



Branch Secretary Portal

The new UNITE membership system

Step-by-Step
Guide

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Introduction

This manual is to help Branch Secretaries update the membership of their Branch. Not only will you be able to see who are the members in your Branch you can also conveniently inform the Union's administration of any changes to Branch Officers and members. You can download the list of members and download a sheet for cash payers.

You will need to go the website <http://branch.unitetheunion.org> from any browser software you have.

Your Username and Password are the same as for "My Unite". If you have not got a "My Unite" login please visit www.unitetheunion.org/myunite to create one or contact the helpdesk (details below).

Where to get Help

If you have any problems, please call the helpdesk on **020 3371 2100** or email icthelpdesk@unitetheunion.org.

This information is always displayed on the Home page of the Website once you have logged in.

Branch Secretary Portal

Welcome to the Branch Secretary Portal!
For help on using this site please call the
helpdesk on 020 3371 2100 or email
icthelpdesk@unitetheunion.org

Logging In and Out of the Branch Portal

Using your Internet Browser, type in the web address branch.unitetheunion.org and press Enter on your keyboard.

The screen below will appear, please type in your membership number and password and click on login

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://branch.unitetheunion.org/

branch.unitetheunion.org

unite the UNION

the union for life
BRITAIN & IRELAND'S BIGGEST UNION - 1.5 MILLION STRONG

Type in:
> your **username**
> and **password**
> and click on **login**

Branch Secretary Login

Username

Password

login

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To log out at any time click on **logout**

unite the UNION

the union for life
BRITAIN & IRELAND'S BIGGEST UNION - 1.5 MILLION STRONG

Welcome: Jackie Roberts

logout

Home Member List Unite Webmail

Getting Around the Site

There are three areas of this website:

- The Home page
- The Member List page
- The Unite Webmail page

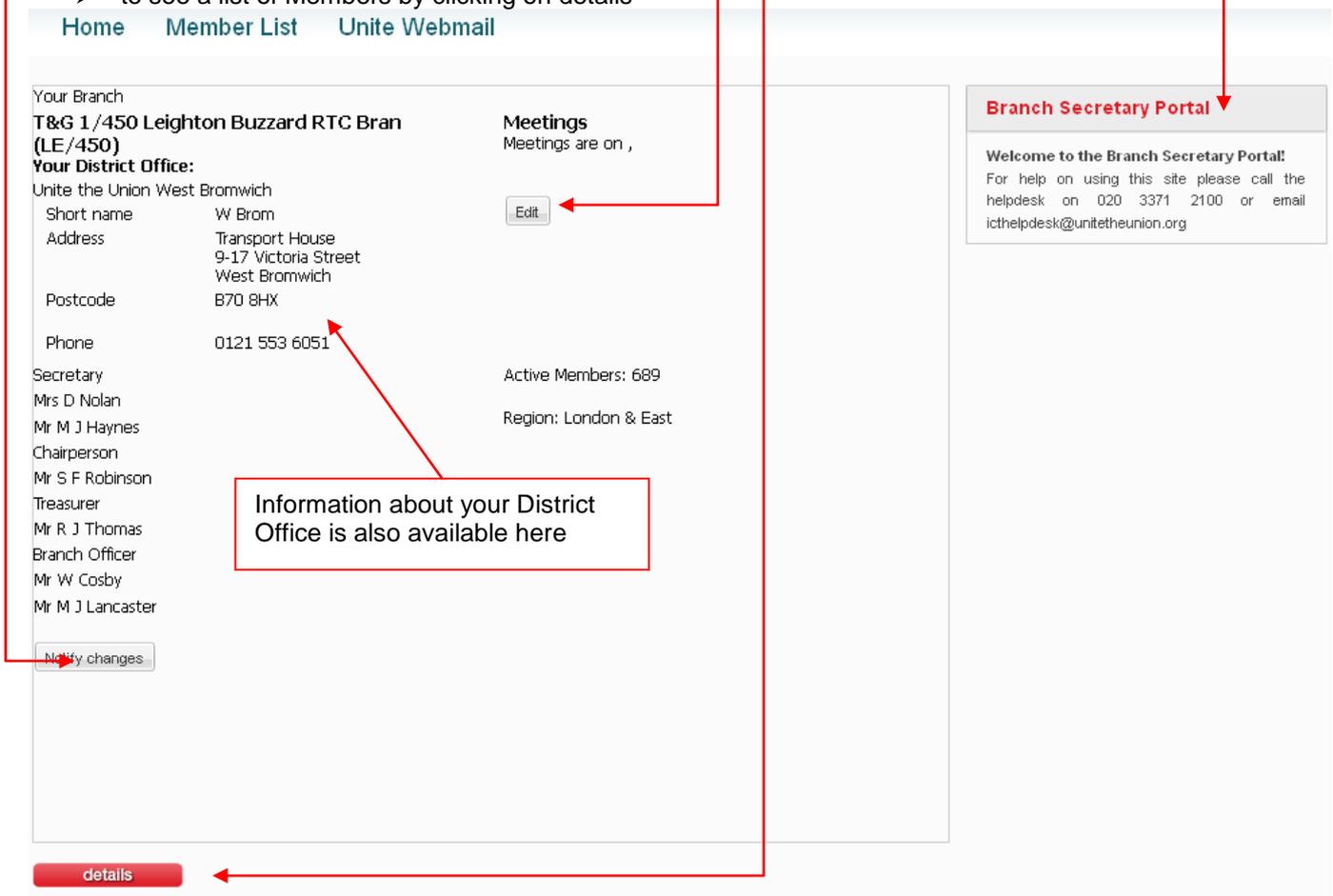
Below is a summary of what can be done on each of the pages:



The Home Page

From the Home page you can access:

- the help information
- the ability to edit the Meeting place information
- the ability to Notify Unite of any changes
- to see a list of Members by clicking on details



Members List Page

The Member List page allows you to:

- See a list of members and some basic information about them, including All Members, Lapsed Members and Recently joined and Recently lapsed Members (last 30 days)
- It allows you to add notes to a member
- It allows you to remove a member from your branch
- It allows you to add a member, as long as you have their membership number and surname
- It allows you to print a list for ease of use when collecting cash payments
- It allows you to download a list of all the members into an Excel Spreadsheet that gives you more information than the few columns shown here, e.g. Employee Ref, Date of Joining, etc

Active records

Name ▲	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687415	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Fedex UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Add Member
Show all
Lapsed only
Recently joined
Recently lapsed

i The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

[Cash payers](#)

Unite Webmail Page

This link opens Outlook Web Access for use if you have a unitetheunion.org email address.

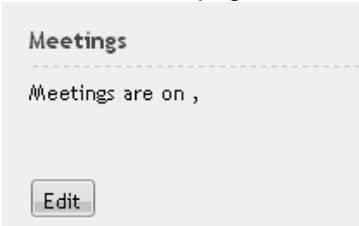
If you do not have a unitetheunion.org email address and you would like one, this can be created for you. Please complete the **Unite Email Address Activist Application** form and send it to your Regional Office.

If you previously had a tgwu.org.uk or amicustheunion.org email address and cannot log on using your usual details please contact the Helpdesk on **020 3371 2100** or **ICTHelpdesk@unitetheunion.org**.

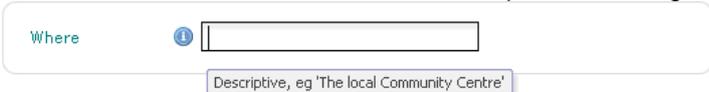
Changing Branch Information

Changing the Meeting Place information

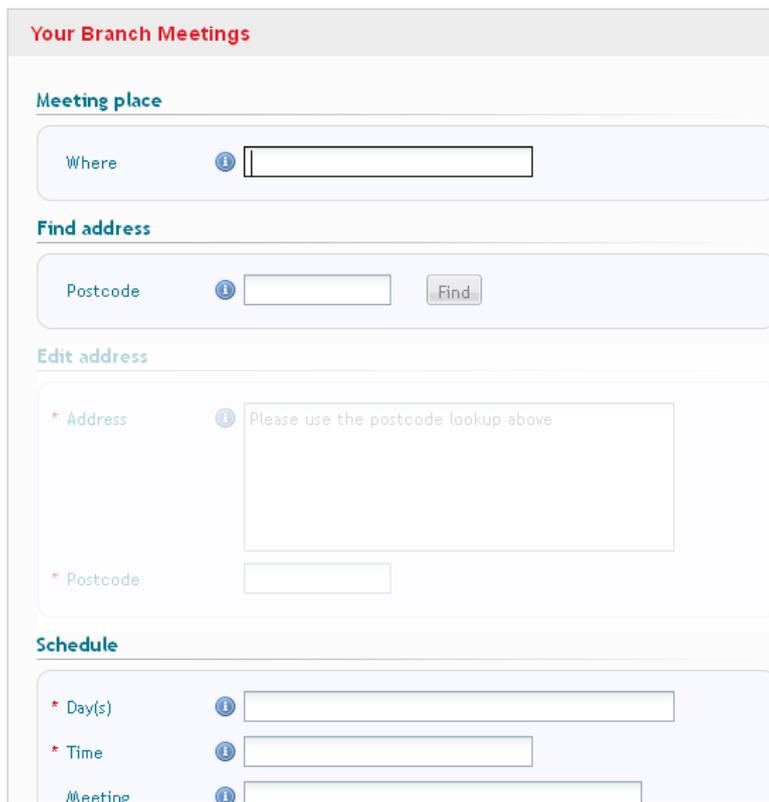
From the **Home** page, click on **Edit** under the Meetings area:



Please note that each area has an Information point that will give you up to date information on what is required,



e.g.



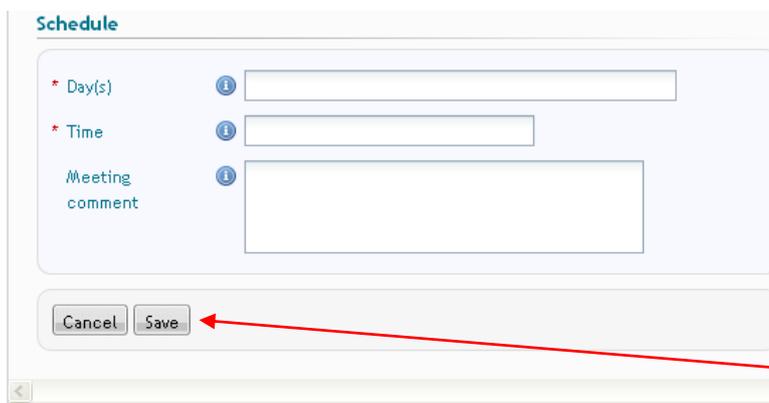
Where: Type in a description of where you will be meeting.

Find Address: Type in the postcode and click on **Find**.

From the list choose the address you want – or if not listed choose Other Address (Enter address manually)



Schedule: To type in all this information you will need to use the Scrollbar to move down.

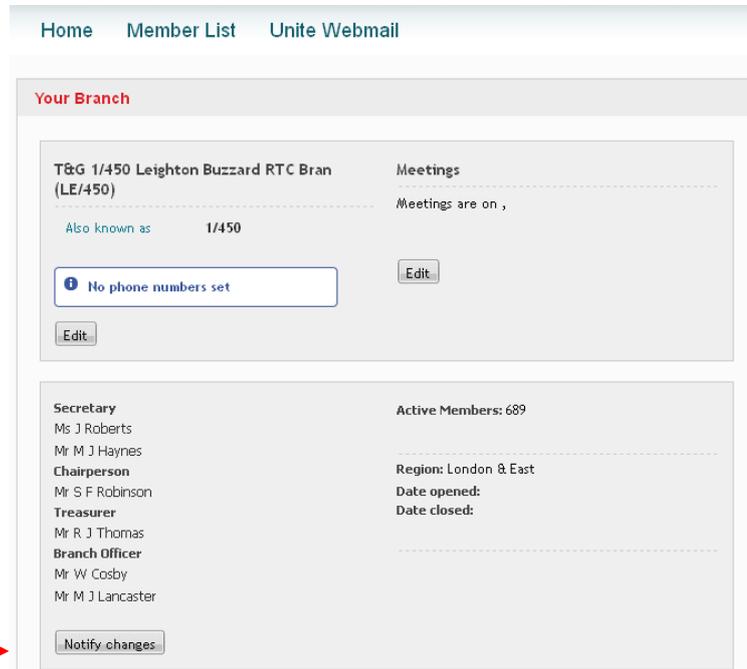


Schedule Type in the following:
Days Description eg First Tuesday of the month
Time Description eg 7pm – 9pm
Comments Any additional comments about the Meeting

Click on **Save** when completed.

Notify Unite of any Branch Officer changes

From the Home page, click on **Notify changes** button to notify Unite of any changes to your officers. We would need to have the Full Name, Membership number, of both the old and new officer as well as the Position, and the date of change.



The screenshot shows the 'Your Branch' page with the following details:

- Navigation: Home, Member List, Unite Webmail
- Branch Name: T&G 1/450 Leighton Buzzard RTC Bran (LE/450)
- Also known as: 1/450
- Meetings: Meetings are on ,
- Buttons: Edit, Edit, Edit
- Secretary: Ms J Roberts, Mr M J Haynes
- Chairperson: Mr S F Robinson
- Treasurer: Mr R J Thomas
- Branch Officer: Mr W Cosby, Mr M J Lancaster
- Active Members: 689
- Region: London & East
- Date opened: , Date closed: ,
- Notify changes button



The screenshot shows the 'Officer changes' form with the following details:

- Instructions: Complete the form below to let us know if any of your officers have changed. For each change, we need to know the position, the date of change, and the full name and membership number for both the old and new officer.
- Section: Officer changes
- Label: Details
- Form: A large empty text area for entering details.
- Buttons: Cancel, Save

Type in the information required, eg Full Name, Membership number, of both the old and new officer as well as the Position, and the date of change.

Click on **Save** when completed.

Member List

Viewing Member's Details

To see a list of Member's you can either click on Details from the Home page or click directly on the Member List page:

Home Member List Unite Webmail

Your Branch

T&G 1/450 Leighton Buzzard RTC Bran (LE/450)

Also known as 1/450

No phone numbers set

Meetings

Meetings are on ,

Edit

Secretary

Ms J Roberts

Mr M J Haynes

Chairperson

Mr S F Robinson

Treasurer

Mr R J Thomas

Branch Officer

Mr W Cosby

Mr M J Lancaster

Active Members: 689

Region: London & East

Date opened:

Date closed:

Notify changes

details

The results window can be sorted into order based on any of the headings.....Scale, Employer, Workplace, etc....

Home Member List Unite Webmail

Active records

Name	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687415	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Fedex UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Show all Lapsed only Recently joined Recently lapsed

The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

Cash payers

You can also decide to view different members, e.g. Show all, Lapsed only, Recently joined and Recently Lapsed (these last two show those who have joined or lapsed in the last 30 days)

Also note that the search options show that there are 46 pages of members in this Branch and you can use the arrows to go to the Next or Last or the Previous or First.

You can also amend the number of items you see per page if necessary and use the green Download button.

Adding and Removing Members

Adding and Removing Members is very similar and can both be done from the Member List page

Home Member List Unite Webmail

Active records

Add Member
Remove Member

Name	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687475	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Fedex UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Add Member Show all Lapsed only Recently joined Recently lapsed

The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

Cash payers

Remove a Member

From the Member List Page, find the member you want to remove and click on the **Remove** button.

Comment

Member's Details

Warning - you are about to remove the following person. If you continue, this person will no longer appear in your list, so please be certain that this action is correct.

* Reason

Incorrect Branch

Deceased

Resigned

* Comment

This is the incorrect Branch for this member.

* I confirm that this person should be removed from my list

Cancel Save

Update completed

The details have been updated.

Return

Please read the **Warning** as if you continue this person will no longer appear in your list.

Please choose the **Reason** and you must add a **Comment** and tick the **Confirmation** box before clicking on **Save**.

Confirmation that this has been updated is displayed.

Click on **Return** to see that the member is now removed from your list.

Adding a Member

To add a member, you must already have their membership number and surname. From the **Member List** Page click on **Add Member** at the bottom of the page.

Add Member

To add someone to your list, they must already have a record in the membership system. Enter that number below, and their surname, and we will try to locate them.

If you already know that they do not have a record, please ask them to use the Join Online website and, when finished, let you know the number they are allocated.

Member's Details

* Member number

* Surname

Type in the **Member's number** and **Surname** and click on **Next**

Comment

Member's Details

i Use the text box below to view or record a comment about this person.

* Comment

* I confirm that this person should be added to my list

Type in a **Comment** and tick the **Confirmation** box.

Click on **Save**

Update completed

The details have been updated.

Click on **Return** and the member will now be added to your list.

Adding Notes to a Member

To add notes to the member, from the Member List screen click on the  icon on their row:

Home Member List Unite Webmail

Active records

Name ▲	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687415	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleyway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Fedex UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Add Member Show all Lapsed only Recently joined Recently lapsed

The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

Cash payers

Comment

Member's Details

Use the text box below to view or record a comment about this person.

* Comment

Cancel Save

Type in your **Comment** and click on **Save**.
Click on **Return** to the **Completion** screen

Update completed

The details have been updated.

Return

Download Member's Details to Excel

You can download the



Branch Member's details to Excel from the **Members List** page download button

Home Member List Unite Webmail

Active records

Name	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687415	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Fedex UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Add Member Show all Lapsed only Recently joined Recently lapsed

The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

Cash payers

Click on this to download all members [not just those on the first page] to an Excel spreadsheet.

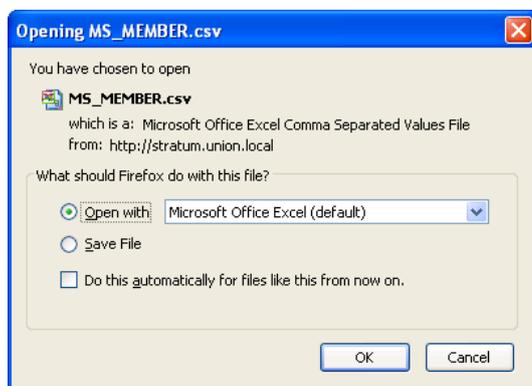
This may take a minute and you might see messages at the bottom left hand corner of your screen like this:

Waiting for testapt.union.local...

Or see the Tab at the top showing a green circle going around and around....



But you will then see the following:



Click on **OK** to see your list in **Excel**.

Please see Appendix for a brief guide on the use of Excel.

Cash Payers

If you still have members who pay by cash rather than through their wages (Check off) or through Direct Debit then the Branch Secretary Portal has the facility to provide a printable list of members in the Branch together with their contribution type and rate and the value of current arrears. This will be live information at the time the list is printed.

There is also a blank column that should be completed for amounts received. Once completed, this list should be totalled and matched to the cash/cheques paid at the branch meeting.

The monies and this list should then be taken or sent to the local District/Regional office for processing or paid in locally to the Regional General Fund, with the contribution list and copy pay in slip forwarded to the Regional Office for processing.

Please contact your Regional Finance Team for details of the Regional General Fund and to obtain a Unite Trust paying in book for that account.

All monies must be banked gross at the earliest opportunity and subscriptions MUST NOT be banked to a Branch bank account.

No deductions for Branch Administration or expenses are permitted from contribution monies.

Printing List for Cash Payers

To print the list for Cash payers, click on **Cash payers** from the **Member List** page

Home Member List Unite Webmail

Active records

Name	Number	Scale	Indicator	Employer	Workplace	Notes	Remove
L Abdul	15398020	Core + Ancillary	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Abdulle Abdulle	15294865	Core	Check Off	Wincanton Ltd (1/9947038)	Wincanton Ltd (15342T)		
P Adams	14137711	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
B Adams	14239210	Core + Ancillary	Not Paid Up	GEFCO (1/0107270)	GEFCO (12254T)		
Mushtaq Ahmed	15408215	Core + Ancillary	Not Paid Up	SAMPAN FOODS LTD (1/0113341)	SAMPAN FOODS LTD (14183T)		
Dinesh Akula	15622901	Core	Not Paid Up	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Michael Alderton	15532018	Core	Not Paid Up	NORBERT DENTRASSANGLE (C SAL...	NORBERT DENTRASSANGLE (C ...		
Edward Allen	15687415	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
M Alleway	14245184	Core	Check Off	BOC / GIST (1/9940002)	BOC / GIST (15273T)		
Graham Allford	15487288	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Ian Allford	15521194	Core + Ancillary	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
Jamal Amani	14784375	Core + Ancillary	Not Paid Up	FEDEX UK (5/0513805)	Felex: UK (W904642)		
A Ambridge	14006377	Core	Check Off	TNT UK LTD (1/9943045)	TNT UK LTD (15317T)		
C Archer	14103088	Retired-Free (20yr+)	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		
V Archer	14245196	Free card	Fully Paid	Manual Members & Retired (1/00000...	Manual Members & Retired (103...		

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Add Member Show all Lapsed only Recently joined Recently lapsed

The button below will open a list of Cash payers in a new window. You will be able to print the list for ease of use when collecting cash payments.

Cash payers

Stratum Engage - Mozilla Firefox

testapt.union.local/unite-wrap-officer/workflows/REP.CASH.PAYER.LIST?wrapper=standalone

Cash payers

Print list

Name	Number	Scale	Each payment	How often	Total due now	Amount received
Philip English	15645516	Core	11.70	Monthly	151.04	£
Kelvin English	15645540	Core	0.50	Weekly	2.15	£
Terence Ferguson	14781006	Non Working	0.50	Weekly	19.84	£
Martin Ferguson	14581110	Core + Ancillary	2.85	Weekly	87.63	£
P Ferguson	15021551	Non Working	2.27	Monthly	-48.41	£
Thomas Raymond	15579281	Core	11.70	Monthly	126.10	£
R Raymond	14086188	Retired-Free (20yr+)	0.05	Weekly	-0.72	£
Davy Raymond	15551968	Core + Ancillary	2.85	Weekly	138.31	£
Paul Riggs	15532057	Core	2.17	Monthly	14.42	£
J Riggs	14270522	Core + Ancillary	0.50	Weekly	4.00	£

Click on **Print list**

You will then see a Print box, click **OK** to print the list out.

Appendix

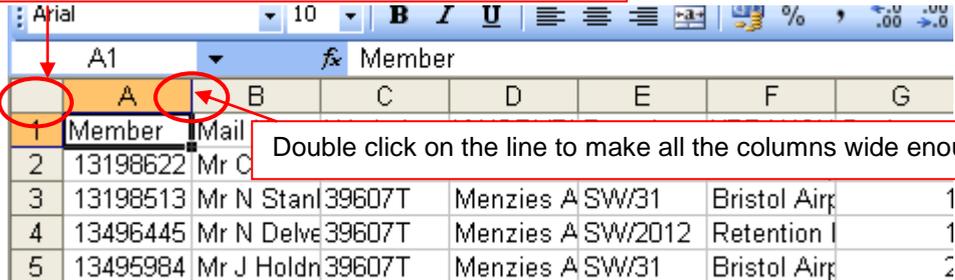
Excel – Basic Data Techniques

In a lot of cases we just need to do some adjustments once the data is in Excel so below are some of the more common techniques but this is not a substitute for Excel Training:

Adjusting all the column widths to fit text

When you see your Excel spreadsheet, you may need to adjust the column widths to be able to see everything – a quick way to do this is to click on the grey box to the left of the A column (this selects everything) and then take your mouse on the line that separates the A from the B and double click:

Click here to select all the columns

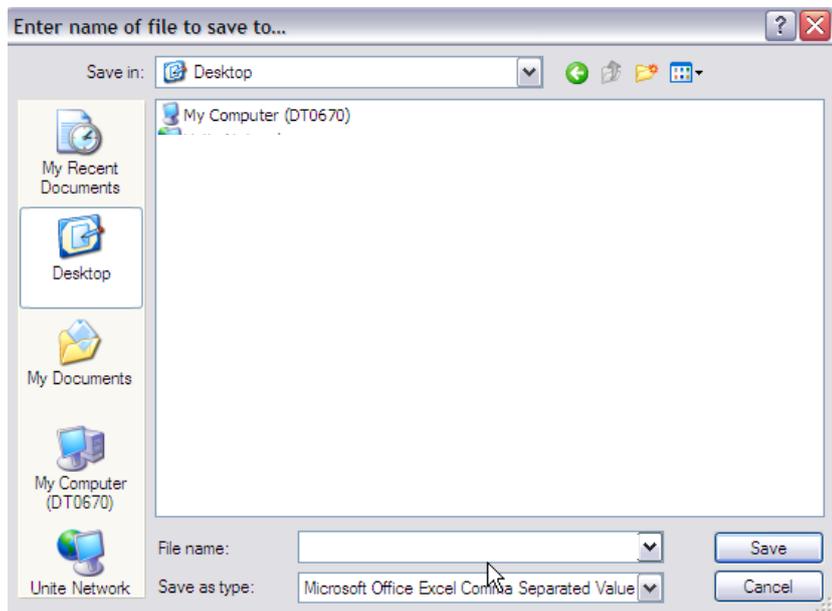


Double click on the line to make all the columns wide enough

	A	B	C	D	E	F	G
1	Member	Mail					
2	13198622	Mr C					
3	13198513	Mr N Stanl	39607T	Menzies A SW/31	Bristol Airp		1
4	13496445	Mr N Delve	39607T	Menzies A SW/2012	Retention I		1
5	13495984	Mr J Holdn	39607T	Menzies A SW/31	Bristol Airp		2

Saving the list in an Excel format

Now we need to save the file, click on **File – Save As** and you will be prompted to save the file:



Note that the **File name** by default is blank so that you can name the data to anything you want...

File name:

Save as type:

And the **Save as type** has defaulted to Microsoft Office Excel Comma Separated Value – which is useful for mailmerge but strips out formatting, e.g. removes Bold and italics – so we recommend you change this to **Microsoft Office Excel Workbook (*.xls)**.

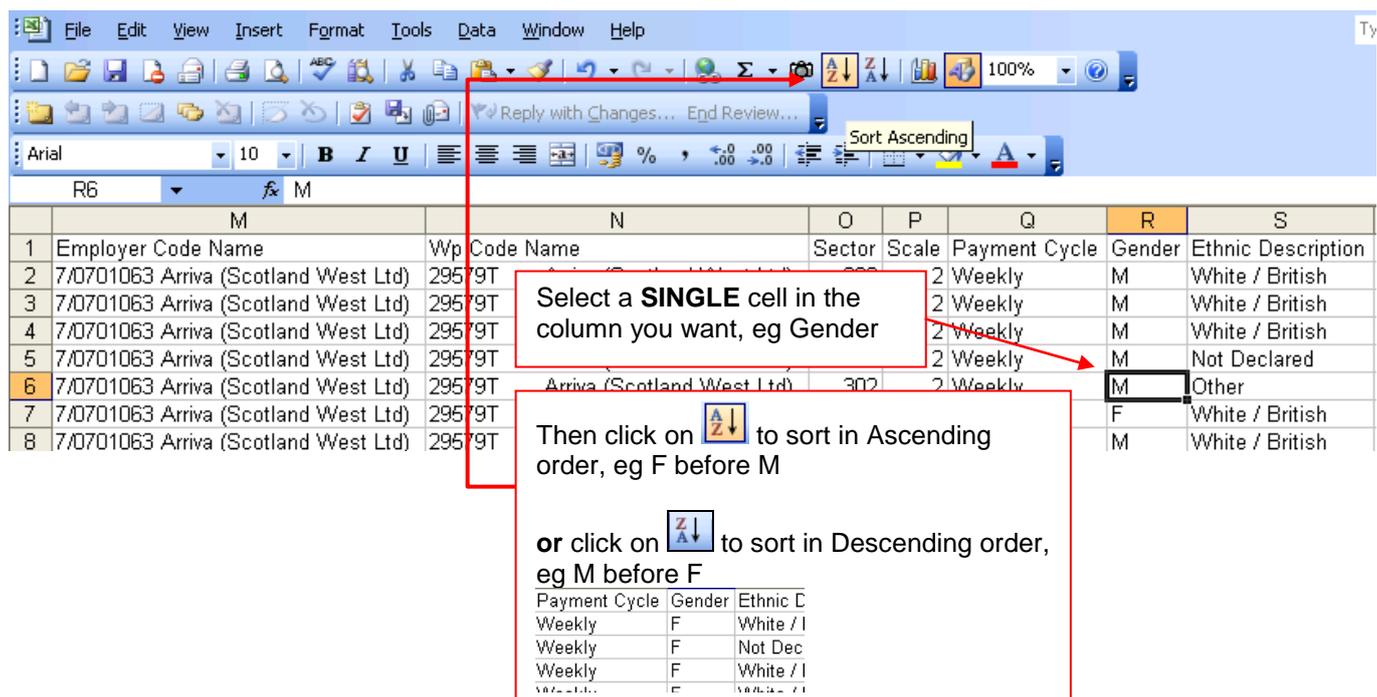
Sorting Data

All of the exported data from Stratum appears in Excel, sorted by Surname, so if that's how you want it fine, but you may want to view or remove all the people who are in Arrears more than 26 weeks, or you may want to view or prepare to remove those who have an Invalid Home Address, or you may just want to see all those who pay by Direct Debit.

Whatever your requirements you can sort the data several times until it is sorted the way you want.

Simple Sort

To do a simple sort, e.g. I just want to see the Females before the Males then do the following:



Select a **SINGLE** cell in the column you want, eg Gender

Then click on  to sort in Ascending order, eg F before M

or click on  to sort in Descending order, eg M before F

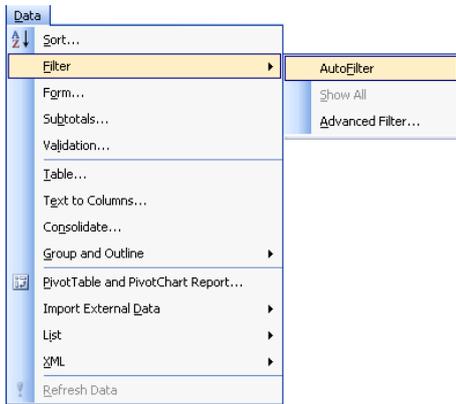
Payment Cycle	Gender	Ethnic C
Weekly	F	White / I
Weekly	F	Not Dec
Weekly	F	White / I
Weekly	F	White / I

Please Note: Once you have the list that way, you can delete the rows (see below) you don't want, a lot easier as they will be together, and if you want to sort in surname order again, just select a single cell in the Surname column and click on the Ascending order button.

You can also use the **Sort** dialogue box from the **Data** menu for more complex sorting. This is not covered in this manual.

AutoFilter

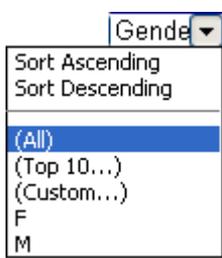
AutoFilter is a quick way to hide the rows of information you don't want temporarily, e.g. I don't want to see the Males. Do the following:



Select a **SINGLE** cell in your data and click on **Data**, then **Filter** and then **AutoFilter**.

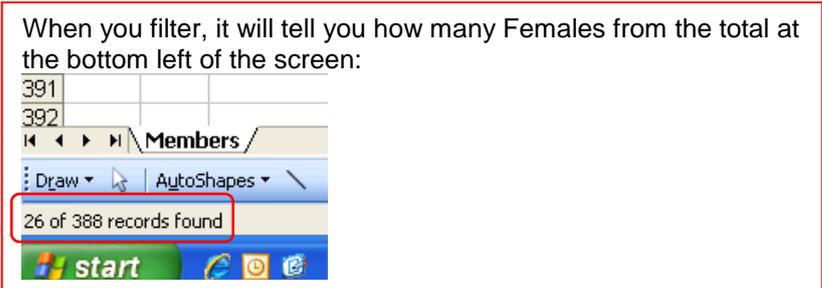
Please note this is how you would turn the filter off as well.

Each column will now have a drop down list arrow to the right of the top cell:



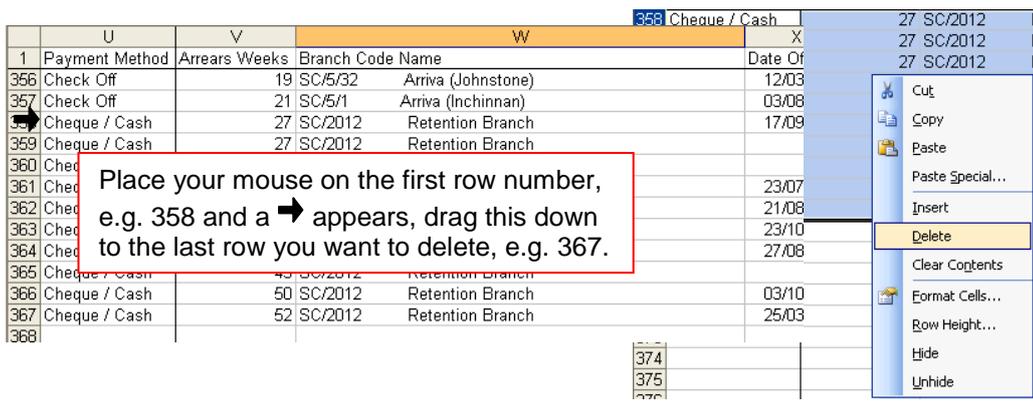
Click on the drop down arrow of the column you want to filter by and choose from the list, eg F for Females in this case.

Please note that you can select **(All)** to get all the rows back.



Deleting unwanted Rows or Columns

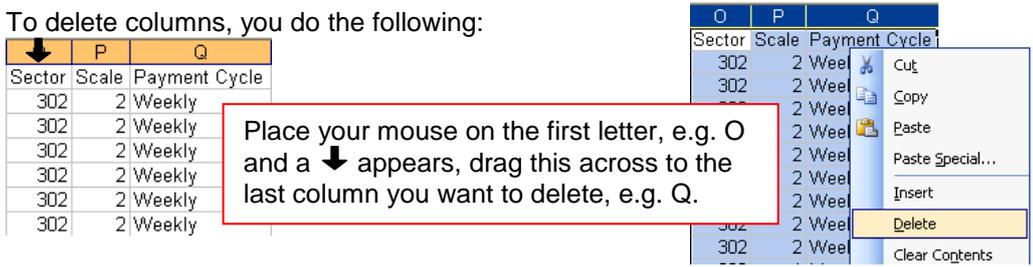
To delete unwanted Rows, eg all the members who are more than 26 weeks in Arrears, I would first perform a simple sort (see above this) on the Arrears Weeks Column and then I can delete all the rows I want in one go:



Place your mouse on the first row number, e.g. 358 and a → appears, drag this down to the last row you want to delete, e.g. 367.

Right mouse click into the selected area and choose **Delete** from the drop down menu.

To delete columns, you do the following:



Place your mouse on the first letter, e.g. O and a ↓ appears, drag this across to the last column you want to delete, e.g. Q.

Right mouse click into the selected area and choose **Delete** from the drop down menu.