

California-Nevada-Hawai'i District
Circle K International

2017-2018
Master Records Sheet
User Guide

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Introduction

Greetings! Welcome to the user manual for the 2017-2018 Master Records Sheet (MRS). The MRS is used to help organize your club. The main job of the MRS is to keep track of your dues-paid members' service, leadership, and fellowship hours, in addition to keeping track of Membership Recognition Program status and helping members apply for awards.

As you may or may not have heard, the MRS is a tedious file to fill out. Going into this, you might find yourself lost or even confused about where to put the simplest of information. However, you shouldn't worry because that's why this user manual is here for you!

This year, we chose to reuse the MRS from the 2016-2017 term with a few changes to it. The most significant change was the removal of the MRP tiers as a result of the passing of the MRP proposals at the July 2017 District Board Meeting. Another change that was made was the addition of color coding for events to make the awards application process easier.

This guide has a ton of pictures for you to follow and make your MRS adventure a whole lot easier. Don't let the size of the MRS intimidate you, because it's definitely a lot easier than it looks! By the time you finish this guide, your Excel knowledge will expand ten-fold!

With that being said, there is a sample MRS file that you can look at. If you are ever confused about where to put certain things, refer to the sample file to guide you. If you get stuck there, have any questions, comments, or concerns, don't hesitate to contact me via email (tylertran.cki@gmail.com) or via Facebook (Tyler Tran). Let's make this a combined effort between you and me, and make this one heck of a term!

Wishing the best of luck,

A handwritten signature in black ink, appearing to read 'Tyler Tran', with a large, stylized flourish extending from the bottom right.

Tyler Tran
2017-2018 Membership Recognition Program/Master Records Sheet Coordinator

Important Notes

Deadlines

Bimonthly Check-In Deadlines: **October 5, 2017 by 11:59PM**
December 5, 2017 by 11:59PM
February 5, 2018 by 11:59PM

FTC Recognition Deadline: **October 5, 2017 by 11:59PM**

Final MRS Submission for DCON Deadline: **March 2, 2018 by 11:59PM**

Submit all Master Records Sheets by the deadlines to District Member Recognition Chair Esther Wang at member-recognition@cnhcirclek.org.

File Name

Please name your file using the following format:

2017-2018 MRS_School Name

where School Name is the name of your school.

For example, if I'm from Circle K University, the file would be named

2017-2018 MRS_Circle K University.

Please do not use full abbreviations of your school name (ex. UCSD). CSU, UC, UH, and UN are the only permitted abbreviations.

Contact Information

If you have any questions, please do not hesitate to contact any members of the Member Recognition Committee. We are always here to help!

District Member Recognition Chair – Esther Wang – member-recognition@cnhcirclek.org

Administrative Executive Assistant – Jack Wang – cki.jwang@gmail.com

Creative Executive Assistant – Serena Mann – serenathemann@gmail.com

MRP/MRS Coordinator – Tyler Tran – tylertran.cki@gmail.com

Northern Representative – Casey Kieng – caseykieng.cki@gmail.com

Central Representative – Henry Casarez – biscuitism@gmail.com

Southern Representative – Allan Le – allanle.cki@gmail.com

Getting Started

Note: Before you start filling out any data, please make sure that you glance through the MRS User Guide to ensure that you don't run into any issues that can be resolved by the instructions given below. The User Guide also includes Excel hacks which can help make your job more efficient, so read through those as well before you fill out any data.

1. School Name

Put in your school name, the way it's stated when you save the file. Please do not use full abbreviations of your school name (ex. UCSD).

CKI California-Nevada-Hawaii District
Master Records Sheet
2016-2017

<School Name>

Version: v16.07.16
Paid Members: 0
Total Events: 0

Service: 0
Leadership: 0
Fellowship: 0

Members: 0
Attendees: 0

Date: Name of Event

2. Transfer date of events.

Copy and paste each month's date column from the MRF to the MRS. If you have been keeping track of hours using the 2016-2017 MRS, you can copy and paste the data from the date column into the 2017-2018 MRS.

should be the number of hours in total and should fall under that color; from there, you

Date: Name of Event

3/1/16
3/1/16
3/1/16
3/2/16
3/2/16
3/3/16
3/3/16
3/4/16
3/4/16
3/5/16
3/5/16
3/9/16
3/10/16
3/11/16
3/11/16
3/12/16
3/13/16

CKI California-Nevada-Hawaii District
Master Records Sheet
2016-2017

Circle K University

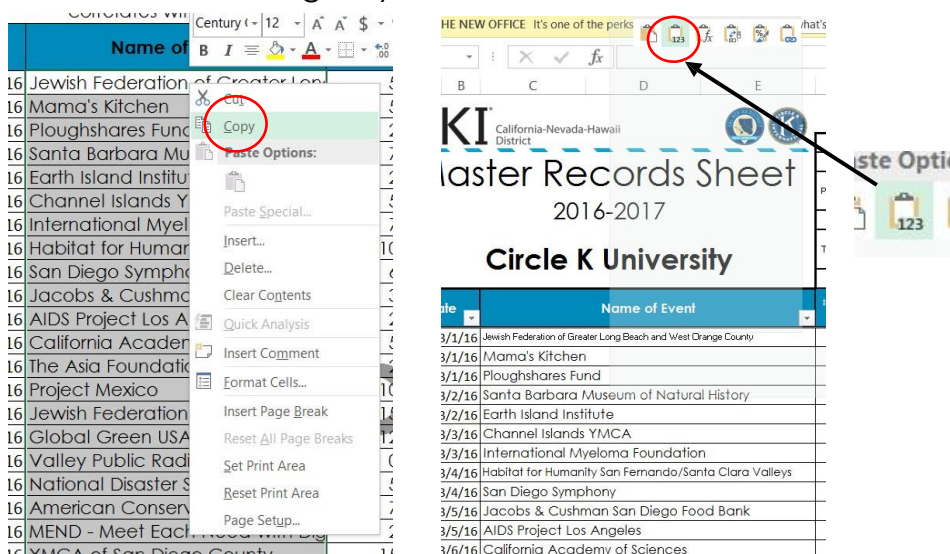
Date: Name of Event

3/1/16
3/1/16
3/1/16
3/2/16
3/2/16
3/3/16
3/3/16
3/4/16
3/4/16
3/5/16
3/5/16

Tip: Use Ctrl + C to copy and Ctrl + V to paste quickly instead of right-clicking. You cannot use Ctrl + V when you want to use paste special (ex. Paste only values, formulas, etc.).

3. Transfer name of events.

Copy the Events column for each month from the MRF. If you have been keeping track of hours using the 2016-2017 MRS, you can copy and paste the data from the Name of Event column into the 2017-2018 MRS. Now, instead of pasting directly via Ctrl + V, right click and select paste values, like in the images below. This ensures that the MRS formatting stays the same.



4. Transfer the event tags.

Copy and paste the tags (CO, CA, ..., INT, HE). You can either copy the data from the MRF or the 2016-2017 MRS, if you've already compiled this. Note that the tags you use should be the same ones used on the respective CERF and the MRF.

Note: Columns F through I (member attendance and hours columns) should not be filled out since the sheet will automatically calculate it based on the inputted hours. There may be slight differences in these columns between your MRF and the MRS, since the MRS does not account for non-dues-paid members' hours while the MRF does.

Now that you have all the events inputted, you can input all the members. Each member section looks like what you see on the right.

<Member Name>	1		
	AS		
	CM	X	
	WH	X	
	LP	X	
	\$'15-'16	X	
	Paid '16-'17	X	
0	0	0	
S	L	F	

5. Input members' names and info.

Replace <Member Name> with a member's name. You should be filling in a member's name in the format Last Name, First Name and you should

be inputting members in alphabetical order by last name. Next, input the general info about the member:

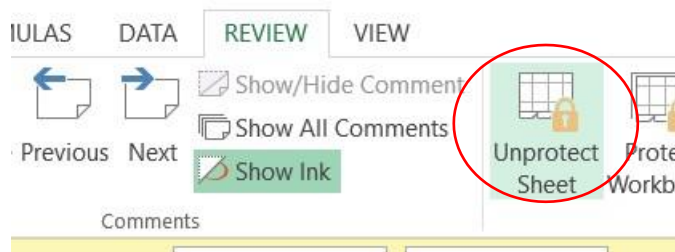
- **AS** (Articles Submitted): Any articles submitted to the club, divisional, district, or international newsletter.
- **CM** (Committee Member): Committee member on a club, divisional, district, or international level.
- **WH** (Workshop Hosted): Hosted a workshop/webinar on the club, divisional, district, or international level.
- **LP** (Leadership Position): Club or district officer.
- **\$'16-'17**: Dues-paid member during the previous term.
- **Paid '17-'18**: Dues-paid member during the current term.

Note: Click on the X and use the dropdown options to change it to ✓.

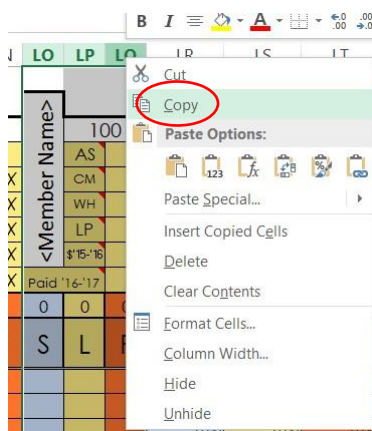
Note: You should always leave the last member blank so that you can copy and insert it when you are inputting a new member.

If your club has more than 99 members (remember that the 100th member is blank), follow the steps below to insert more members. Always insert members before the last member section, which should always remain blank.

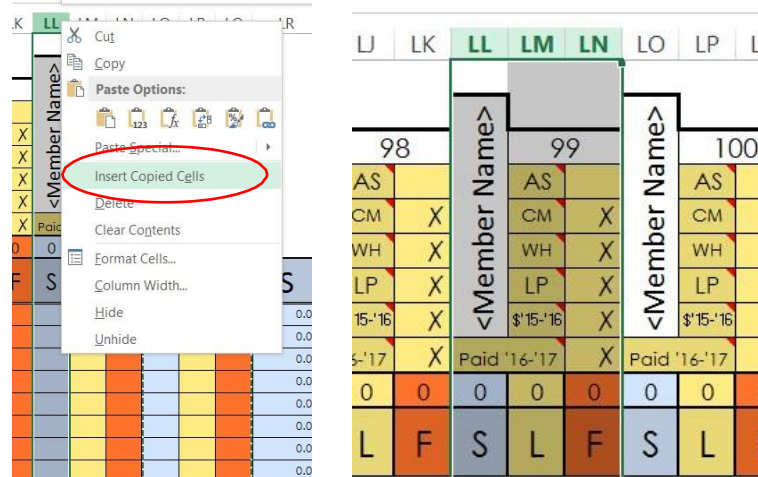
Step 1: Unprotect sheet.



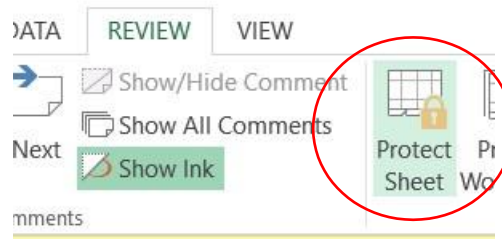
Step 2: Highlight the last 3 member columns. In this case, I'm highlighting the columns for the 100th member. Copy the columns.



Step 3: Click on the column you want to insert the copy cells to. Then right click and choose Insert Copied Cells. In the case below, I want to insert the member between member 98 and 99, so I clicked on column LL. The inserted member now becomes #99 and member #99 is now #100.



Step 4: Protect the sheet.



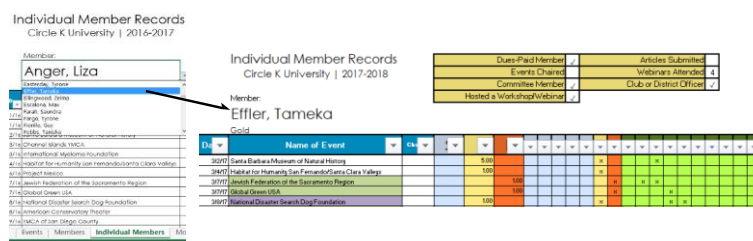
6. Input event chairs and hours.

After you've inputted all the members, fill out the Event Chairs column (column AA) and input all of the hours. If you have been keeping track of members' hours using the 2016-2017 MRS, copy and paste all the hours.

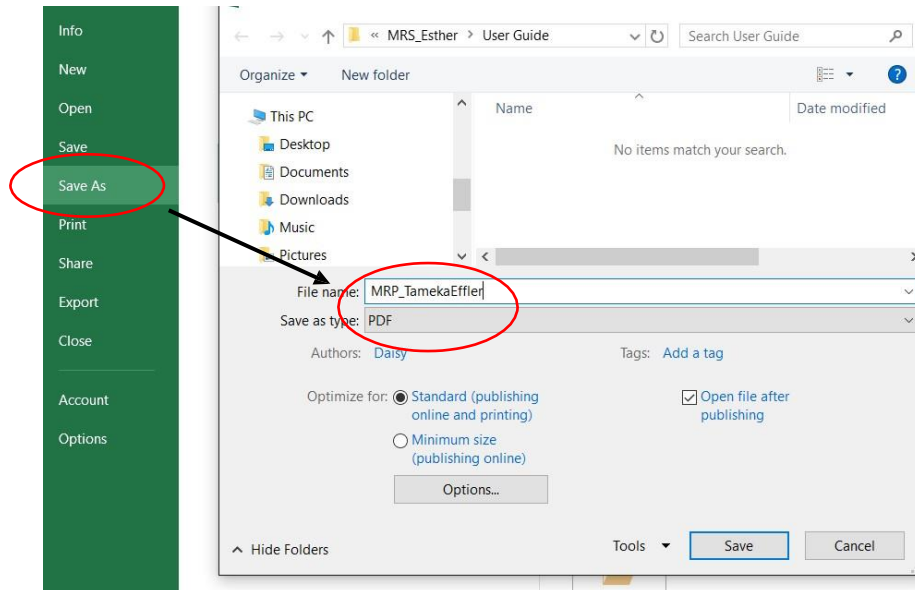
Similar to the 2016-2017 MRS, you can use the Members tab to look at MRP standings, which are automatically calculated, or view event attendance for individual members. There's also a Frequently Asked Questions (FAQ) tab for questions that you may have throughout the term.

If a member requests their event attendance, you can view it on the Individual Members and save it as a PDF. Below is a visual explanation.


Step 1: Select the member whose event attendance you want to view. In this case, I chose Tameka, Effler.



Step 2: Click on FILE then “Save As” and save the file as a PDF with the title you want. Be sure that you are saving a PDF and not an Excel file!




The resulting PDF looks like the following and can be sent to members.



Individual Member Records
Circle K University | 2017-2018

Member:
Effler, Tameka
Gold

Dues-Paid Member	<input checked="" type="checkbox"/>	Articles Submitted	<input type="checkbox"/>
Events Chaired	<input type="checkbox"/>	Webinars Attended	4
Committee Member	<input checked="" type="checkbox"/>	Club or District Officer	<input checked="" type="checkbox"/>
Hosted a Workshop/Webinar	<input checked="" type="checkbox"/>		



Date	Name of Event	Chaired	S	L	F	CO	CA	CS	DSI	ISI	AD	BE	MD	FR	CK	RY	IN	WS	DV	DE	INT	HE
3/2/17	Santa Barbara Museum of Natural History			5.00							x			x								x
3/4/17	Habitat for Humanity San Fernando/Santa Clara Valleys			1.00							x											x
3/7/17	Jewish Federation of the Sacramento Region			1.00							x		x	x								x
3/7/17	Global Green USA			1.00							x				x							x
3/8/17	National Disaster Search Dog Foundation			1.00							x				x	x						x
3/12/17	Catholic Charities of Santa Clara County			1.00		1.00					x	x										x
3/13/17	Long Beach Museum of Art			1.00							x				x	x						x
3/16/17	Legisl. Aid Society of San Mateo County					2.00																x
3/23/17	John Tracy Clinic		1.00	17.00	15.00	x					x	x	x	x	x	x						x
4/4/17	Tony La Russa's Animal Rescue Foundation			1.00							x				x	x						x
4/5/17	Haven Ministries			1.00							x				x	x						x
4/14/17	Goodwill Foundation			4.00	x				x		x	x	x	x	x	x						x

When you are working on District Convention awards, the PDF file above is what you will be submitting when your board fills out the following awards.

- Distinguished Appointed Board Officer Award
- Distinguished President Award
- Distinguished Secretary Award
- Distinguished Treasurer Award
- Distinguished Secretary Award
- New Member of the Year Award
- Returning General Member Award

The events will be highlighted to meet each question's requirements under the Event Attendance section of the awards above. Merge the PDF file above with your award (in PDF format) when you submit it.

Be sure to save your file throughout this process. If you haven't done so, please name your file as below:

2017-2018 MRS_School Name

where School Name is the name of your school (ex. 2017-2018 MRS_UC San Diego). Please do not use full abbreviations of your school name (ex. UCSD). CSU, UC, UH, and UN are the only permitted abbreviations.

Excel Hacks

Now that you have the basics down, here are some tips & tricks to help make your job more efficient!

Hack #1: Don't like right-clicking to copy and paste? Here are some keyboard shortcuts you should know:

Save	Ctrl + S
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V

Hack #2: Hate clicking on every dropdown box to turn a X into a ✓? You can unprotect the sheet and copy one of the check marks and paste it onto the applicable boxes. Combine with hack #1 to maximize efficiency!

Hack #3: Don't waste time by going back and forth between the MRF and MRS to copy and paste events data! You can actually view both at the same time. To do this, open up both your MRF and MRS. Go to one of the files, and click on VIEW. Then, under the Window section, click on View Side by Side. If you can't see both files on the same screen, click on Reset Window Position. You can also click on Synchronous Scrolling to turn it off if you don't want to scroll through both files at the same time. Click on View Side by Side again to view one file at a time.

Hack #4: Highlight board members and non-dues-paid members in your MRS. Since members are put in order by last name, it can be hard to find board members when you're inputting hours for recurring events like board meetings, general meetings, etc. To do this, unprotect the Events sheet and fill the cells with the board member names with a non-white color. This makes the names stand out on the sheet and helps you fill in hours quickly. I also like to do this with non-dues-paid members because I forget to delete them when I have to turn in the MRS. Make sure you use different colors for different purposes (ex. Green for board, red for non-dues-paid). Don't forget to protect the sheet when you're done!

Frequently Asked Questions

When is the Master Records Sheet due?

Bimonthly Check-In Deadlines: October 5, 2017

December 5, 2017

February 5, 2018

FTC Recognition Deadline: October 5, 2017

Final MRS Submission for DCON Deadline: March 2, 2018

All MRS submissions are due by 11:59 PM of these dates to the District Member Recognition Chair Esther Wang at member-recognition@cnhcirclek.org.

I accidentally forgot to put an event in. What do I do?

Unprotect the sheet and put in the event at the bottom of your events log on the MRS. Then cut the whole row (Ctrl + X). Next, click on the row where you want to insert the event. It will be inserted above the row you clicked on. Right click and choose Insert Cut Cells. Protect the sheet again.

What are the little triangles next to the date, event name, hours, and tags?

The little triangles allow you to filter through your events. Unlike last year, we will not be using a separate Awards Filter. Instead, we integrated it into the MRS. You can click on the arrow and choose the specific things you want to see. For example, if I only want to see Community Service events, I would click on the triangle next to CO and deselect blanks to see only events tagged CO. After you do so, a little filter will appear next to the triangle. Be sure to click on Select All on all the triangles with the little filter to be able to view all the events your club has had. You can use the Awards Filter on the Events, Individual Members, and Monthly Events tabs.

How many members can I input?

You can input up to 800 members. If you need more room, please let Esther know.

How many events can I input?

You can input up to 1000 events. If you need more room, please let Esther know.

Should I keep track of non-dues-paid members' hours?

No. Since MRP only counts for dues-paid members, you do not need to keep track of their hours. However, if a non-dues-paid member ends up paying dues, you would need to input their hours for all the events they've attended. Since it's

difficult to input members in bulk, I suggest creating separate Excel sheet/Google Spreadsheet and making a list of all the events your club has had. In the column next to it, you can input all the non-dues-paid members that attended the event. That way, if a non-dues-paid member pays their dues, you can refer back to the sheet to see all the events they've attended instead of going through all the CERFs.

My file keeps crashing. What do I do?

This is inevitable because the MRS is a very big file. To avoid this, we suggest that you try to work on the MRS on school computers since they usually handle the files better.

Help! I don't see my question here.

Please don't hesitate to contact any of the members of the District Member Recognition Committee. We love to help and are always here for you!

District Member Recognition Chair – Esther Wang – member-recognition@cnhcirclek.org

Administrative Executive Assistant – Jack Wang – cki.jwang@gmail.com

Creative Executive Assistant – Serena Mann – serenathemann@gmail.com

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