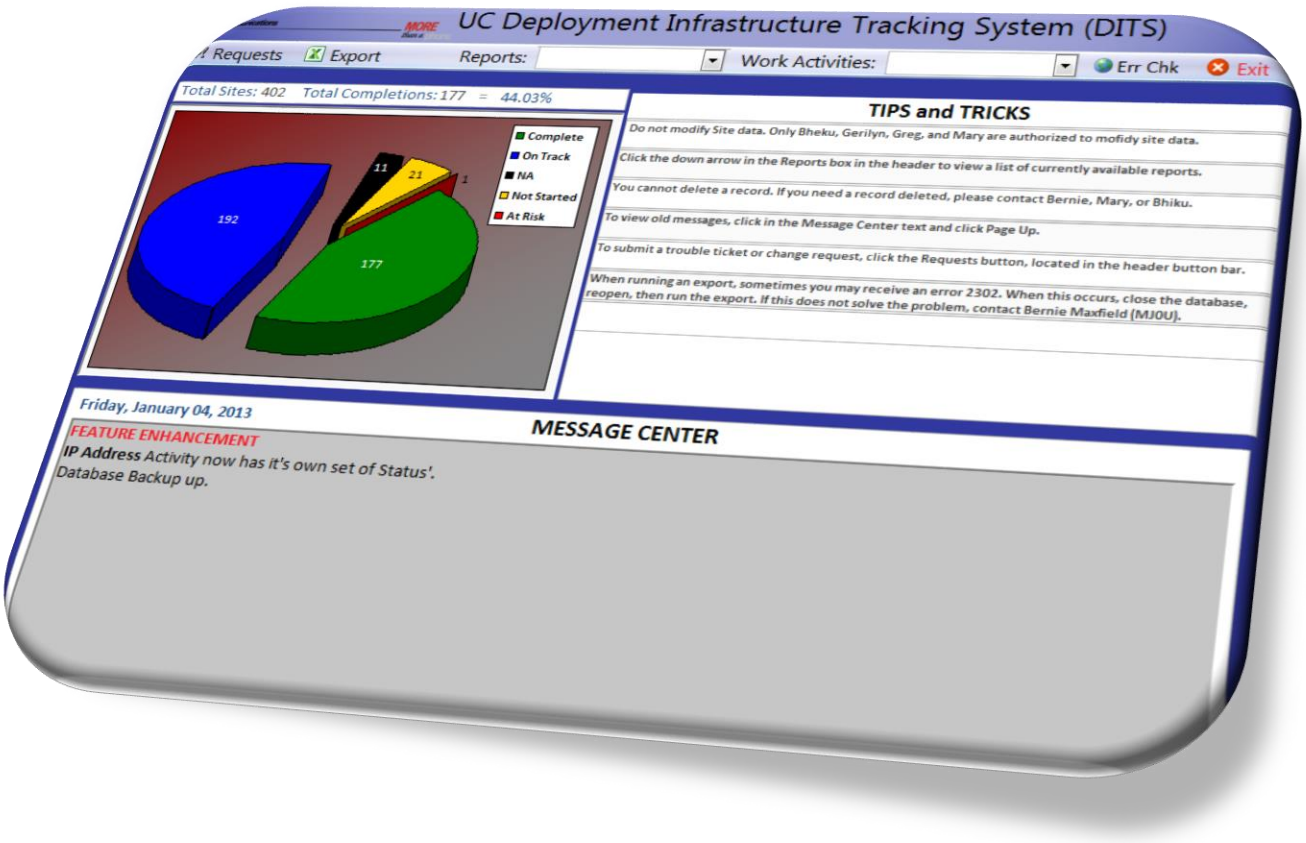
Deployment Infrastructure Tracking System (DITS) Version 4.x



User Guide

Revision G: 6 October 2013

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Overview

The Deployment Infrastructure Tracking System (DITS) is a Microsoft Access 2010 database that was built for UC Project R18530 by Bernie Maxfield at the request of Greg Maurer.

The original datasets were imported from the **Infrastructure** and **Deployment Schedule** spreadsheets.

Purpose

The original purpose of DITS was to be able to import data from various spreadsheets and provide a weekly "dashboard" status report.

Prior to the creation of DITS, each Work Activity tracked their progress in separate Microsoft Excel spreadsheets. During the weekly status meetings, each Activity Lead would provide the status for all Sites to the coordinator, who would manually create a weekly dashboard.

DITS provided the project with the means to track all activities from one central location, significantly reducing the amount of time it took to provide a weekly status.

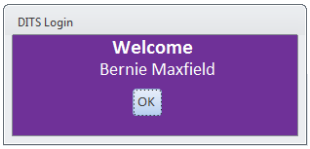
Since its original inception, DITS has been through several iterations, with each modification providing greater control of the data, increased automation, advanced error checking, and improved reporting capabilities.

Access

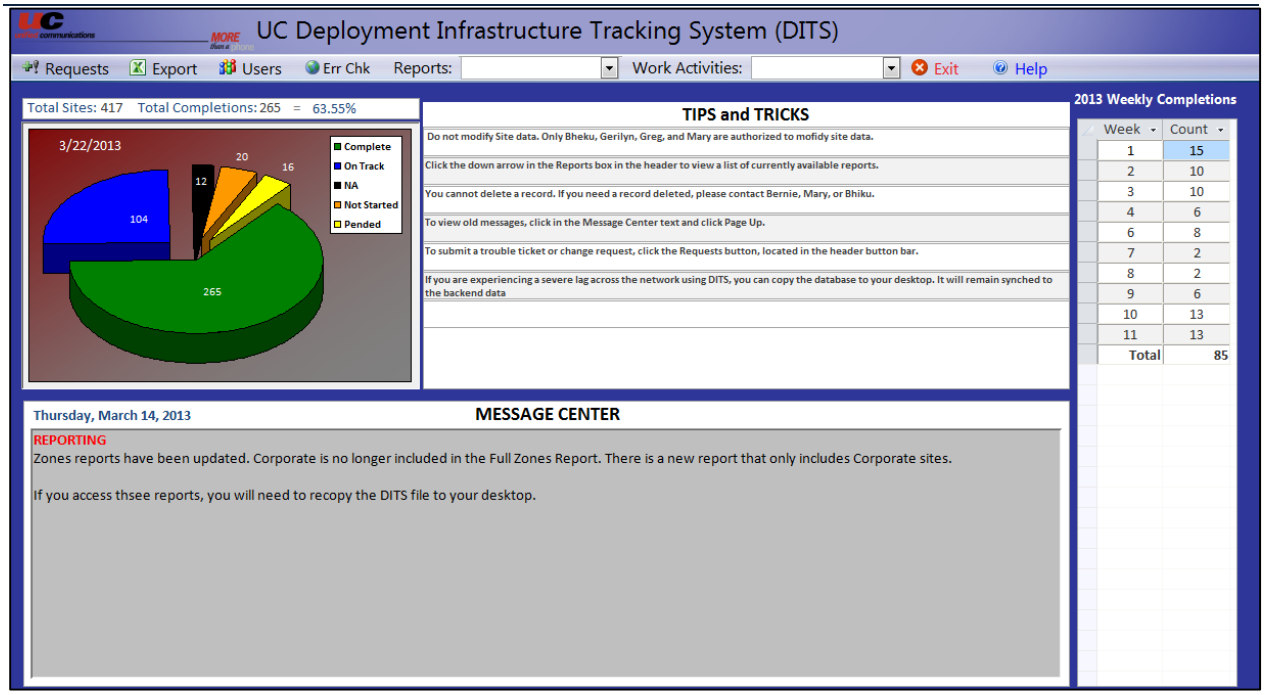
The DITS is stored on a public network drive, and is therefore accessible to any employee and associate that has access to and are mapped to the PUBLIC "N" drive. However, permissions have been established at the folder level to restrict access to authorized project members only. Microsoft Access 2010 does not allow the creation of user groups and roles, therefore security measures cannot be created in Access.

Using folder permissions provides adequate security. However due to the nature of Microsoft Access, all users must be given write permission to open the database. Access creates a lock file open opening any database. And in order to create the lock file, a user must have write permission at the folder level.

The DITS stores the login and logout times on all authorized users. Upon login, authorized users are greeted with a welcome screen. At that time, it will record the login time. When a user exits DITS, it will record their logout time.



Navigation



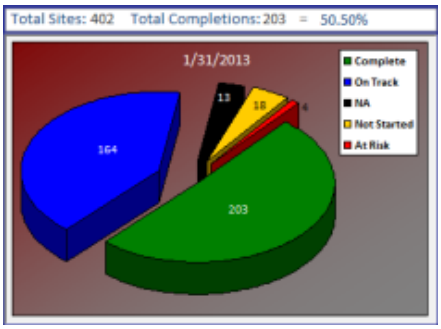
Components

When you first open DITS, the Home page is displayed. The Home page, as well as all pages (tabs), contains the same primary components.

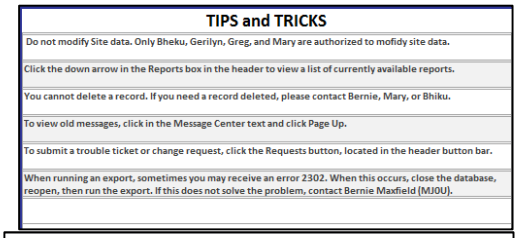
- The **Masthead** only contains the UC logo and either the Database Name (**Home** page only) or the Work Activity name.

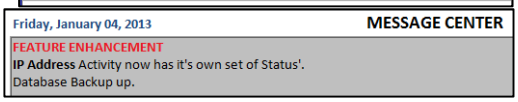
- The **Action Bar** contains all navigation components.

- The **Dashboard** is the primary section of the **Home** page. It consists of four panes:
  - **Project Metrics**: This section has a bar that displays the Total Number of Sites, Number of Sites that are completed, and the completion percentage. Below the bar is a pie chart that shows the counts for each of the active Site status options. Sitting atop the chart is the current date.

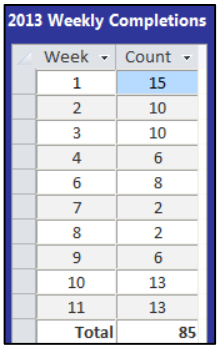


- **TIPS and TRICKS**: This section displays a list of helpful messages, such as hints, tips, and important messages that need to be permanently displayed. New entries can be added by anyone with access to DITS by simply typing a new message in the blank space.





- **Message Center**: The **MESSAGE CENTER** displays a single message and the date of the message. Messages are in an RTF format which allows font manipulations, such as color, weight, and size. New messages should only be added by authorized personnel. New messages can be added, as well as viewing of all messages, by double-clicking on the MESSAGE CENTER header text.



- **Weekly Completions**: The Weekly Completions shows a total count by week for all sites that were marked as complete during that week, for the current year. The DITS does not record the date the site was physically completed, but the date it was marked as complete.
- For all tabs other than the **Home** page, the **Dashboard** is a spreadsheet that displays the records for each particular Work Activity.

Buttons

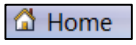
Each **Work Activity** tab contains an **Action Bar** with several navigational components.

- The **Requests** button 

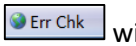
will open the **Change, Repair, Add** form where you can submit a ticket to request a change, new feature, or report a problem.
- The **Export** button 

will open the Export to Excel form where you can export the various Work Activities one or more Microsoft Excel spreadsheets. From each Work Activity page (tab), the **Export** button will immediately export the associated Work Activity only.
- The **Users** button 

will open the **User Listing** tab that lists all authorized users.
- The **Reports** drop box 

will display all availabe reports. Selecting a report will open it, where you can view, print, or export the selected report.
- The **Home** button 

returns you to the **Home** page. This button is not available on the **Home** page.
- The **Work Activities** drop box 

will display the list of all available work activities. Selecting an option from the list will take you to the data entry form for the selected Activity. This is where you will actually go to input and modify data records.
- The **Err Chk** button 

will open a custom form that is used to validate the status' of each Activity for every Site. This button is only available from the **Home** page.
- The **Weekly Status Check** button 

opens the **Dashboard** page (tab), from where you can conduct the weekly status checks.
- The **Exit** button 

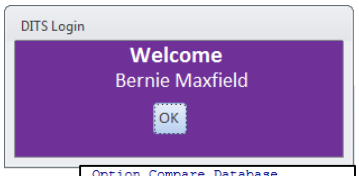
will close DITS, compacting the file as it closes.

Accessing DITS

Although Microsoft Access is not capable of security functions, DITS does include a tracking system that captures a user's alias, login time, and logout time. It does not record the user's activities.

Logging In (Authorized User)

When an authorized user logs into the database, they are greeted by the **DITS Login** welcome screen that displays their name.



The form, called **FRM_Login**, contains coding in the **On Open** event to go to a **New** record in the table **TBL_ActivityLog**.

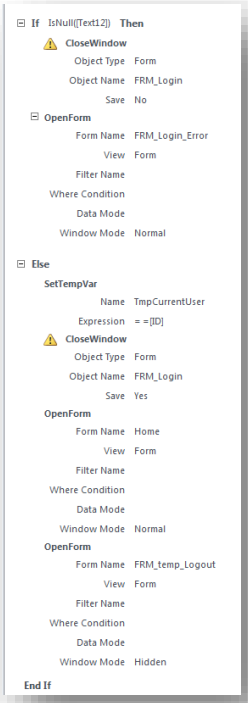
The form also contains coding in the **On Load** event that identifies the user's alias using the environmental variable "**username**"and records the user's alias and login time.

```
Option Compare Database

Private Sub Form_Load()
Me.Alias = Environ("username")

End Sub
```

The form includes a subform, **FRM_Login_Sub**, that contains the user's full name (first, last), from the table **TBL_Users**. The subform is linked to the main form, **FRM_Login**, by alias, so it will only display the name of the user that matches the login alias.



When the user clicks **OK**, the code attached to the button will perform the following four actions:

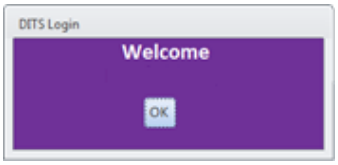
- Verifies the **User Name** field is not blank (null value) by using an **IF** statement. If the **User Name** field is not blank, the **ELSE** portion of the statement is invoked.
- Creates an environmental variable called **TmpCurrentUser** that equals the record **ID** from the **TBL_ActivityLog**
- Closes the form, **FRM_Login**
- Opens the Home page form, **Home**
- Opens a hidden form, **FRM_temp_Logout**

The last action, opening the hidden form, holds open the new activity record that was created during the login process, and is needed to record the logout time, when a user closes the database window without using the **Exit** button.

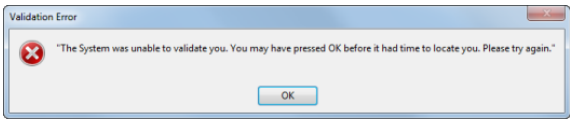
NOTE: Due to network latency, it is possible for a user to click the **OK** button before their name is displayed. When this happens, the automation in DITS will see this as an unauthorized user. This is why a user is given a second chance to attempt a login.

Logging In (Unauthorized User)

When an unauthorized or inactive user attempts to log into the database, they are greeted by the same **DITS Login** welcome screen, except there will be no name displayed. This may also occur if there is a severe latency in the network.



When the user clicks **OK**, the code attached to the button executes the same code as an authorized user.



DITS will execute a secondary check to allow the user to try again by displaying the Validation Error message. When the user clicks OK, it returns them to the DITS Login window. If they are an authorized user, and the problem occurred to to delays in the network, there name should appear in the box, and they will be able to successfully login.

However, if the user is not authorized, the name field will continue to be blank. This time, when the unauthorized user clicks the OK button, DITS will close the form and open the **FRM_Login_Error** form. This form will let the user know they are not authorized, and who to contact to become authorized. Clicking the **OK** button will close the database.

Logging out

There are two ways a user can exit the DITS:

- Using the **Exit** button 

- Closing the database window 

When a user clicks the **Exit** button from any tab, it invokes the macro **ExitDTS**, which will perform the following two actions:

- Closes the current form
- Opens the form **FRM_Logout**

The form **FRM_Logout** appears as a message box, where the user is prompted with a message "**Are you sure you wish to Close DITS**?

If a user clicks **No**, the code will close the form **FRM_Logout** and open the form **Home**.

If a user clicks **YES**, it executes an event procedure to exit Access, which then performs the same as if the user closed the database window.

When the database closes by either method, it will first close all remaining open objects.

The hidden form, **FRM_temp_Logout**, is still open and set to the current user's login record in the table **TBL_ActivityLog.**

This form contains the necessary code in the **On Unload** event to record the user's logout time.

```
Option Compare Database


Private Sub Form_Unload(Cancel As Integer)
Me.logoutime = Now
End Sub
```

When Access shuts down by either method, it will close this hidden form, thereby executing the code to record the user's logout time before shutting down.

Data Entry

To keep the reports current the existing records need to be continuously updated to reflect recent changes. Data entry is critical in maintaining an accurate record of each Site's status. This is done in the following sequence:

- Creating the initial Site record
- Building a Work Activity Record for a Site
- Updating a Work Acitvity Record to maintain currency
- Closing the Site and Work Activity records when all work in completed for each Site

Adding a new Site

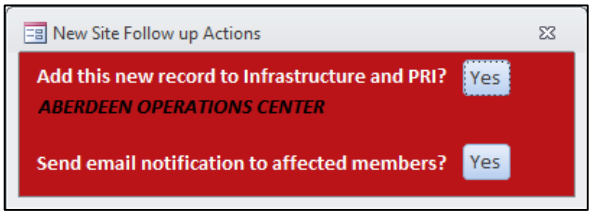
Tracking the status for each Site is the primary purpose of DITS. Because of the need to ensure each Site is tracked and maintained properly and effectively, a restrictive process has been created, with several automated functions built in. Only authorized personnel should create a new Site record. If you are not sure if you are authorized, then you are NOT authorized.

To add a new Site, perform the following steps:

1. From the DITS **Home** page, click **Work Activities** 

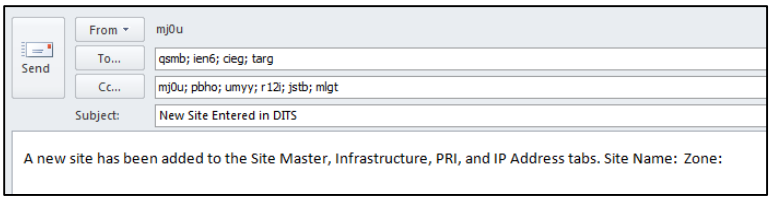
and select **Site Master**. The **Site Master** tab will open.
2. At the bottom of the page, click the **New Record** icon.


3. Click the **Zone** field (column) and select the zone that the new Site belongs to.
4. Enter the **Schedule Name** (name of the new Site), as it appears in the **UC Deployment Schedule**. If it is not yet in the schedule, enter the official name of the Site.
5. Tab across to each remaining field (column) and enter the associated details.
6. When you are at the **Site Status** field (column), select the appropriate status.
7. Enter a comment, if required. Click [**Enter**] until you move to a new record.
8. A popup window will appear with two options.
9. **Option 1** is to add the record you just created to the **Infrastructure** and **PRI** Work Activities. To create a new **Infrastructure** and **PRI** record for the newly created Site, click **Yes**. This is the action that should be taken.
If you do not want to create a new **Infrastructure** and **PRI** record, ignore the option.



10. **Option 2** is to send an email to the affected team members. Clicking **Yes** will open a **New E-mail Message** window, with the aliases for all affected members already added.

In the body of the message, type in the Zone Name for the Site, then add any additional text.



11. Click **Send**. This completes the process of adding a new Site. If needed, you can go to any of the Work Activities page and manually create a new record for that activity from the new Site.

Adding a new Work Activity Record

New Work Activity records can only be created for existing Sites. If the Site record has not yet been created, submit a request to [site mgr] to have him create a new Site record. To create a new Work Activity record for an existing Site, perform the following steps:

1. From the **Home** page, click **Work Activities** 

and select the appropriate Work Activity. The selected page will open.
2. At the bottom of the page, click the **New Record** icon.


3. Click the **Schedule Name** field (column) and select the appropriate Site. All Site-related fields will auto-populate.
4. Tab across to each remaining field (column) and enter the associated details. When you are at the **Status** field (column), select the appropriate status.

Updating a Work Activity Record

The majority of work that is performed by end users will be updating existing records. Each Work Activity includes unique record sets, which are the equivalent to a Microsoft Excel worksheet. The most common action that will be taken is the updating of a Work Activity's status.

1. From the DITS **Home** page, click **Work Activities** 

and select the desired activity.
2. Locate the record to be updated.
3. Click on the field (column) to be updated and make the necessary changes.
   - For text fields, enter the new text
   - For selection fields, select the appropriate option
   - Some fields are linked to the **Site Master** table, and are therefore not updateable

NOTE: Since Microsoft Access databases contain live data, any changes you make are immediately stored. Changes can be undone by clicking the **ESC** key before you leave the modified record. However, once you select another record, or perform any other action (such as clicking a button), the changes are permanently stored and cannot be undone.

NOTE: Updating the **Cutover Date** will automatically update the **Target Completion Date** to 30 days prior to Cutover. This can be manually overridden.