**DB2000 Workshop Notes**

**Introduction**

There are multiple passwords each having different user rights.

USER allows downloading a roster but not uploading. This can be given to any member that needs to use DB2000.

UPDATER allows the user to download and upload roster data. This should be used by the member(s) that is entrusted to maintain the database.

MERIT MARK is used to submit Merit marks.

MASTER, in addition to download and upload rights, has administrator rights allowing changes to the passwords via the USPS web site.

**General Feature List**

* To avoid information overload, the multiple fields of the HQ roster file are broken into separate parts that are displayed in a grid. The sections are Roster, Grades, History, Boat Information, Communications and User.
* Merit mark support with a tracking system that allows the MM recommendation process to be kept in the database.
* User defined fields may be added and can contain any type of information the user desires. User fields can also be designed to assist in report preparation.
* Built in report generator and database query generator. This so called “Down & Dirty” method can print the roster, squadron organization, labels etc. based on queries made to the database.
* To extend the report generating capabilities, query results can be saved as a file that can be used by other applications such as Microsoft Office.
* *Report Wizard* further extends the report generating capability. Based upon the report designer for the Microsoft Access database program, it has a comprehensive query generator and the ability to design sophisticated colored page layouts with data, text, lines, shapes and images.
* *DB2000* can access the HQ computer directly using an IBM server program named “MQ Series Client”. This provides a much easier way to upload and download information. Email is still available as a backup.
* Three forms can be replaced by DB2000: OD-1 and OD-2 forms for reporting the officer’s data for the next watch, and the HQ-102 form, for reporting name changes, resignations and deaths. The historian’s report H-701 form can also be filed electronically using DB2000.

**Getting an up-to-date Roster**

The HQ roster may be downloaded in two ways.

1. Direct downloading from the HQ computer. This is highly recommended.

2. By Email. In this case the HQ roster file is a self-extracting archive consisting of several files. Because many Email systems have filters that bar importation of *.exe* files, the extension has been changed to *.ex\_.* The important thing to remember is that *DB2000* users need do nothing with this file, except remember where it is saved.

The next step is to import the file. Select “Import/Update with email Roster File”.

The import rules are as follows:

* All fields maintained by HQ will always be imported. These fields are those for course modules, grades, merit marks, membership status etc.
* A member not already in the database, a new member, will always be imported completely.
* Members that are in the user’s database but not in the new import roster file will be listed in a grid and may be deleted at the user’s option.
* Members whose records have been changed are listed in another grid. These records may be tagged for further inspection in a record comparison display grid. This feature is found on the main screen *File/Compare Tagged Records with Backup DB.*

**Navigation: Getting Around DB2000**

There are two ways of navigating around the screens in *DB2000*, the mouse and the keyboard. Since the program is largely word based the keyboard method may be preferred or perhaps a combination of both.

**Mouse**

Single-Clicking a cell will select it. Double-Clicking the cell will open it for editing if the data in the cell is editable. If the cell controls some other action, this will activate it. Double click again to close.

**Keyboard**
Use the *arrow* keys to select a specific cell, press *Enter* to open the cell for editing or taking action associated with the cell. Press *Enter* again to close.

The cell background changes color indicating status. White – not selected, cyan – selected and pink - editing mode.

**NOTE:** When a cell contains a list box, its contents can be scrolled with the *arrow* keys.

**Using Tags**

This seemingly simple function is actually a very powerful tool, especially when it is used with User defined fields. Each major display grid has buttons that control tags:
TA Tag All
CA Clear All

C2T Column to Tag. Sets tag for each cell in highlighted column that has data.

IT Invert Tags
T Tag / Un-tag selected record. This is useful when tag column is not visible.

Email Found on the Communications and User grids only.

**Editing Fields**

There are 57 data fields in the HQ roster file. Many of these are not editable in *DB2000.* They are maintained exclusively by HQ. The squadron maintains the others. HQ prefers that *DB2000* be used for keeping the HQ database current because the export file is used as received without need for re-keying the data. This eliminates the cause of many errors.

**Note:** District users using a district database cannot export updated information to national. Squadron roster information can only be updated at the squadron level.

The fields are color coded in the grid headers.

Green: Editable HQ field

Red: non-editable fields have.

Yellow: fields used locally by *DB2000* or the user. They may contain editable data, or have some other function.

**Editing authorized fields in the grid view**.
Use the arrow keys or mouse to select the cell to be edited. Get into the edit mode by either double clicking the mouse or pressing the *Enter* key. The cell will change color indicating that the edit mode is selected. After editing, return to normal mode by either double clicking the mouse or pressing the *Enter* key.

Abandon an edit by pressing the *Esc* key. The cell will return to the original.

**Overview of the Grids**

As mentioned above, *DB2000’s* data is presented in several grids. The data is divided into related topics.

**NOTE:** On the main view there is a check box that allows affiliated members to be omitted from the grid views. This is handy if the user wants to deal with just squadron members.

**Roster Grid**

The roster grid contains the basic name and address information, spouse information, birth date, etc. The roster grid is the only view that allows records to be deleted and affiliated members added. NOTE: to be permanently deleted, submit a Change of Status Form.

**Dual Address Members**

Many squadrons have the problem of tracking dual address members. National’s database does not support this but *DB2000* can support it locally using the following rules.

* Members selected for dual address support will no longer have their address and related fields updated by roster imports from national. This is because there is no way of knowing what data currently resides in the HQ database. Remember that individual members will often advise HQ of their current address to make sure they receive their *Ensign*.
* Any time a dual address member’s current location is swapped, the *Export – Review and Send* upload list can be optionally updated for the next upload to HQ.

There are two columns in the roster grid, “DA” and “Swap”. To assign a member to dual address status, select the “DA” cell in the member’s row and press *Enter*. This will raise a dialog asking in which location to assign the current address. Make a selection and the cell content will reflect this with “H” for home or “A” for away. The grid can be toggled between the two by double-clicking or pressing *Enter* on the “Swap” cell. Alternate address information can be entered into the grid directly by editing the grid cells, or the BDU form may be used which will reflect the current location selected.

**Affiliated Members**
The user may add anyone to the roster as an affiliated member. This is a handy way of including individuals who are not in the squadron, such as the mayor, Chamber of Commerce representatives, boating store owners, etc. To add an affiliated member, click on the “*Affiliates*” button to open the dialog. Click “New” to begin.

**TIP:** Use some thought when assigning a name for an affiliation. Since the name can be used in a database query, it can be used to group affiliates by affiliation.

**TIP:** A new member can be added to the database as an affiliate. When he or she receives a certificate number in a roster update the affiliate label will be automatically removed as long as the name entered is identical. If not, there will be a duplicate record. Manually remove the affiliate record.

**Grade Grid**

The grade grid is a non-editable grid containing each member’s grade history. It also contains number of merit marks and senior/life membership status. Right clicking a record will show the members insignia.

**History Grid**

The history grid is a non-editable grid containing each members USPS membership history. Certificate date, membership years, membership status etc. Double-Clicking or pressing Enter on a squadron cell will show the name of that squadron and its district.

**Boat Grid**

The boat grid contains the three fields in the HQ roster and a number of other fields that each squadron can use for additional boat information.

**Communications Grid**

This grid is communications central. It contains all telephone, fax and email address information. Clicking on the telephone number to dial can launch the Windows telephone dialer. This utility may have to be set up to make it work smoothly with *DB2000*. DB2000 will open a search dialog box to record the path information. It is easier to use the *Windows* file search to find “Dialer.exe” and then make a note of the path. Then select this path from the DB2000 dialog.

To email a member, inserting a tag in the grid and launching the email client from the box at the top of the page.

**User Grid**

This grid shows information contained in fields that are defined by the user. Two of the fields, *Squad1* and *Squad2,* are stored by HQ and provided to everyone who downloads the roster. They can contain any squadron related data. Because these fields are public they should not be used for personal data. Use them for an agreed upon squadron wide use. The “User” grid also displays fields defined by the user. *This is discussed further in Advanced Topics.*

**Organization Grid**

This grid is designed to show the squadron organization. To enter information click the *Assign Jobs* button. This opens a dialog, and the user assigns a position to the selected member. There are lists defining the level, department, committee and position on the committee. Level defines Squadron, District or National. Department determines Bridge, Executive, Education etc. It is quite simple, though maybe a bit time consuming, to fill in the whole organization.

The user can add new committees in any department. To do this, click on *Committees / Add* to open a dialog. In this dialog select department and name the committee. From the check boxes select a suitable committee configuration and create the committee. Return to the organization grid, and then click *Assign Jobs* to add individuals to the new committee. The new committee will be found in whatever department it was placed. When staffed, it will appear in the organization grid and on printout of the D & D roster printer.

The organization grid can be arranged in several ways. When viewing structure it is useful to turn on the color and/or merge options to make grid easier to view. The grid may also be sorted by name showing how many jobs each member holds.

There are Tag options to tag various members of the organization based on their positions.

**TIP:** When changing or adding a job to a member already existing on the organization grid, highlight before selecting *Assign Jobs*. This way the member will already be selected in the name list.

**TIP:** If changing an existing assignment, the *Find* button can be used to cycle through all current assignments.

**Merit Marks Grid**

DB2000 is now the preferred method for merit mark submissions. Being able to use the data in the database makes it very easy for the user. Names, certificate numbers etc. will be correct and need not be typed in. A tracking system was devised to keep the records categorized. This is shown in the “Status” column of the MM grid and is the key to the whole operation. Stepping through a typical MM cycle, the status column is used as follows.

1. When a name is added to the grid, the Status column will read “No Data”

2. When the recommendation information data is added, the Status column will change to “No Recommendation”

3. After all of the recommendations have been entered, go to the Change Status menu at the top of the page and select “Mark all No Recommendation to Submittal”.

4. Make the original submission.

5. When the results of the Original Submission are received, most will have been accepted while a few may have been rejected.

6. For those that will be resubmitted, edit the recommendation, click the “Status” cell, and then from the popup menu select “Resubmit”.

7. When the resubmitted results are received, the individual records will be “Accepted” or “Rejected”.

8. In the event that a Supplementary Submission needs to be made, first mark the record as “No Recommendation” then go back and mark it as “Supplementary”.

9. In the event that a Retroactive Submission needs to be made, first mark the record as “No Recommendation” then go back and mark it as “Retroactive”. Be sure the name of the appropriate submitting officer and year will have to be provided.

The status tracking system allows all recommendations to be displayed on the grid. The print utility will only print recommendations that have status appropriate to the submission requested. Records with “No Data”, “No recommendation”, “Accepted” or “Rejected” states cannot be printed.

Note that the “Change Status” menu at the top of the page contains several bulk change options to assist in rapid editing. This is helpful at the beginning of the next cycle. For example, last years submissions might be used as a starting point. Use the bulk change “Mark all as No recommendation” to reset everything. Then remove any members that should not be listed and add those that should. Be sure, if you do this, that when you are ready to submit you are showing this year’s date, not last year!

**Advanced Topics**

**Spousal Record Crosscheck**

* *Click on Main, Roster, Tools, Create/Edit Spousal Relationships.*
* *A box will appear. When the relationship is set and correct, there will be a black X in the middle of the box. Click Next. When it’s wrong or missing, the X will be red and a message in red will be flashing. If what’s showing on the screen is correct, click Confirm the fix to the relationship. You can also add/delete text in the boxes before clicking Confirm. Click on Next to continue making corrections.*
* *The squadron updater should do this for the entire squadron. Be sure and upload the changed spousal relationships to National.*

After the first time, you can do this using File, Repair Spouse Record Inconsistencies on the opening screen in the main menu.

**User Grid**

Did you know that there are two fields that you can use for data that are unique to your squadron’s needs?

Go to the USER tab (top, towards the right) and click on it. This grid shows information contained in fields that are defined by you and your squadron. There can be as many fields as you want in the USER tab.

HQ provides two fields in the roster download, *Squad1* and *Squad2.* These two fields can be updated and sent to national so that everyone who downloads your roster will have the updated information. These data are public and should not be used for personal data. Use them for an agreed upon, squadron wide use. Our squadron hand delivers our newsletter, and the *Squad1* column is dedicated to indicating which delivery person delivers that member’s newsletter. Other uses might include where member’s boats or homes are located, membership in special groups: whatever is important to your squadron.

You can also **add** additional fields in the USER tab. These are only stored on the user’s machine and can be used for any private purpose. The data can only be shared with others by using *Export User Defined Field* in the Options Menu. This option makes a data file that can be passed to other users. They can import it using *Import User Defined Field*. This automatically creates and fills the field.

Suppose you have an annually recurring, large event. You could use this field to save the names of volunteers and the positions they held. This is also a good place to list the committees that each member serves on.

To access user field options, click the Options button and select “Field Options”. In the resulting dialog box, the user can define a new field, delete an unwanted field, and change the name of a field. The field can be of several types: text, numeric, currency, yes/no or memo. The length of a text field must be defined. Fifty is the default, but you can go as high as 255 characters. A memo field can contain very long texts and formatting. Since you use the *Enter* key to start a new paragraph in a memo field, you must close a memo field by clicking on the button provided at the top of the screen.

Remember, these additional fields are NOT UPLOADED to national’s database, and therefore no one else has access to them unless you share the data using *Export User Defined Field* in the Options Menu.

**Alternative Newsletter Mailing List**

The User Grid offers another way of making a mailing list which does not have duplicate addresses. From the list select Name: Mail List. The database will be searched for spousal relationships (which, of course, you have kept up to date) and will make a list with entries such as “John and Mary Boater”. The entry will appear on John’s row and Mary’s row will be blank. This is similar to selecting active members and rejecting additional-active members in a database query while having a less formal naming format. Since this field will be empty for many records, use the CA and C2T to tag the filled records and use the tags when making labels.

**Querying the Database**

The heart of database use is the ability to create reports based upon queries. It’s built in query generator is accessed under the “Reports” menu on the main screen. On the dialog screen the user can select from check boxes that are associated with various data fields. On clicking the “Find” button, the query is performed and the result shown in the list boxes. In the left text box is a list of members found. In the right text box the Structured Query Language, SQL, query that was generated.

To get access to user defined fields or to further refine a query, other criteria may be added in the dialog boxes provided. First, define a Logical Operator, AND, AND NOT, OR. Next select the field from the “Field Name” list. Next, define the Comparison Operator. =, <>, >, <, >=, <=, NULL, NOT NULL, LIKE, NOT LIKE. Lastly define the test “Criteria” which is user provided. Use the “Add” button to add to any selection made elsewhere on the query form.

While the user can generate useful queries knowing nothing of SQL, studying the structure of the queries will help the user use the *Report Wizard’s* much more advanced capability.

Useful queries can be saved for future use. E.g. a list of course candidates. Remember that saved queries are dynamic. Each time they are used they will find the current list of potential candidates. Upon completion of the query the user can send it to the printer or save the result for use with another applications.

**TIP**: Remember the check boxes “AND” / “OR” have logical inference that may sometimes seem counter intuitive. E.g. If “P” and “AP” course boxes are checked an AND result will list members that have both. An OR result will list those having either but not both.

**Exporting to Other Applications**
After making a query, the user has the option of exporting the result as a CSV (comma separated value) file. Clicking the file option opens a new grid that shows all of the fields in the database including the user defined ones. The query determines the members included in the list but the user can determine which fields are to be included in the saved file and the order they will be displayed.

When selection is complete click *Save* and decide on a name and format for file. The default file extension is CSV but user can use TXT if desired. The content of the file is the same but the target application may interpret the content differently.

**TIP:** Sometimes your browser will not show .csv files. Change your view to display all files, not just Excel files.

**Improved Down and Dirty Roster Printer**

This built in report printer still has limited capability, but has been upgraded to allow more flexible user control. All printing modes have a data entry system so that each action is instantly seen in the preview. Features common to all printing modes are:

* Selection of font face and size. This selection is used for entire report.
* Paper size: 8.5 X 11 or 5.5 X 8.5 (excepting label mode)
* Headers and footers (excepting label mode)
* Page layouts can be saved for each printing mode.

Except organization, the record content in each printing mode is built by the user from several options. Preformatted common items such as name/grade/rank, street address and city/state/zip are provided. You can choose a data field from a drop down list. You can also provided text. Multiple entries can be made on each row using the “Add” button. Entries can be undone for each row, last in first out. Punctuation of constant text labels may be added with user provided text.

Each mode, except label, may have a header and footer with several formatting options. Separator lines may be added. A date may be included in the footer. The date in a saved page remains as saved.

**Roster Mode**
 in this mode, the user builds the record. You can have up to 6 rows. The roster can be printed on two paper sizes. The number of records per column is fixed. The 8.5 X 11 has 9 records per column and up to 3 columns. The 5.5 X 8.5 size has 6 records per column and one or two columns. If text overflows into the next column or overflows the page, it is shown in red on the screen view to alert user that some editing or page layout adjustments are needed.

Note: Many printers do not have a 5.5 X 8.5 paper size and some don’t have a user defined size, so the print routine just instructs the printer to print on 8.5 X 11 paper. Most printers will

print on 5.5 X 8.5 stock without complaint, some may give a “text exceeds margin” message. If so, just ignore it.

**Mailing Labels**
Mailing labels can be printed on Avery 8160 label sheets. This mode has a very valuable feature. It can print labels starting at a selected location in order to use partially used label sheets. You can also print a single label at any sheet location.

A special font is no longer required for bar-coding address labels. These are now drawn graphically. **NOTE:** If bar-coding is selected, access to rows 4, 5 and 6 is prevented.

**TIP:** You can print labels that have nothing to do with the underlying database by just entering every row as a text item. This way you can print one or several “foreign” labels. **However**, never forget that the underlying data for each label position is the database, so don’t try to barcode because it will be that for the underlying record.

**Organization**

The D & D roster printer is the easiest way to print the organization structure of the squadron or district having several formatting options. You can only print the organization if you have completed the necessary entries in the “ORG” grid.

**Tab List**
This new mode allows a list to be made using the method described above.

**Merit Mark Overview**

Original data can be input three ways – individually from a drop down list, clicking on Tagged, which adds individuals that you have marked with a tag, or clicking on add all, which adds every member. There are two ways to remove – individually or all.

To add information about an individual, click on one of the boxes.

* For courses, double click in Course 1 column and a drop down box appears. Choose the course. Enter the number of session taught and/or proctored.
* For Valuable Service, double click and type in the text. You are limited to 438 characters, so keep it brief! You can also RIGHT CLICK to open a dialog box that enables you to copy and paste from MS Word.

When finished inputting all data, you can spell check if you have Word installed on your computer. If you have Word but Spell Check is grayed out, go to the Main Menu, and under Settings click on Enable MM Spell Checking. Note that if you just click on Spell Check, you will check the entire document, and that can take some time. (There is also a warning about what you have selected.) To just check one person’s data, click on the Valuable Service cell, then click on the spell check button. TIP: Be sure and save all frequently used abbreviations!

Now you are almost ready to submit. Right now everything that you have entered says No Recommendation. Either click on each individual’s status cell, or at the top, click on Change of Status. Only the available options are highlighted. Since this is our original submission, change all to Submit. Now you can click on the Review/Submit Button at the top of the page.

This action brings up a new menu. By default it is an original submission and the year is the current year. Click to submit to the area monitor. This action takes you **on line** to USPS to the Merit Mark Submission Page. (Just a reminder – make sure that you have access to the internet!) On the opening page there is a very detailed set of instructions, but basically go to the bottom of the page where you’ll find the path and name of the file that you need to submit. Copy and paste it if you can. If you can’t, click on Browse and go to your DB2000 folder, find the file, select it and then click on Open. Make sure that it is the same as the one printed by HQ, and do verify that your commander’s email address is correct. That is where the results will be sent after the area monitor as finished the review.

The response will come as a file in an email. Best place to save it is the DB2000 folder. To read it, open DB2000 and go to the MM Grid. Select File, Submission Status Update. In the dialog box, select the new file.

The records’ status will have changed to either Accepted or Rejected. For those that were rejected, you can examine them and make changes as appropriate. Now change the status from rejected of resubmit. You follow the same basic steps for a resubmittal.

Cooperative Submissions

DB2000 can accept files made by other members and assemble them for final submission. Squadron Chairpersons can make recommendations for their committees on *DB2000* and save in a file. This file is sent to the MM Chairperson who can import it. If a member is already listed in the list the length of the combined recommendations may exceed what is permitted. In that case both records are displayed for editing. Otherwise DB2000 combines both records. Members not already in the list are added to it. The import MM file dialog offers several options. When doing cooperative submissions input make sure import mode is “Append”.

There is a check box which offers the option of previewing the incoming data record by record.

The existing and import data can be edited and combined in the preview mode.

There is another check box that will tag the new or changed records. It first deletes any existing tags.

NOTE: For users of the *“Boating Course Assistant”, BCA*, program, a coop MM file can be made for each class and the resulting files can be emailed to the MM chairperson for inclusion in the squadron master MM list.

I wish to acknowledge that I used the DB2000 Workshop Notes by J. Kenneth Guscott that can be found on the USPS website as the starting point and inspiration for my presentation. Please use his presentation for additional information.

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**WORKSHOP CONCLUSION**