How To Create a Database

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NEUAC – June 22, 2015

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From a Program Manager's Perspective

- Assess needs
- Procurement process
- Role/Responsibilities

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Assess Your Needs: Question

▶ What isn't working now?

▶ How can this work better?

▶ What will you need in the future that you don't have now?

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Assess Your Needs: Things to Consider

- Track Data
  - For how long?
  - What historical data needs to be kept?
  - Multiple applications/records for each customer

Assess Your Needs: Things to Consider

- Contact Management
  - Do you have multiple entities sharing information and communicating?
  - Do you need to track events?
  - Do you want to know time lapses between events?

Assess Your Needs: Things to Consider

- Reporting
  - What kind?
  - How many?
  - How often?
  - Standard vs. ad-hoc

Yes! I want a new Database: now what?

Time to choose a database or hire a programmer!

Off the Shelf or Custom Made?

- Things to Consider…
  - In house expertise for building and/or maintenance
  - Customized fields, reports necessary?
  - Long term feasibility
  - Ability to share across organization or multiple organizations?
  - Amount of data now and in the future

Procurement Considerations

- ▶ Cost

- ▶ Scope of project

- ▶ Ability to serve future needs

- ▶ Ability to combine old and new data

- ▶ Timeline

- ▶ Accessibility of staff (yours & contracted)

- ▶ Security & confidentiality of data

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Procurement Process

▶ Develop a scope of need

▶ Request proposals from multiple organizations

▶ Develop score sheet – pay attention to weighting

▶ Hear oral presentations and read proposals – ask questions

▶ Interview referrals and other clients

▶ Rank organizations based on feedback

▶ Negotiate a contract

▶ Now the WORK begins!

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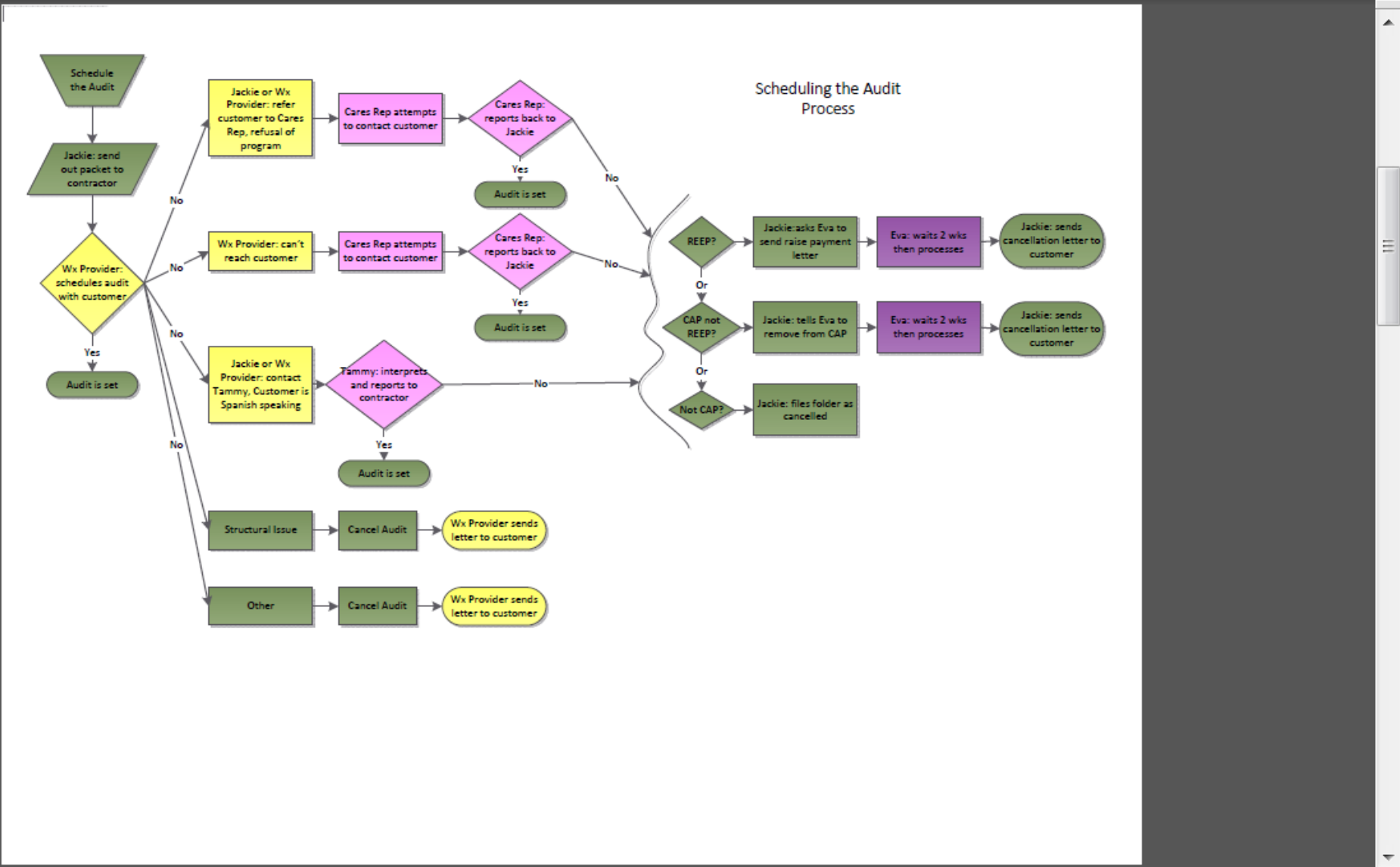A NiSource Company

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Your Role: It really has JUST begun!

- Remember this!
  - No one knows your data better than you
  - No one knows your needs better than you
  - But – you can't think of everything
    - Ask everyone for feedback
      - Users/agencies/contractors
      - Funders (that need reports)
      - Your boss
      - Your entire team

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Your Role: Specific Tasks

▶ Complete a detailed flow chart of every process

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Examples: Work flow

Your Role: Specific Tasks

▶ Complete a detailed flow chart of every process

▶ Provide data formats and mapping for any historic data to be transferred and/or housed

▶ Provide formatting rules, field value qualifiers,

Examples: Data Elements (fields)

Data Field	Current Location	Data Source	Future Data Source	Field Format
PCID & Seq	Demographics 1	DIS	DIS	Text or Number?
PSID	Demographics 1	DIS	DIS	Text or Number?
Address	Demographics 1	DIS	DIS	Text
City	Demographics 1	DIS	DIS	Text
State	Demographics 1	DIS	DIS	Text
Zip	Demographics 1	DIS	DIS	Text
CAP status	New	DIS	DIS	Y/N
Phone	Demographics 1	DIS	DIS	Phone
Best time to call	New	new	Data Entry	
Second Phone	New	new	Data Entry	Phone
e-mail address	New	new	DIS/Data Entry	Text
Approval to use E-mail as primary	New	new	Data Entry	Y/N
County	Demographics 1	DIS	DIS	Text
Birthdate	Demographics 2	USS	DIS/Data Entry	Date
Occupants >62	Demographics 2	USS	Data Entry	2 digit field

Your Role: Specific Tasks

▶ Provide data formats and mapping for any historic data to be transferred and/or housed

▶ Complete a detailed flow chart of every process

▶ Provide formatting rules, field value qualifiers,

▶ Provide drop down menus for all fields

Example: Drop down values

Primary source of supplemental Fuel(Pre) Titled : SUPHEATB		Primary source of supplemental Fuel(Post)Titled: SUPHEATF		House Type	
Code	Name	Code	Name	Code	Name
0	**None**	0	**None**	1	**1 1/2, 2 or more story single family**
1	Fuel Oil/Kerosene	1	Fuel Oil/Kerosene	2	Ranch, single level
2	Utility Gas	2	Utility Gas	3	Bi-level or split level
3	Bottled Gas/Propane	3	Bottled Gas/Propane	4	Mobile home (half or more of heatec
4	Electricity	4	Electricity	5	Row house, inside of row
5	Coal	5	Coal	6	Row house, end of row
6	City Steam	6	City Steam	7	Duplex or condominium with two uni
7	Wood	7	Wood	8	Multi-family, including condo, with th
8	Solar	8	Solar	9	Other
99	Other	99	Other	10	Manufactured/Modular Housing
M	**Missing**	M	**Missing**		

Your Role: Specific Tasks

▶ Complete a detailed flow chart of every process

▶ Provide data formats and mapping for any historic data to be transferred and/or housed

▶ Provide formatting rules, field value qualifiers,

▶ Provide drop down menus for all fields

▶ List of all your reporting needs

▶ Present each process orally and allow for questions

▶ Be available during programming

▶ Meet on a regular basis & document all activities

▶ Designate a Project Manager

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My Top Ten List

- 10 - DO understand the difference between the sales pitch and the reality. Be prepared to be flexible but know what is non-negotiable for you

- 9 - DO wish BIG! Let them tell you what they can't do. Until then - Expect the Moon!

- 8 - DO consider future needs as well as current needs. You'll thank yourself later

Top Ten List

- 7 – DO make this your (or someone's) primary job for the duration of the project

- 6 – DO act as if your life depended on it. Or at least the next 10 years of your work life!

- 5 – DO be specific always. Never assume.. Always verify

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Top Ten List

- 4 – DO write down every conversation, every deliverable, every deadline, every change of scope, every.. every…

- 3 -DO include others in planning. Everyone

- 2 – DO reward for deliverables, not time

Top Ten List

- 1 – DO your best Happy Dance! This is exciting! If you do it right, It will ROCK your (future)world!

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Questions?

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