Notes on Using the Macros in Personnel Database

(Updated 24 Feb 2021)

We can create 5 control buttons on the DATABASE Worksheet, assigning the corresponding macros:

* “Update Record” - MetaUpdateRecord
* “Add New Record” - MetaAddRecord
* “Remove Formulae” - MetaRemoveFormulae
* “Refresh Worksheet Formulae” - MetaRefreshFormulae
* “Transfer/Delete Record” - MetaDeleteRecord

When a button is clicked, the assigned macro will run. The functions of the macros are outlined as follows:

**1. Update Record**

Purpose: update fields of an existing record.

Method: The macro copies the values of the fields in the form on DATABASE worksheet to the other relevant worksheets of the database. The positions of the relevant rows on the updated worksheets are preserved.

Note: If applicable, the spouse’s data on the worksheets “2 Children” and “3 Emerg Info”, will be updated as well.

The recommended workflow for using this macro is:

* Retrieve the desired record by selecting the name in the drop down menu on the DATABASE worksheet.
* Remove formulae from the fields by clicking the “Remove Formulae” button. This preserves the values of the fields.
* Edit the desired fields.
* Click the “Update Record” button. A completion message pops up when the updating process has been completed.

**Note**: The update will be aborted if either or both of the Legal Name and Household Number fields are empty.

**2. Add Record**

Purpose: add a new record to the database.

Method: The macro copies the values of the fields in the form on DATABASE worksheet to the relevant worksheets of the database. It makes a prior check that the Legal Name and Household Number values are not already existing in the database. A new row is added to each of the latter worksheets.

The recommended workflow is:

* Retrieve some record, preferably one that is similar to the new record to minimise the amount of information to modify, using the Name drop-down list.
* Remove formulae from the fields on the worksheet by clicking the “Remove Formulae” button.
* Fill in or update the fields as needed.
* Click the “Add Record” button. A completion message pops up when the new record has been added to the database.

**Note**: The addition of record will be aborted if the Legal Name or Household Number is already existing in the database. The addition will be aborted if either or both of the Legal Name or Household Number fields are empty.

**3. Remove Formulae**

Purpose: remove the formulae from the fields in the DATABASE worksheet so that modification of the values can be done easily.

**4. Refresh Worksheet Formulae**

Purpose: to recover the formulae in the relevant fields of the worksheet. This macro returns the worksheet to its original state. It is used after updating a record or after adding a new record.

**5. Transfer/Delete Record**

Purpose: transfer a record from the current workbook to another workbook.

The recommended workflow for using this macro is:

* Retrieve the desired record by selecting the name in the drop down menu on the DATABASE worksheet.
* If an updating of any of the fields is required before the transfer, remove formulae from the fields by clicking the “Remove Formulae” button. Then proceed to update the fields as desired.
* Click the “Transfer/Delete Record” button. A message box pops up to ask for the file path of the workbook the record will be copied to. Click the “OK” button to run the transfer. Click the “Cancel” button to cancel the copy function.
* Upon completion of the copy function, a message box pops up with a message that says the transfer has been completed.
* Next, the user is prompted to confirm the Delete function. Click the “OK” button to confirm the deletion. Otherwise, click the “Cancel” button.
* The Delete function deletes the information for the given Legal Name and Household ID from each of the 10 worksheets of the workbook hosting the macros. Upon successful deletion of the record from the database, a completion message pops up to inform the user.
* Click the “Refresh Formulae” button on DATABASE worksheet to refresh the form and the drop down menu of names.