

Work Samples

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Then open the footer and do the same.

Target Audience:

Prospective Customers.

The following is the purpose of this document:

Demonstrate our competency servicing clients with legacy IT systems built on Microsoft Access technology.

Cover Letter

WORK SAMPLES

March 4, 2021

Hello,

Thank you for taking the time and effort to learn about our unique competency of supporting complex Microsoft Access database applications. Your organization will benefit from your due diligence and it's my goal to present our expertise in a way that efficiently communicates to you our depth of experience and knowledge of this topic.

However, there's a limit to what a document can communicate, so if at any time you would like a live walkthrough and Q&A session, please contact me directly. I'd be happy to provide a deeper dive into any particular sample project.

[Our mission](#) is simple, to make your information **access**-able to anyone within your organization from any type of device.

Our strategy to achieve our mission is to offer world-class support for the world's most popular rapid application development platform – Microsoft **Access**.

Being that Access is the world's most popular database application technology on the planet, our customers exist in every industry and include both large enterprises and small to mid-size organizations.

To service this diverse set of customers, we have a guiding enterprise approach that provides a structured roadmap to both our enterprise clients as well to our smaller workgroup customers.

Whether your business has a single mission critical Microsoft Access database application or ten-of-thousands, we have the dedicated team, the tools and the proven processes to support, modernize and migrate your legacy Access application to your organization's standard technology of choice.

Continued improvement plays a big part in our service offering. We are confronted daily with the most complex Microsoft Access environments around the U.S. Being on the front-line we've seen allot and take those lessons learned and apply them back into our tools and proven process to ensure we'll continue to have the world's best Access modernization and migration solutions for your Access environment, today and into the future.

The samples in the presentation are but a tiny subset of the over 800+ Access clients we served since 1992 when Access version 1.0 was released by Microsoft.

Kind regards,
Sasha Froyland – President / Enterprise Architect

Role Definitions

The samples within this document are divided into two categories:

1. Enterprise Architect Samples
2. Solution Architect Samples

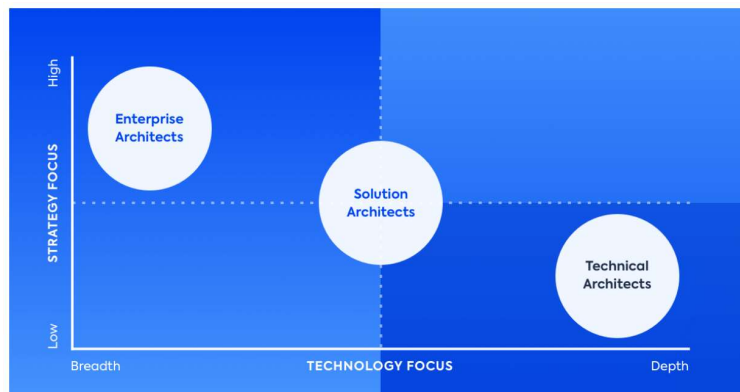
In order to have a clear definition of each, we're providing these definitions.

An **enterprise architect (EA)** establishes and oversees the 4 architecture domains:

1. Technical Architecture
2. Data Architecture
3. Application Architecture
4. Business Process Architecture

The EA mentors and ensures through the change management (CM) process that the **solution architects (SA)** stay aligned within an organization's EA standards.

A **solutions architect** focuses on developing solutions at the department and workgroup level which endeavor over time conform towards the EA established solution architectures.



A **technical architect (TA)** focuses on computer hardware and networking. The TA role is most often provided by the client's own information technology (IT) group or a third-party.

In our typical customer engagements with large organizations, our EA is utilized for short periods at the beginning of a project acting as an interism EA. In smaller organizations, our EA is often asked to perform a wider array of roles best described as an interim CIO.

Predominately, our **solution architects** do the bulk of the work providing one or more of the following IT functions: business architect, data & application architect, business and systems analyst, application and database programmer, tester, documentation, production support and often some level of project management or account management too. Microsoft Access has many complexities which differ from other IT technologies and it's important to have dedicated Access expertise in each IT function to maintain technical continuity, which is why our solution architects perform multiple roles simultaneously.

Enterprise Asset Samples

Help4Access – Microsoft Access DiscoverAccess™ software tool.

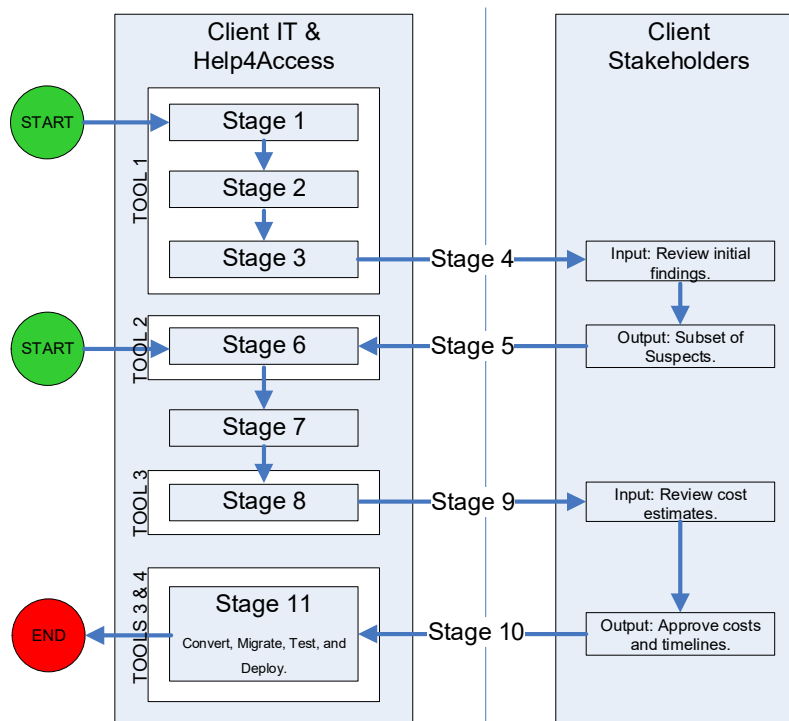
Purpose: Software designed to scan a customer's entire network and catalog all Microsoft Access database applications building a library of IT assets. Designed to be repeatedly ran to identify targets for modernization and migration then be ran again later to determine the progress made toward reducing the risk from legacy Access systems.

2017 Albertsons, Pleasanton, CA.

Case Study: <https://www.help4access.com/clients/albertsons-65000-legacy-microsoft-access-database-applications-discovered-at-albertsons-safeway/>

Detailed Walkthrough: <https://www.help4access.com/ms-access-risk-mitigation-pt1/>

Logical View - Diagram



This strategy offers a comprehensive solution that any size organization can leverage to reduce its risk of critical business function failure due to loss of support on legacy Microsoft Access applications.

If an organization has already identified its high-risk suspects, then it can move right into Stage 6 and start developing cost estimates. Otherwise, the protocol can start being applied at Stage 1 for organizations which need a full discovery to identify potential risks.

Help4Access - Microsoft Access Roadmap to Maturity™ framework.

Purpose: Assess the level of maturity of an Access database application and provide a maturation roadmap towards the next level of maturity.

		<div><div>Rapid Application Development</div><div>FAST</div><div>MODERATE</div><div>SLOW</div><div>Rapid Application Development</div></div>							
		<div><div>Stability & Scalability</div><div>HIGH RISK</div><div>MODEST RISK</div><div>SECURE</div><div>Stability & Scalability</div></div>							
4 Architecture Domains		MATURITY BENEFIT	MATURITY 0	MATURITY 1	MATURITY 2	MATURITY 3	MATURITY 4	MATURITY 5	BENEFIT
Technical Architecture	(Usability) (Usability) (Usability / Supportability) (Supportability) (Supportability)	Desktop	Desktop	Client-Server Desktop / Fileserver	Client-Server Desktop / Fileserver Remote access (Citrix / RDP)	Client-Server Database Server Remote access (Citrix / RDP)	Client-Server Database Server Web Server Cloud/Hybrid	Client-Server Database Server Remote access (Citrix / RDP) Web Server/Web Services Cloud/Hybrid Enterprise Service Bus	(Usability) (Usability) (Usability / Supportability) (Supportability) (Supportability)
Application Architecture	(Supportability) (Supportability) (Supportability) (Stability) (Stability) (Security) (Security) (Performance) (Usability) (Usability)	Microsoft Excel 1 or more files	Microsoft Access 1 File System	Microsoft Access 2 File System (frontend)	Microsoft Access 2 File System Upgrade to Current version of Microsoft Access v2019. Assorted Application Architecture Enhancements Application Launcher (3) Add form and column data value constraints. Source Control (Application) Application object level security	Microsoft Access 1 File System ASP.NET, Java, n-tier Microsoft PowerApps, Microsoft Power BI, BPM Application Launcher (4)	Microsoft Access 1 File System Microsoft PowerApps, Microsoft Power BI, BPM Application Launcher (5) Sunset some critical business functions.	(Supportability) (Supportability) (Supportability) (Stability) (Stability) (Security) (Security) (Performance) (Usability) (Usability)	
Data Architecture	(Supportability) (Supportability) (Supportability) (Stability) (Stability) (Security) (Performance)	Spreadsheet(s)	Microsoft Access Coupled within Front-end. Relational (1-3NF) and non-relational tables.	Microsoft Access Decoupled from front-end. Relational (3NF)	Microsoft Access Relational (3NF) Standardized database object Add meta data columns Source Control (Database)	SQL Server / Oracle +database constraints to enforce meta data columns and data audit. +consolidate, denormalize, EIDs, etc. SQL Server / Oracle Table and row level security Tune database objects for performance	Controlled from Active Directory or LDAP.	(Supportability) (Supportability) (Supportability) (Stability) (Stability) (Security) (Performance)	
Business Architecture	(Usability) (Supportability) (Supportability)	Fragments of a single business function 1-3 Users	1 business function 1-20 Users Runbook - Operational Support Documentation Training Manual - Business Support	1 business function 5-50 Users	1-3 business functions within a single workgroup 25-200 Users	Multiple business functions and business units supported. 50-500 Users	Unlimited	(Usability) (Supportability) (Supportability)	
Change Management	(Business Value)	Change Control / Change Management (0)	Change Control / Change Management (1)	Change Control / Change Management (2)	Change Control / Change Management (3)	Change Control / Change Management (4)	Change Control / Change Management (5)	(Business Value)	
	Vision	Inspire innovation while keeping capital investment low.	key stakeholder acceptance via socialization and gain momentum.	Gain greater user acceptance & start to insure data quality as user community grows.	Support critical business function while preparing for technology modernization. Complete as much in pure MS Access technology.	are duplicated into web services web services becoming available enterprise.	are sunsetted out of MS Access and a single version of the truth achieved across the enterprise.	Vision	

After assessment, the framework's detailed architecture solution worksheet lists the modernizations necessary to mature the system forward.

Full framework available upon request.

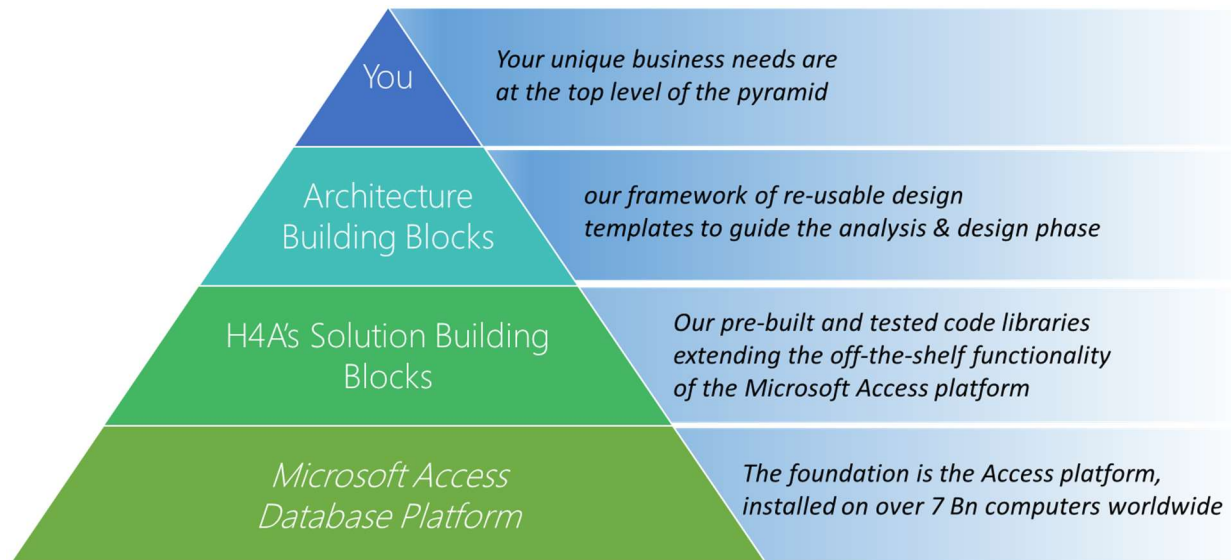
Help4Access – Microsoft Access Solution Building Blocks™ code library.

Purpose: The Help4Access Solution Building Block code library serves to reduce new database application costs and risk by providing a library of the most popular product feature requests not included in the standalone license of Microsoft Access.

Detailed Description: <https://www.help4access.com/solution-building-block-library/>

Video: <https://www.help4access.com/solution-building-block-video/>

A Help4Access video demonstration of the Help4Access Solution Building Blocks and their standard features that come on every Microsoft Access database application Help4Access designs. This video is often used to train new users on the standard features of their pending custom database application to insure they are ready to use their new database application the very first day it's deployed.



Full Presentation available upon request.

Help4Access – Microsoft Access MigrateAccess™ software tool

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Help4Access – Microsoft Access Change Management using Azure DevOps® whitepaper.

Purpose: A practice to ensure stable, continued improvement of IT assets into a production environment.

Collaborate and Control

- The main challenge in working with many people on a single Access project is the process of managing co-creations, sharing, and updates to your code files.
- **Version control system** is a tool for managing all the contributions your team makes to shared working Access Code and database files.
- Your contributors may be working simultaneously or asynchronously.
- No matter how your team is organized, the work of many contributors needs to be wrangled into a single project.

DevOps (Development and Operations)

- **DevOps** is the combination of cultural philosophies, practices, and tools.
- It increases an organization's ability to deliver applications and services at high velocity.



Whitepaper available upon request.

Solution Architect Samples

2019 – California Appellate Mediation Program, Court of Appeal, Third Appellate District – Microsoft Access 365

Purpose: Update and modernize the current Microsoft Access environment from Office 2007 to Office 365, version 2017 and to migrate existing data. The system is used for reference, reporting and analysis of data related to appellate mediation cases. Data includes all information related to cases referred to the Appellate Mediation Program including eligible, selected, excluded, set and settled case as well as success rates and produces quarterly reports which provide both quarterly and historical trend analysis. (3DCA RFO18/19-06)

Case ID	Case No	Numeric Cat	Mediator	RESULT	NOA File	ACAMS file	RCAMS filed	MAQ Sent	MAQ Rec	Order Dir Da	Status Selec	Order Date	Dash Case	DIS Procedu
6223	C088935	88935				4/2/2019	4/10/2019			4/12/2019	Not Selected	4/15/2019		
6222	C089181	89181												
6221	C089180	89180				5/28/2019	6/18/2019			6/27/2019	Not Selected	7/1/2019		
6220	C089179	89179												5/3/2019
6219	C089178	89178	Wcook	failed		4/19/2019	5/1/2019			5/7/2019	Selected	9/11/2019		
6218	C089170	89170				5/2/2019	5/10/2019			5/15/2019	Not Selected	5/17/2019		
6217	C089169	89169												
6216	C089165	89165				8/5/2019	8/15/2019			8/26/2019				
6215	C089160	89160												4/2/2019
6214	C089157	89157				4/22/2019	5/1/2019			5/7/2019				
6213	C089156	89156				4/24/2019	5/6/2019			5/9/2019	Not Selected	5/14/2019		
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6211	C089148	89148				4/18/2019				6/27/2019	Not Selected	7/2/2019		
6210	C089143	89143	Hbezner-Parrish	failed		4/19/2019	4/29/2019			5/3/2019	Selected	6/12/2019		
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6208	C089125	89125												5/3/2019
6207	C089090	89090												5/16/2019
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6199	C089030	89030	sgorman	failed		5/2/2019	5/13/2019			5/15/2019	Selected	7/26/2019		
6198	C089028	89028												
6197	C089010	89010				5/13/2019				6/12/2019				
6196	C089009	89009				3/28/2019	4/8/2019			4/11/2019	Not Selected	4/12/2019		
6195	C088991	88991				4/18/2019				5/15/2019	Selected	5/24/2019		
6194	C088990	88990				3/29/2019	4/9/2019			4/11/2019	Not Selected	4/11/2019		

Case No C053824
×

Appeals Details

Case ID:

Go to:
Save and New
Print
Close

Case No:
MED DATE:

Entered:
Entered By:
Last Modified:
Last Modified By:

Mediator(s) Bthomas

Mediators 1

Bthomas	Primary	Note <input style="width: 80%;" type="text"/>
Bradley Thomas	(530) 757-0883	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Note <input style="width: 80%;" type="text"/>

Related Cases:

Evaluations:

Statements:

Information
 Related Cases
 Evaluations
 Statements

NOA File:
ACAMS filed:
RCAMS filed:
MAQ Sent:
MAQ Rec:
Order Dir Date:
Status Selected:
Order Date:

DIS Procedural:
DIS Reason:
Status:
Status Date:
VOL REASON:
VOL DISMISS:
SPON ABA:

UNSUCCESSFUL:
SETTLED BC:
SETTLED AC:
ABA FILED:
OPF DATE:
DISPO CODE:
RESULT:

CASE NOTE:

Record: 1 of 6276 Unfiltered Search

Mediator Evaluation: wcook | C089178

Mediation Evaluation

Go to

Evaluation ID:

Mediation Date

Case(s) C053163, C053824, C089178

Cases 3

89178	failed	Wcook	
53163	settled	TBlizzard	
53824	failed	Bthomas	

Entered:
 Entered By:
 Last Modified:
 Last Modified By:

☐ Case ☒ Counsel ☒ Rating

On a scale of 1 (very dissatisfied) to 5 (very satisfied) please rate the mediation process:

3 Appropriateness ★★★★★
 5 Opportunity ★★★★★
 5 Knowledge of Subject ★★★★★

5 Fairness ★★★★★
 5 Temperment ★★★★★
 5 Confidentiality ★★★★★

On a scale of 1 to 5 please rate the program administration:

4 Efficiency ★★★★★
 3 Courtesy ★★★★★

Would you use this process again (check box for yes?): ☒ YES

Would you use this mediator again? ☒ YES

Comments

Outstanding mediator!! Thank you.

2017 - Present – Health Plan of San Mateo, CA – Microsoft Access 365, SQL Server 2016

Purpose: Support, modernize and migrate 12 Microsoft Access databases (Ruby Suite) connected to SQL Server. Utilize a 3-phase approach of analysis, development and deployment, then repeat. Follow the [Help4Access - Microsoft Access Roadmap to Maturity™](https://www.help4access.com/clients/healthplan-san-mateo-updates-consolidates-microsoft-access-database-applications/) framework.

Case Study: <https://www.help4access.com/clients/healthplan-san-mateo-updates-consolidates-microsoft-access-database-applications/>

Personal Protected Information (PPI) has been obfuscated.

ACR Navigation

HealthPlan of San Mateo

AID Code ReAlignment

Active CSS Members

	Active CSS Members		Combined DE HR MO		Disenrolled Members		Tables		Reports		Import	
Foster-Adopts	Worked	HS ID	CIN	LAST NAME	FIRST NAME	DOB	CASE ID	STARTDATE	Orig. Aid	Current Aid C	FILE DATE	DISEN
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A/C Override	<input type="checkbox"/>	000067601	91992574				27827	3/9/2006	3N	P5	4/1/2007	
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AID Code Changes	<input type="checkbox"/>	000106229	94899359				67589	1/28/2004	3N	3N	4/1/2007	
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Update CINs	<input type="checkbox"/>	000090933	93727413				62917	2/16/2007	82	30	4/1/2007	TRUE
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	<input type="checkbox"/>	000013172	96060445				05076	2/1/2009	3N	60	4/1/2007	TRUE
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	<input type="checkbox"/>	000138856	97903389				02092	11/22/2003	3N	60	4/1/2007	TRUE
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	<input type="checkbox"/>	000126496	96614453				09692	7/23/2005	33	33	4/1/2007	
	<input type="checkbox"/>	000115757	95723669				05321	3/24/2003	3N	3N	4/1/2007	
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	<input type="checkbox"/>	000075334	92556522				81340	9/1/2017	3N	H5	4/1/2007	TRUE

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

[Today](#)

Contract H7885 CA-CMC

Displaying Enrollments/Disenrollments Received 5/1/2020 to 5/31/2020

O/P	Type	Date Rec'd	Tent Eff Dt	HS ID	Last Name	First Name	MSID	Language	OEVLett	CMS/M	Cancel By	Contract
T	N	5/1/2020	6/1/2020	0001			05	Spanish	<input type="checkbox"/>		5/31/2020	H7885
T	N	5/1/2020	6/1/2020	0000			05	Spanish	<input type="checkbox"/>		5/31/2020	H7885
T	N	5/1/2020	6/1/2020	2187			70	English	<input type="checkbox"/>		5/31/2020	H7885
V	D	5/1/2020	6/1/2020	5519			00	English	<input type="checkbox"/>			H7885
T	RE	5/4/2020	6/1/2020	0000			05	English	<input type="checkbox"/>		5/31/2020	H7885
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T	N	5/6/2020	6/1/2020	0001			05	English	<input type="checkbox"/>		5/31/2020	H7885
T	RE	5/6/2020	6/1/2020	0000			05	English	<input type="checkbox"/>		5/31/2020	H7885
V	D	5/6/2020	6/1/2020	0000			00	English	<input type="checkbox"/>			H7885
T	RE	5/6/2020	6/1/2020	6709			70	English	<input type="checkbox"/>		5/31/2020	H7885
T	N	5/7/2020	6/1/2020	0001			70	Spanish	<input type="checkbox"/>		5/31/2020	H7885
T	RE	5/7/2020	6/1/2020	0001			70	Spanish	<input type="checkbox"/>		5/31/2020	H7885
T	N	5/7/2020	6/1/2020	2952			70	English	<input type="checkbox"/>		5/31/2020	H7885
T	RE	5/7/2020	6/1/2020	0000			70	English	<input type="checkbox"/>		5/31/2020	H7885
V	D	5/7/2020	6/1/2020	0363			00	English	<input type="checkbox"/>			H7885
P	N	5/7/2020	6/1/2020	3397			05	Chinese	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/7/2020	6/1/2020	1909			70	English	<input type="checkbox"/>		5/31/2020	H7885
P	RE	5/7/2020	6/1/2020	0000			05	Tagalog	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/7/2020	6/1/2020	0222			05	Chinese	<input type="checkbox"/>		5/31/2020	H7885
T	RE	5/7/2020	6/1/2020	0000			70	Spanish	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/8/2020	6/1/2020	0001			05	English	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/8/2020	6/1/2020	8581			05	English	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/8/2020	6/1/2020	0000			70	English	<input type="checkbox"/>		5/31/2020	H7885
P	N	5/8/2020	6/1/2020	0000			70	English	<input checked="" type="checkbox"/>			H7885

Deeming Date **202005**
834 File Availability Date **5/1/2020**

Lookup Member
Add Record

Deeming Reports
Navigators Performance Report

Non-SSI
SSI

Final Status	EDS Action	Letter Set	COVID	ReleaseHCP	HPSM Initial	SPD Comments	HPSM Additi	Last Name	First Name	HS ID	C
Restored	Ex 30A sent	4/30/2020	Yes				SCH-SOC 1956			0046849	9042
Deeming	Ex 30A sent	4/30/2020	Yes			Pending inter county trans	SCH-OOA Fren			0154164	9956
Deeming	Ex 22 sent	4/30/2020	Yes			Reported to be out of the C	SCH			5917154	9137
Deeming	Ex 30A sent	4/30/2020	Yes			Pending inter county trans	SCH-OOA Trac			2879465	9126
Deeming	Ex 30A sent	5/1/2020	Yes		Rsd Cty 43/OO	Pending inter county trans	JG			3658652	9120
Deeming	Ex 30A sent	5/1/2020	Yes		OOA/Antioch		JG			0118796	9597
Deeming	Ex 30A sent	5/1/2020	Yes		OOA/Antioch	Pending inter county trans	JG			0118727	9597
*			No								

Record: 1 of 7
No Filter
Search

Deeming 6
Restored 1
Total 7

Timeliness Report
Average Report

Disenroll Effective Date 5/1/2020 - 6/30/2020
Process Disenrollment 7/1/2020

Moved To
History within 60 days
Records: 198

File Date	834 File Date	Name	Type	DOB	HSID	Final Status	Status Changed	Days	Navigator
202002	1/29/2020		SSI	8/2/1997	000085592	Disenrolled	1020	42 day(s) ago	
202002	1/29/2020		SSI	1/1/1997	0483981	Disenrolled	120	41 day(s) ago	
202002	1/29/2020		SSI	9/1/1997	323892	Disenrolled	120	41 day(s) ago	
202002	1/29/2020		SSI	1/1/1997	000197	Disenrolled	1020	42 day(s) ago	
202002	1/29/2020		SSI	1/1/1997	0000731	Disenrolled	1020	42 day(s) ago	

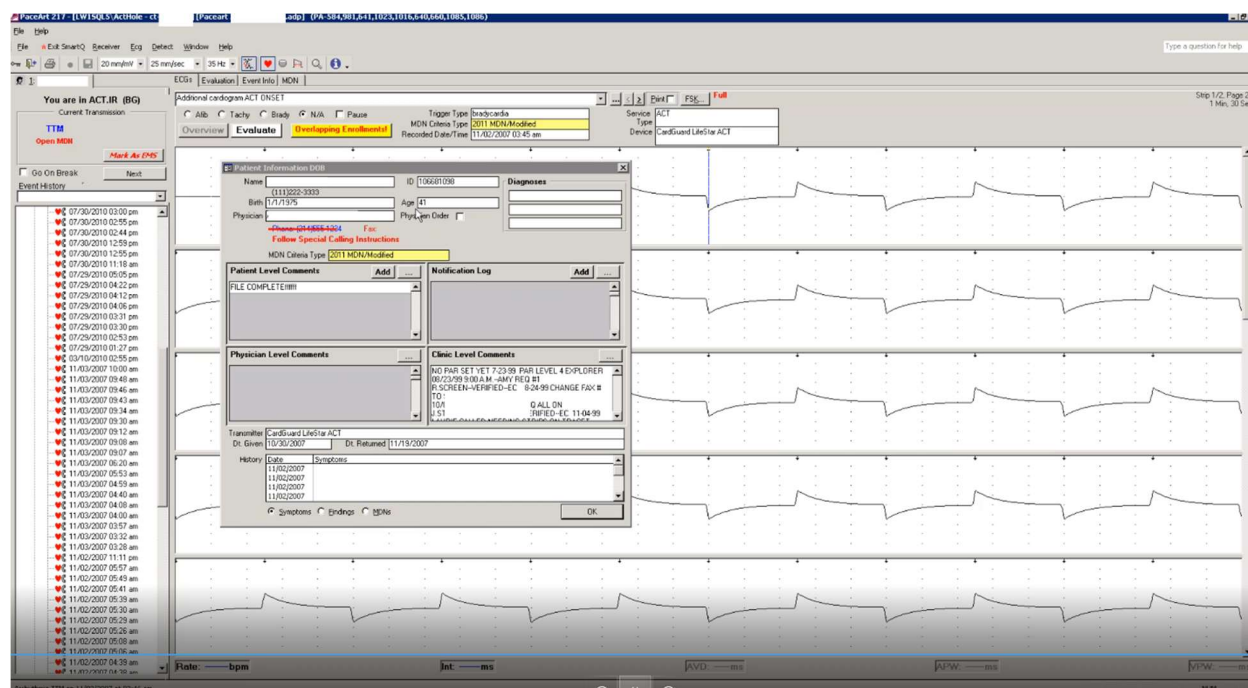
2018 – LifeWatch, IL – Medical Devices – Microsoft Access 2003, SQL Server 2014

Purpose: Cardiac Monitoring System supporting 50,000 patients across the U.S. with 24-hour support from three call centers located in San Francisco, Chicago and India. Change management of critical life-support system leveraged the [Help4Access – Microsoft Access Change Management using Azure DevOps® whitepaper](#).

Please note, this the most complex Microsoft Access system we've yet supported.

Case Study: <https://www.help4access.com/clients/lifewatch-cardiac-telemetry-monitoring-system/>

Personal Protected Information (PPI) has been obfuscated.



Receiver Ecg Detect Window Help

20 mm/mV 25 mm/sec 25 Hz

Click to leave a comment

are in CEM Elite.IR (OS)

Current Transmission

ECGs | Scheduling | Billing | Event Info

Additional cardiogram ACT COMPLETE

Alib Tachy Brady N/A Pause

Trigger Type manual

Service Type CEM Elite

MDN Criteria Notification

Start MD

3

Patient:

Last Name, First Name DOB: MM/DD/YYYY

Alternate Contact: Alternative Name

(123) 456-7894 Yes No (123) 456-7894 Yes No

Physician:

Dr. Last Name, First Name Code #####

Add Verbal Order

(123) 456-7894 Yes No Main Number - Physician

(123) 456-7894 Yes No Secondary Number - Physician

(123) 456-7894 Yes No Answering Service - Clinic

Call back Yes No

2

Covered in this call

mm/dd/yyyy Bradycardia Pause <=50 bpm >=30sec 1 Call Fax Email

tt:tt am auto-triggered >= 5sec.

mm/dd/yyyy Tachycardia >=200 bpm >=30sec Call Fax Email

tt:tt am manual triggered

Completed MDNs

MDN Date/Time Tachycardia >=200 bmp >=30 sec auto-triggered

MDN Date/Time Tachycardia >=180 bmp >=30 sec manual

MDN Date/Time Tachycardia >=200 bmp >=30 sec auto-triggered

ian Findings added to Report

Extra O

Move to TTM Move to Clinic

Close MD Keep Open

MD Criteria Notification Preferences

PaceArt 217 - [LW1SQL5] Paceart 2016-03-13-08.adp (PA-584,981,641,1023,1016,640,660,1085,1086) - [WinCPTS 2000]

File Help
File SmartQ Receiver Ecg Detect Window Help

20 mm/mV 25 mm/sec 25 Hz

Main 1: REPORTS, I ECGs Evaluation Event Info MDN

Symptoms: SEM BASELINE TRANSMISSION

Activity: LYING DOWN
STANDING

Comments: TRANSMISSION CONTAINS 1 RECORDED EVENT

Patient Information

- Devices
- Medications
- Implants
- Follow-Ups
 - Arrhythmia TTM's (10)
 - (New Event)
 - 03/21/2016 03:10 pm
 - 03/21/2016 12:45 pm
 - 03/20/2016 11:13 pm
 - 05/21/2012 03:26 pm
 - 05/20/2012 03:27 pm
 - 05/06/2012 02:06 pm
 - 05/06/2012 05:05 am
 - 05/02/2012 04:11 pm
 - 05/02/2012 03:21 pm
 - 06/24/2011 11:17 am
 - Arrhythmia Clinics (2)
 - Pacemaker TTM's (0)
 - Pacemaker Clinics (0)
 - ICD Clinics (0)
 - Programmings (0)
 - Miscellaneous (0)

1 ☒ SINUS RHYTHM
2 ☒ SINUS BRADYCARDIA
3 ☐ SINUS TACHYCARDIA
4 ☐ ATRIAL FIBRILLATION
5 ☐ ATRIAL FLUTTER
6 ☐ SUPRAVENTRICULAR TACHYCARDIA
7 ☐ NARROW COMPLEX RHYTHM
8 ☐ NARROW COMPLEX TACHYCARDIA
9 ☐ SECOND DEGREE AV BLOCK TYPE I
10 ☐ SECOND DEGREE AV BLOCK TYPE II
11 ☐ AV DISSOCIATION
12 ☐ 2:1 AV BLOCK
13 ☐ THIRD DEGREE AV BLOCK
14 ☐ JUNCTIONAL RHYTHM
15 ☐ JUNCTIONAL TACHYCARDIA
16 ☐ PAUSE 0 SEC
17 ☐ PAUSES: 0 SEC TO 0 SEC
18 ☐ VENTRICULAR STANDSTILL: 0 SEC TO 0 SEC
19 ☐ VENTRICULAR STANDSTILL: 0 SEC TO 0 SEC
20 ☐ VENTRICULAR RHYTHM
21 ☐ WIDE COMPLEX TACHYCARDIA
22 ☐ ICD DISCHARGE
23 ☐ WIRE PULL
24 ☐ ARTIFACT TRANSMISSION
25 ☐ PACED RHYTHM
26 ☐ ABNORMAL ECG - UNKNOWN ORIGIN

1 ☐ VENTRICULAR ESCAPE BEAT(S)
2 ☐ WIDE COMPLEX BEAT(S)
3 ☐ PVC(S)
4 ☐ MULTIFOCAL PVC(S)
5 ☐ INTERPOLATED PVC(S)
6 ☐ VENTRICULAR COUPLET(S)
7 ☐ VENTRICULAR BIGEMINY
8 ☐ VENTRICULAR TRIGEMINY
9 ☐ NON-CONDUCTED PAC(S)
10 ☐ PAC(S)
11 ☐ ATRIAL COUPLET(S)
12 ☐ ATRIAL RUN(S)
13 ☐ ATRIAL BIGEMINY
14 ☐ ATRIAL TRIGEMINY
15 ☐ JUNCTIONAL ESCAPE BEAT(S)
16 ☐ SINUS BEAT(S)
17 ☐ INTRINSIC BEAT(S)
18 ☐ PACED BEAT(S)
19 ☐ FIRST DEGREE AV BLOCK
20 ☐ IVCD
21 ☐ QRS MORPHOLOGY CHANGE

Measurements

Within Normal Limits ☒

Rate (bpm)
23.3 to 32.2

PR interval (s)
to

QRS width (s)
to

QT interval (s)
to

Extra Options

☒ None
☐ Cannot Rule Out
☐ Consistent With
☐ Versus (vs)

Amend Findings

Technician Findings: SINUS BRADYCARDIA, SINUS RHYTHM

2017 – FP International, CA – Manufacturing – Access 2016, Azure SQL Server

Purpose: Manage reports from sales teams with advanced functions: annotations, revisions and emailing options.

FP International Sales Reporting Tool

FP INTERNATIONAL WELCOME TO THE
FP International Sales Reporting Tool

Please wait. Adding MBR annotations to Azure SQL Server...

Email: Password:

Version : 1f [07/10/2017]
Last Data Sync : None

Search Sales Reports

Idle... Data Mode: Azure SQL Server

Report Type

Period

From To

Location & Reps

Sector Region

Territory

Rep

Terms

Seek Term[s] in

Seek in original/unannotated reports + display only original/unannotated reports.

User : tim.leschinsky@fpintl.com Run Mode: Idle...

Published Rsm Monthly Reports							
Period	RsmReport	Print	Sector	Region	Name	Reviewed Today	Version
2016-06 [6/5/2016 - 7/2/2016]	93	<input type="checkbox"/>	AMER	Midwest Region	Michael Laux	<input type="checkbox"/>	Original
2016-06 [6/5/2016 - 7/2/2016]	20	<input type="checkbox"/>	EMEA	Export-UK-Benelux	Simon Richards	<input type="checkbox"/>	Original
2016-07 [7/3/2016 - 8/6/2016]	105	<input type="checkbox"/>	EMEA	Export-UK-Benelux	Simon Richards	<input type="checkbox"/>	Original

and Debbie to ensure that we have all of the parts needed for this install on site prior to 6/23. Got the okay to hold off on finishing the install until their scissor lift is fixed.<Tim Novak> [1. Bosch

check in on the PRO PAK'R machinery and review the current layout with N

open up additional Bosch locations. We will look into Bosch's corporate co

to roll out a national program.

3) Distributor Relationship Calls: Distributor name // Meeting summary

4) Service Issues: Report any issues noted/received during the week

Komatsu we had some switch issues on the M9 units. Bobby was very help

help.<Tim Novak> [Medline and Sport Bike Track Gear / 041] See notes on

5) New Business

<Tim Novak> [1. Sport bike track gear / 041] We had our first order for Spo

film. This was another prospect that we did all the work on and passed the

lot of success with other items as well.

6) Business Lost

<Tim Novak> [Mercury Marine / 041] I spoke to Dave this week and found

mil film and that the warehouse manager is going to stay with Sealed Air.

compensating the warehouse manager at Mercury some how, so it was a b

the 59 mil film in place the account would not average 2 cases of film per month. Not worth keeping all assets in this

Print Preview Options

In View : [All reports in list]

Jump to Report [double click]

93	Michael Lau	2016-06 [6/
----	-------------	-------------

Pages in Preview : 2

Reports in Preview : 1

2019 - Energy Northwest, WA – Utilities – Access 2016, Access 365
Reporting tool for testing of critical nuclear power plant parts.

The screenshot shows the 'Menu Form - Access' window in Microsoft Access, displaying the PSTS (Penetration Seal Tracking System) interface. The window title bar includes the user name 'Pablo San Gabriel' and a 'PS' icon. The menu bar contains 'File', 'Home', 'Create', 'External Data', 'Database Tools', 'Help', and a search bar. The main content area has a grey background with the Energy Northwest logo and the text 'PSTS PENETRATION SEAL TRACKING SYSTEM'. Navigation buttons include 'PSTS User's Guide', 'Open PIDS', 'Exit PSTS', 'Data Input Form', 'Penetration Data Form', 'Query/Filter', 'Surveillance Reports Menu', and 'SCF Log'. A 'Seal Control Forms' section contains a hierarchical tree of forms: 'Foam', 'Flexible Boot', 'Fireplug', 'Feraloy Plug', 'SF-60 or SF-150NH', 'Miscellaneous', 'Biscoseal / Locaseal', and 'Water Intrusion'. Sub-forms are listed below: 'Foam/BS', 'Foam/Boot', 'Foam/SF-60', 'BS/Boot', and 'Biscoseal / Locaseal'. The status bar at the bottom shows 'Form View' and 'Num Lock'.

PENETRATION SEAL CONTROL FORM - BISCOSEAL

[Print Seal Control Form](#)

[Another SCF?](#)

[Go To Menu](#)

Logpoint:



**PENETRATION SEAL
CONTROL FORM**

PAGE #:

WOT #:

Penetration Seal ID:

SCF No.

WORK SCOPE
☐ REWORK ☐ NEW PENETRATION
☐ MODIFICATION

SEAL REQUIREMENTS

FIRE

☐ ESSENTIAL
☐ NON-ESSENTIAL
☐ SMOKE
☐ FIRE BREAK

AIR FLOW

☐ HELB
☐ SECONDARY
☐ CNTMT
☐ CRVB

OTHER SEAL REQUIREMENTS

☐ RAD. SHIELD ☐ HOUSEKEEPING
☐ WATER ☐ OTHER:

PENETRATION DATA

Opp Room Nbr:

Pen Mark Nbr:

Barrier Depth:

CARPS Pen Nbr:

Barrier Type:

Seal Req Code:

Pen Elevation:

Pen Cont Code:

Pen Type:

Seal Quality Class:

Pen Height/Dia:

Location Drawing:

Pen Width:

PENETRANT(S):

Item #	Penetrant ID	Type	Mat	Qty	Hgt/Dia	Wdt	% Ca Fill	Temp	X Mvt	Y Mvt	Z Mvt	Max Disp	Ins	Ctn
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

SEAL DESIGN:

Detail Number	Minimum Req'd Seal Depth	Installed Seal Depth	Seal Material	Room Side Installed	CVI Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Special Work Instructions:

2019 - Patz Materials Technologies, CA – Manufacturing – Access 365 – Evaluation

Every new client project starts with an assessment – an evaluation phase which explore the current state of the IT solution we're hired to support, modernize and migrate.

Within the evaluation we performed the following:

- Develop the transitional architectures needed to convert, upgrade, and modernize existing MS Access DBs to MS Access 365.
- Function as an IT technical expert related to the design, structure, security, and performance of the client's critical Access systems.
- Provide IT consultation services to the client's IT staff on the method, tools, techniques, and activities used to provide support for conversion and upgrade of Access systems.
- Attend meetings, report status on completion, review Access DB Issue Logs, Access DB bug tracking lists, and information from business users to gather information about Access databases in need of conversion and upgrade.
- Establish communications plan and identify key stakeholders from which to interact both verbally and written communications to deliver information regarding upgrade activities, including execution plans, any potential issues, and risks.
- Gather information in order to analyze the overall database design and any dependencies within the client's Access DBs subject to upgrade and modernization.
- Prepare for, track, and perform User Acceptance Testing (UAT).
- Use MS Teams and Outlook to communicate with business users and client's IT staff.
- Evaluate Access DB to determine plan for conversion and upgrade according to:
 - The complexity and size of the database.
 - Location of database.
 - File formats, open codes, source codes and reference libraries.
 - Design and build of table relationships (Entity Relationship Model).
 - Integration of existing data.
 - Database forms, queries, and reports.
 - Known security issues (i.e., DB contains confidential or sensitive information).
 - Dependencies on other applications (i.e., MS SharePoint, Word, Excel, etc.), user groups, and control sources.
- Identify and document all risks associated with conversion and/or upgrade of Access DBs on Access DB Issue Log for assigned database prior to conversion and/or upgrade.
- Identify and document the effects of Access DB upgrade and conversion on associated applications/systems on Access DB Issue Log for assigned database prior to conversion and/or upgrade.
- Notify client's management regarding risks and negative effects on associated applications and systems prior to conversion and upgrade of Access database applications.

- Convert and upgrade Access DB systems to meet business and technical requirements.
- Provide troubleshooting support for more complex Access DBs with identified dependencies, risks, and coding issues.
- Provide troubleshooting support to minimize effects on associated applications/systems during the Access DB conversion or upgrade process.
- Work collaboratively with the client's management to follow their established best practices for risk mitigation, change management and other established IT formal processes.
- Produce a final system documentation at the end of the engagement
- Provide a phased approach with appropriate signoffs prior to and proceeding every phase with each phase having specific deliverables.

The following is a sample of a phase 1 assessment deliverable

4/8/19	On site meeting with: Sarah – Director of Administration Joseph – Production Manager Jessica – Quality Manager	
	Signed the Non-Disclosure Agreement	
	Waiting for Sarah to send me the Production Access database	
	Once I have the database, I will spend an estimated 4 hours analyzing the database and documenting my findings.	Estimated 4 hours
	I will spend an additional 4 hours building a prototype database to manage their customer file which does not currently exist. I will extract it from the production database and attempt to normalize using the hierarchy outlined further below.	Estimated 4 hours

Observations

Reviewed current MS Access database configuration	
There is a single MS Access database on a desktop on the production floor. It is accessed by various production personnel. It used to reside on a server, but the server became unreliable, so they moved it off to a local desktop.	Joseph says it is backed up regularly, but I don't know if it is backed up to the local C Drive, to an external hard drive on the local machine or to a server that is backed up each night.
Financial information is processed using QuickBooks. All other business functions are handled by various departments using Excel spreadsheets. <ul style="list-style-type: none"> • Approved Supplier List 	In some instances, data is entered on a spreadsheet in one department, printed and handed off to another department that enters it on another spreadsheet.

<ul style="list-style-type: none"> • Purchasing • Receiving • Inventory • Scheduling 	<p>That spreadsheet is then passed on to the production floor where the relevant information is entered into the Access database.</p> <p>Besides being redundant, there is always the possibility of errors in transcription which at times are not caught until after the product is produced or shipped to the customer.</p>
The tables and application code are all in the one .accdb file.	There are no plans to move the backend data to SQL server at this point.
They are currently working with another developer on some enhancements.	When those enhancements are complete, they will switch support over to Help4Access.
There are no existing problems with the current database but there are some shortcomings.	<p>There is no main menu from which to select various capabilities.</p> <p>The database opens to the main data entry form where the majority of the functionality is accessed via tabs on the form.</p>
	As new features are added, a main menu will be useful to easily access them.
New features could include	<p>A Reports menu to provide ad hoc reporting.</p> <p>Data integrity reports to point out possible data exceptions.</p> <p>I.E. Excessive quantities for a unit of measure.</p>
There is no customer master table	All customer information is entered for each production work order.
Phase one of the engagement will include extracting customer static information out of the production database and creating a new Access database for customer master maintenance.	<p>New customer database will include a customer hierarchy as follows:</p> <p>Corporation Id: 0001 Widgets Inc</p> <p>Customer Id: 0001 Widgets Inc Benicia</p> <p>Parent Id: 0001</p> <p>Shipto Id: 001 Industrial Blvd</p>

<p>This maintenance will be performed in the administrative office and not on the production floor.</p> <p>Possible status codes to be added</p> <ul style="list-style-type: none"> • Active • Inactive • Pending • Credit Hold <p>Date of Status</p>	<p>Shipto Id: 002 Man Street</p> <p>Customer Id: 0002 Widgets Inc Fairfield Parent Id: 0001 Shipto Id: 001 Travis Blvd</p> <p>Using the Corporation hierarchy, reports can be generated at the customer level using the Customer Id or at the corporation level using the Corporation Id.</p>
<p>Once the Customer Master database is complete, it will be linked into the production database to eliminate duplication of data entry.</p>	
<p>There are numerous formulas imbedded in queries that perhaps are duplicated across multiple queries.</p>	<p>Modifying formulas in queries can be cumbersome and are sometimes difficult to interpret. If the same formula appears in multiple queries, there is always the possibility that one of the queries could missed thereby causing inconsistent results which can affect the quality of the final product.</p> <p>The proposal is to review all queries looking for formulas and turning them into functions that can be called by any query, form or report and always return the same consistent value.</p>
<p>While the database produces numerous reports, they are primarily screen prints using imbedded Access macros.</p>	<p>Proposal is to turn the screen prints into Access Reports where there is much greater flexibility over content and formatting.</p>

2019 - Patz Materials Technologies, CA – Manufacturing – Access 365 - Development

After the phase 1 assessment, the phase 2 development, test, document and deploy produced the following Access database application into a production environment.

Inventory Database with advanced multi term search.

The screenshot shows the 'PATZ Parts Master List' database application running in Microsoft Access. The interface includes a menu bar with options like File, Home, Create, External Data, Database Tools, and Help. A search bar is present with the text 'Tell me what you want to do'. The main content area displays a 'Main Menu' with the PATZ logo and the title 'Parts Master List Database Version 1.04 [11/10/2019]'. Below this is a table listing part groups and their counts. The table has two columns: 'Part Group' and 'Count'. The rows are: 600 Packaging (30), 900 Tooling (81), 500 Paper and Poly (35), 100 Fiber and Fabrics (244), 700 Finished Products (425), 200 Resin Sub Components (72), 300 Production Supplies (32), 400 Mixed Resins (98), and 800 Core Products (22). The row for '100 Fiber and Fabrics' is highlighted. Below the table are three buttons: 'Reorder List', 'Quick Search', and 'Quit'. The status bar at the bottom indicates 'Form View' and 'Num Lock'.

Part Group	Count
600 Packaging	30
900 Tooling	81
500 Paper and Poly	35
100 Fiber and Fabrics	244
700 Finished Products	425
200 Resin Sub Components	72
300 Production Supplies	32
400 Mixed Resins	98
800 Core Products	22

Quick Search

Term 1

Term 2

Term 3

Search complete...

2 record[s] found....

Searching tbl900....

Searching tbl800....

Results (double click to open)

Product Group	Part Number	Column	Search Term
300 Production Supplies	300393	Description	steel
300 Production Supplies	300613	Description	steel

Parts List - PATZ Parts Master List

Pablo San Gabriel PS

File Home Create External Data Database Tools Help Tell me what you want to do

100 Fiber and Fabrics

Part Number	Active	Type	SORT	Fiber and Tow Si	Weave	Finish/ Sizing	FAW	Class	Width (IN)	Supplier P/N	Supplier	Manufai
100115	Yes	CARBOI	IM7 6K PW	IM7 6K	PW	GP	196	FAB	50	PC2011270	SIGMATEX	SIGMAT
100119	Yes	CARBOI	3K TR30	TR30S 3K		SLA 1.2%		FIB				MITSUBI
100170	Yes	CARBOI	IM7 6K PW	IM7 6K	PW	GP	196	FAB	50	CF00196D783800C	COMPOSITES	HEXCCEL
100176	Yes	CARBOI	80K TW	FORTAFIL 80K	TWILL		1330	FAB	50	TC5121270	SIGMATEX	
100183	Yes	CARBOI	M55J 6K	M55J 6K				FIB		AF008		TORAY
100184	Yes	CARBOI	T300 3K 8H	T300 3K	8HS	309NT	370	FAB	46		SIGMATEX	SIGMAT
100185	Yes	CARBOI	T700 12K 4I	T700SC 12K +/- 45				FAB		MC8481270	SIGMATEX	SIGMAT
100187	Yes	CARBOI	G30 3K PW	G30 500 3K	PW		195	FAB	42	F3C282(C1)	COMPOSITES	
100188	Yes	GLASS	120 VOLAN	120	4HS	VOLAN	106	FAB	50	1512050V	REVCHEN	HEXCCEL
100190	Yes	CARBOI	HMS63 12K	HM63 12K				FIB		711432	HEXCCEL	HEXCCEL
100192	Yes	GLASS		108	PW	CS-440	48	FAB	38			
100198	Yes	CARBOI	3K AS4 PW	AS4 3K	PW	GP	193	FAB	42			HEXCCEL
100201	Yes	GLASS	7781 HT	7781	8HS	HT	301	FAB	50			

Record: 1 of 244
Unfiltered
Search

Active
Parts Count : 242

Part Number 100115 Active Yes

Fiber and Tow Size IM7 6K

Width (IN) 50

Supplier SIGMATEX

Finish/ Sizing GP

Class FAB

Supplier P/N PC2011270

Weave PW

Type CARBON

PRICE \$37.50

FAW 196

Manufacturer SIGMATEX

UOM LYD

Form View

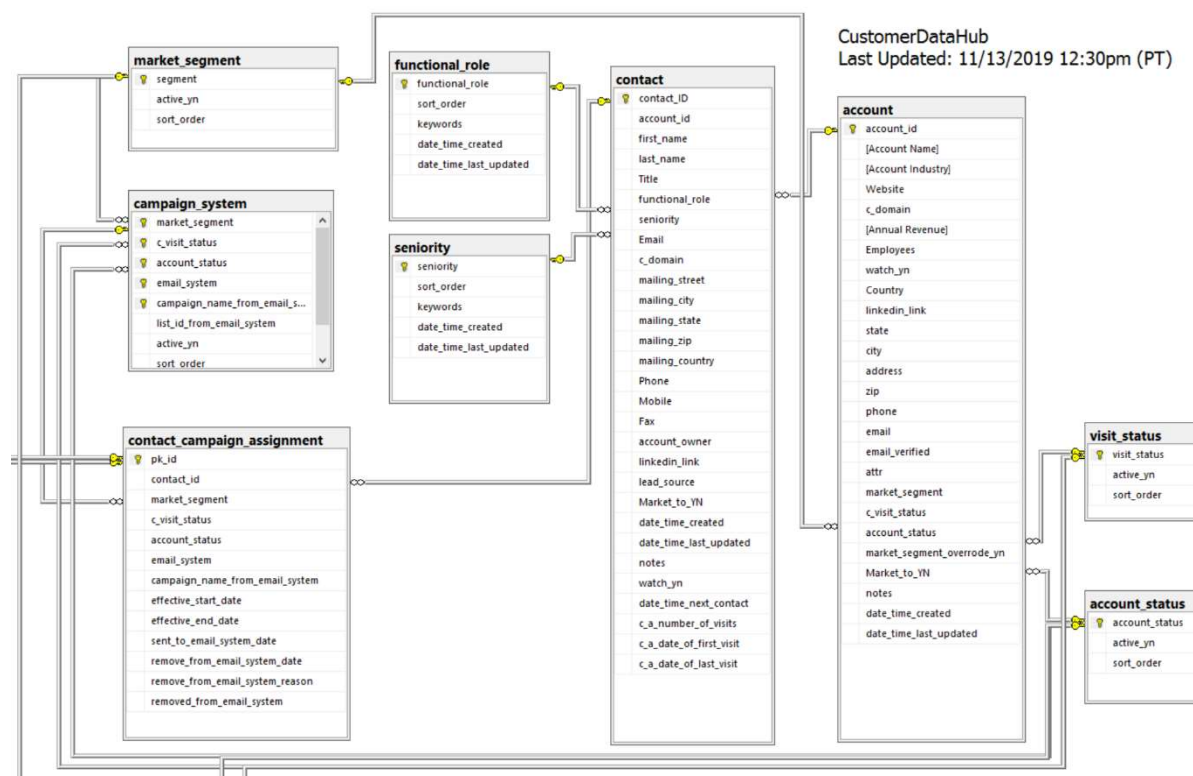
Num Lock Filtered

2020 – (Private Client), CA – Marketing – MS Access 2019, Azure, SQL Server, Logic Apps, APIs

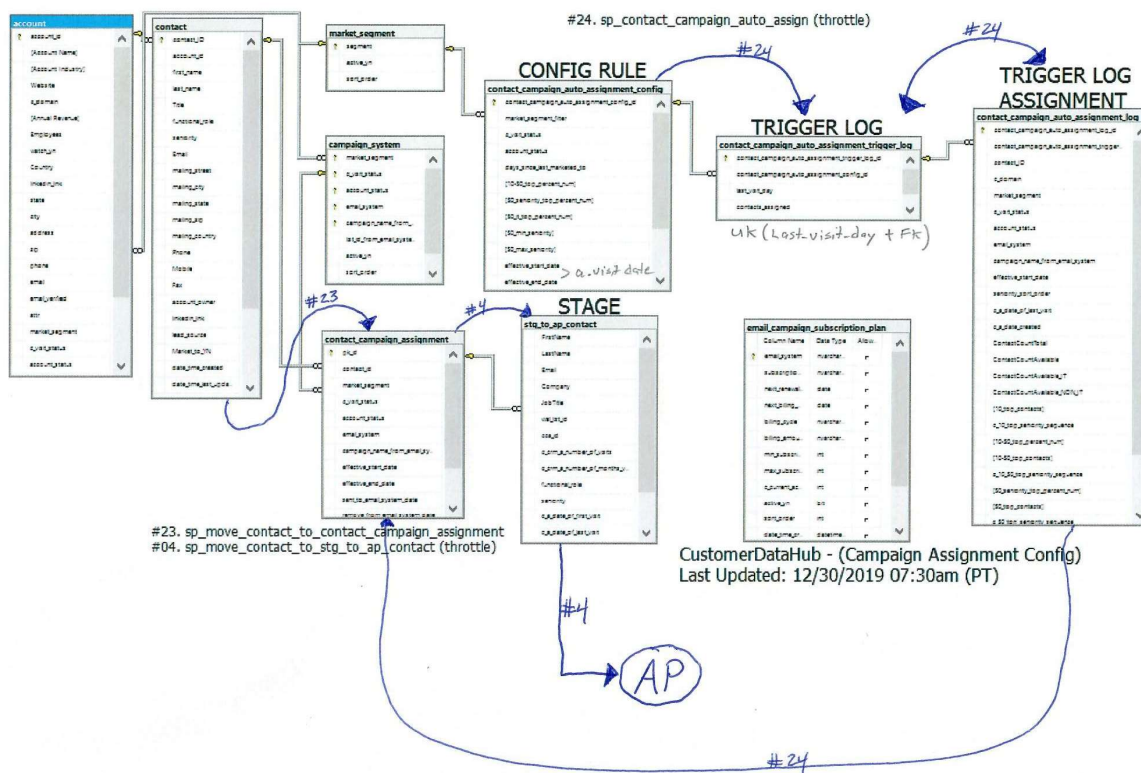
Purpose: Marketing Automation, Systems Integration, CRM – Example of Entity Relationship Diagram (ERD)

Case Study: <https://www.help4access.com/services/ms-access-migration-to-cloud/>



CRM Base Tables



CRM – Stage/Work, Systems Integrations tables with SQL Server stored procedure and API references



CRM – a single Fact table

	account_id
	c_domain
	crm_count_of_all_contacts
	crm_date_contact_first_added
	crm_date_contact_last_added
	crm_count_of_available_contacts
	crm_count_of_dm
	crm_count_of_dm_it_avail
	crm_count_of_dm_non_it_avail
	crm_target_count_of_dm_it
	crm_target_count_of_dm_non_it
	crm_target_count
	a1_count_of_visits
	a1_date_first_visit
	a1_date_last_visit
	a1_page_urls
	outlook_count_of_email_froms
	outlook_date_first_from
	outlook_date_last_from
	ap_sum_of_sends
	ap_date_first_sent
	ap_date_last_sent
	ap_sum_of_opens
	ap_date_first_opened
	ap_date_last_opened
	ap_sum_of_clicks
	ap_date_first_clicked
	ap_date_last_clicked
	ap_sum_of_visits
	ap_date_first_visit
	ap_date_last_visit
	ap_sum_of_c_contact_score
	ap_page_urls
	date_time_created

Gold

Microsoft
Partner



(Office) 1-855-595-2380 (Direct) 1-415-228-1900
www.Help4Access.com

Page 33 of 59

2016 – Present – Fast Extract Transportation, CA – Transportation Industry - Microsoft Access 365, MySQL

Purpose: Transportation Management System.

The screenshot displays the Fast Extract Transportation Management System interface. The top navigation bar includes tabs for various companies and services: ALL, FEDEX, PARKER, SYLECTUS, AFRO, XPO, FAST EXTRACT, TIME FX, YRC, AVERITT, TRISTATE, ECCO, CH ROB, UNGLOBE, VA_4, CANADA, BACK HAUL, BIDS, and MY BIDS. The left sidebar lists a series of jobs with columns for Job ID, Miles, Vehicle, and FLC. The central panel shows detailed information for a specific job, including Job ID, Job, Company, Contact, Phone, Email, Origin, Destination, Received, Status, Miles, Weight, Order, Vehicle, Pick Up, Delivery, Dock High, and Fast. The right sidebar contains fields for Driver, Cell, Email, SMS Email, Coverage, Team, Orders, BID Amt, Order Amt, Bid Date, Comment, Map, Latitude, Longitude, GPS Last Updated, Calculate Travel Time, and Miles, Hours.

Wednesday, January 9, 2019 6:49:14 PM

LOGISTICS

ALL OPEN INVOICES

Open Invoices Contacts* Payment Notes

Invoice	Inv Date	Due Date	Aging	Terms	OPEN	Invoice Amt	Total Paid	Fee/Disc	Open Balance	Status
15594	11/5/2018	11/20/2018	50	Net 15	65		\$0.00			
12081	5/22/2017	6/6/2017	582	Net 15	597		\$0.00	\$17.44		
						\$1,674.00	\$0.00	\$17.44	\$1,656.56	

Record: 14 1 of 2 No Filter Search

Customer Name	Amt (exclude FLF)	Max Open	1-30	30-60	60-90	90-120	Over 120	Terms	Total Paid	Pd Invoices	Avg Open Dys
	1	597						Net 15	\$1	16	225
		464						Net 15	\$	0	50
	8	466						Net 15	\$1	10	32
		369						NET 30	\$1	19	52
	1	366	2					NET 30	\$1	15	35
		365						Net 15	\$	0	39
	9	218	29					Net 21	\$1	12	39
	21	216	79					Net 30	\$2	29	37
	1	196	7					Net 30	\$	0	14
		196						Net 30	\$	7	35
		196						Net 15	\$	1	47
	5	196	12					Net 30	\$1	15	36
		191						Net 15	\$	8	37
		191						Net 30	\$	8	64
	1	191						Net 30	\$1	10	47
		191						Net 30	\$	2	51
	6	190	21					Net 30	\$1	19	34
	5	190						Net 30	\$1	13	51

2018 – Current – SOS Meals on Wheels, CA – Microsoft Access 365

Purpose: Providing enhancements to their two Access databases that support their Oakland and Hayward services. Developed two free standing databases to allow for ad-hoc reporting via views into the tables linked to the master db.

The sample which follows is an example of a weekly status report.

12/13/18	Initial on-site consultation with Rose and Annemarie. Includes travel time to/from San Leandro.	5 hrs. No Charge
12/13/18	Begin off-site analysis of databases	1 Hr.
12/14/18	Continue off-site analysis of databases	3 Hrs.
	Contracted hours	25 Hrs.
	Remaining Hours	21 Hrs.

12/13/18 – Initial observations

SOS provides meals on wheels services to clients in Alameda County	Meals are prepared and delivered from their local office in San Leandro
Staff consists of employees (office personnel, kitchen personnel and drivers) and volunteers (meal box preparation and drivers)	
Clients pay for their meals monthly and are billed at the end of each month	Payments are referred to as Contributions
They are running MS Office 2010	
I was introduced to 3 databases	
MOW-Oakland.accdb	Contains data for clients in Oakland which consists of client Information, meals ordered, meal delivery schedules, donations
MOW-Hayward.accdb Referred to as Central	Contains data for clients in Hayward, Castro Valley, San Leandro, San Lorenzo which consists of client Information, meals ordered, meal delivery schedules, donations
Volunteers.accdb	Contains Volunteer Master, Volunteer Availability and Volunteer Service Hours
Databases were developed by a “non- developer” who passed away a year ago and they have been getting by with no support ever since.	Mostly Macro driven. Menus are all driven by Microsoft generic “Switchboard” functionality which complicates menu modifications. No manually coded VBA modules which implies very little data integrity checks on forms or sophistication with regards to report selection. VBA modules that are present are imbedded in forms and are generated by Access in response to

	<p>button clicks and do not include “Option Explicit” which syntax checks the VBA Code to catch run time errors.</p> <p>Data entry forms do not have “Required” fields or data integrity checks to ensure clean data.</p> <p>Forms do not have a “Close” button requiring the user to click the “X” box to close them.</p> <p>Forms and reports requiring select criteria use a query to ask for a date range or volunteer id with no data validation. When that occurs, the form or report returns no data and the user does not realize they entered invalid data.</p> <p>I.E. Through Date could be less than From Date or even invalid. I.E. 2/29/2019.</p> <p>Forms and reports should use text boxes and dropdown lists for a cleaner and more robust user experience.</p>
All users use the same copy of the respective databases	
Databases are not split between front-end application code and back-end data	As a result, in order to make modifications to the databases, users must log off and the changes must be made to the live system after hours.
Databases were recently moved to a cloud service	Developer had remote access to the cloud account to make changes after hours
The Oakland database appears to be a clone of the Hayward database but with fewer menu options.	<p>The Oakland area was added at a later date (2012).</p> <p>There are no plans to merge the two databases primarily because the Client Id could be duplicated between the two.</p>
Initial Recommendations	<p>Split the application and data into separate files to enable ease of maintenance and implementation of upgrades.</p> <p>Add a Rev date to each database to track the latest release.</p> <p>Add “Option Explicit” to the current VBA modules.</p>
Future recommendations	<p>Research the data integrity errors and modify the respective data entry forms to trap invalid/missing entries as well as enforce required fields on forms.</p> <p>Possibly work with users to determine the extent of the data integrity issues and correct the affected rows.</p>

	Add text boxes for date ranges and dropdown list for clients and volunteers to assist in selection criteria.
There is no defined list of projects so no further action is required at this time.	Asked Rose and Annemarie to prepare a project list for each database and prioritize them as bug fixes, must have enhancements, nice to have enhancements.

Volunteers Database (Volunteers.accdb)

Statistics	<p>Tables = 17 Queries = 79 Forms = 10 Reports = 24 Macros = 12 Modules = 0</p>																																								
Primary Tables																																									
VOLUNTEERS	<p>Row Count = 600 Master file of volunteers Start Year ranges from 1946 (1) to 2048 (1) 44 with no start year</p> <table border="1"> <thead> <tr> <th>Start Year</th><th>Count</th></tr> </thead> <tbody> <tr><td></td><td>44</td></tr> <tr><td>1946</td><td>1</td></tr> <tr><td>1953</td><td>1</td></tr> <tr><td>1955</td><td>1</td></tr> <tr><td>1970</td><td>1</td></tr> <tr><td>1977</td><td>1</td></tr> <tr><td>1988</td><td>1</td></tr> <tr><td>2009</td><td>5</td></tr> <tr><td>2010</td><td>4</td></tr> <tr><td>2011</td><td>5</td></tr> <tr><td>2012</td><td>5</td></tr> <tr><td>2013</td><td>12</td></tr> <tr><td>2014</td><td>51</td></tr> <tr><td>2015</td><td>72</td></tr> <tr><td>2016</td><td>85</td></tr> <tr><td>2017</td><td>115</td></tr> <tr><td>2018</td><td>194</td></tr> <tr><td>2019</td><td>1</td></tr> <tr><td>2048</td><td>1</td></tr> </tbody> </table> <p>Active status based on column Active/Inactive Active = 149 Inactive = 451</p>	Start Year	Count		44	1946	1	1953	1	1955	1	1970	1	1977	1	1988	1	2009	5	2010	4	2011	5	2012	5	2013	12	2014	51	2015	72	2016	85	2017	115	2018	194	2019	1	2048	1
Start Year	Count																																								
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2015	72																																								
2016	85																																								
2017	115																																								
2018	194																																								
2019	1																																								
2048	1																																								
VOLUNTEER AVAILABILITY	<p>Row Count = 600 Contains Volunteer ID and a checkbox for each day of the week they are available</p>																																								
MONTHLY SERVICE UNITS	<p>Row Count = 9,966 Mileage and Total Hours by Volunteer Contains Volunteer Id, Name, Active Status, Year and Month Year should be 4 digits</p>																																								

	<table><tr><th>Year</th><th>Count</th></tr><tr><td>18</td><td>140</td></tr><tr><td>1966</td><td>135</td></tr><tr><td>2009</td><td>62</td></tr><tr><td>2010</td><td>265</td></tr><tr><td>2011</td><td>397</td></tr><tr><td>2012</td><td>410</td></tr><tr><td>2013</td><td>443</td></tr><tr><td>2014</td><td>730</td></tr><tr><td>2015</td><td>911</td></tr><tr><td>2016</td><td>1268</td></tr><tr><td>2017</td><td>2203</td></tr><tr><td>2018</td><td>2855</td></tr><tr><td>2019</td><td>147</td></tr></table> <p>-----</p> <p>Month should be 3-character month (I.E. Dec) Month = 201 – 289 rows all in 2018 Note: Mileage and Total hours = 0 for those</p> <p>Invalid month entries imply no data integrity checks during data entry and missing data on reports for a month.</p> <table><tr><th>Month</th><th>Count</th></tr><tr><td>201</td><td>289</td></tr><tr><td>apr</td><td>710</td></tr><tr><td>aug</td><td>884</td></tr><tr><td>dce</td><td>147</td></tr><tr><td>dec</td><td>850</td></tr><tr><td>fde</td><td>194</td></tr><tr><td>feb</td><td>654</td></tr><tr><td>jan</td><td>778</td></tr><tr><td>jul</td><td>919</td></tr><tr><td>jun</td><td>711</td></tr><tr><td>mar</td><td>707</td></tr><tr><td>mAY</td><td>665</td></tr><tr><td>nov</td><td>852</td></tr><tr><td>oct</td><td>876</td></tr><tr><td>sep</td><td>730</td></tr></table> <p>Volunteer Name and Status are carried in each row and do not match those in the VOLUNTEERS table causing reporting errors</p>	Year	Count	18	140	1966	135	2009	62	2010	265	2011	397	2012	410	2013	443	2014	730	2015	911	2016	1268	2017	2203	2018	2855	2019	147	Month	Count	201	289	apr	710	aug	884	dce	147	dec	850	fde	194	feb	654	jan	778	jul	919	jun	711	mar	707	mAY	665	nov	852	oct	876	sep	730
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dec	850																																																												
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feb	654																																																												
jan	778																																																												
jul	919																																																												
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sep	730																																																												
Reported Issues	Per Carrie																																																												

<p>"Enter Volunteers Hours and Mileage" form. Inactive employee is appearing in the list. In some cases, the volunteer name reflects the name before a name change in the VOLUNTEERS table.</p>	<p>Problem is due to the fact that Volunteer Name and Status are carried in the MONTHLY SERVICE UNITS table. Solution: While on-site I modified the underlying query to join MONTHLY SERVICE UNITS with VOLUNTEERS to get up-to-date name and status. Per Carrie, the form now shows the correct information.</p>
---	---

Oakland Database (MOW-Oakland.accdb)

Statistics	<p>Tables = 81 Queries = 388 Forms = 31 Reports = 82 Macros = 103 Modules = 0</p>
Primary Tables	
Clients-Personal	<p>Row count = 2,807 One row per client Client master table Contains Client Id, Status, Open Date, Start Date, Address, Senior code, Demographic information Inactive clients based on Inactive Date = 2,101 Active Clients based on no Inactive Date = 706 Many records missing demographic information (Age, Sex, Gender, etc.) but they may be inactive. Further analysis required.</p>
Clients-Meal Order Information	<p>Row count = 2,807 One row per client Contains Client Id, Route, Days of week, Main Dish, Alternate choices, Preferences</p>
Clients-Contacts	<p>Row count = 2,756 One row per client Contains Client Id and contact information</p>
Clients-Billing	<p>Row Count = 2,756 One row per client Contains Client Id, Bill at Senior Rate (Yes=7, No=2,749), Bill Type (C=5, D=2,615, I=136), Address Information, Credit Card information</p>
Clients-Assessment	<p>Row Count = 2,756 One Row per client Contains Client Id, Assessment Date, Next Assessment Date, Drivers Assessment Date, Lives Alone flag. Assessment Date empty = 496 rows One Assessment date of 8/28/8018 Id = 7401 - David Foecke Implies no data integrity checks on input form</p>
Observations	<p>There are 2,807 clients but there is missing information in support tables (2,756 rows) but those clients may be inactive.</p>
Reported Issues	None

Hayward Database (MOW-Hayward.accdb)

Statistics	Tables = 101 Queries = 459 Forms = 38 Reports = 106 Macros = 120 Modules = 0																								
Primary Tables																									
Clients-Personal	Row count = 4,857 One row per client Client master table Contains Client Id, Status, Open Date, Start Date, Address, Senior code, Demographic information Inactive clients based on Inactive Date = 4,218 Active Clients based on no Inactive Date = 639 Many records missing demographic information (Age, Sex, Gender, etc.) but they may be inactive. Further analysis required.																								
Clients-Meal Order Information	Row count = 4,857 One row per client Contains Client Id, Route, Days of week, Main Dish, Alternate choices, Preferences																								
Clients-Contacts	Row count = 4,827 One row per client Contains Client Id and contact information																								
Clients-Billing	Row Count = 4,827 One row per client Contains Client Id, Bill at Senior Rate (Yes=4, No=4,823), Bill Type (C=1, D=4,275, I=548, None=3), Address Information, Credit Card information																								
Clients-Assessment	Row Count = 4,827 One Row per client Contains Client Id, Assessment Date, Next Assessment Date, Drivers Assessment Date, Lives Alone flag. Assessment Date empty = 1,810 rows Future Assessment Dates <table><tr><th>Assessment Date</th><th>Inactive Date</th><th>First Name</th><th>Last Name</th></tr><tr><td>8/8/2019</td><td>9/19/2018</td><td>James</td><td>Rodrigues</td></tr><tr><td>5/2/3201</td><td>5/25/2012</td><td>James</td><td>Hoyt</td></tr><tr><td>3/30/6201</td><td>3/26/2014</td><td>Jing</td><td>Xiao</td></tr><tr><td>2/1/2201</td><td>2/13/2013</td><td>Jerley</td><td>Shrader</td></tr><tr><td>8/2/7201</td><td>9/12/2013</td><td>Alberto</td><td>Gonzalez</td></tr></table>	Assessment Date	Inactive Date	First Name	Last Name	8/8/2019	9/19/2018	James	Rodrigues	5/2/3201	5/25/2012	James	Hoyt	3/30/6201	3/26/2014	Jing	Xiao	2/1/2201	2/13/2013	Jerley	Shrader	8/2/7201	9/12/2013	Alberto	Gonzalez
Assessment Date	Inactive Date	First Name	Last Name																						
8/8/2019	9/19/2018	James	Rodrigues																						
5/2/3201	5/25/2012	James	Hoyt																						
3/30/6201	3/26/2014	Jing	Xiao																						
2/1/2201	2/13/2013	Jerley	Shrader																						
8/2/7201	9/12/2013	Alberto	Gonzalez																						

	<div>3/3/2201</div> <div>Elihu</div> <div>Takao</div>
	Implies no data integrity checks on input form
Observations	There are 4,847 clients but there is missing information in support tables (4,827 rows) but those clients may be inactive.
Reported Issues	Per Sharon
<p>Monthly printing of Client statements exceeds 600 pages.</p> <p>Prior to moving to the cloud, statements printed with no problems.</p> <p>Since moving to the cloud, printing fails (missing data on pages, missing pages)</p> <p>Sharon must review each statement to verify all data is present and determine which ones are missing altogether.</p> <p>She must then step through the print preview to locate the erroneous pages and reprint them individually.</p> <p>In order to minimize the printing effort, she prints 99 pages at a time. If she prints more than 99 pages at a time, the print function fails altogether.</p>	<p>Possible cause: The buffer in the printer cannot handle the volume when printing from the cloud. Although it worked OK prior to moving to the cloud.</p> <p>Possible solution: I showed Sharon how to save the report as a PDF to her desktop so she can print locally instead from the cloud. The next run won't take place until the end of December so I don't know if that solves the problem.</p> <p>Recommended enhancement: Add a page number at the bottom of each page to assist in reprinting the missing pages.</p>

2018 – Current – SOS Meals on Wheels, CA – Microsoft Access 365

This is an example of a MS Access reporting screen.

Additional Reports Rev 4/29/2020 Close

Special Requests Rose Development Data Integrity

☒ **Report By Language**

Primary Language X **City** X

Primary Language	Count	City	Count
>>Unknown	11	Castro Valley	67
Chinese	19	Hayward	364
English	631	San Leandro	211
Japanese	2	San Lorenzo	57
Mandarin	1		
Portugese	3		
Russian	1		
Spanish	29		
Tagalog	4		

☐ **Mom's Meals**

☐ **Route Counts For Clients**

☐ **Route Counts For Zip Codes**

2018 – Present – Gastineau Guiding, AK – Recreation – Microsoft Access 365

Purpose: Modifications to existing screens and reports, develop a dynamic report selection screen and providing ongoing support.

Parameters

Process Year
2020

☐ **Allocations by Ship Ordered by Cal Date**
Select date range and ship

☐ **Passenger Counts By Tour** ☐ Excel
Optionally Select Ship and Tour

☐ **Timing Notes and Offsets By Tour**

☐ **Timing Notes and Offsets By JobId**

☐ **Vehicle Usage Report By Vehicle**

☐ **Vehicle Usage Report By Timing Notes**

☐ **AdHoc Query**

Show in Query

Cruise Lines ☐ X

Captains ☐ X

Ships ☐ X

Tours ☐ X

Vehicles ☐ X

Other People ☐ X

Period

PriorWk
CurrWk
Today
Tomorrow
MTD
Q1
Q2
Q3
Q4
YTD
PriorYear
All

--- Select Date Range ---

Month Year

From Thru

☐ **Trail Use Report**
Select date range and optionally Trail(s)

Trails X

Admiralty Island/Shelter
Auke Bay
DIPAC-Adults
DIPAC-Child
Do not use - E Glacier/Nugget
East Glacier
Glacier Visitor Center
Herbert Glacier
Moraine Eco
Mt Roberts / Perseverance
Mt Roberts Loop

Other Work Id's X

Boat
Boat Training
Coach
Dock Rep
Driverg
Guide
Maintenance
Nature Center
Office
Photog
Scienceg
Shadow
ShadowCapt
Shuttle
Shuttle_B
Standby Guide

2019 - Present – Electronic, CA – Manufacturing – Microsoft Access 365

Purpose: Modifications to existing screens and reports, develop functions to dynamically format items and groups and providing on-going support.

ELECTROSONIC
Rev 2.4 12/19/2019
Project Type = Design

☒ Design
 ☐ Engineering
 Quit

MAIN PAGE Template for evaluation only
Set Up Project Profile
Set Up New Project
Wishlist/alert Questions
Archive Database
Setup Tutorial

Electrosonic Phone: 818.333.3600
 Current Rev: 2.2 Update Project Info
 Rev Date: 13-Dec-19 Add Revision

Project Layout

Zone

Uber Group

Data Entry

Equipment By Manufacturer

Equipment By Group

Forms

Manufacturers	IP Addresses
Model Details	Cable Data Entry
Equipment Details	Wire Number Entry
Junction Box Entry	Equipment Status
Circuit Entry	USH Documents

Equipment Reports

Equipment List - 8.5 x 11

Equipment List - 11 x 17

Facility Impact Reports

Equipment by Location - 11x17

Equipment by Location - Letter

Location Totals (No Equipment)

Racks 8.5 x 11

Racks Arch - C

Facility Impact - Weights

Junction Box and Fill Schedule - 11x17

JBOX- and Fill Schd. - ARCH C

AV Device Schedule - Arch C

Circuit Loads for Rack Elevation

Additional Reports Menu

FOR INTERNAL USE ONLY
ROM (Cost and Specifications)

Report Notes

Edit Report Notes

Excel Export

Cost/Sell Qty for Export

Export JBox Sch (11x17)

Export Cable Schedule

Note: JBX and Cable Schedule uses 'ES-Macros'

PDF AutoCAD Reports (C-Size)

Cable Schedule

Junction Box Schedule

Junction Box and Cable Schedule

Device Schedule

10/9/2019 Added bigger Cable List with calculated fields and USH style information: Made Cable Area an expression in respective reports

Contingency Markup	20%	Margin/Markup Cross-Reference
Install Margin	40%	
Big Ticket Install Margin	10%	

ROM Budget Total

Hardware COST Total:	\$62,200.00
Hardware SELL Total:	\$77,842.00
Contingency Total:	\$15,568.40
Installation Estimate Grand Total:	\$51,894.67
Project ROM Grand Total:	\$145,305.07

Ad/Alternate Total

Ad/Alt Hardware COST Total:	\$150.00
Ad/Alt Hardware SELL Total:	\$188.00
Ad/Alt Contingency Total:	\$37.60
Ad/Alt Installation Estimate Total:	\$125.33
Ad/Alt Total:	\$350.93

Suggested Spare Equipment Total

SSE Total:	\$10,940.00
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2005 – Present – Enteroptyx, TN – Medical Device Manufacturing – Microsoft Access 365, SQL Server 2016.

Purpose

Provide support, modernization and migration services to support the manufacturing of medical devices.

Two of the systems included in these samples are:

- 1) Device Master Records (DMR), images 1 and 2.
- 2) Control Identification Documents (CID), images 3 and 4.

Image 1

Demonstrates the DMR Search tool. The user has input “600” in the search field at the top, and all records containing “600” in the part code are listed. Part “600” has been selected and relevant, high-level information is displayed on the right.

Device Master Records Search Tool

Clear XL Print DMRs

Search Part: 600 Search Desc/CID: []

Part: 600 Sterility: G Description: SATALOFF MALLEUS PISTON 6.0 X 6.0 Last CID: 417-XXXX Rev No: CID 2275

Production Hold Pending CID(s) Finished Goods Labels PM

CIDs	Status	Prepared	Effective	Prepared By	Title
G 6307	Approved	4/22/2019	5/2/2019	Ireland, Patrick	OFFSET ALTO TOTAL
G 5727	Approved	1/8/2018	1/29/2018	Ireland, Patrick	OFFSET ALTO TOTAL
G 5629	Approved	10/16/2017	10/18/2017	Ireland, Patrick	OFFSET ALTO TOTAL
G 5197	Approved	10/24/2016	10/28/2016	Ireland, Patrick	OFFSET ALTO TOTAL
G 5000	Approved	6/17/2016	6/27/2016	Efird, Tyler	OFFSET ALTO TOTAL
G 4105	Approved	9/23/2014	11/13/2015	Ireland, Patrick	OFFSET ALTO TOTAL
G 3955	Approved	7/2/2014	7/3/2014	Grogan, Susan	OFFSET ALTO TOTAL
G 3382	Approved	7/25/2012	8/7/2012	Grogan, Susan	OFFSET ALTO TOTAL
G 3003	Approved	7/25/2011	7/28/2011	McCool, Elaine	OFFSET ALTO TOTAL

23

Assoc Docs	Type	Description	DocID	Start CID	Stop CID	Current CID
600	Engineering Mas		10527	4105		4657
600F	Drawing	Adj. Len Titanium Total	1246	4105		538

Label Headers	Description	Start CID	Effective	Stop CID	Effective	Product Code	UOM
English	OFFSET ALTO TOTAL	4105	11/13/2015			G-IMPLANTS	BOX
Chinese	OFFSET ALTO TOTAL	4105	11/13/2015			G-IMPLANTS	BOX
Turkish	OFFSET ALTO TOTAL	4105	11/13/2015			G-IMPLANTS	BOX

3

Labels by Placement	Label Report	Active Only	Qty	Height	Width	Start CID	Stop CID
Product Carton	BarCode GM31-BAR-GS1-128-LT-E	1	1	3		4105	
Sterile Barrier	LABL-GM22PP-STERILE	2	2	2		4105	

Part	Sterility	Description	Last CID	Drawing ID	Rev No
417-600	G	STERILE	SATALOFF MALLEUS PISTON 6.0 X 6.0	417-XXXX	CID 2275
421-600	G	STERILE	LIPPY BUCKET W/NOTCH .4 X 6.0	421-XXXX	CID 3362
421-600S	G	NON-STERILE	N TI Bucket Stapes Prosth .4 SC	421-XXXX	CID 3362
430-600	G	STERILE	GRACE BUCKET OFFSET .4 X 6.0	430-XXXX	CID 2886
430-600S	G	NON-STERILE	Offset Bucket0 .4mm SD X 6.0	430-XXXX	CID 2886
431-600	G	STERILE	MOD LIPPY BUCKET W/NOTCH	431-XXXX	CID 3316
436-600	G		GRACE FLPL PISTON	436-600F	
436-600F	G		FLUOROPLASTIC PISTON .4MM	436-600F	
436-600M	G		GRACE FLUOROPLASTIC PISTON		
436-600MF	G		Grace Fluoroplastic Piston w/o		
440-600	G	STERILE	ECLIPSE MALLEUS PISTON .4 X 6.0	440-XXXX	CID 3291
442-600	G	STERILE	ECLIPSE MALLEUS PISTON .6 X 6.0	440-XXXX	CID 3291
452-600	G	STERILE	GRACE PISTON .5 X 6.00MM	452-XXXX	CID 2626
454-600	G		GRACE MALLEUS PISTON.6MM	454-XXXX	CID 4323
464-600	G	STERILE	ECLIPSE PISTON .4 X 6.00MM	464-600	CID 3998
467-600	G	STERILE	ECLIPSE PISTON .5 X 6.00MM	467-XXXX	CID 4313
468-600	G	STERILE	ECLIPSE PISTON .6 X 6.00MM	468-XXXX	CID 2569
600	G	STERILE	OFFSET ALTO TOTAL	600F	538
600A	G	STERILE	OFFSET DUO ALTO TOTAL	600F	CID 538
600F	G	na	ADJ TITANIUM TOTAL PROSTHE	600F	CID 538
600-M1	G	STERILE	OFFSET ALTO TOTAL 15MM L	600-M1F	CID 1658
600-M1F	G	NON-STERILE	Offset ALTO Total, 15mm L	600-M1F	CID 1658
600-M2	G	STERILE	OFFSET ALTO TOTAL .56MM D	600-M2F	CID 1238
600-M2F	G	NON-STERILE	ALTO Modified, Small Foot	600-M2F	CID 1238
602-600	G	STERILE	PRECISE OWENS ASSURE TOT	602-XXXX	CID 3514
602-600F	G	NON-STERILE	Owens TI Total 0.2mm SD x 6.0	602-XXXX	CID 3514
700-600	G	STERILE	Precise OFFSET TOTAL 6.00MM	700-XXXX	CID 2377
700-600F	G	NON-STERILE	Precise TI Total 0.2mm SD x 6.0	700-XXXX	CID 2377
705-600	G	STERILE	Precise CENTERED TOTAL 6.00	705-XXXX	CID 5244
705-600F	G	NON-STERILE	Precise TI Total 0.2mm SD x 6.0	705-XXXX	CID 2377
720-600	G	STERILE	Precise HA LITE TOTAL 6.00MM	720-XXXX	CID 2104
720-600F	G	NON-STERILE	Precise HA LiteTotal0.2mm SD	720-XXXX	CID 2104
CO6000	G	NON-STERILE	Haberman Tot. Adj. Assmb.		
			OFFSET ALTO TOTAL		

54

Image 2

Demonstrates the detail form for part 600 after the user double-clicks the row on image 1. The primary use of this tool is control of labels.

PM - Product Maintenance

Find Doc Number: 600

Assembly Item: 600

Inv Descr (40 chars): OFFSET ALTO TOTAL

Pndg/Past: VMFG Part Data

UOM: BOX

Prod Code: G-IMPLANTS

Drawing ID: 600F

Rev Drawing ID: 538

Prod CID: 6307

View Device Master Record

View Part List

UNLOCK

Update VMFG

CID History

CIDs	DocID	CID	Effective	Document	Cause For Change	Description
1244	6307	5/2/2019	ALTO Total Prosthesis	To clarify manufacturers information.	Revise Chinese Label patient label.	
1244	5727	1/29/2018	ALTO Total Prosthesis	CFDA changed Grace code in China.	Revise Chinese label.	
1244	5623	10/19/2017	ALTO Total Prosthesis	Changing Notified Bodies from Intertek to BSI. Update labeling per attached mark-ups.		
1244	5197	10/28/2016	ALTO Total Prosthesis	The "z"s in the turkish labels were not showing up o Correct format box in turkish label form.		

Label Headers

Related Documents

Accounting

English

Chinese

Turkish

All

Fabricated

Purchased

Label Stock

Design Cntrl

Label Descr (40chars x 3)

Commodity Sort

Product Line

Sterility

Product Image Label 1

Production Hold

Copy This Label Header

Add New Language

Labels

Bar Code for Part 600

Placement History

Labels	Placement	Part	Label Report	Language	Sample	Start CID	Stop CID	DocID	Qty	Height	Width
New Label				English	X	6307		1244			
New Label				English	X	6307		1244			
Patient Record		C00061		English	X	5623		1244			
Product Carton		7207		English	X	5623		1244			
Product Carton		C01019	BarCode GM31-BAR-GS1-128-LT-EXP	English	X	5623		1244	1	1	3
Product Container		C00061		English	X	5623		1244			
Sterile Barrier		C00061		English	X	5623		1244			
Sterile Barrier		C00069	LABL-GM22PP-STERILE	English	X	4105		1244	2	2	2

CID History

BarCode GM31-BAR-GS1-128-LT-EXP 4105

Label Placement

Label PartID

Report Label Name

Qty Apply

1 Smpl

Note

Print Label Sheet

Print Label

Date Created

04/28/2015

Label Width: (4 " max)

3

Label Height: (6 " max)

1

Specified Printer

TestSATO

Default Printer

Accounting

Sample Label Image

(01) 00844505002059(10) 54321(17) 991230

Image 3

Demonstrates the CID Search tool. A similar search rationale is applied, again with high-level information on the right.

CID Data Control, Version 3.00

Company Filter: ☐ All ☒ Grace ☐ Eagle ☐ Empty

Date Range: ☐ Prepared ☒ Effective ☐ No Effective Date

Search CIDs: VerVal Not Complete

Search: 548 Filter: Pending From: Through: Filter:

CIDs	Status	Prepared	Effective	Prepared By	Title	DocID	DocNumber	CmpyDoc Type	Doc Title	Action	Changed By	
5485	Pending	7/7/2017		Bateman, Cody	Touma Tube 510-501F: Fix ID on Drawing	12905	TF014	G	Technical File	DragonFly Surgical Drill System	Create	Prescott, Tony
5484	Pending	7/6/2017			DragonFly - Technical File							
5483	Pending	6/28/2017		Guillermo, Alice	Update RIR037							
5482	Pending	6/28/2017		Prescott, Tony	IFU-Grace Instrument Reprocessing							
5481	Pending	6/28/2017		Goodhart, Matt	Creating TR17-032 for Eclipse Piston Investig							

5

☐ Not Completed

Target	Department	Assigned	Task
	Marketing		Review Pricing Impact.
	Marketing		Catalog Update
	Marketing		Sales Forecast
	Marketing		Advertising Literature
	Product Developn		Product Performance Testing
	Product Developn		DHF Review / Update
	Product Developn		Process Validation - overall
	Materials Manage		Remove/Quarantine Inventory

23

Image 4

Demonstrates the detail form and tabs for CID 5484.

Document Control - CID/ECN

Lookup 5484 CID = Control Identification = Document Creation and Revision History + C/P Actions Close

Control ID: 5484 Add CID Preview CID Status: Pending Effective Date HardCopy

☐ Check if Desn Ctl List Docs on This CID Current Location:

☒ Check to Use Help PopUps

Title: DragonFly - Technical File

Control ID Header Changes Instructions

Click to Toggle View

Document Changes Verification and Validation Activities

Verification / Validation Activities *If activity is not applicable, select record and delete.*

VVID	Target	Completed	Department	Assigned	Task/Activity	
1			Marketing		Review Pricing Impact.	<div style="text-align: right;"> Add Edit Del </div>
2			Marketing		Catalog Update	
3			Marketing		Sales Forecast	
4			Marketing		Advertising Literature	
5			Product Developme		Product Performance Testing	
6			Product Developme		DHF Review / Update	
7			Product Developme		Process Validation - overall	
8			Materials Managen		Remove/Quarantine Inventory	
9			Manufacturing		Fixtures create/update & cal	
11			Product developme		Hazard / Risk Analysis	
12			Regulatory Affairs		Regulatory Notification & Tech File	
14					Employee Training	
16			Product developme		Process Changes	
17			Materials Managen		Planning Review	
18			Materials Managen		Rework product	
19			Manufacturing		CNC Program Create/update	
20			Quality Assurance		Equipment IQ/OQ	

VerVal ID: 9 Department: Manufacturing Task/Activity: Fixtures create/update & cal

Target: Person Resp: Notes:

Completed: DocLink:

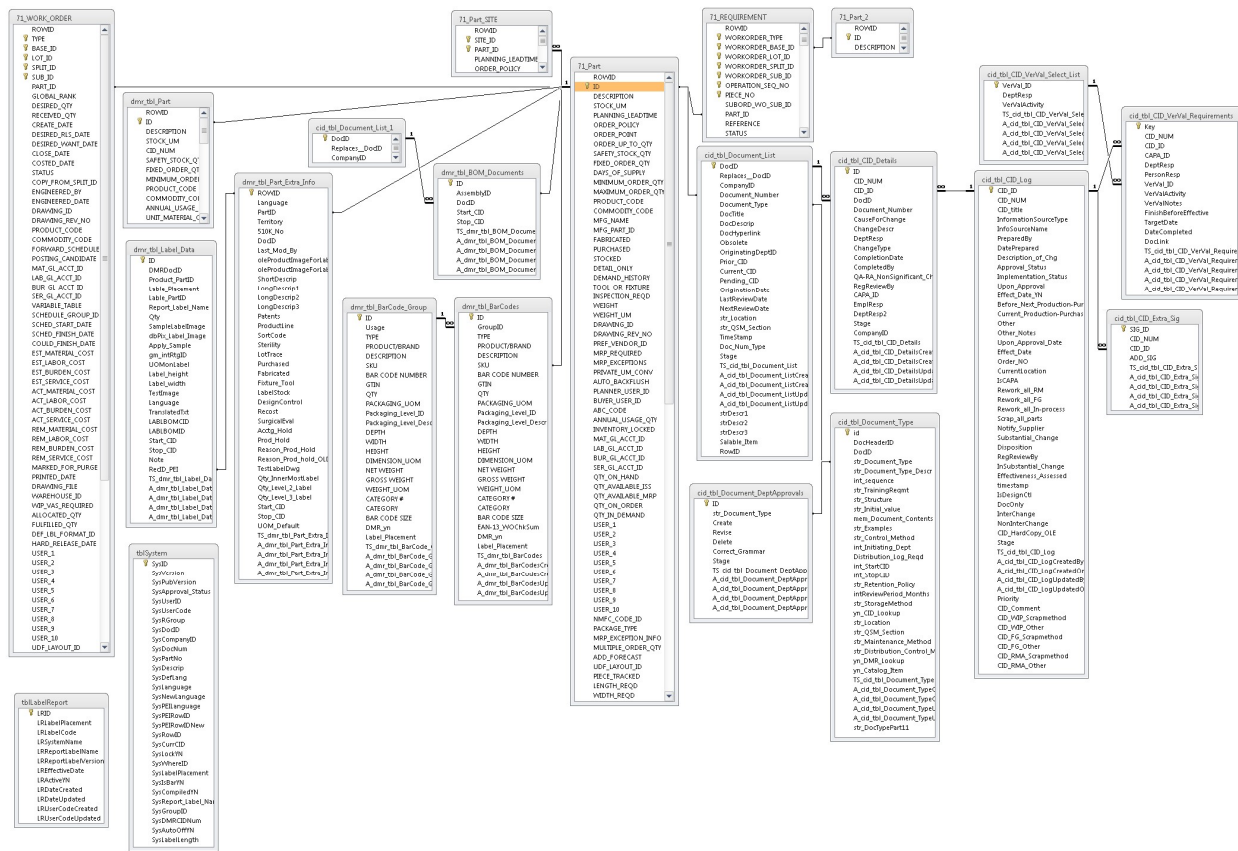
Finish Before Effectivity ☐

Save Cancel

Form# COP 42301-F2db CID# 4562

Image 5

Entity Relationship Diagram (ERD) – demonstrates the highly complex nature of the systems supported.



2002-2016 - Veteran Affairs, CA – Healthcare – Microsoft Access, SQL Server

Purpose:

Provide support, modernization and migration services to support the Veteran Affairs (VA) management of patient information and medical treatment. The samples provide a cursive demonstration of the Functional Measures (FM) utilized at the VA. The focus was on older patients who had major surgeries. The concept was to interview them at different points after the surgery and see how they were progressing which lead improved patient recovery by optimizing the process via continued improvement.

Simple tasks were documented which tied to setting up and delivering the interviews. The interviews themselves were collected following a built-in, rigidly documented questionnaire process.

One of the most powerful attributes of this tool ties to the freedom to create new questionnaires for any purpose.

Image 1

Main menu, including unfinished tasks.

Functional Measures Project
Version 1.29

Week

5/18/2020

5/24/2020

Unresolved Tasks	Patient	Task	Analyst
05/19/2020 10:00	Public, Jane	LETTER	Kiya
05/21/2020 10:00	Public, Jane	PHONE	Kiya

New

Patients

Tasks

Maintenance

Refresh

Reports

Quit

2

Lists patients who were recently imported after being filtered from the VA's Vista system. The "New" button is used to perform new imports. These listed patients are also qualified to receive the interview.

[illegible]

Image 3

Shows details for the patient. Communication methods, task history, interviews are controlled here.

Patient Demographics ID# 3 Close

Soc Sec # **123-45-6789** Gender **F** Opt Out ☐ By

First Name **Jane** Marital **S** Consent ☐

Last Name **Public** Interviewer **Kiya**

DOB **1/1/1970** **50** Sta3n **55**

Status **INTERVIEW**

☒ Only

Phone	Type	Prim	Active	
4154445555	CELL	Yes	Yes	<input type="button" value="Add"/>
4157776666	HOME	No	Yes	
4154445555	WORK	No	Yes	

Address(es)

100 Some St	123	SF	<input type="button" value="Add"/>
			<input type="button" value="Edit"/>
			<input type="button" value="Del"/>

Screen ☐ Admit ☐ Discharge ☐

Questionnaires

5/12/2020	P	FM	<input type="button" value="Del"/>
-----------	---	----	------------------------------------

☒ All

Tasks	Action	Scheduled	Completed	
PHONE	FOLLOWUP	05/21/2020 10:00		Reconfirm on phone <input type="button" value="Add"/>
LETTER	CONFIRMATION	05/19/2020 10:00		Send Letter to conf <input type="button" value="Edit"/>
				<input type="button" value="Del"/>
PHONE	FOLLOWUP	05/21/2020 10:00		2

Presets

Dx's Filter MDC

--

Encounters Filter 1

--

0

Image 4

When the user is stepping through the questionnaire, there are two main types of questions. Image 4 demonstrates a message to be read to the patient.

Questionnaire

Interviewee: **Public, Jane Last 4: 6789**

Date: 5/12/2020

Start Time: 15:31

End Time:

Interviewer: , Tobé

Include Skips/Done ☐

Questions	Answer	Date	Page
C1	Would you like to take part in this study?	YES	5/12/2020 1
C2	Do you give permission to be audio-recorded while taking part in the study?	YES	5/12/2020 6
CV	Before we start the survey, I need to make sure that I explain the study to you.		5/12/2020 8
CV01	[Begin asking questions below. If R answers any question, please click 'Next' to continue.]		5/12/2020 9
1	Based on what we just talked about, can you tell me why you want to take part in this study?	YES	5/12/2020 10
2	What will happen if you take part in this study? What will you be asked to do?	NO	5/12/2020 11
3	What are the risks of being in the study?	YES	5/12/2020 12
4	What are the benefits of being in this study?	NO	5/12/2020 13
5	Can you stop being in this study at any time?	YES	5/12/2020 14
6	What should you do if you have questions about the study?	YES	5/12/2020 15
CV02	I am so sorry but only patients who can correctly tell us what this study is about can be in the study. Thank you so much for taking the time to hear about the study anyway. Have a nice day.		5/12/2020 16
M0	We are done with the first part of the interview. You are now going to answer a few more questions about your health.		5/12/2020 17
M01	Now I would like to ask you a few questions about the difficulties you have with your health.		5/12/2020 18
1a	Because of a health or memory problem, do you have any difficulty with your daily life?		5/12/2020 19
1b	Does anyone ever help you bathe?		5/12/2020 20
2a	Because of a health or memory problem, do you have any difficulty with your daily life?		5/12/2020 21
2b	Does anyone ever help you dress?		5/12/2020 22
3a	(Because of a health or memory problem, do you have any difficulty with your daily life?)		5/12/2020 23
3b	Does anyone ever help you use the toilet?		5/12/2020 24
4a	(Because of a health or memory problem, do you have any difficulty with your daily life?)		5/12/2020 25
4b	Does anyone ever help you get in or out of bed or a chair?		5/12/2020 26
5a	(Because of a health or memory problem, do you have any difficulty with your daily life?)		5/12/2020 27
5b	Does anyone ever help you eat?		5/12/2020 28

Image 5

Demonstrates a question with a multiple-choice answer. Of course, there can be numeric answers, simple text answers, and more.

Questionnaire

Interviewee: **Public, Jane Last 4: 6789** Close

Date: 5/12/2020 Complete?

Start Time: 15:31 Set

End Time: Set

Interviewer: , Tob6

Include Skips/Done ☐

Questions	Answer
C1 Would you like to take part in this study?	YES 5/12/2020 136
C2 Do you give permission to be audio-recorded while taking part in the study?	YES 5/12/2020 141
CV Before we start the survey, I need to make sure that I explain the study to you.	5/12/2020 143
CV01 [Begin asking questions below. If R answers any question, please click on the question number.]	5/12/2020 144
1 Based on what we just talked about, can you tell me why you are taking part in this study?	YES 5/12/2020 145
2 What will happen if you take part in this study? What will you be asked to do?	NO 5/12/2020 146
3 What are the risks of being in the study?	YES 5/12/2020 147
4 What are the benefits of being in this study?	NO 5/12/2020 148
5 Can you stop being in this study at any time?	YES 5/12/2020 149
6 What should you do if you have questions about the study?	YES 5/12/2020 150
CV02 I am so sorry but only patients who can correctly tell us the answers to these questions can take part in the study.	5/12/2020 151
M0 We are done with the first part of the interview. You are now going to answer a few more questions about the study.	5/12/2020 152
M01 Now I would like to ask you a few questions about the study.	5/12/2020 153
1a Because of a health or memory problem, do you have any difficulty with bathing or showering?	5/12/2020 154
1b Does anyone ever help you bathe?	5/12/2020 155
2a Because of a health or memory problem, do you have any difficulty with dressing?	5/12/2020 156
2b Does anyone ever help you dress?	5/12/2020 157
3a (Because of a health or memory problem, do you have any difficulty with using the toilet?)	5/12/2020 158
3b Does anyone ever help you use the toilet?	5/12/2020 159
4a (Because of a health or memory problem, do you have any difficulty with getting in or out of bed or a chair?)	5/12/2020 160
4b Does anyone ever help you get in or out of bed or a chair?	5/12/2020 161
5a (Because of a health or memory problem, do you have any difficulty with eating?)	5/12/2020 162
5b Does anyone ever help you eat?	5/12/2020 163

Because of a health or memory problem, do you have any difficulty with bathing or showering?

Answer Save

NO
YES
CAN'T DO
DON'T DO
DK
RF

Image 6

Shows the Maintenance tool which is available to users who have the appropriate security clearance. The users are controlled on this form. Critical drop-down lists are controlled here. Most import, the details of the questionnaire are controlled here. Note those details include skip-control, which will force the tool to jump to a specific question depending on the interviewee's answer(s) support the skip.

User Management

User	Role	Level	Active
Tob6	DBA	3	Act
Fung, Kathy	SAS	1	Act
Hendrickson, Roberto	DBA	1	Act
Jacob, Riya	RA	1	Act
Komaiko, Kiya	MGR	1	Act

Presets

List Type	Item	Value	Seq
OptOut	Called back refusing	0	2
OptOut	No response - assent to contact	0	4
OptOut	N/A	0	6
OptOut	IC - Do Not Contact	0	7
OptOut	Ineligible	0	8

Question Groups

Question Groups	Parent
PHQXX	FMPre
FM01	
FM02	
FM02B	

Questions

Number	Type	Text
0	M0	Msg
1	M1	List
2	S6.1	List
4	S6.1a	Text
5	S6.1b	Text
7	S6.2	List
8	S6.2a	Msg
9	S6.2b	Msg
10	S6.2c	Text
11	S6.2d	Text
12	S6.2d	Text
13	S6.3	Text
14	S6.4	Text
15	S6.5	Text
16	S6.6	Text

Question Editor

Type: List List: QUESLIST_DKOther Multi-select? ☐

Question/Msg: When would be a good time to call back?

Number: 2 Label: S6.1 End: ☐ Active: ☒

Skip If: OTHER S6.1a

Skip To: S6.1a : Okay. I will try calling back another day.

Online Samples

Client Writeups: <https://www.help4access.com/clients/>

Online Videos and Articles: <https://www.help4access.com/library/>

YouTube Videos: <https://www.youtube.com/Help4access>

END OF DOCUMENT