Form\_010A

Purpose:

Form 10 is designed to

1.- facilitate recording attendance at Luncheons (including special event luncheons)

2.- Provide information analysis of attendance.

3.- Allow additions (and losses) of members – and put names in alphabetical order without loosing data.

4.- Accommodate branch membership size (smallest to largest).

5.-

Requirements:

1.- A computer with a spreadsheet capability that can do “Sorting of rows of data by specific columns”.

This document: I am writing the information file based on Microsoft Excel but other platforms and tools have the similar capabilities (I just do not know the “Names” of the commands to use on these other tools).

Loading the spreadsheet on your computer:

1.- Link into SIRINC.ORG on the internet

2.- Look for “FORMS” and left click on that selection. A menu will be displayed of all the available forms offered by SIRINC.

3.- Select Form 10. A menu will appear with a choice of Options displayed.

4.- Select “Excel”. You may want to select “Instructions” first to retrieve this file…

5.- Select “Open File” - selecting “Download File” is a possible option on your particular computer. The Download method is to click the lower right area of the “Download” box and click on the down-arrow.

6.\_ Save the File to your computer with a NEW NAME and in a FILE LOCATION that you can remember. You may also need to “Enable Editing” before your spreadsheet will allowed you to save the file or to make changes. This depends on your computer and the spreadsheet software you are trying to use.

You now own the spreadsheet and you know where to find it… Until this last step, the file may not allow editing.

Pre-Loading the required data…

1.- There are two primary pieces of information used in this spreadsheet to allow sorts: Badge Number and Member Name. Badge number is not a requirement but I use it in my branch and I do sorts on the badge number.

2.- The member Name can be entered in two parts. “Last Name” and “Front Name”. These are strange words but they relate to how you have your information stored. My branch has a naming convention in a single field that has the “Last name” followed by the member’s first name (one or more words that might include a nick name) and followed by his Partner’s name. It sorts properly as the Last name is ahead of the first name. Another of my other branch files has the Last Name and First Name in separate columns. The First Name is entered in a strange “Front Name” text. If the Member Name occupies two columns, we will need to adjust the “Sort” process to use both columns.

3.- My branch has a tradition of putting the Badge Number in a “Text” format and not as a number. I need the badge number to be in number format so I have to convert my branches “Badge” number column to numeric. On the right side of the spreadsheet is a column with the formula “=Value()” of the Badge number column. I then the highlight all the numbers in this column and Paste Values overwriting the Badge number column. This converts the text to numeric.

Luncheon Activity….

Step 1: Print out the list of Badge and Numbers plus the recording columns. You will only need to print out columns A through H in the “BEC” worksheet.

Step 2: Take the list to the Luncheon.

Step 3: Check off the membership “Today” box and list any money paid at the luncheon against the Member.

Step 4: Take the worksheet to the BEC meeting.

Step 5: Give the list to the Attendance Secretary if you are not that person.

Assistant Secretary Records the Luncheon information:

Using Excel put the Number 1 in the correct monthly column for the luncheon (or special event column if this Luncheon was an extra event) for each member that was present. The reason for the number 1 is that Excel uses this value for tracking and a “Check-mark” cannot be summed in Excel.

Correct the Date at the top of the column to be the Date of the event.

Update the Excused/Unexcused absences columns so it is ready for the next BEC meeting.

OOPS: No luncheon this month.

Step 1: Put the text “NoL” in line 15 in the Luncheon Month Column. (as an aside, as long as the cell line 15 is not Null, it is treated as “No Luncheon”. If the spreadsheet is behaving like you typed “NoL” but there is nothing there, you probably typed a “Space”… highlight cell in row 15 and used the “Delete” key.

When done with a month highlight the data in the luncheon column for rows 5 through 15. Select the “Copy” command under “Home”. Select the Cell in row 5 in your monthly column and do a “Paste” “Values”. This lock the calculations so that changes in membership stay with the month the data was first recorded. This preserves each monthly “Total Membership” before moving to the next month. The best time to do this might be the day just before you begin recording data for the Next Month’s luncheon.

Maintenance:

1.- The Form is too long for your branch.

This is fine to reduce the size of the file.

Step 1: To the left of Spreadsheet Column A are the “Row” Labels. Click on the desired row label. The entire row should now be highlighted. Move your cursor to the top of the spreadsheet and select the “Home” option. A new command bar will appear.

Step 2: In the Command Bar select the “Cells” box. A new menu will appear. Click the “Down” arrow to the right of the cell. The select the “Delete Cell Row”. The row is gone.

Some of your needs is to delete a large number of rows. For Step 1 just above, use the SHIFT key along with the mouse to highlight a larger number of rows. The do Step 2.

2.-\_ The Form is too short for your branch.

Again this is fine to increase the number of lines. Method 1:

Step 1: Go to column A and position your cursor to the row just below where you want to add a line and click once on that cell.

Step 2: Move your cursor to the tool Bar at the top of the spreadsheet and select “Home”. A new menu will appear.

Step 3: Select “Cells” box. A new menu will appear.

Step 4: Select “Insert New Row” once. A row is now added.

An example for this task is when you want to add a new member.

Step 5: Unfortunately not all the calculations have been duplicated. Column AP through AX formulas are not restored. Find a line above that has calculation formulas in AP AQ, and AR and highlight the cells in AP through AY for that line. Type ctrl-c

Step 6: Highlight all the boxes in column AP that are missing the formula in column AP. Type ctrl-v

Method 2:

Step 1: In the Badge Number / Member Name area, highlight all column A through AX for the number of rows that you want to add. Type Control C (hold down the “Ctrl” key and type “c”.

Step 2: Move your Cursor to just below the last name on the spreadsheet.

Step 3: Go to the tool bar at the top and select “Home”.

Step 4: In the same tool bar to the left is a “Paste” command. Below it is a Down-arrow. Select the down-arrow. Another menu will appear…

Step 5: Don’t click yet!!! Hover your cursor over each selection and notice the changes Usually in the bottom row, one of the hovering selections will show boxes in the target area having black lines around all the cells. That is the one you want, click it. This is a Paste Special Preserving Formatting.

Observations and some Suggestions.

As I was developing the Excel spreadsheet for Form 10,

1.- I noticed that I had to a significant amount of formatting of cells to keep things like “Badge Number” to being a number instead of a text field. I had to create a column that copied the text badge numbers from Column A and converted them to numbers. I could then use this column with a “Copy” of the entire column combined with “Paste Special” so that the text in column A could be made into only numbers.

2.- When I inserted a new line for a new member, the other worksheets skipped over the new data calculations for the spreadsheet. I found that I could just put the new person or persons at the bottom of the current data and follow all of the additions with a new SORT command to put the people back into alphabetical order. That done, the summary in the other worksheets, allows the new data to be used.

3.- When doing a sort, make sure all of the column are part of the sort. Column A18 through AXnnn so that all that all the data fields are selected.

4.- The form comes with “Errors” showing. Until at least one member is added, the total number of members in the calculations for percentage have a denominator of zero…

5.- If you do not use a column in your branch. E.g. E for “excused” and U for “unexcused” absents are not tracked. You can go to the top of the spreadsheet and shrink the width of the E and U columns small enough to no longer see them on the screen.

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