Instructions for Using the Annual *Plan of Work (POW) TIMELINE BUILDER*
January – December, 2009

Overview

This year you will again develop your Annual Implementation Plan Timeline using Microsoft ACCESS. Each line in the POW Timeline Builder 2009 (PTB9) table represents a particular Action or Activity and related information. You may enter the actions/activities in any order that you desire. However, the Annual Implementation Plan Timeline should be presented for approval by month. Each month will be printed on a separate page with the Actions/Activities sorted by Team/Emphasis Area.

Downloading the PTB file to Your Computer

You must download the ptb9.mdb file from the website – http://intranet.okstate.edu/par/ptb. You must save the file to your computer. It is important to remember the location of the file and the filename once it has been downloaded. You are advised to create a PTB2009 subdirectory (folder) for your planning documents prior to downloading the PTB9 file from the web.

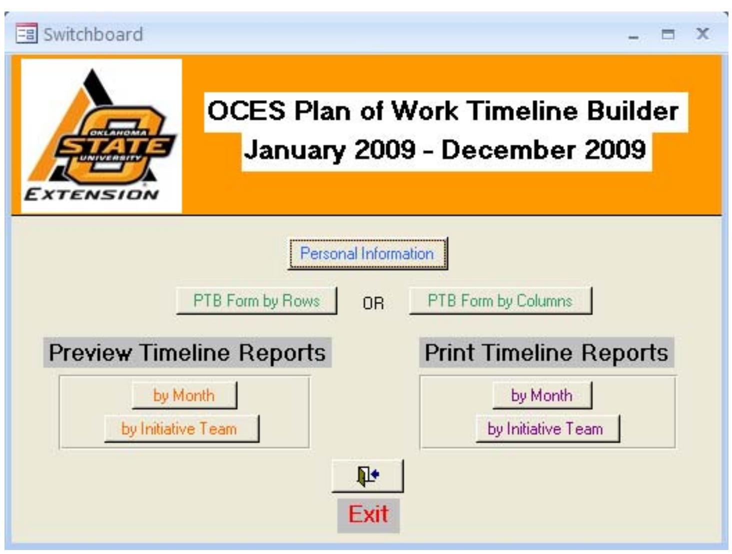
To download the PTB file, click on the link labeled "Plan of Work Timeline Builder" (Access version). **Firefox or Netscape users:** choose "Save it to disk" then click the "OK" button. **Internet Explorer** users: you should see a box which may give you a warning that "This type of file could harm your computer if it contains malicious code" which is a reasonable warning. Click on the "Save" button.

Choose the 2009 subdirectory folder (or whatever you called it) to store the file. After you choose the folder, change the filename from "ptb9" to something you can remember and has meaning to your District Office. We suggest your name (first and last). Do not modify or change the "Save as type" as it must keep a .mdb extension. Once you've chosen the folder name and modified the filename, click the "Save" button. This will download the file from the web, place it into the folder you've selected, and name it the filename you've entered.

Opening Your PTB File

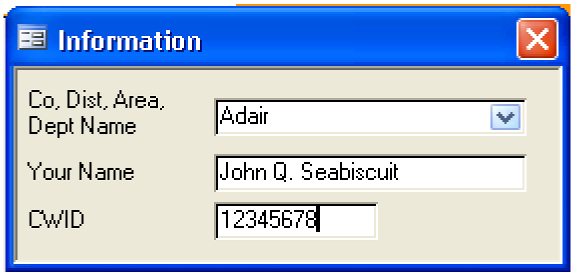
Open the PTB9 database file (ptb9_*yourname*.mdb; or whatever you named it) by double-clicking on the file. If you use Office 2007 you should notice the security alert. Choose “Enable this content” and click the OK button.

The PTB Menu Screen should appear:



Personal Information

Before you begin entering your PTB information into the database, you must enter your "Personal Information". Click on the button for "Personal Information" and enter the associated information (location, name, CWID).

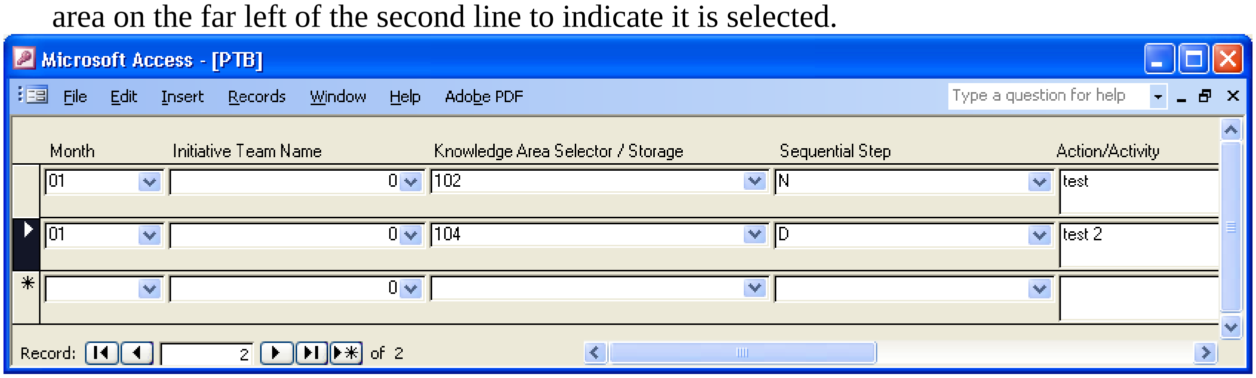


It is critical that you replace the default personal data with your information (geographic location, name, and CWID). This information is used in the "Preview" and "Print" reporting section. Once you have entered your personal information, click on the X in the upper right hand corner of the "Information" dialog box to exit the "Information" box and return to the main Menu Screen. Your personal data will be saved, you only need to enter it once.

PTB Information

To enter information into the PTB database, click on either the button labeled "PTB Form by Rows" or the button labeled "PTB Form by Columns". Both of these forms will allow you to view, modify, and enter data. However, they present the data in different formats. You can choose to use whichever form is most comfortable.

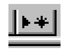
- "**PTB Form by Rows**" displays data in a "datasheet" view where several records are seen at one time. To move between rows of data, use the ↑, and ↓ keys (or <Page Up> and <Page Down> to advance to next/previous pages of records. This is the table where you will enter your activity/action information. The horizontal scroll bar, which is at the bottom of the screen when viewing your records in this view, can be used to move to the left and right. Note that if you have common activities throughout the year you can copy and paste several activities (rows) into the database: highlight those rows you want to copy then <CTRL>-<INSERT> to copy them to the clipboard then move to the bottom (or wherever you want to insert the rows) and <SHIFT>-<INSERT> to insert them. In the following example row #2 is selected – note the highlighted area on the far left of the second line to indicate it is selected.



- "**PTB Form by Columns**" displays data in a columnar format. With this view, you can only view one record at a time, but you will be able to view all of the record's data. To move between records, use the <Page Up> and <Page Down> keys or use the record navigation bar which is located at the bottom of the page to move between records and looks like the following:

To advance to the last record, press the "last record" button on the navigation bar:

To add a record, use either of the following methods: go to the last record then press your <Page Down> key, or press the "auto-insert" button on the navigation bar:



1. Team / Emphasis Enter the number code of the most appropriate Team / Emphasis for this Action/Activity. A list of the Team / Emphasis and codes is available at the POW site. You may choose to select the code from the drop down menu.

2. Knowledge Area Enter the code of the most appropriate Knowledge Area for this Action/Activity.

3. Sequential Steps This column is where you specify the type of needs assessment, planning and development, marketing and promotional, educational, and evaluation and reporting activities you will conduct this program year for this major program. Also included are any staff development and in-service education you expect to receive. You are not expected to have steps for all actions/activities every month.

Classify each major action on your timeline by listing it under the appropriate Sequential Step category: Enter the appropriate letter N, D, E, or S in the column headed "Sequential Step".

a. **(N) Advisory, Needs Assessment, and Plan of Work** involves OCES advisory system, seeking input from clientele through surveys, one-on-one discussion, PAC meetings, etc., and developing Plans of Work.

b. **(D) Design, Development, Marketing, Promotion, Delivery and Implementation of Programs –** Design and Development activities include building partnerships or collaborations, task force or committee meetings; human and fiscal resource acquisition activities, i.e. grant writing, fund development, or acquiring resource people; and seeking and preparing educational materials and information. Marketing and Promotion activities include those activities designed to reach appropriate audiences including minority or under-represented groups, the types of media, methods and materials to be developed and used to reach the target audience**.** Delivery or Implementation activities include <u>topics</u> you will teach in educational experiences. Describe <u>methods and activities</u> such as: workshop series, seminar, field day, demonstration, fact sheets or other materials, newsletter article series, and/or leader training.

c. **(E) Evaluation and Impact Assessment** represent the types of evaluation activities to be conducted by specifying the evaluation methods you will use. Evaluation and impact assessment ought to consider outputs, outcomes and impacts. These action/activity steps also include various forms of reporting of your program results.

d **(S) Staff Development and In-service Education Received** activities in which you expect to participate should be included. Enter them under the most appropriate Key Program Component (even though they might touch several).

3. Action/Activity Type a short description of the action or activity. This field will be limited to 180 characters.

4. Month Enter the number of the month you expect the Action/Activity to occur. Enter 07 for July, 08 for August, etc.

5. Audience Enter the appropriate audience code. You may enter a second audience code if appropriate in the next column.

6. Hours Planned Specify the number of hours anticipated for each activity**.** Remember you are to plan only 60% of your time. This is 140 days or 1,120 hours for 100% extension employee.

Access automatically saves data as you move from line to line (in the "PTB Form by Rows" view) and from page to page (in the "PTB Form by Columns" view). When you exit the program, it will not ask if you want to save changes, because it has saved your entries as you went along. Also, you may enter the activities in any order you choose. To delete an entire record (which would be a row in the "PTB Form by Rows" view and a page in the ""PTB Form by Columns" view), click on the gray cell in the far left column of the row you want to delete. Press the <DELETE> button then choose "yes" (unless you really didn't want to do that and then select "no").

Many activities may occur periodically throughout the year (monthly, quarterly, etc.). If you enter one of each of these types of activities next to each other, you can copy them to open rows and just change the number in the month column. View your data using the "PTB Form by Rows", then:

- place your pointer in the far left cell (gray cell left of Key Program column which will have a ▸ in the cell) of the first row you wish to copy
- drag downward to the last row you wish to copy. As you drag your pointer downward, you should notice that the cells become highlighted.
- go to your Access tool bar, across the top, and select "Edit" and then "Copy"
- click on the far left cell of the first available row (should have an * and may be at the bottom of your table)
- move to the Access tool bar select "Edit" and then "Paste" and select yes when prompted.
- you will note the first record you copied of a group is not showing in the pasted row. No problem. Move to the Access toolbar select "Records" and then "Refresh" and the record on the row will be visible.
- don't forget to go in and change to appropriate months (and any other changes).

If you choose to undo a move (such as copying rows or changing data), choose Edit from the Access tool bar (across the top of your screen), then choose Undo.

Once you have completed your entry of activities, click on the X in the upper right corner of the box. This will close out the entry form and return you to the main menu.

Viewing and Printing of Reports, and Submission of Plan

When you select a report from the main screen you will have three format options to sort the data. The first option - by Month - will be the option you need to use to send a printed copy of your plan to your District Director/Department Head.

To preview the timeline, select the desired report format in the "Preview Timeline Report" box. Once in the report preview, you can move through the pages by going forward and back with the page indicator in the lower left of the Access screen. You can reposition the screen using the vertical and horizontal scroll bars.

In this report preview, you can review your plan entries. If they are satisfactory, you may choose to print the report. If you want to make changes, return to the main Menu Screen (click on the X in the upper right hand corner of the reports screen). From the main Menu Screen click on "PTB Form" button. You may then select the entry you want to change and make changes or add entries

If no changes are necessary or once you complete your changes, return to the Menu Screen. Now you may print your Annual Plan Timeline. Click on the button for the format you desire (by Month is how you should send to District Directors and Department Heads).

If you haven't been contacted by your district office, please check to see if they would prefer to receive this draft Plan Timeline printed or as an attachment to an email. The District Directors will need to send the final versions of the Annual Timeline Plan to Lee Freeman as PTB files.

Your draft Timeline Plan is due in your District office.

For questions, call or email: Ross Love – general; Dwayne Hunter – technical.