

Prgrms98 Database Maintenance and Administration Procedure

Administrative Procedure

Campus: All

Approved: March 2004

Department: Swedish Research Center

Next Review: March 2006

Purpose

To provide guidance for maintaining and administering the Prgrms98 database.

Policy

The Data Analyst, or the Research staff functioning in his or her capacity, shall maintain and administer the Prgrms98 database with due diligence according to the procedures enumerated herein; or, if a situation arises which is not specifically addressed by these procedures, shall endeavor to address the situation in the spirit of these procedures.

Population Covered

The Data Analyst, or the Research staff functioning in his or her capacity.

Responsible Persons

The Data Analyst, or the Research staff functioning in his or her capacity.

Definitions

Brost Report – The report submitted to the Payroll Department for each employee, which documents the time for which they must be paid, along with the type of hours, the project and/or department number to which the hours should be charged, and the shift in which the hours occurred. The employee is paid based on the information itemized on this report.

T&E for Managers Application – The application used by Research Managers to approve staff T&E reports. It is also used to run a variety of management reports.

Time & Effort (T&E) System – The application used by the Research Center to track time and effort worked by all staff. The data in this system is used to produce the Brost Reports.

Equipment/Supplies

N/A

Forms

N/A

Supplemental Information

N/A

Tasks

Downloading Checks

1. Highlight the Excel spreadsheet in the email from the Grants and Contracts Specialist. Right-click on it and select Save As.
2. Save the Excel spreadsheet, which contains records for checks received, to the computer Desktop.
3. Open the Programs98 database. (T:\TimeEffort\Progrm98.mdb)
4. From the main database window, go to the File Menu and select Get External Data > Import.
5. From the Import dialog box, search the Desktop for the Excel spreadsheet (be sure to select "Files of Type" = Microsoft Excel), and press the Import button.
6. Select Show Worksheets and select the correct sheet, then press Next.
7. Select First Row Contains Column Headings, then press Next.
8. Select In a New Table, then press Next.
9. Don't make any changes to Field Options. Press Next.
10. Select No Primary Key, then press Next.
11. In the Import to Table field, type "Temp", then press Finish.
12. As long as there are no import errors, open the Temp table and check to make sure that there aren't any lines that are completely blank. If there are any blank lines, highlight and delete them.
13. Look at the lower left corner of the table window and make a note of the total number of records in the table.
14. Close the Temp table.
15. Making sure that the Temp table is highlighted, go to the button in the upper right-hand portion of the window that has a lightning bolt on it. Press the arrow next to that button and select Query > Design View.
16. In the query window, double-click on the table title so that all fields in the table are highlighted. Drag and drop the fields to the query grid.
17. Go to the Query Menu and select Append Query.
18. In the Append to Table Name dialog box, scroll through the table names and highlight DR_MASTER. Press OK.
19. Go to the button at the top of the query window that looks like a red exclamation point, and press it to run the query.
20. When the Append Query verification dialog box appears, check the number of records being appended against the total number of records in the table that you noted in Step 12. If the numbers match, then press Yes. (If not, then press No and go back to see what went wrong. Also, if any error comes up after you press Yes, make a note of how many records did not append, and go back to see what went wrong.)
21. Close the query window without saving the query.
22. In the Tables Tab of the main database window, highlight the Temp table and delete it.
23. Close the database.
24. Send an email to inform the Grants and Contracts Specialist that the checks have been downloaded.
25. Delete the checks spreadsheet from the computer desktop.

Downloading DR_Master Updates

1. Highlight the Excel spreadsheet in the email from the Grants and Contracts Specialist. Right-click on it and select Save As.
2. Save the Excel spreadsheet, which contains the DR Master updates, to the computer Desktop.

3. Open the Programs98 database. (T:\TimeEffort\Progrm98.mdb)
4. From the main database window, go to the File Menu and select Get External Data > Import.
5. From the Import dialog box, search the Desktop for the Excel spreadsheet (be sure to select “Files of Type” = Microsoft Excel), and press the Import button.
6. Select Show Worksheets and select the correct sheet, then press Next.
7. Select First Row Contains Column Headings, then press Next.
8. Select In a New Table, then press Next.
9. Don’t make any changes to Field Options. Press Next.
10. Select No Primary Key, then press Next.
11. In the Import to Table field, type “Temp”, then press Finish.
12. As long as there are no import errors, open the Temp table and check to make sure that there aren’t any lines that are completely blank. If there are any blank lines, highlight and delete them.
13. Look at the lower left corner of the table window and make a note of the total number of records in the table.
14. Close the Temp table.
15. Making sure that the Temp table is highlighted, go to the button in the upper right-hand portion of the window that has a lightning bolt on it. Press the arrow next to that button and select Query > Design View.
16. In the query window, double-click on the table title so that all fields in the table are highlighted. Drag and drop the fields to the query grid.
17. Go to the Query Menu and select Append Query.
18. In the Append to Table Name dialog box, scroll through the table names and highlight DR_MASTER. Press OK.
19. Go to the button at the top of the query window that looks like a red exclamation point, and press it to run the query.
20. When the Append Query verification dialog box appears, check the number of records being appended against the total number of records in the table that you noted in Step 12. If the numbers match, then press Yes. (If not, then press No and go back to see what went wrong.)
21. An error message will most likely appear, indicating that some records cannot be appended. Make a note of the number of records that failed to be appended, and then continue the query.
22. Go to the Stat Code field in the query grid. Highlight the Stat Code entry in the Append To line, delete it, and then type Not Like “PHR” in the Criteria line.
23. Go to the button at the top of the query window that looks like a red exclamation point, and press it to run the query.
24. When the Append Query verification dialog box appears, check the number of records being appended against the number of records that failed to append in Step 21. If the numbers match, then press Yes. (If not, then press No and go back to see what went wrong.)
25. Close the query window without saving the query.
26. In the main database window, go to the Query Tab, and double-click on the query named qryUPDATE_DR_PREFIX. When the Action Query verification dialog box appears, press Yes.
27. When the Update Query verification dialog box appears, check the number of records being updated against the total number of records noted in Step 12. If the numbers match, then press Yes. (If not, then press No and go back to see what caused the unexpected result.)
28. In the Tables Tab of the main database window, highlight the Temp table and delete it.
29. Close the database.
30. Send an email to inform the Grants and Contracts Specialist that the DR Master updates have been downloaded.
31. Delete the DR Master spreadsheet from the computer desktop.

Expert Consultant

Debra Reetz, Data Analyst Research Administration

Jennifer Hansberry, Director Swedish Research Center

Author

Debra Reetz, Data Analyst Research Administration

Regulatory Requirement

N/A

References

N/A

Manual

SRC Department Manual

Additional Computer Search Words/Terms

Checks, DR Master

Addendum (Addenda, if plural)

None

dcr:Pgrms98_Admin_Procedure (06/13/07)