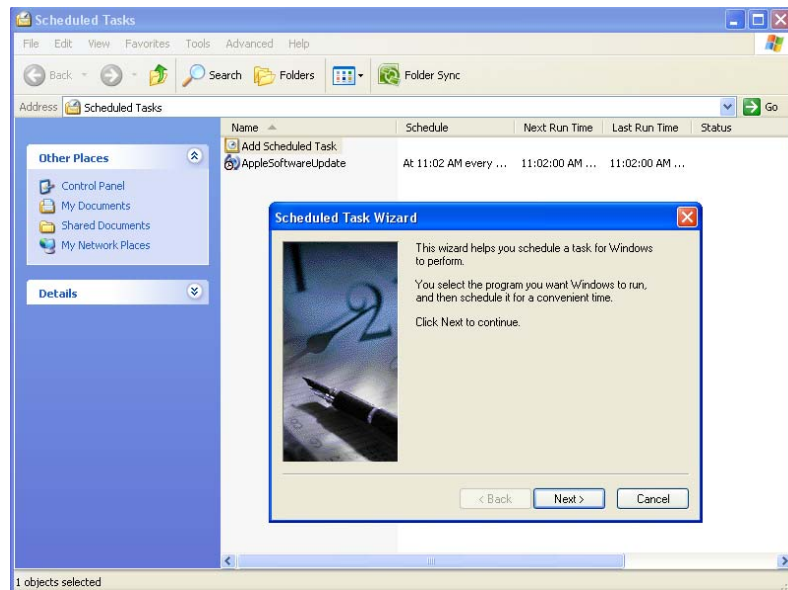
- h. Click\Yes Pro 2010 are disabled (RED). When the PEF runs, Click\Yes Pro 2010 will become enabled and allow e-mails to be sent. After all e-mails are sent, ClickYes Pro 2010 will be disabled.
- i. Click\Yes Pro 2010 is ready to be used. Click the “Save” button and then close the dialog box.

Setup Schedule to send e-mails:

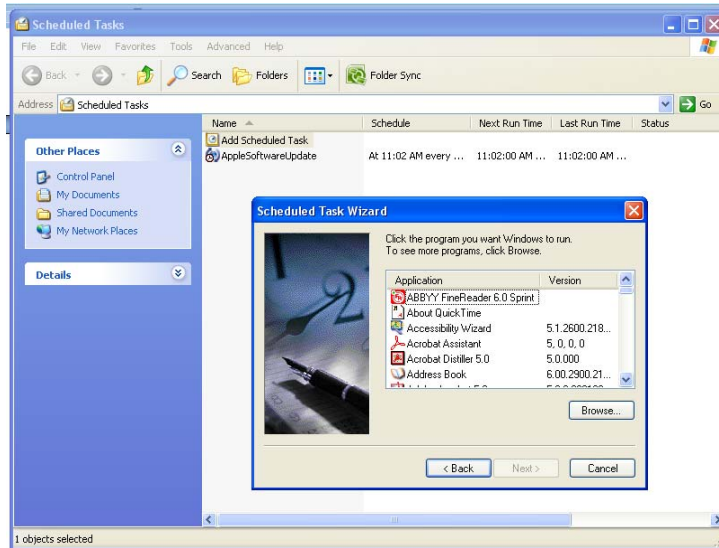
- a. The Schedule Tasks is located in System Tools. The dialog box shows how to open the Scheduled Tasks dialog box.
- b. Click in the following order
“Start” button
“All Programs”
“Accessories”
“System Tools”
“Schedule Tasks”
- c. The Schedule Tasks dialog box opens.



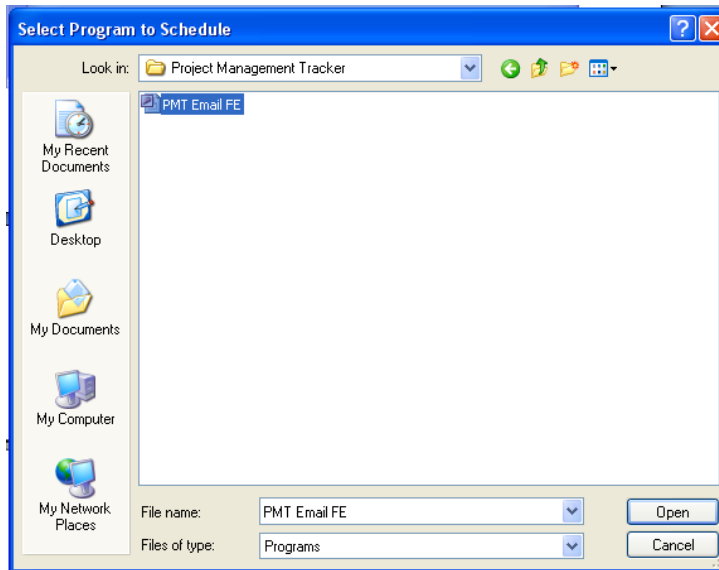
- d. The Scheduled Tasks dialog box opens. Double click “Add Scheduled Task” and the “Scheduled Task Wizard” opens.



- e. Click “Next”, the Wizard advances to selecting the program to be run dialog box. Click the “Browse” button to find the PEF database.



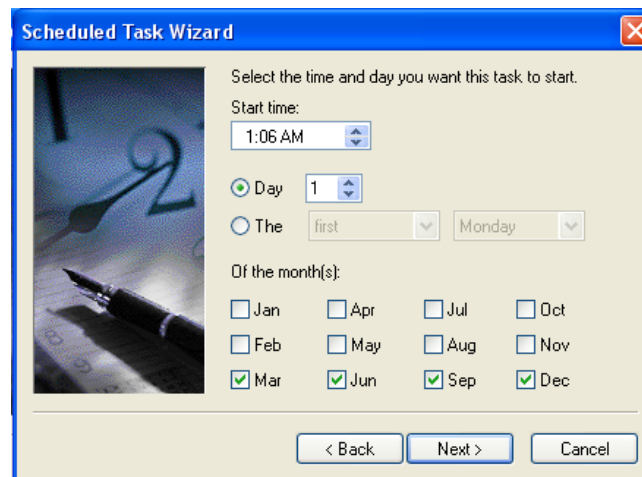
- f. The PEF database is located in the “Project Tracker” folder. Select the PMT Email FE and click the “Open” button.



- g. The next Wizard screen opens asking how often the task will be done. Select Monthly and click “Next.”



- h. The next Wizard screen opens. Select the Start Time, Day, and Month. Notice the time is early morning. This was done so the program will not interfere with normal maintenance operations such as backups. When completed, click “Next.”



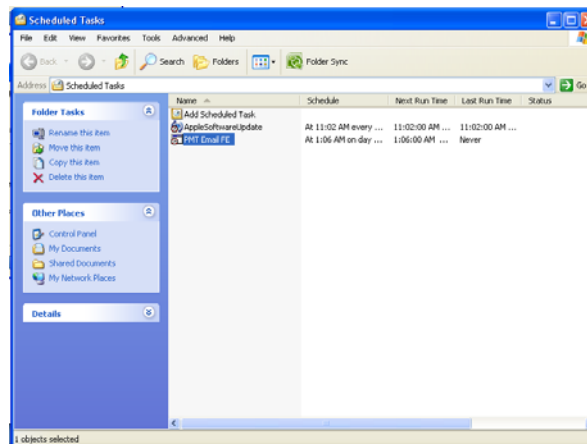
- i. The next Wizard screen sets up the name and password.



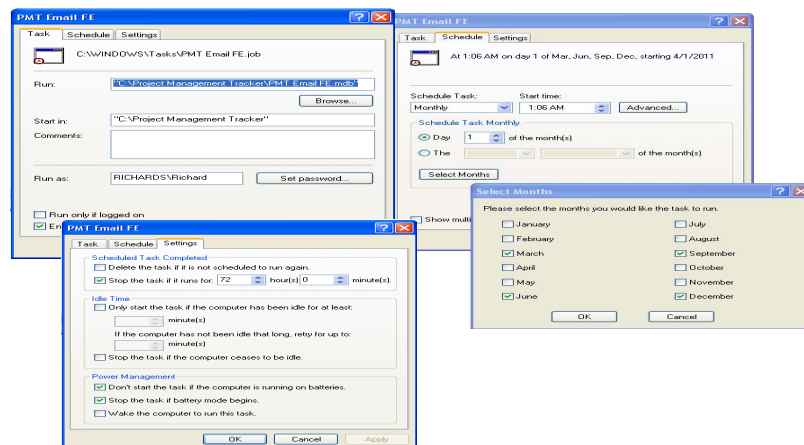
- j. The last Wizard screen shows a summary of scheduled task. Click the “Finish” button to close the Wizard and open the “Scheduled Tasks” dialog box.



- k. The “Scheduled Tasks” dialog box shows the PMT Email FE task is set to run. Close this dialog box.



- l. To check or edit the schedule, double click “PMT Email FE” task and the following dialog box opens.



- m. As the time comes to run the e-mails, make sure the Server and Outlook is turned on.