

Facility Onboarding Workflow System Design & Automation

Premium Case Study

A structured Microsoft Access build focused on onboarding visibility, blocker identification, cleaner workflow tracking, and reliable dashboard reporting.

Project Type Workflow system design and process automation	Environment Microsoft Access	Primary Records Facility records, statuses, blockers, dashboard views
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The challenge	The solution
Facility onboarding needed a more dependable way to track progress, highlight blockers, and show all records on a single dashboard without relying on inconsistent manual follow-up.	The system was redesigned to support controlled status tracking, a Waiting On dropdown, automated LastUpdated timestamps, conditional formatting, and full dashboard visibility.

4	100%	2	Validated
facility records visible after dashboard correction	final validation checks passed	critical dashboard logic fixes resolved	Refresh and Reset functions

Project Summary

This project focused on turning a workable database into an operational onboarding system that could be read quickly, maintained consistently, and handed off to another team member without confusion.

The final design centered on four priorities: consistent status management, blocker visibility, trustworthy timestamps, and dashboard accuracy.

Core Improvements Delivered

<p>Status visibility</p> <p>The Status field was confirmed as the primary tracking field and enhanced with conditional formatting so records can be read at a glance.</p>	<p>Blocker management</p> <p>The Waiting On field was converted into a functioning dropdown so blockers are selected consistently instead of typed freehand.</p>
<p>Timestamp automation</p> <p>The LastUpdated field now stamps automatically when a facility record changes, giving the team a more reliable audit trail.</p>	<p>Dashboard accuracy</p> <p>The dashboard was corrected so it shows all facility records rather than hiding newer records because of restrictive filters or joins.</p>

Technical Implementation

Component	Implementation
Form structure	frm_Facility used as the primary maintenance form and frm_FacilityDashboard used as the reporting view.
Tracking field	Status confirmed as the main operational field for interpreting workflow progress.
Blocker field	Waiting On implemented through a dropdown structure to improve consistency.
Automation	VBA used to update LastUpdated whenever a record changes.
Dashboard logic	A restrictive FacilityHealth filter was removed and the WaitingOnID join was changed to include all facility records from tbl_Facility.
Usability	Conditional formatting added for visual status recognition and Refresh and Reset behavior validated during final testing.

Optional portfolio enhancement

Add screenshots of frm_Facility, the Waiting On dropdown, conditional formatting, and the final dashboard to make the case study even stronger for portfolio use.

Problem Solving Highlights

- Corrected a dashboard issue where only two out of four facilities were visible.
- Identified and removed a hidden filter set to FacilityHealth = Overdue.
- Changed the WaitingOnID relationship to include all records from tbl_Facility so records would not disappear when a related value was missing.
- Validated that all records, all tasks, and all major controls were visible and functioning after the fix.

Business Impact

Operational clarity	Cleaner handoff
Users can now see the full set of facilities instead of a restricted slice of the workload.	The project now ends with documentation that allows another team member to continue the work with less dependency on the original builder.
Reduced friction	Portfolio value
Dropdown controls, conditional formatting, and automatic timestamps reduce rework and make the system easier to interpret.	This project demonstrates workflow analysis, system design, debugging, and process optimization skills that translate beyond one department.

Final Validation

Validation item	Result
All records visible	Passed
All tasks visible	Passed
Status updates saving	Passed
Waiting On dropdown	Passed
LastUpdated automation	Passed
Conditional formatting	Passed
Refresh and Reset	Passed

Positioning Statement

This case study shows practical workflow strategy in action: identifying logic issues, improving visibility, standardizing inputs, automating routine tracking, and packaging the finished system for handoff and scale.