

A dashboard where 3 methods had ~~failed~~ deferred success

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My background



- Started in mainframe/mini development (punched cards and green screens) – COBOL, Algol68R, Fortran
- Mid 80's – came the PC into business
- Used Windows since v2.x and Access developer since the 1st beta (this does not, necessarily, make me an expert!)
- 20+ years of IT Management dabbling in code for internal needs
- Now self-employed, I have three development areas:
 - Turn data into information – long term (pseudo-)agile/prototyping projects
 - Build new systems to replace rubbish or outmoded system
 - Take over maintenance
- That's my excuse list finished 😊

Agenda

- Client scenario & how did it start
- How the user presented their requirements
- Quick build
- Demo – including SQL across multiple databases
 - Finally that multiple connection DSN code I considered a couple of years ago



Client scenario



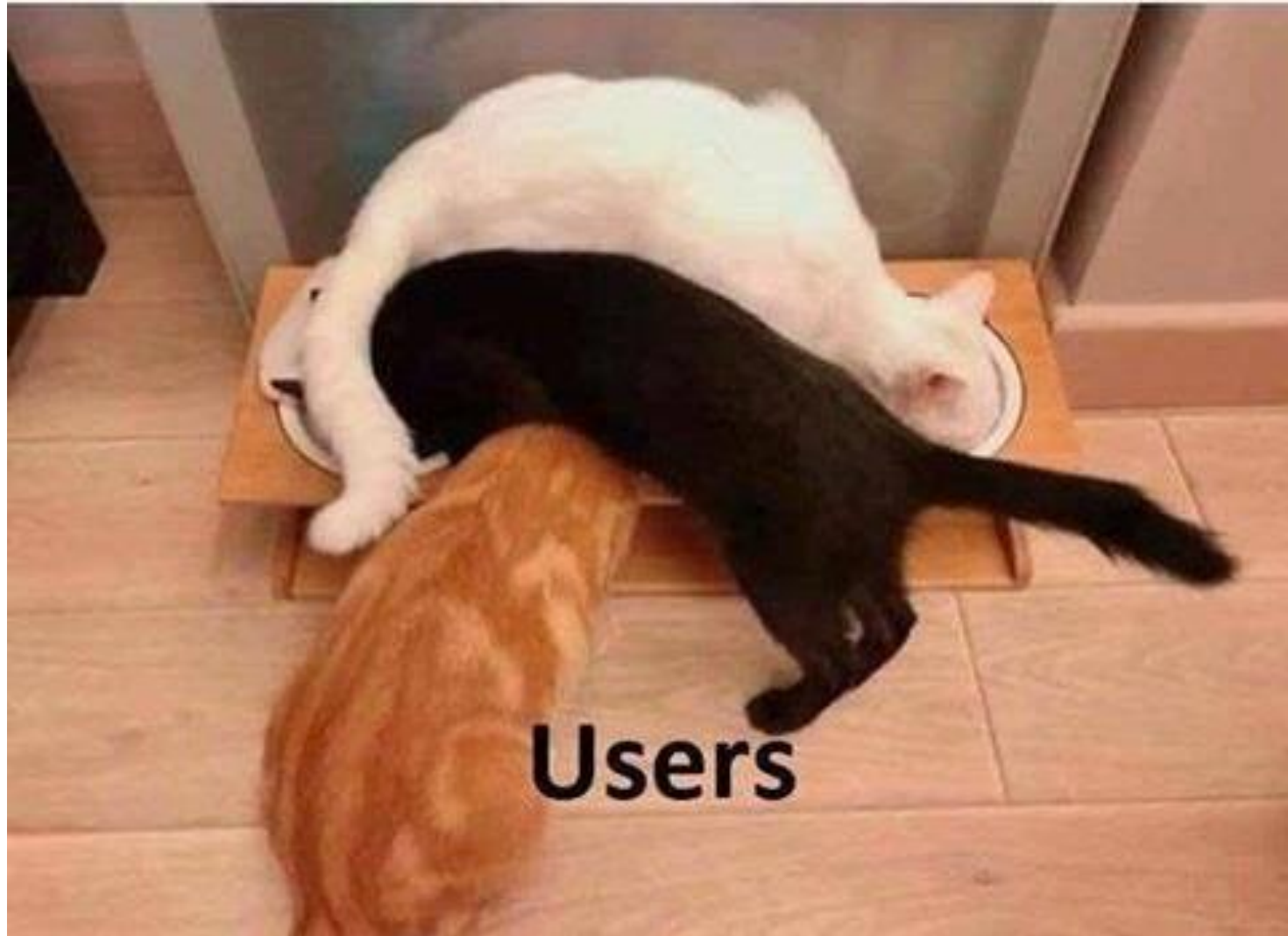
- User was a client of a VAR with whom I have worked on for a number of mutual clients.
- Quick on site meeting
- Some ideas and discussions, they are technical, so it was a good effective discussion
- Some examples given of what failed
- SINGLE PANE OF GLASS concept
- Some Excel attempts to show what was needed.
- Thankfully everyone liked each other
- So we just got on with it

Observations on design (1/2)



Developer: Makes a simple, intuitive UI

Observations on design (2/2)



How the needs were expressed



- This was an interesting one, I got an Excel sheet "notes on crm design" mapping out how it might look
- Whilst this worked, I saw subforms in orange, where they saw this as different sources of data in a single list.

	A	B	C	D	E	F	G
1	Today						
2							
3	Customer	Action (QUOTES ONLY)			Date	From	To
4					prev	Auto Today	<-
5	1234	Q12345	Part number	M number		Follow Up date	Fr
6	2345	Task					
7							
8							
9		Task	2345		Date		
10							
11							
12							
13							
14		Notes	1234	Q12345	Part Number		
15		Date					
16		Date					
17		Date					
18		Date					
19		Status	Change JB	Reason	Change JB	FU Date	Change JB? <-
20							
21							
22							
23	Add				Total Tasks	No	<-
24	New Task	New ?			Total Follow up	No	<-

Quick start



- Fortunately they worked with Crystal Reports for some data, so the concept of looking for data sources (tables) and fields (columns) was familiar to key personnel
- A TeamViewer session later that excel sheet had become a master document of data source
- They are Office 365 customers, so had Access which I could use in runtime mode for the app compiled as an ACCDE.

Demo & Walkthrough



- Quick look at the app
- Closer inspection of the queries and ideas used in the system.
- Firstly; know that: the data for the main panel is consolidated information from two entirely separate sources
 - Data from the manufacturing system (SQL Database) JobBOSS
 - Data from a new Dashboard specific databaseBut blended to appear as one “call to action” list

This slide is deliberately left blank



- Seriously
- It really is
- I really should be on the demo now...

Demo Wrap-up



- This isn't intended to be a “wow, what an amazing app”
- I do function, not style (did you spot that?)
- Although busy, remember - they wanted 1 pane of glass for all their needs

Couple of SQL things



- Hopefully I showed you the multiple database DSN-less bit
- Collation – if you run SQL View across databases you may get a collation conflict, especially with older SQL2008 era servers.
 - <ForeignTable>.<ForeignIndexColumn> has collation **SQL_Latin1_General_CI_AS**, (and likely the Server & DB)
 - But <localtable>.[IndexColumn] has collation **Latin1_General_CI_AS**, as does local server and DB
 - <ForeignDatabase>.dbo.<ForeignTable> AS table1 ON <localtable>.[IndexColumn] = <ForeignTable>.<ForeignIndexColumn> **collate Latin1_General_CI_AS**

And at the end



Help for Heroes

- I'm (still) doing my 9th bike ride – 350 miles from the Normandy Beaches to Paris in June. And the 10th is booked for 2020!
- If you would like to donate – [http://bit.ly/pjb2019!](http://bit.ly/pjb2019)



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