



Forecast Projects Database

User Manual

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For on-going support, e-mail: LogbookSupport@oshpd.state.ca.us

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The Forecast Database

The Forecast database was developed to more accurately track upcoming projects, and help the office to predict future revenue. The Forecast database stores dates for when stages of a project are expected to come into the office and also stores the dates that those stages were actually received.

The Forecast database is a Microsoft Access database application (front end) that is linked to a table on the SQL Server (backend). The name of the table on the server is dbo.ForecastProj. This enables users in multiple offices to record and edit data, and store it in one central location so that everyone within the office has access to the same information.

Health Facility Review Supervisors (Sup HFR) and Regional Compliance Officers (RCO) will be responsible for entering new upcoming projects into the database and updating existing forecasted projects on a monthly basis, or sooner as deemed appropriate by the Deputy Director. The Administrative Services Unit (ASU) will send out a report quarterly to the Sup HFRs and RCOs asking them to update active forecasted projects. This will ensure that projects that have come into the office are no longer being reported as future projects. At this time, there is no automated functionality that will update the Forecast database when logbook data is entered for a forecasted project.

The following pages will provide detailed instructions on how to add new records to the database, edit existing records, and print the forecasted projects reports.

Opening the Database

Each office will have a copy of the Microsoft Access application file on their W:\ drive. It can be found at W:\Logbook\Logs\Forecast.mde.

To open the database, browse to the location above and double-click on the file. Once you have opened the file, you will be prompted to enter a password as seen below.

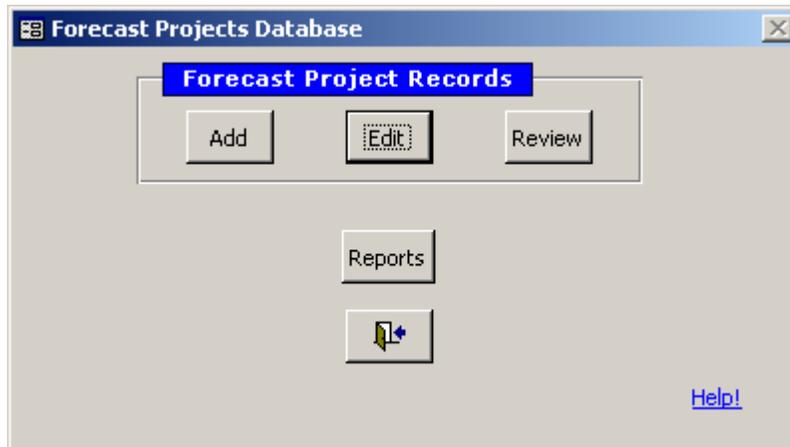


The password for the database will be provided in an e-mail from Logbook Support, following your training.

Once you have entered the password, click OK to access the database.

Forecast Database Start

Once you have opened the database, you will see the following form; this will be referred to as the “main form”:



The form has five buttons, each of which performs a specific function.

The “Forecast Project Records” group contains three buttons that can be used to access the database records. They are Add, Edit, and Review.

The Add button allows you to add new forecasted projects to the database. To Add a forecasted project, click on this button.

The Edit button allows you to make changes to forecasted project records that have already been entered in the database. To edit any existing project record, click this button.

The Review button allows you to open and review existing database records safely without the risk of changing any data. To review existing project records, click this button.

The fourth button on this form is a Reports button. This button opens up a new form that will allow you to access the database’s reports that detail the office’s projected revenue.

The last button on the form has a picture of an open door with an arrow pointing to it. This button will exit the database and close Microsoft Access for you.

There is also a hyperlink on the page that will allow you to send an e-mail to the database administrator if you need assistance with the database or need to request a modification to the database. Click on the word “Help!” to access the hyperlink.

Working with the Forecast records

In this section, we will cover Adding, Editing, and Reviewing the database records, and the various business rules that are enforced while doing so.

Adding Forecast Records

Click the Add button on the main form.

Adding Search:

You will then see the form below to search the Logbook database for an existing facility. Please enter any part of the facility name for which you intend to enter a record.



The image shows a standard Windows-style dialog box titled "Enter Parameter Value". The dialog contains a text input field with the label "Enter Facility Name to Search for:" above it. Below the input field are two buttons: "OK" and "Cancel".

Even if you think the facility is not in our database, you will be forced to search for it in the database first.

Click on OK to begin the search.

The search result will be returned in the Facility-Select form as shown below:

Select Facility:	Facno	Name	Address	City	Zip	Cty	Status
	10052	Sutter Delta Medical Center	3901 Lone Tree Way	Antioch	94509	07	OPEN
	10494	Sutter Auburn Faith Hospital	11815 Education Street	Auburn	95603	31	OPEN
	10625	Sutter General Hospital	2801 L Street	Sacramento	95816	34	OPEN
	10628	Sutter Memorial Hospital	5151 F Street	Sacramento	95819	34	OPEN
	10757	Sutter Tracy Community Hospital	1420 North Tracy Blvd.	Tracy	95376	39	OPEN
	11034	Sutter Medical Center of Santa Rosa	3325 Chanate Road	Santa Rosa	95404	49	OPEN
	11072	Sutter Warrack Hospital	2449 Summerfield Road	Santa Rosa	95405	49	OPEN
	17700	Sutter Roseville Medical Center	One Medical Plaza	Roseville	95661	31	OPEN
	17725	Sutter Davis Hospital	2000 Sutter Place	Davis	95616	57	OPEN
	17490	Sutter Amador Hospital	200 Mission Blvd.	Jackson	95642	03	OPEN
	22785	Sutter Oaks Nursing Center - Carmichael	3630 Mission Avenue	Carmichael	95608	34	OPEN
	20578	Sutter Oaks Nursing Center - Arden	3400 Alta Arden Expressway	Sacramento	95825	34	OPEN
	20579	Sutter Oaks Alzheimer Center - Sacramento	500 Jessie Avenue	Sacramento	95838	34	OPEN
	20609	Sutter Oaks Nursing Center - Midtown	2600 L Street	Sacramento	95816	34	OPEN
	12525	Sutter Solano Medical Center	300 Hospital Dr.	Vallejo	94590	48	OPEN
	12784	Sutter Coast Hospital	800 East Washington Blvd.	Crescent City	95531	08	OPEN
	13901	Sutter Maternity and Surgery Center of Santa Cruz	2900 Chanticleer Avenue	Santa Cruz	95065	44	OPEN
	14345	Sutter Lakeside Hospital	5176 Hill Road East	Lakeport	95453	17	OPEN
	15944	Sutter Center for Psychiatry	7700 Folsom Blvd.	Sacramento	95826	34	OPEN

Buttons: Cancel, Search Again, Not in List, Select

If the Select Facility box is empty, the search has not found any records based on what you entered.

The form will display all of the OPEN or PROPOSED facilities that matched your search criteria. You now have several options to choose from.

- 1.) You can Cancel adding a record at this time by clicking the Cancel button. Once you click Cancel, the form will close and you will be returned to the main form.
- 2.) If you do not see the facility you are looking for in the list provided you can click Search Again to modify your search criteria. This will close this form and ask you to enter your search criteria again.
- 3.) If you have done multiple searches and still cannot find the facility in the database, you can click the Not in List button. This will allow you to continue entering your forecast project without selecting an existing facility from our database.
- 4.) You can select a facility by first, clicking on the facility from the Select Facility box, then clicking the Select button.

To minimize duplicate entries, if you select a facility that already has a record in the database, you will get a warning that you may be attempting to enter a duplicate record. Please search the database to ensure that you are creating a unique record.

Creating the Record

You should now see one of two versions of the following Forecast form. If you selected Not in List, the form will have the Date Entered completed and locked, the Facno field grayed out, and the rest of the fields blank and ready to accept information. If you selected a facility from the list, that facility's information will be entered on the form and cannot be changed. The latter version is displayed on the following page:

Forecast Records

* Required Field *Last Updated*

Date Entered Facno Facility Name * County Region

Proj Num Sub Scope Construction Cost *

Project Details

M i l e s t o n e D a t e s

Expected Dates			
Date Expected *	Geotech	Preliminary	Final
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Received Dates			
Logbook	Geotech	Preliminary	Final
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cancelled			
<i>(Not Coming In)</i>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Memo

Close Form

Required fields are indicated by a red asterisk (*).

You may now complete the record by filling out the fields on the form. Below is a description of each field.

- * Last Updated: Date and time the record was last edited.
- * Region: The region that will be performing the review of the project.
- * Proj Num: The project number for the project, once it has been entered in Logbook.
- * Sub: The sub number for the project, not county number. (defaults to 0)
- * Scope: The scope of the forecasted project.
- * Construction Cost: (Required) The dollar cost of the project excluding equipment costs.
- * Project Details: Any project specific details you wish to record.
- * Milestone Dates:
 - o Expected Dates

- Date Expected: (Required) This is the date the project is expected to be received by the office. This date will not put the record on the Forecasted Revenue report; only the Geotech, Preliminary, and Final expected dates would add the project to the forecasted revenue reports. This date can only be changed while you are creating the record.
- Geotech: The date the Geotechnical report is expected in the office.
- Preliminary: The date the Preliminary review is expected in the office.
- Final: The date the final plans are expected to be received by the office. (Defaults to 1 year from the Preliminary date)
- Received Dates
 - Logbook: The date the project was entered into the Project Tracking system. If there is a date in this field, one is also required in the project number field.
 - Geotech, Preliminary, and Final: Similar to the descriptions above except these fields record the dates these reviews are entered into the Project tracking system. Once dates are entered in these fields, the associated fees are removed from the forecasted revenue reports because the fees are no longer in the future.
- Cancelled: These check boxes allow you to indicate that a forecasted review from above will not be coming into the office. A check in these boxes also removes the associated fees from the forecasted revenue reports.
- * Memo: This field is to record any memo you would like about the project up to 1000 characters.

Once you have completed entering information for the record you can do one of 4 things.

- 1.) Save, saves the record to the database and keeps the form open.
- 2.) Save +New, saves the record and returns you to the search box to search for a new facility name.
- 3.) Cancel, cancels any changes you have made to the record and leaves the form open.
- 4.) Close Form, closes the form returning you to the main form.

Editing Existing Records

Click the Edit button on the main form.

This will load the Forecast form and select the first record in the database. To find the specific record you are looking for, click in any field you would like to search, and then click the button with the little binoculars on it.

Once you find the record you would like to edit, close the search box and make your changes as needed.

The only fields you will not be able to edit are the Date Entered, Facility Number, Facility Name, County, and Date Expected fields. All other fields can be edited following the rules as outlined in the field descriptions in the adding a record section above.

Reviewing Records

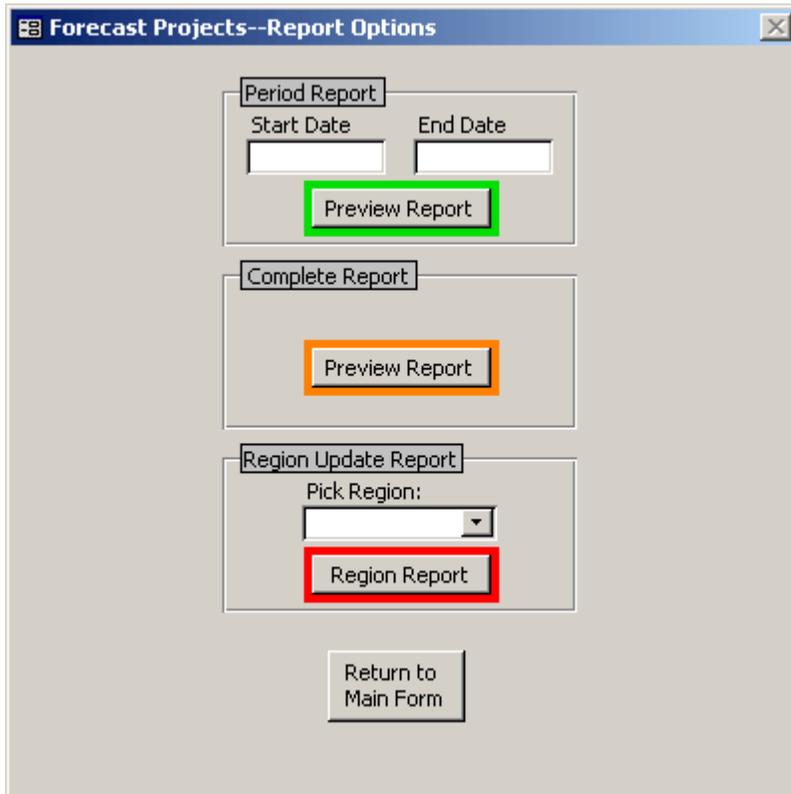
Click on the Review button on the main form.

This will load the Forecast form and select the first record in the database. When you click the review button, all record information is protected from editing. You can only search the records and review the information in them.

Reports

To access the reports, click the Reports button on the main form.

This will load the reports form as shown below:



You have can choose from one of **three report options**.

The first report option is a Period Report that will print forecasted revenue for a specific time period. To view the Period Report, fill in a Start Date and an End Date for the report, and then click Preview Report. This report retrieves all projects with an expected date within the time frame specified, regardless of any received dates or cancelled indicator.

The second report option is for the complete forecasted revenue report that will print all forecasted revenue that is entered into the database.

To view this report, simply click on the Preview Report button. This report retrieves all records with one or more expected dates from today forward where there is no received date or cancelled indicator.

A sample of the report is attached on the following page.

The third report is a Region specific report. To view Region report, first, select a region from the drop-down list, and then click Preview Report. This report will show all forecasted projects for that region that need to be updated. Completed projects (projects that have a received date or a cancelled check for each review type where there is an expected date) will not show up on this list.

***Facilities Development Division
Future Project Estimated Construction and Revenue***

<i>FY</i>	<i>Est. Construction Cost</i>
03/04	\$1,368,625,262.00
04/05	\$446,000,000.00

<i>Facility Name</i>	<i>Project Scope</i>	<i>Region</i>	<i>Est. Construction Cost</i>	<i>Fee</i>
<i>FY 03/04</i>			<i>Total Fees for this FY: \$6,107,732.64</i>	
University of California Davis Medical Center	Surgery & Emergency Pavilion (Preliminary)	NOR	\$150,000,000.00	\$246,000.00
<i>October 2003 (1 project)</i>			<i>Total Revenue:</i>	<i>\$246,000.00</i>
Sutter General Hospital	(Preliminary)	NOR	\$186,000,000.00	\$305,040.00
Kaiser Foundation Hosp-Rehabilitation Ctr Vallejo	Replacement Tower (Preliminary)	NOR	\$110,000,000.00	\$180,400.00
Kaiser Foundation Hosp-Rehabilitation Ctr Vallejo	New Central Plant (Preliminary)	NOR	\$14,000,000.00	\$22,960.00
<i>November 2003 (3 projects)</i>			<i>Total Revenue:</i>	<i>\$508,400.00</i>
Sutter General Hospital	(Gedtech)	NOR	\$186,000,000.00	\$0.00
<i>January 2004 (1 project)</i>			<i>Total Revenue:</i>	<i>\$0.00</i>
Catholic Healthcare West	Spanos Heart Center Master Plan (Preliminary)		\$183,000,000.00	\$295,120.00
Sutter General Hospital	Women and Children Addition (Preliminary)	NOR	\$107,276,000.00	\$175,932.64
Glendale Adventist Medical Center - Wilson Terrace	New Acute Care Tower Project (Preliminary)	NLA	\$25,000,000.00	\$41,000.00
<i>April 2004 (3 projects)</i>			<i>Total Revenue:</i>	<i>\$512,052.64</i>
Kaiser Foundation Hospital - Modesto Med Center	New Hospital (Final)	CEN	\$103,000,000.00	\$1,520,280.00
Kaiser Foundation Hospital-Sand Canyon Med Cente	New Hospital (Final)	SLA	\$98,000,000.00	\$1,446,480.00
Kaiser Foundation Hospital - Antioch Med Center	New Hospital (Final)	CEN	\$88,000,000.00	\$1,298,880.00
Kaiser Foundation Hospital - Antioch Med Center	Central Plant (Final)	CEN	\$15,000,000.00	\$221,400.00
Kaiser Foundation Hospital-Sand Canyon Med Cente	Central Plant (Final)	SLA	\$13,000,000.00	\$191,880.00
Forest Hill Manor	New 4 Story Building w/basement parking (Final)	COA	\$11,000,000.00	\$162,360.00
<i>June 2004 (6 projects)</i>			<i>Total Revenue:</i>	<i>\$4,841,280.00</i>