

Using the Seminar Workbook v2.0

This spreadsheet application is a simple tool for squadron seminar administrators to use to manage student records and record student completions to the headquarters database. Coupled with on-line registration and its upload feature, it substantially eliminates manual data entry both at the squadron level and at headquarters. It also links to a Word merge document to print a seminar completion certificate for each student.

The application was developed using Microsoft Excel and Word 2003. This updated version is compatible with Office 2007 and the Vista operating system. It is a Windows PC application, but it should also work on a newer Intel-based MAC with Parallels installed. (See *Tips for Office 2007 users on page 9*)

Installation:

1. Download and Save the seminarworkbook.zip file to your C:\ drive.
2. Double-click on seminarworkbook.zip and extract the files to your C:\ drive.* This will create a folder named SeminarWorkbook 2.0 containing the five files used by the application:
 - **Seminar_Workbook.xls**
(the main spreadsheet application which contains up to six individual seminar worksheets)
 - **Registration.txt** (do not rename this file)
(the holding file for on-line registration e-mail data)
 - **Certificate_Merge.doc**
(the merge document for printing certificates)
 - **Sample_Preregistration_Email.txt**
(sample e-mail received from on-line registration for practice)
 - **Seminar_Workbook_Instructions.pdf**
(this instruction booklet – set printer to print double sided in landscape mode)

* Unless you are an advanced Excel user, be sure to extract the folder to the root directory (Local disk C:\), not to any other sub-directory.

Note: If you have copied the file from a CD and are not running the Windows XP operating system, you will need to clear the read-only attribute from the files. You can do it in one step by **right** clicking on the folder containing the files, select properties, clear the box next to the read-only attribute, and click OK.

Working with the Seminar Workbook

The workbook contains separate worksheets for up to six different seminars (note the sheet tabs across the bottom initially labeled Sheet(1), (2), (3), etc) Each worksheet has been formatted for 100 students. Adding more than 100 is not recommended as they will not be picked up by the automatic print area and sort settings. If the class is larger than 100 students, it is recommended that you modify the Seminar ID in the Class Assignment Table on the Query sheet and assign the rest of the class to another sheet.

Set up a Class Worksheet

1. Open the Seminar_Workbook.xls (Excel file). You will get a macro warning message. Click 'Enable Macros' to activate the toolbar at the top of the workbook when it opens.
2. Select a worksheet, by clicking on its tab at the bottom of the workbook. (i.e., Sheet(1), Sheet(2), Sheet(3), etc.)
3. Fill out the information in the title area – top three rows
 - Squadron Name
 - Seminar Title
 - Location

Enter the **required** information in the green shaded cells

- **Seminar date** (month/day/year)
 - **Seminar code** (Inventory #) – an initial list of the first six seminars is displayed as you drag your cursor over the cell or you can copy and paste it from the list on the CodeList sheet (last tab on the bottom of the workbook).
 - **Squadron Acct#** (four digit squadron account code)
 - **Class Number** defaults to 1, increment it when two or more of the same seminars are held on the same date.
 - **District number** (01, 16, etc)
4. You can rename the Sheet() tab to identify it to the class. Right click on the tab and select rename. Use any abbreviation meaningful to you, but include at least one alpha character.

example: VHF0306 where 'VHF' identifies the seminar and '0306' it's date.

Note: You must also rename the corresponding sheet assignment on the Query sheet. (See page 5)

Warnings:

As this application was created to be as simple and flexible as possible, it also has certain vulnerabilities. None of it is protected, so it can get out of whack. Although it can be easily fixed, some specific warnings should be heeded:

1. The cells and column headings that are green are required and should not be changed.
2. Don't insert, delete or change any of the standard columns as the order determines how the data is sent to HQ. You may hide those columns you don't want to see or print and you may add additional columns at the end of the rows for your own use.

Tips:

1. If you need to remove a student record, select the whole row by clicking on the row number (far left) and then right click in the highlighted row and select Clear Contents. Running Sort Names and Renumber ID from the toolbar will remove the blank line and reset the ID numbers. Be sure the first row contains a "1" in the ID column before renumbering.
2. If you wish to sort on any columns other than the automatic lastname/firstname provided by the Sort Names button, use the standard Excel data sort tool and be sure to highlight the entire record area before you choose the column on which you wish to sort. Otherwise you could end up with a mess of unrelated data.

Three Steps to Success

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Toolbar Buttons

When you open Seminar_Workbook.xls and *Enable Macros*, a special toolbar is created at the top of the workbook. It contains buttons to simplify and automate the principal tasks of the application.

- **Import New Registration** – Imports the student information from the Registration.txt file containing the data received via e-mail.
- **Sort Names** - Sorts the student records on the class sheet in Last name/First name order.
- **Renumber ID** – Resets the ID numbers in column B. (Be sure there is a '1' in the first cell)
- **Setup Merge Names** - Creates a list of names on the MergeData sheet which is used by the Certificate.doc Word file for printing seminar completion certificates.
- **Send Data to HQ** – **You must be connected to the Internet before pressing this button** - Creates a text file of the data on the current sheet and sends it to Headquarters where it is automatically imported into a database on the AS400.

Importing a New Student Registration

The Seminar Workbook will import the student registration data received via e-mail from the on-line registration process. However, an intermediate step is required to copy and paste the data string from the e-mail into the "Registration.txt" file. The "Registration.txt" file is reused for each subsequent e-mail data string replacing the previous data.

1. Minimize the open Seminar Workbook to place it temporarily on the task bar at the bottom of your screen.
2. Open the "Registration.txt" file.
3. Open your e-mail containing the prospective student's pre-registration data.
4. Click and drag to highlight the complete data string at the bottom of the e-mail.

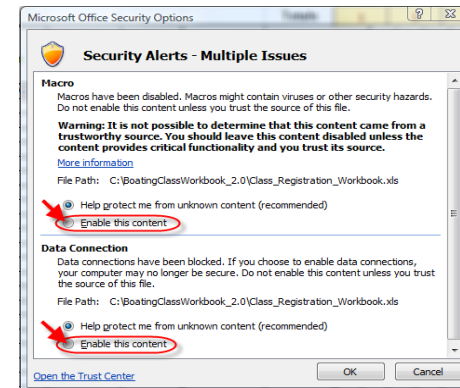
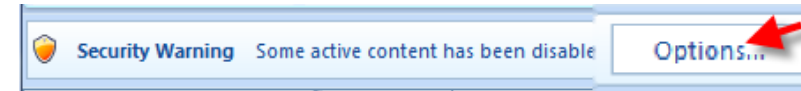
```
"SeminarID", "LastName", "FirstName", "StreetAddress", "City", "State", "ZipCode", "Zipplus", "0392001:05 OCT 06:5:15 AM", "Green", "Sally", "65 East Front Street", "Keypoint", "NJ", "0"
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5. From the Edit menu select Copy (or press CTRL+C from the keyboard)"

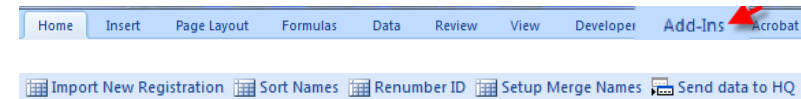
Tips for Office 2007 users

Workbook (Excel)

1. The first time you open the workbook you will see a security warning message in the upper left below the main toolbar. Click "Options" and enable content under both issues: Macro and Data Connection.

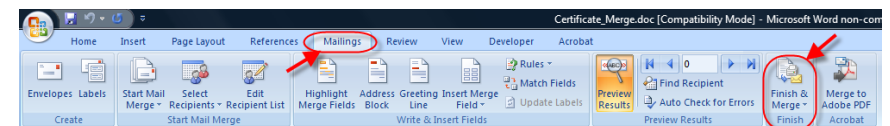


2. To see the special tool bar buttons, click the 'Add-Ins' button on the top row of toolbar selections.



Merge Documents (Word)

1. Select 'Yes' to continue on the opening message.
2. Load the 'Mailings' toolbar from the top tabs.
3. After replacing Squadron name, Seminar name and Date on the first certificate, click on 'Finish & Merge' to see print options.



Upload Data to Headquarters

1. Verify all data for correctness.
2. Enter a 'Y' in the completed column for each student.
3. Be sure you are connected to the Internet.
4. Press the Send Data to HQ button from the appropriate class sheet.
 - a. This process will select all students marked completed and create a file named '**semload.txt**' in the same folder as your Seminar_Workbook is located.
 - b. An Upload prompt screen will appear. Select the *Browse* button to find and open the **semload.txt** file. (It will be in the same folder as your Excel workbook). The filename will fill in on the prompt screen. Click the *Send File* button to complete the upload.

Boating Class/Seminar Upload

- For Boating Classes - Click on browse and select the file "bcload.txt".
- For Seminars - Click on browse and select the file "semload.txt".
- Click on "Send File" to transfer the file to the USPS server.

Send this file:

- c. A confirmation message will appear upon successful completion of the upload.
- d. The date sent field in the students records will be automatically set to prevent them from being sent again.
- e. Any student records that are not marked completed will not be sent.

Note: If the upload is not successful (usually the result of not selecting the **semload.txt** file), clear the date sent field in each record before trying again.

6. Switch to the "Registration.txt" file.
 - a. From the Edit menu, click on *Select All* to highlight everything (or press CTRL+A on the keyboard).
 - b. From the Edit menu, select *Paste* to replace everything with the new data you copied from the e-mail (or press CTRL+V).
 - c. From the File menu select *Save* to save the data in the Registration file. (or CTRL+S).
(Very important step - don't forget to SAVE)
7. Open the Seminar Workbook file and click on the toolbar button that reads *Import New Registration*. (*See note below) The student's information will automatically appear on the correct class sheet.

*Note: The first time a record is imported for a particular class two messages will appear informing you that you have to set up the Class Assignment table on the Query sheet.

Set up the Class Assignment Table on the Query sheet

A Seminar ID is automatically generated by the on-line registration process based on data contained in the class record listed on the web site for which the student wishes to register. That Seminar ID must be linked to a specific class sheet in the Workbook. The link only needs to be set up once, the first time you import a record for that specific class.

1. Select the Query sheet tab and you will see the record you imported in row 5.
2. To assign it to a class sheet, select the cell containing the Seminar ID (Col A, Row 5) - Copy and Paste into the first available *Unassigned* cell in the Class Assignment Table. This will match that Seminar ID to a corresponding worksheet.

You can rename the individual class worksheets to whatever you choose, but make sure that the Seminar ID value in column A of the table perfectly matches the Seminar ID that is in the first column of the student record and the values in column B exactly match the name on the class worksheet tab for that class.

Once the Class Assignment Table has been set up to link the Seminar ID to a class sheet, run *Import New Registration* again to apply that first record to the class sheet. All future imports will automatically apply the data from the Registration.txt file to the correct class sheet.

Data can also be entered manually from the Seminar registration forms.

Printing the Worksheet

The following instructions describe automatic printing of the whole worksheet in two parts. Two print areas (PrintArea1 and PrintArea2) have been predefined to allow printing so that both parts will line up and can be taped together to show the whole worksheet in reasonably readable form.

1. On the File Menu select Page Setup
 - a. Click on the 'Sheet' tab.
 - b. In the box labeled Print Area, enter either 'PrintArea1' or 'PrintArea2'.
 - c. Click on the 'Page' tab, select Landscape and adjust the scaling to 70%.
2. Click Print Preview to see how it will look.

Of course, printers vary so you may need to make adjustments accordingly.

PrintArea1 includes Last Name through E-Mail and PrintArea2 includes Birth Date through Years Boating.

If you don't need to print all the columns and would like to print at 100%, you can hide columns you don't need. **Right** click in the alpha cell at the very top of the column you wish to hide and select *Hide*. To unhide columns, highlight the two columns on either side of the hidden column, right click, then click *Unhide* from the fly out menu.

Tip: Use the print preview feature to test your settings before sending it to the printer.

Printing Certificates

1. Be sure you are displaying the class sheet for which you wish to print certificates. Click the *Setup MergeNames* button to create the list of names used by the merge documents. You can look at the data on the MergeData sheet to be sure you have set up the right records.

Note: The MergeData sheet is where the Certificate_Merge.doc looks for the names to print on the certificates. You can delete any names you don't want to print.

2. Minimize the workbook to the task bar to get it out of the way.
3. Open the Certificate_Merge.doc.
4. Answer 'Yes' to continue the merge on the prompt message that appears.
5. Click on the Tools menu, point to Letters and Mailings and click on Show Mail Merge Toolbar, if it is not already showing.



The first time you use the merge documents you will need to customize them for your squadron.

Customize Merge Document

6. Click on the *View Merged Data* on the toolbar to display the formatted certificate.
7. Highlight and Replace the Seminar Title, Squadron Name and Date on the first certificate.
8. To display the mail merge toolbar, select View/Toolbars/Mail Merge.
9. Click on the *Mail Merge Recipients* icon, click *Last Name and select (non-blanks) to prevent blank records from printing.
10. Click the *Propagate Labels* icon on the toolbar to bring in the student names from the workbook.
11. Click the *Merge to New Document* icon and print the certificates.
12. Close the files without saving them. They will be recreated each time you open them.