



NOVEMBER 2021 REPORT GUIDELINES

REPORT OVERVIEW

The November Report is to provide Sections and Sub Sections with a membership summary and a detailed view of the data currently held on individual members in the National Register.

At present the NAA has a multitude of databases. The National Register, the NAA Website, the Sections and many local Sub Sections have their own local databases. The intent was for Sections and Local Sub Sections to check their databases against the online database and make corrections online to the basic data.

At present there is no automatic synchronization between National Register and Web database and any updates need to be identified and updates carried out manually. This situation allows for errors to easily creep into the data as there is no mechanism to automatically synchronize and check the databases.

At present there are two views available in the workbook, the first, a simple and the second, an extended data set which can be viewed by pressing the *Extended Data* or *Normal View* buttons to change the amount of data displayed.

- ❖ The Normal View gives a basic summary of members and their membership details and their current financial status. The second sheet, the Summary, provides the numbers and totals of the various combinations of the data presented in the Data sheet.
- ❖ The Extended View provides the common members data that is likely to change and should be checked against the Section / Sub Section records.
- The intention is for the following steps to be completed by the end of the January of the following year.
National Secretary to produce Section Files from the National Data set and forward these files to Section Secretaries to produce Sub Section files from the Section Data set and forward the files to Sub Section Secretaries for information or correction.
- It is expected that each Sub Section will compare the data set provided against local records and note any corrections or changes required to synchronize the NAA data supplied with local Sub-section records.
- Corrections identified by Sub Sections are to be updated in the workbook then forwarded to their Section Secretary. The Section Secretary, on receipt of all updated spread sheets, is to update the Section workbook and the local Section Records.
- The Section Secretary is to send a copy of the updated Section workbook to the National Secretary who will then forward the updated Section workbook to the National Membership Registrar to update the National Registrar.

REQUIREMENTS / SUMMARY

- Microsoft Software – Microsoft Excel 365 was used for this workbook.
Note: The Excel workbooks and spreadsheets should work with other versions of Microsoft Excel, but the compatibility is not yet tested.

- Enable Macros in Excel.
Note: The workbook uses Visual Basic macros to Export data and display the Normal (or collapsed) and Extended (all available data) views.
- A directory structure is required so the macros in the main workbook can locate the required file and save the output files.
- Files must be saved into the correct subdirectories.
- Open the Worksheet and run the macro to produce the individual Section or Sub Section reports. The output depends on the type of file, for example,
 - ❖ The National file produces Section files and
 - ❖ The Section file produces Sub Section files.
 - ❖ **Beware:** If the Export button is pressed in the Sub Section file the workbook will try and produce another copy of the Sub Section file and put it in an Output Subdirectory. This operation will result in an error as no subdirectory has been set up to receive the output file.

HOW TO ENABLE MACROS IN EXCEL.

- If asked <click> on the *Enable Content* button at the top of the screen to enable Macros to run in the workbook.

OR (manually Enable Macros).

Open EXCEL

1. <click> File
2. <click> Options
3. <click> Trust Center
4. <click> Trust Center Settings
5. <click> Macro Settings
6. <click radio button> Enable VBA macro settings.
Note: When macros are no longer required disable macros in Excel.
7. <click radio button> Disable VBA macros with notification (when required).
8. <click> Ok twice to exit the options page.

DIRECTORY STRUCTURE

The directory structure required is:

C:\NAA\November Report 2021\Output

Create the directory structure by opening File Explorer then:

1. <click> On the Root of C: Drive, for example, C:\
2. <right-click> on C:\
3. <click> New
4. <click> Folder

Change the Name of the New Folder to NAA then:

5. <right-click> on C:\NAA
6. <click> New
7. <click> Folder

Change the Name of the New Folder to November Report 2021 then:

8. <right-click> on C:\NAA\November Report 2021
9. <click> New

10. <click> Folder

Change the Name of the New Folder to Output.

SAVE FILES INTO THE SUB DIRECTORY

Save the files provided in the email:

November Report Instructions Rev 2.1

NAA Data Export.xltn and

<Section Name> 2021-10-31 150019.xlsm into the following subdirectory:

C:\NAA\November Report 2021

Note: C:\NAA\November Report 2021\Output - is used only for the output files.

FILES REQUIRED / SUPPLIED

- Template **NAA Data Export.xltn**
Contains format information for exported sheets
- Workbook **<Section Name> 2021-10-31 150019.xlsm**
Naming convention of the Section File - <Section Name> yyyy-mm-dd hhhmm
- Instructions **November Report Instructions Rev 2.1**
This document with the instructions on how to create the directory structure, enable macros and produce the individual reports.

FILE DISTRIBUTION

National to Sections:

1. Section Breakdown.xlsm – National Data File
2. Data Export Template.xltn – Output File Template
3. Instructions (this document)
4. Output - <section name> yyyy-mm-dd hhhmm.xlsm (gives date report was run)

Sections to Sub Sections:

1. <section name> yyyy-mm-dd hhhmm.xlsm – Section Data File
2. Data Export Template.xltn – Output File Template
3. Instructions (this document)
4. Output - <ann>,<sub section name> yyyy-mm-dd hhhmm.xlsm

Sub Sections:

1. <ann>,<sub section name> yyyy-mm-dd hhhmm.xlsm
2. Instructions (this document)

SUB SECTION REPORTS

3. Open the file
4. <Section> yyyy-mm-dd hhhmm.xlsm
5. Locate the Data Sheet
6. <click> The Export Button, above the Full Name Column, to produce the individual sub section files which are then saved in to the following Sub Directory
C:\NAA\November Report 2021\Output
7. <click> OK when the message box appears.
The message appears when the files have been produced and placed in the Output sub directory.
8. Retrieve Sub Section files from Output sub directory and forward the files to the relevant Sub Sections with a covering letter for action.