

AWARD DATABASE

USER GUIDE

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1 INTRODUCTION

1.1 **General**

1.1.1 When first accessed, the database contains a series of worksheets accessible by their tabs, which can be seen along the bottom of the open window. In order, they are:

- i) [AWARD MATRIX](#);
- ii) A series of [individual record](#) sheets numbered '01' to '25';
- iii) [BADGE LISTS](#).

1.1.2 The only sheets that can normally be edited by the user are the [individual record](#) sheets; the other two are protected and cannot be edited unless the protection is removed.

1.2 **Macro Security**

1.2.1 For the database to function correctly, it is necessary to have macro security set to 'medium'. To do this, you need to have Excel open and then carry out the following steps:

- i) On the main toolbar click '**T**ools';
- ii) Select '**M**acro', move across to the right and click on '**S**ecurity...';
- iii) Click on '**M**edium' then click '**O**K';
- iv) You will need to save, close and then reopen the document for these settings to take affect. When you re-open the document, please select 'Enable Macros'.

1.2.2 If macro security is set to 'High', the database will not function as the macros it uses will be disabled; setting security to 'Medium' will give you the option of enabling the macros each time you open the workbook. You could set the security level to 'Low', which will have the macros always enabled and stop you being prompted each time you open the workbook, but this is not recommended as it puts your system at risk. For an explanation of the different security levels, follow steps i) to iii) above.

2 WORKSHEET DESCRIPTIONS

2.1 **AWARD MATRIX**

2.1.1 This is the main worksheet and is not normally editable by the user.

2.1.2 The sheet takes award information from each of the [individual record](#) worksheets and displays it in a matrix that allows the user to easily see which individuals have passed which elements of the award test work. When a 'test' is passed (and entered onto the individual's record), it is indicated on the matrix by a green 'dot' against the test in the column under the individual's name.

2.1.3 At the top left of the worksheet is a set of 7 buttons that provide the user with a range of different functions for manipulating the data in the workbook and these are described later (see section 3). For these buttons to function correctly, macros must be enabled – see section 1.2 above for a description of how to do this.

2.2 **INDIVIDUAL RECORD**

2.2.1 When the workbook is first opened, there are 25 individual record sheets, numbered '01' to '25', which are to be used for each individual member in the section.

2.2.2 *Primary Fields*

2.2.2.1 The primary fields are those at the very top of the sheet and these should be completed before any other data is entered. The fields are self-explanatory and are:

- i) Last name;
- ii) First name;
- iii) Date of birth;
- iv) Telephone number;
- v) Address.

2.2.3 The two other blocks at the top right of the sheet, which are not editable by the user, show the earliest and latest dates that the individual concerned can move on to the next section, based upon the date of birth entered into the relevant field (noted above).

2.2.4 *Secondary Fields*

2.2.5 The remaining ('secondary', but important) fields accessible by the user are where the information concerning the individual's award records should be entered. These are generally self-explanatory but please note that the first block only needs to be completed if the individual is coming up from a previous section or is a transfer-in from another Group.

2.2.6 There is a section for each of the awards that the individual can undertake, plus sections where data can be recorded for Hikes Away events, Nights Away events and Activity Badges undertaken. The Hikes Away and Nights Away sections also show the user a running total of the respective Hikes Away and Nights Away achieved by the individual and indicates which level under each has been achieved – the levels achieved for these are also shown on the main '[Award Matrix](#)' sheet.

2.2.7 **IMPORTANT NOTE:** Whilst data can be entered individually on these sheets, it should be noted that almost all of the award information can be entered via the 'ADD EVENT' button on the '[Award Matrix](#)' worksheet – see section 3.3. Whilst presenting an easier way of entering the same information for a set of section members (selectable), the buttons also provide extra functionality (as noted under their descriptions). For example, if you use the Hikes Away button to add a Hikes Away event to a set of individuals, you will be given messages telling you when the event has taken a given individual over the next level of the award, which you will not get if you enter the information directly into the individual's record. It should also be noted that when all the available Hikes Away, Nights Away or Activity Badge fields are used up on an [individual record](#), extra lines can only be added using the 'ADD EVENT' button on the '[Award Matrix](#)' worksheet.

2.3 **BADGE LISTS**

2.3.1 This worksheet simply shows all the badges available within the section and contains hyperlinks to the relevant pages on the [ScoutBase website](#).

3 **AWARD MATRIX BUTTONS**

3.1 **Introduction**

3.1.1 For the buttons to function correctly, macros must be enabled. If they do not work, then macro security is set to 'High' and macros are disabled, so this must be changed. For a description of how to do this, see section 1.2.

3.2 **General Note on the Selection of Individuals When Using the Buttons**

3.2.1 When you are offered the option of selecting individuals under the respective functions, it operates in the normal way for selecting lines in a list. First, you left-click with the mouse on the first individual in the list you want to add to. To add further individuals, you then press and hold the 'Ctrl' key before you left-click on the extra name(s). To select all individuals between two names, left-click on the first, then press and hold 'Shft' and left-click on the last individual. All selected individuals will be highlighted. To unselect an individual, simply left-click again on their name.

3.2.2 In many cases (though not all, such as in the 'Copy' mode), you are given the option, via a 'check button' of selecting ALL the names in the list. If this is selected, the operation will be applied to ALL records even though the names aren't highlighted in the list. It should be noted that selecting this option will override any other list selections.

3.3 **ADD EVENT**

3.3.1 *Function:* Enables the user to add a particular event to a selection of (or all) records. This can be any award event, an activity badge, or a Hikes or Nights Away event. Whichever event is selected, further data is requested, e.g. details of the Nights Away event and how many nights have been achieved, and then the user is asked to choose which record(s) to add it to.

3.3.2 *Reason:* Allows a particular event to be added to a selection of records, or all records, in one go rather than the user having to enter the same information onto the [individual record](#) sheets one at a time.

3.3.3 *Notes:* When adding Hikes or Nights Away, the workbook will detect if it takes a given individual over the next level of the respective award and will pop up a message (once only for each record concerned) informing the user of the fact. When all the available Hikes Away, Nights Away, or Activity Badge fields are used up on an [individual record](#), an extra line will be added containing the new data – this cannot be done when adding data manually to [individual records](#).

3.4 **ADD RECORD(S) / SHEET**

3.4.1 *Function:* Enables the user to add one or more records to the database, or a general-use worksheet to the database.

3.4.2 *Reason:* To allow larger sections to add sufficient records to cover all members. Alternatively, the user may wish to keep extra information in the database that is not part of the [individual records](#). To maintain security and avoid data being moved around (which would cause some functionality to stop working) the workbook is protected and so this enables the user to add a general-use worksheet in a safe manner.

3.5 **ARCHIVE RECORD(S)**

3.5.1 *Function:* Enables the user to copy records to the end of the workbook or to an external workbook and clear down the original worksheets, thus freeing space for new entries.

3.5.2 *Reason:* Used when a member leaves the section, either to move on to another section or if transferring-out to another Group or leaving.

3.5.3 *Notes:* The name entered onto the record being archived is used to name the new archived worksheet. The user will also be given the option of either leaving the data in the original sheet or clearing it.

3.5.4 *WARNING:* If the sheet is archived to this workbook, it is appended as the last worksheet in the book; if it is archived to an external file, the user is given the choice whether they wish to archive it to this workbook as well – if this is declined and the original record is cleared, *this workbook will no longer contain any data for the individual concerned.*

3.6 **CLEAR RECORD(S)**

3.6.1 *Function:* Enables the user to clear data from the selected record(s).

3.6.2 *Reason:* The user may archive or export a record and choose not clear the original record until it is confirmed that the data has been successfully copied. This button allows the user to clear the record concerned when they are ready to do so.

3.6.3 *WARNING:* If a record is cleared without first being archived or exported, the data it contained will be lost.

3.7 **COPY RECORD**

3.7.1 *Function:* Enables the user to copy details from one [individual record](#) sheet to another.

3.7.2 *Reason:* Can be used to effectively move records around the database, particularly if the options available via the 'SORT' button are not what is wanted.

3.7.3 *WARNING:* If data is copied from one record to another that already contains data, any data in the worksheet being copied to will be lost.

3.8 **IMPORT/EXPORT**

3.8.1 *Function:* Enables the user to import or export basic data or full records from/to other excel files.

3.8.2 *Reason:* This is particularly useful when section members are moving up or transferring. 'Basic data' consists of the header information (name, tel, DoB, address) along with details on Joining-In/Participation Awards and Hikes and Nights Away data; full records are the entire record sheets for the chosen individuals.

3.8.3 *WARNING:* Basic Data or Full Records can only be imported from worksheets that contain the data in the right format, e.g. workbooks provided from another section that has exported the data using their version of the Award database. If data is provided from any other source, it will need to be manipulated into the same order and format before it can be imported.

3.9 **SORT Records**

3.9.1 *Function:* Enables the user to sort the records within the workbook by surname or date of birth in either ascending or descending order. This will show the records in the chosen order from left to right on the main '[Award Matrix](#)' worksheet and the [individual records](#) are renamed correspondingly.

3.9.2 *Reason:* As time goes by, new records will be added to the workbook, other records will be archived or deleted and the names will therefore be in random order. This function allows the user to sort the workbook at any time and get it all in the chosen order, whilst at the same time making it easier to see which record sheet belongs to which person.

4 **ADDITIONAL FUNCTIONALITY**

4.1 **Birthdays and Participation (Joining-In) Awards**

4.1.1 Once data has been entered into the workbook, it is used for calculating when individuals' birthdays or participation awards are due. Whenever you open the workbook, checks are made against each [individual record](#) and, when a birthday or participation award is due within two weeks, a message will be displayed showing the user the relevant details – e.g. name and when the birthday/award is due.

4.2 **Hikes Away and Nights Away Awards**

4.2.1 As noted in section 3.3.3, if the '[Add Event](#)' button is used to add a Hikes Away or Nights Away event, a message will be displayed for each individual when the event takes their total over the next level for that award. This is NOT the case when the event is added manually to each [individual record](#) and the user will need to note where this is the case.