Developing Data Management System for Project

1. Review logframe, note the objectives and any statistics that are used in the logframe.
   a. Record the objectives, activities and statistics in a chart to track the data needs and linkages
2. Develop list of data requirements for project
   a. Consider the desired outcomes and possible types of information
   b. Consider what type of data the field/project can collect
      ii. If possible, use the easiest level of data to collect for the project team, as they are more likely to collect it then in a timely manner
      iii. Always, default to using the data the logframe said will collect, as that is part of the project financing contract
      iv. Always consider how you can sustain/keep up the data collection, if it isn't sustainable then generally best to not collect it
         1. (unless used for very specific purpose and you can sustain it for the short time period needed for that purpose, such as a trial project to prove need)
   b. Enter data to be collected in your data management chart with the objectives, activities.
      i. This allows you to track what you have done for each project over time
         1. (very easy to confuse projects and mixup links, if in a chart you, or the project manager, can go back and figure out what was done and why)
   c. Remember, computer can figure out the percentages, totals, etc, so don't bother making your field project track those numbers.
      i. However, you do need to track those data points in your chart so you know you have all the information coming in from field to the project to be able to do the math to make those 'calculated fields'
      ii. List the calculated fields in your chart
         1. this will let you double check your data making sure you have all the data coming in you need to create the 'calculated fields', and lets you link the data to the objectives of the program
   d. Blank file I use for this chart is in file ProjectDataPlanBlank.doc
2. Develop a chart of all data fields needed
   a. Chart should include
      i. data field name,
      ii. data field definition,
      iii. any criteria for field in program to be used for data entry (eg. Cell size for EpiInfo),
      iv. any criteria for field in program to used for data analysis (eg. Categorical data),

     v. a column for notations about merging or breaking data field up (this is for future needs), and

     vi. a general comments column

  b. Blank that I use is saved in file DataBaseNotesBlank.doc

  c. Easiest way is to copy the column from ProjectDataPlan file that is titled Activities of Objective to the column in DataBaseNotes file titled Field Definition/Description.

    i. (if using my charts)

  d. then complete the field name and other appropriate columns

    i. if going from LogFrame to data collection, other fields to complete

      1. any criteria for field in program to be used for data entry (eg. Cell size for EpiInfo),

      2. any criteria for field in program to used for data analysis (eg. Categorical data),

      3. others typically used if going from data collection instrument to

3. Develop your Excel worksheet/Access Database or Project/EpiInfo Project to hold your data

  a. Easiest way if using my charts, for Excel copy the column Field Name from the DataBaseNotes file to top left cell

    i. Then move by cut and paste to putting the field names in the top row

    ii. This cut and paste helps with making sure field names stay same through all the charts

  b. Double check field names by matching data fields to objectives and measures of the LogFrame and ProjectDataPlan file

4. Develop data canvasse

  a. Matching field names from spreadsheet to data blanks on form

  b. Double check by matching to LogFrame and ProjectDataPlan file to make sure all data blanks are matched to Fields required and data needs from the LogFrame

    i. Also double check all fields and LogFrame measures are on the data canvasse as a data blank

  c. Organize data canvasse so that categories of data are logically placed on canvasse

    i. The more organized the data canvasse is, the easier for your field personnel to complete the report, the more likely you are to get good data on-time from the field.

    ii. Review the data canvasse to make sure there are no duplicate fields

      1. (if there are, go back and check ProjectDataPlan and DataBaseNotes and delete and change as needed to match)

  d. last double check

    i. now compare newly organized data canvasse to the Excel spreadsheet/Access form for Data Entry/EpiInfo Make View, putting the computer data entry in order of the data canvasse

      1. makes it easier for you enter data fast and without errors

       ii. start a worksheet in Excel workbook called 'tempholding' put any of your calculated fields here with notes to yourself about how to calculate the field using the field names, etc

5. Enter data from Data Canvasses sent by the field project
6. Develop basic set of charts and analyses used for each report
   a. Don't forget to title the charts and the series used in the charts so you and your readers know what the chart is about
   b. Can use data labels by writing out the labels in a column and linking that as the labels series in the series page of the chart maker.
   c. Can also just type each label name in independently
   d. Save after each set of labels added to worksheet
   e. SAVE AFTER EACH chart is made
      i. Or excel will often stop working if go on to next chart before saving and you will loose the chart you just made
   f. Copy data you are working on from first worksheet of Excel spreadsheet to a second worksheet titled TempHolding
      i. This allows you not to accidently overwrite data
      ii. Also allows you to link Excel chart (by paste special) to the Word Document that holds the report, and by updating the data in the TempHolding Worksheet the charts will up date in the Word document report.
         1. BE SURE TO SAVE each version of the report (each monthly or yearly report is a version) to a different name
            a. I generally use file naming system such as
            b. WamaSimameniAnRep0709 (project, type of report, date)
         2. If you don't do this you will overwrite your previous months report and if you need a copy of that report, it won't exist
7. Develop basic report(s) for project
   a. Using copy and paste or paste special put your charts from Excel into Word document
   b. Put headers in place for narrative portion of report that you will have to write each report separately
   c. Format by report requirements
   d. Save a blank (linked) version of this report
      i. So you have if available to work from with all the presets ready for you – makes for faster report writing in the long run
   e. Develop a system for naming your reports and filing them on the computer
   f. Always have a backup copy on CD or jumpdrive of all files linked to project
      i. I personally use lots of folders in folders, just like I would in a file cabinet.
         1. a folder for the project
            a. in that folder a folder for blank forms, reports
            b. a folder for notes about project

          c.   a folder of completed reports for each type of report
               routinely done for project

Good luck.

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