

CREATING A DATABASE OF VOLUNTEERS

Most clubs have a large computer database with volunteer contact details, addresses, hours served, awards presented, and other vital information. The most direct means by which computers can streamline the management process is with the use of a volunteer database, made possible by one of the many different types of software. Clubs can create their own database if they have such programs as;

* Microsoft Access, Filemaker Pro, Excel, or Lotus Approach

**Steps to ensure an effective database:**

* **Ensure to use someone used to computers to set up your database.** This can be volunteers who use the database on a regular basis or have knowledge about databases.
* **Create a written process for working with the database.** Written documents about database instructions mean there is less chance for error and it will also assist a new volunteer coming into a role to use this in future.
* **There needs to be a Record keeping King or Queen.** While several people might be keeping the records up-to-date, one person needs to take the lead and report to the volunteer coordinator.
* **Train, train, train.** Volunteers using the record-keeping database are less likely to make mistakes if they are trained. Volunteers need to attend upgrade training as your system is improved.
* **Limit the access.** The only people who can access the database are those with training and have been given guideline son how to use the system or document. It is easy to do this by using the security parts of the program in the database e.g. security code. The King or Queen of the database should be in charge of access.
* **Clean up.** Many volunteers serve in more than one capacity and that makes it likely they may appear more than once in the database. There should be a regular system for eliminating duplicates in the records and checking the accuracy of the information, you have.
* **Stay on top of Input.** Keep the database viable by timely input of data. A good database is only useful if you make changes regularly.
* **Think disaster.** Organize a disaster plan. Back up records once per month in an off-site location, e.g. Cloud or external hard drive.

**Create a Simple Excel Database**

*A sample excel database is available under ‘Additional Resources’.*

Access is a great database application, but let’s face it – sometimes it’s just a “bit”

complicated! There are a lot of times when it would be nice to have some of the

capabilities of a database without all the hassles. This is where Excel really comes in

handy!

If you design your Excel workbook correctly, you can use Excel to look at your data in

many of the same ways you would use a database application – you can sort data in

many different ways, filter it so you see only data that matches specific criteria, and you can reorganize your data in any way you want it “on the fly” as your needs change.

At times, we need to keep track of information and a good place to this is in an Excel database file. An Excel database file makes it easy to enter, store, and find specific information for your volunteers.

To use an Excel workbook as a database, your data needs to be structured in the list

format. An Excel list consists of columns and rows of data structured in a specific way:

* Each column contains the same category of data in every row in the column (similar to a field in a database)
* Each row in the list contains all of the fields of data for one entity (a person, club, role, etc.) similar to a record in a database, but called sets of data in Excel’s terminology
* The first row of the list must contain a unique name at the top of each column. This first row does **not** need to be the first row of the worksheet.
* The row containing the column headings must be formatted differently from the rest of the list (i.e. bold, larger font, italicized, etc.)
* There can be no blank rows in the list (there can be blank cells in a column, but the entire row cannot be empty)
* Data in a column must be in the same format for every row in the column (i.e. numbers can’t be spelled out in one row and entered as digits in the rest of the rows in that column)
* Other data in the worksheet can be located outside the boundaries of the list

Here’s an example of an Excel list:

|  |  |  |
| --- | --- | --- |
| ***Number*** | **First Name** | **Surname** |
| 1 | Mary | Malone |
| 2 | Emma | Murphy |
| 3 | Paula | Kane |
| 4 | Karen | Hanlon |

* The cells in the first row of the list that contain the column headings are formatted differently (italicized), and each column has a unique name. Each row contains a set of data about one person, and there are no blank rows in the list.
* Data can be sorted alphabetically or numerically in Excel using the Quick Sort buttons on the Standard Toolbar. Sorts can be in Ascending (A-Z) or Descending (Z-A) order.
* Many people get frustrated with sorting in Excel because of the way they perform the sort – first they select an entire column by clicking on the column letter, then they click the Quick Sort buttons on the Toolbar. The only trouble with this method is that only the selected data gets sorted – the rest of the data in each row stays right where it started!
* To sort the right way in Excel, all you need to do is put the cell pointer in any cell in the column you wish to sort, then click one of the Sort buttons.
* If your data wasn’t originally sorted alphabetically or numerically, once you’ve performed a sort on the data you won’t be able to return the list to its original order; however, you CAN add an additional column to your list, and number each row sequentially so that you can resort that column numerically.

Numbering Cells

You can use Excel’s Fill Series feature to quickly number the new column sequentially:

1. In the first cell to be numbered, type the number 1
2. In the next cell down, type the number 2
3. Select those two cells
4. Position the mouse pointer over the Fill Handle in the lower right corner of the selected cells
5. Click and drag the black, thin cross mouse pointer down to the end of the column
6. To return the list to its original sort order, select any cell in the numbered column and click the Sort Ascending button

Sort by More than One Row

The Quick Sort buttons only allow you to perform sorts on one column at a time, but sometimes you need to perform more complex sorts. For example, if you have a list of

names you may want to sort first by Last Name, then additionally by First Name in case

there are duplicate last names. Use the Data, Sort command to perform this type of sort and others.

* Place the cell pointer in any cell in the list, choose Data from the Menu Bar, then click Sort…
* In the Sort dialog box, select the column you wish to use as the primary sort criteria from the Sort By drop-down list.
* Additionally, you can select a secondary sort criteria from the first Then by drop-down list and a third criteria from the second Then by drop-down list. This sorting method should make your sorting tasks **much** easier!



Filtering Your Database Using Autofilter

When your worksheet is structured as an Excel list, you can use the Data command to filter items that meet criteria you specify. When you’ve filtered a list, rows of data that don’t match your criteria are temporarily hidden from view, but not deleted, making it easier to find exactly what you’re looking for and do different kinds of data analysis.

There are two methods of filtering an Excel list – AutoFilter and Advanced Filter.

AutoFilter is easier to use than the Advanced Filter method, but the AutoFilter method doesn’t always have the power you need. Try AutoFiltering first – if that doesn’t meet your filter needs, you can always remove the AutoFilter, and try building an Advanced filter.

To turn on AutoFilter, place the cell pointer in any cell within your list, click Data, highlight Filter, then click AutoFilter. Your list now displays small black triangles next to each column heading.



When you click a triangle in one column, a list of all of the different values in that column

drops down. Click the desired value to filter the list to display only those values.