

Forms, Reports, and Database Needs

1. FORMS

A. Program database generation

The following fields are on the Access Program Form:

Trip Number: 1 to n, where n is number of trips.

Day: Which day of the festival, i.e. Friday, Saturday, Sunday or Monday

Event: the name of the trip

Type of Event: drop down arrow – can select Birding Event, Family Event, Nature Event

Trip Status – this has several selections – “up for consideration” “Retain” “New” and “Delete”

I need to be able to set all as “up for consideration” in a new year database – as confirmations come in from the leaders regarding their participation, I change the status to Retain or Drop – when I add a new trip, status is set to “new” – if something cancels, we need to be able to set it at drop – this does not delete the page/trip, it just shows as a “drop.”

Leader Info: 4 leader lines that draw from the Leader Form with a drop down arrow.

Start Time

End Time

Duration – populated from the start and end times

Maximum Attendance: trip attendance is limited based on trip/leader preference.

Type Full: drop down arrow with 5 choices – Field Trip; Field Trip/Presentation; Presentation; Presentation/Field Trip; Special Event

Type: No drop down – have several codes that correspond with type of trip choices; we use this for the brochure instead of the longer names in Type of trip.

Site New: Drop down with 16 choices – some others might get added, so perhaps we'll need an “other” – the current choices are: Buellton, Cloisters, Community Center, Embarcadero, Montana de Oro, Morro Bay High School, Morro Landing, Morro Rock, Museum, Oso Flaco, Santa Maria, St. Peter's, St. Timothy's, State Park Marina, Veterans' Hall.

Site: No drop down – codes correspond with above Site New fields – we use this for the brochure instead of the long names. Buellton=BU, CL=Cloisters, CC=Community Center, E=Embarcadero, MDO=Montana de Oro, MBHS=Morro Bay High School, ML=Morro Landing, MR=Morro Rock, M=Museum, OF=Oso Flaco, SM=Santa Maria, SPM=State Park Marina, SP=Saint Peter's, ST=Saint Timothy, V=Veterans' Hall

Level: No dropdown – we have codes to indicate which groups this event is particularly appropriate for – like BYW(beginner, youth, wheelchair.)

Sometimes there is no code. *Note this one is tricky because these codes are*

presented in a number of different ways depending on the need, e.g. brochure, Signup Master data. Will give you more detail in a later document.

Transportation: Drop down choices – None, Bicycle, Boat, Bus, Kayak, Personal Vehicle, Super Van, Van, Walking.

Program: The large field in which we write the description of the trip.

There's also a Program Form & Multi-Codes – this one changes when we change the Program Form, but it has added fields.

Fee: where the fee for the trip, if any is entered

Site Room: some sites use specific rooms – it is not an often used field

Multi-Event – checked if there are several events exactly the same except for date/time and leaders

Multi-Code – Used as a key to find event names that are same (the leaders names on these trips will change.)

Multi-trip #s – these help us identify which trip #s are the same trip – if trip 001, and 083 are exactly the same trip description, just different days or times, it is noted in the program description as “Same as event #083 (in description of 001) and Same as event #001 (in description of #083).

Review Notes: When we have proofed a form page we make a note –OK or a note if necessary in this field.

B. Leader database generation

First Name:

Last Name:

Full Name:

Phone: Cell Phone:

Email:

Notes:

Address

Address Supp

City

State

Zip

Bio – used for the leader part of the website.

** need to be able to search data pages by any field – mostly use trip numbers and leader name, but have to be able to access page to make changes, change trip status, etc. sometimes need to look at all trips that are using a van, or all trips with 20 people, etc. don't normally need a report about those – just need to be able to access them

2. REPORTS NEEDED - Pulled from Access Databases. Example forms include:

1. Leader Name – Email – Cell phone

2. Starter Excel File – Attached to email with this document
3. Trip list by day – including Day (not necessarily date), trip number, trip name, start time, end time, leader
4. Excel files:
 - a. used to create brochure. Then converted to pdf
 - b. used to create Schedule on the website. Then converted to pdf
5. Word file of Program on the website. Converted to pdf.
6. Various sorts of data including but not limited to:
 - a. List of all field trips – day, trip number, start time, end time, trip name, transportation, leader
 - b. List of all workshops – day, trip number, start time, end time, workshop name, leader
 - c. List of nature events – day, trip number, start time, end time, name of trip, leader
 - d. List of Start times – day, trip number, start time, end time, trip name – sorted by Day, then start time.
 - e. List of leaders with trips they are leading – include leader name, trip number, trip name day, start time, end time
 - f. List of Van trips, including cost for van, trip number, day, start/end times, trip name, leader
7. Trip “Starter” file (those who organize the departure of events from the Community Center--). Info for yearly leader letter – Leader first name, email, trip number, day, start time, end time, trip name. – this needs to be an excel file for a mail merge (if I ever figure out how to mail merge).