# PDI Operations Database - Readme

The PDI Operations Database is a Microsoft Access Database. Any computer at PDI with Microsoft Office 365 or later can access this database. The goal of the database is to unify the maintenance & tooling tasks and hours tracking. Management can assign tasks, and tooling technicians can complete these tasks and check them off the list. When someone checks something off the list, he is asked to estimate how many hours the task took. The team responsible for book keeping is then able to see a summary of how much time and money was spent on each job for each customer.

# Modifying this Database

If you would like to modify this database. You will need two files. Files are stored in **usr1 \ DATABASE \**

1. **PDI Operations Database\_fe.accdb** – the front end of the database (all the forms and buttons, etc….)
2. **PDI Operations Database\_be.accdb** – the back end of the database (all the tasks, employees, etc…, this is where all the data is stored) - LEAVE THIS FILE ALONE UNLESS YOU KNOW WHAT YOU ARE DOING

A copy of the front-end file exists on the desktop of each computer running the database. Users log open that local copy. When they create a task, it makes a change to the back-end data stored in usr1. If you would like to make a change to this system, focus on changing the front-end file.

Usually, you will want to hire a developer to make structural real changes to this database. See the next section.

# How to hire a developer

1. Log in to upwork
2. Optionally hire Shahid Ullah for $13.33/hour. Scott used him for the majority of the work to create the initial version in 2017
3. OR post a job called **Microsoft Access & VBA Developer** with the following description:
   1. We have a working MS Access Database that needs a few more features.  We use this at our 30 person company to record hours, assign tasks, and prioritize tasks.  We are looking for someone who has previously worked on multiple MS Access Databases including using VBA to automate some of the more complicated problems.  
        
      Our accounting system runs on Sage 50 (similar to Quickbooks desktop), and the ideal contractor would have experience importing and exporting data from Sage 50 in order to sync information between Access and Sage.  If you have never used Sage 50, please do still apply.  Depending on your skill level, we may give you a sample csv file to show you how the Sage 50 data is formatted.  
        
      We're looking for a contractor with the ability to spend 10-30 hours per week for the next 4-6 weeks, and then be available for maintenance and bug fixing over the next 6 months.
4. Give that developer 2 files:
   1. **PDI Operations Database\_fe.accdb**
   2. **PDI Operations Database\_be-DEV.accdb**
   3. Do not touch **PDI Operations Database\_be.accdb**, this is all of our records that we use on a daily basis.

# How to roll out updates to the database

Once the developer is done with his updates, he will send them to you somehow. Here’s how you make those updates available to everyone at PDI.

1. Go to **usr1 \ DATABASE \** paste in the new **PDI Operations Database\_fe.accdb,** overwrite the old file
2. Open **usr1 \ DATABSE \ PDI Operations Database\_fe.accdb** 
   1. You will see a SECURITY WARNING,
   2. first click the **X** on the **PDI Operations Database Login** form to close it,
   3. then click **Enable Content**
   4. Now it will try to connect to the wrong back-end file and reopen the form that you just closed.
   5. So right-click anywhere on the **PDI Operations Database Login** form and select **Close**
   6. In the top menu, click **External Data** **-> Linked Table Manager**
   7. Click **Select All**
   8. Check the box marked **Always prompt for new location**
   9. Click OK
   10. When it prompts you for a new location, type **\\engnas\usr1\DATABASE** into the top field. (IMPORTANT, don’t go to Y:\DATABASE, that will work for you, but it won’t work for the other computers
   11. Select **PDI Operations Database\_be.accdb** and then click **Open**
   12. Now click **Close** in the Linked Table Manager Window
   13. In the left menu, double click **frmLoginScreen**
   14. Enter your email and password to test it
   15. Close Microsoft Access to save the file.
   16. You will only have to do this absurdly long process once.
3. Now on every computer that runs the database, go to the desktop and double click **update Database Interface.bat**. that should copy and paste a new copy of **PDI Operations Database.accdb** to their desktop
4. Double click on that **PDI Operations Database.accdb** to test open it. Log in as yourself just to test it. Your probably won’t have do step 2 again, but you might.

# Accessing the database from a new computer

1. Make certain that your file structure is correct.
   1. Go to my computer
   2. Usr1 should be set as **Y:\**, if it is not, you will need to remap your network drive
2. Copy **update Database Interface.bat** to your own desktop
3. Double click on **update Database Interface.bat**. It will copy **PDI Operations Database\_fe.accdb** to your desktop.
4. If the database is ever updated, the you will need to double click on update **Database Interface.bat**