

Provincial Grand Lodge of West Kent Craft Report 2018 Part 1 Lodge Information Sheet Guidance Notes

NOTES ON THE COMPLETION OF THE LODGE INFORMATION SHEET TO BE COMPLETED BY A SECRETARY

The new Rep Visit reporting system is comprised of 5 parts of which the Secretary is asked to complete Part 1. The Lodge Information Sheet comprises one macro-enabled Excel file as follows:

- 1. Craft Report 2018 Part 1 Lodge Information Sheet.xlsm** – This is a pro forma template in Excel which is to be completed by Lodge Secretaries and returned to the Provincial Membership Team APGM Group liaison. The new file naming convention requires the completed file to be saved in the format - **Lxxx <Lodge Name> Information YYYYMMDD.xlsm** which is ultimately uploaded to the **Provincial Membership** area on Basecamp.

Note: make a copy of the Template into a **target folder** and **rename** the copy using the above naming convention with the YYYYMMDD date format representing **the date of the visit**. **No Lodge Information Sheet should be sent in with the Template name!**

Note: Reps, Escorts and Secretaries should create separate **target folders** for each Lodge visit so that for any given visit the Reports, Lodge Information Sheet and any photographs will be co-located.

APGMs will review and upload to the **Craft Reports Pending** area on the Provincial Shared Data Access site Basecamp.

The report parts are in a new format and their usage is summarised in the following table:

Part	Part Topic	Description
1	Lodge Information Sheet	Completed by the Lodge Secretary. This form will be sent out to all Lodges by the Provincial Membership Team by APGM group and completed forms returned to them. This can be done either for their Installation meeting or 'en masse' at the beginning of the Masonic year, which may be easier to administrate. This will ensure that our Membership Teams and Interviewing Officers have up-to-date information for all of our Lodges throughout the current Masonic year. This completed page should have no GDPR connotations – filed on Basecamp in a general area – available to PGM's representatives and those who may visit the Lodge in an office capacity or assist the Lodge with recruitment and/or retention.
2	Lodge Members	Completed by the Official Visitor
3	The Lodge	Completed by the Official Visitor and escorts if present
4	Provincial Officers' & MM's Review	Completed by the Official Visitor
5	Recommendation Reports	Completed by the Official Visitor

The **Lodge Information** spreadsheet template has been constructed using many lookup tables and drop down selection boxes and Macros and VBA coding to simplify completion. When opening the files ensure that you **enable macros! Also See Appendix 1 – System Compatibility.**

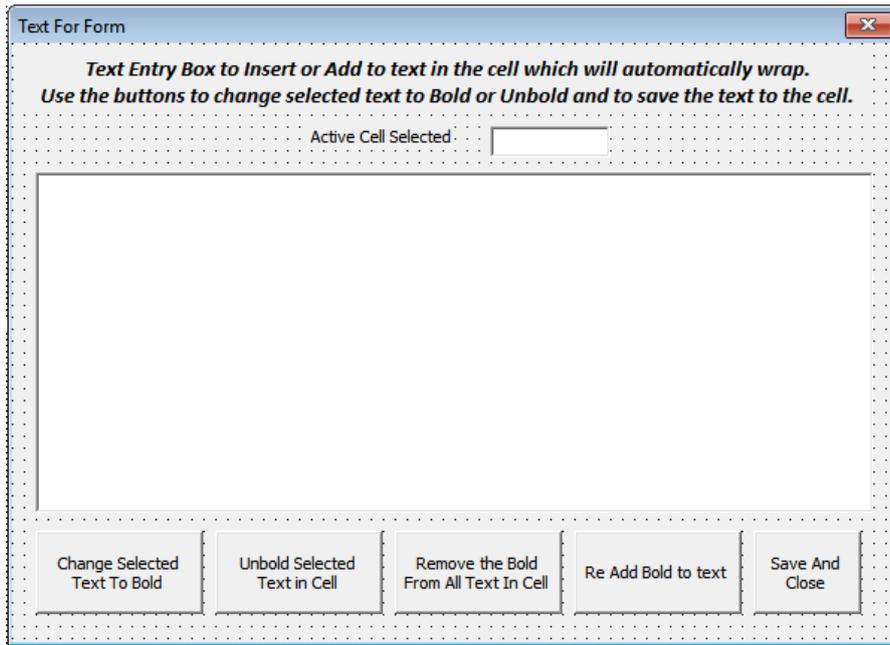
The various section headings, cells with formulae to display the result of the lookups are all shaded light blue with cell protection enabled. The text entry cells are unshaded and cell protection for those is disabled.

The sheet has been protected to activate the required cell protection settings. If for some reason the sheet should become unprotected then if shaded cells are selected then **ON NO ACCOUNT OVERWRITE ANY FORMULAE WITHIN THESE SHADED CELLS!**

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The following describes in greater detail Part 1 of the Lodge Visit Report that the Secretary is asked to complete.

Some cells in this worksheet require text to be entered so a Text Entry Form below is provided so that text can enter the required. When either cell is selected a Text Entry Form opens and displays any text already in that row with the facility to select specified text and use the appropriate button to make the selected **BOLD** or **UNBOLD** selected or **ALL** text and save the text as required. If there had been Bold Text in a previous draft then on opening the text box again will enable you to change the text to be Bold. If you removed all the bold text need to restore it whilst in the same edit use the **Re Add Bold to text** button and continue. The text will automatically wrap but you can press a Return to continue to type on another line within the same cell. After completing the edit the cell reference will be the same as that edited. If you need to re-edit the same text cell click away to a blank cell and then re-select the desired text cell.



Part 1 The Lodge Information Sheet

At the top of this part of the report enter the details of the Lodge visited and date and name of Rep completing the report. Enter the Lodge Number and the Lodge Name and Group are selected from a lookup table.

Note that when entering the date of the visit use format **DD/MM/YYYY**.

Form Completed By:		Lodge Name: (auto displays)	
Group No. (auto displays)	Date of Visit: (format DD/MM/YYYY)	Enter Lodge No. >>	
Provincial Grand Lodge of West Kent			
Lodge Visit Report – Part 1 – Lodge Information Sheet			

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1.1 General Information

Consecration Date		Ritual		Select Ritual		
Secretary's Name		Secretary's Email				
Secretary's Tel. No.		Master's Name				
APGM (Auto Displays)		How Many Times in Chair				
Number of Meetings Per Year (auto displays)	Time of Meetings		Installation Month	Select Month		
Months Meetings Held (check each month as required)	Jan <input type="checkbox"/>	Feb <input type="checkbox"/>	Mar <input type="checkbox"/>	Apr <input type="checkbox"/>	May <input type="checkbox"/>	Jun <input type="checkbox"/>
	Jul <input type="checkbox"/>	Aug <input type="checkbox"/>	Sept <input type="checkbox"/>	Oct <input type="checkbox"/>	Nov <input type="checkbox"/>	Dec <input type="checkbox"/>
Date(s) Meetings Held						
Place(s) of Meetings (auto displays)						
Associated Chapter Name (auto Displays)		Associated Chapter No. >>				
Lodge of Instruction Y/N	N	Location of L of I >>		Select Meeting Location		
Lodge of Instruction Day	Select Meeting Day	Time HH:MM		Duration hrs		

Use the drop down selection boxes to select the Months that Meetings are Held. The Ritual, Installation Month, Lodge of Instruction Y/N and Meeting Day entries are made using the drop down selection boxes provided. Enter the rest of the detail in the corresponding boxes.

1.2 Financial Information

In this part of the report the fees are entered. The Annual Fee - Due Date is selected from a drop down box selection.

1.3 Information About the Lodge

Use the drop down Y/N boxes to indicate use of electronic communications and also the Text Entry Form to enter into the Notes sections for the **Lodge and Masonry Booklets and/or Leaflets** and **Lodge History Available Y/N**.

1.4 About the Social Activity of the Lodge

Use the Text Entry form by clicking the cell for the **Ladies Night Masonic/Non Masonic** and **Social Events Masonic/Non Masonic** areas.

1.5 About the Charitable Work of the Lodge

Enter the charity name and donation details for Masonic and Non-Masonic Charities.

1.6 About Lodge Attendance and Support for the Lodge

Use the Month drop down boxes to select the month of meetings in each column and then below insert the letter to represent the type of meeting and the number of members and guests attending in the corresponding month or INST for the Installation.

1.7 About the Workload of the Lodge

Use the Month drop down boxes to select the month of meetings in each column and then below insert the letter to represent the work in the corresponding month or INST for the Installation.

1.8 Patronages of the Lodge

Enter in the cells the Patronages of the Lodge.

1.9 Lodge Overview (Further Information - Click in the cell below to enter text)

Use the Text Entry Form to enter a description of the Lodge – a pen picture of its activities that might be attractive to prospective new members.

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Appendix 1 System Compatibility

The **Excel Macro-Enabled Workbook** Report spreadsheets were developed using Excel 2007 on Windows.

Windows Systems Macro/VBA Issues.

It is well known that different versions of Excel operate in different ways and can have significant impact on the operation of macros and VBA code. During development of the Report spreadsheets a number of issues were identified and are documented below for Windows systems and also Mac systems. It has been tested on various versions of Excel with the results tabulated below.

Windows Excel Version	Observations
2007	All developments worked as designed. Any attempt to save as Excel 97-2003 disabled the macros so file always had to be saved as a Excel Macro-Enabled Workbook for it to work correctly when reopened
2010	All worked ok with the exception of importing pictures which looked strange after importing. After saving and then opening the file the picture displayed correctly.
2013	Same picture import issue as found with Excel 2010, displays correctly after saving and reopening file. Other problems experienced - Crashed a number of times when opening/editing spreadsheets with macros. When ' Enable Content ' to enable macros, the Excel window fades out - A couple of solutions to this: 1) Before enabling the macros try adding a new blank sheet, and then save the spreadsheet, reload, and sometimes it corrects itself. But not always. 2) Recompile the macro <ul style="list-style-type: none"> • Open the Excel spreadsheet (but don't enable macros yet) • In the 'Developer' ribbon, click 'Visual Basic' • On the 'Tools' menu, click 'Options' • Then on the 'General' tab, untick 'Compile On Demand', then click OK • Then scroll down in the 'Project' window, right click on 'Modules', then Insert a new module • Then just close the Visual Basic window, save the spreadsheet and close Excel. • Hey presto, when you then load your spreadsheet you'll be able to enable macros, and Excel won't crash.
2016	All worked perfectly.
Office 365	All worked perfectly.

How to Enable Macros for a PC

Upon opening a Report form then on some systems, just below the ribbon on Microsoft Excel, you will see a yellow shield and the words, "**Security Warning: Macros have been disabled.**" This is typically the default for Microsoft so it's imperative that you manually enable macros to move forward. Click on the "**Options...**" button to the right. A new window, "**Security Alert – Macro**" will open after you click on "Options..." and will explain the differences between enabling and disabling macros. Select the "**Enable this content**" box and click OK and you will be ready to start using the report.

Mac Systems Macro/VBA Issues.

VBA does **not** work on **Excel for Mac 2008**. Newer or older version of Office will have VBA but not 2008.

Office 2016 and Office 365 on Mac systems works fine for all the macros and VBA code used in the report spreadsheets. The only exception was for the importing of pictures in section 3.2 where the setting up of the path for the folder.

How to Enable Macros for a Mac

Upon opening a Report form, Microsoft Excel will prompt you with the screen below. Simply click on "**Enable Macros**" and you will be ready to start using the report.