# Instructions – adding new row

1. Add the person’s name and case number in ALL individual entry sheets (Staff 1, Intern 1, etc.) – can just copy and paste for each.
2. Add the person’s name and case number in the FY2015 Sheet. It’ll automatically add the relevant formulas.
3. Add all the information you have for the client, but do NOT touch any of the formulas from Col BC onward. They’re hidden, but just in case…

**Caveat: You have to have at least a “Date case opened” for the data to start appearing on the summary sheet.**

# Instructions – regular review of data

1. You may want to update the data re: household, co-occurrence, etc., as the case evolves. This is fine to do, as long as you don’t change the Referral Reason column, to maintain some data integrity.
2. As always, don’t touch any of the formulas from Col BC onward.

**Caveat: If you want to sort data, or rearrange ANY rows of client data, you have to sort in the FY2015 sheet AND \*ALL\* individual entry sheets. Otherwise it’ll calculate formulas incorrectly.**

# Instructions – saving data snapshot and submitting data

1. First, save a copy of the latest working file with a “good” filename, like “Activity Report working file Jan1-Mar31”.
2. Change the date values on the Summary sheet to match your filename (this case, 1/1/15 and 3/31/15).
3. Check that all cases in the FY2015 sheet have up to date opened and closed columns – this is crucial to calculating the summaries correctly.
4. Review cases in the FY2015 sheet:
   1. If you want to just look at ONLY cases part of the time period you’re submitting for, you can unhide Column T and filter to only show rows that have a value of 1 in that column.
   2. At the least, update the Case Stats rows – it’s a running total, so you’ll need to make sure everything is up to date.
   3. Otherwise, review all other relevant data that you can edit, and ensure all individual tracking sheets (if used) are complete.
5. Save this file. This is just the basis of your report file, so we’ll now save a copy the summary sheet only to submit.
6. While on the Summary tab, rightclick on the tab and select “Move or Copy…”
7. Check the “Make a Copy” box and choose (New File) from the destination dropdown.
8. Save this file with a good name, like “Activity Summary Report Jan1-Mar31”
9. Close the first file (the working file)
10. Unprotect the worksheet – click on Review 🡪 Unprotect Sheet, then enter FSS as the password.
11. Break the links to the old worksheet (so it will stop trying to update data automatically; we just want a static one to send on for reporting):
    1. Click on Data 🡪 Edit Links
    2. For every source listed in the popup box, select it, then click the Break Link button.
    3. It’ll warn you about this removing formulas. Go ahead and say OK.
12. Save the file again, and it’s ready to send!

# Instructions – quickly calculating data

1. Change the date values listed on the “Summary” Sheet. That’s it!
2. This, and the agency name, are the only things you can edit on the summary sheet in its normal protected formula state.

**Caveat: Case stats are being entered on a cumulative annual basis, so need to refer to previous submissions if you want to compare over time.**