

GRO Spreadsheet

User Guide

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CONTENTS

<u>COPYRIGHT</u>	3
<u>Disclaimer</u>	3
<u>Acknowledgements</u>	3
1 Table of Figures	6
2 Background	7
3 Summary of Changes	7
4 Operation	8
5 Right Click Menu	11
6 Dropdown Options	14
7 General Flow and Usage	15
8 Handling Incorrect/Unsure Records	18
9 The Backup Feature	20
10 The Import Feature	21
11 Applying Formatting	23
12 Change Date Format	24
13 Recalculating Costs	25
14 Sorting the Worksheets	26
15 Summary of Amendments	27
<u>Obtaining Support</u>	28

1 Table of Figures

Figure 1 : Right Click Menu Options..... 12

Figure 2: The Right Click Menu 13

Figure 3 : Default Sheet Colours 14

Figure 4 : The "To Order" Worksheet 15

Figure 5 : The Date Prompt Input Form 16

Figure 6 : Age of Death Entry Form..... 17

Figure 7 : The Delete Confirmation Prompt..... 17

Figure 8 : The Type Field Dropdown 18

Figure 9 : The "Incorrect" Worksheet 19

Figure 10 : The Backup Option Panel 20

Figure 11 : Workbook Selection Panel 21

Figure 12 : The Import File Selection Dialogue 22

Figure 13 : Input Worksheet Selection Form 22

Figure 14 : Date Format Selection Form 25

2 Background

While working on my family tree I try to keep things organised by using Excel spreadsheets to complement my Legacy database. One of the things that was pretty time consuming was keeping up with which GRO (General Records Office) certificate I have already ordered and ones that I need to order. To help me get a better handle of these things and to prevent ordering duplicate certificates, I created an Excel spreadsheet. I decided to make this public to help others prevent the same thing.

This document is intended for use with the latest version of the GRO spreadsheet. The previous version of the spreadsheet does not contain all the features described within this document.

The latest version of the spreadsheet has an IMPORT facility allowing you to copy the worksheets from your existing GRO spreadsheet into the new version.

3 Summary of Changes

The latest version of the spreadsheet contains the following changes:

- The ability to import worksheets from the old GRO spreadsheet.
- The ability to flip the colour scheme.
- The ability to add a tick mark into a cell.
- The ability to check for duplicate entries.
- The addition of the new worksheet named “Unsure”.
- The ability to move records from “Incorrect” or “Unsure” worksheets.
- A backup facility has been added to allow a backup to either the same workbook, or a different workbook.
- The ability to re-apply formatting to a worksheet.
- The ability to change the date formats on the sheets.
- The ability to recalculate the cost column or add it if it doesn’t already exist.
- The ability to sort the data on a sheet into ascending date order.
- The ability to change the right click menu without the need to change code.
- The ability to disable the right click menu and re-enable it. Any changes to the menu items will be picked up when the right click menu is re-enabled.
- The ability to change the options in the dropdown menus without code changes.
- The right click menu has been made into a submenu and is now toward the top of the Excel right click menu.
- The ability to choose the colours used for formatting the sheet rows.
- The ability to change the tab colours for a worksheet.

The latest version still allows the moving of records in the same manner that the old version allowed, with the addition of returning records from “Unsure” and “Incorrect” to the appropriate Worksheet.

4 Operation

The latest version of the spreadsheet is essentially the same as the old version but with an additional 'main' worksheet. It also contains a couple of 'function' worksheets. The worksheets that are now in the latest version are:

Sheet Name	Description
Births	This keeps a record of all birth certificates, PDFs, or images that have been acquired.
Deaths	This keeps a record of all death certificates, PDFs, or images that have been acquired.
Marriages	This keeps a record of all marriage certificates, PDFs, or images that have been acquired.
To Order	This is the worksheet where you enter the certificates you want, or need, to order. This is the main 'control' worksheet. Entries on this sheet are the ones that will be moved to the relevant sheet by the underlying code when you are ready to file the record.
Incorrect	This keeps a record of all incorrect (not family related) certificates, PDFs, or images that have been acquired. These birth, marriage, and/or death certificates are all recorded on the same worksheet.
Unsure	This keeps a record of all records that you are unsure about. They are records for which you have the certificates, PDFs, or images but have not proved to be valid for your tree yet, but you suspect may do down the line. These birth, marriage, and/or death certificates are all recorded on the same worksheet.
RightClick	This sheet defines the options to be on the right click menu for the spreadsheet. It will only apply to this workbook. All other workbooks will be unaffected.
Options	This defines the items to be used in the QTR, Type and Media dropdown lists for the pertinent cells.

Each of these worksheets has a header line. It is important that these are left in place and the column header names are unchanged but columns themselves can be moved if desired.

The Column headings are slightly different depending on the event (birth, death, marriage or incorrect) being recorded. The header meanings are as follows:

Header Name	Used By	Required?	Description
Year	All	Yes	GRO year of event. This may well differ from the actual event year. This is the year it was registered.
QTR	All	Yes	Registration Quarter of the GRO registration.
First Name	All	Yes	The first name(s) of the individual.
Surname	All	Yes	The surname (Last name) of the individual.
Sex	All	Yes	Sex of the individual. This is either male, female or it could be left empty.
Date	All except "To Order"	Yes	This is the actual date of the event. It will be prompted for and filled in by the "Move Row" function from the "To Order" worksheet.
GRO Reference	All	Yes	This is the GRO reference code.
Cost	All	Yes	This is the cost of the artefact in Great British Pounds. Each sheet (other than the "To Order" sheet) will keep a running total of how much has been spent.
Ordered	All	Yes	This will be filled in with the current date when you click into the column unless there is already an entry there.
Arrived	All	Yes	This will be filled in with the current date when you click into the column unless there is already an entry there.
Media	All	Yes	This specifies the type of media. (Certificate, PDF, Image or other)

Header Name	Used By	Required?	Description
Prt	All	No	This column, if present, will allow the printing of a summary record for the row whose "Prt" column has been clicked. (See below)
Age	Death	Yes	Age of the deceased (from the certificate). This will be prompted for and filled in by the "Move Row" function from the "To Order" worksheet.
Type	"To Order" "Incorrect" and "Unsure"	Yes	This specifies the type of record. This is critical to the correct operation of the "Move Row" and "Move Valid" features.
Reason	"To Order" "Incorrect" and "Unsure"	No	This allows you to add your own notes these will not be copied to the sheet with a "Move Row".
Priority	"To Order" "Incorrect" and "Unsure"	No	This allows you to determine a priority for your own reference and allows priority sorting. This is not copied to the sheet with a "Move Row".

If you wish to add additional comments or change the order of the columns this should not present a problem.

The addition of the "Unsure" worksheet adds flexibility into the spreadsheet when you are uncertain if the record relates to the tree.

The "Incorrect" sheet is used when you are sure that the record doesn't relate to your family tree.

Entries on either the "Unsure" or "Incorrect" sheets can be moved back to the pertinent sheet by using the "Move Valid" option on the right click menu (see below).

5 Right Click Menu

The right-click menu of the spreadsheet is substantially different from the previous version of the spreadsheet. The previous options are still available, but we have added several new features to make the spreadsheet more flexible.

The following ‘right-click’ options are available:

Menu Text	Action Performed
Show Only	This will show all rows that match the data in the active (selected) cell. All others will be hidden. They are not deleted.
Hide All	This will hide all the rows that match the data in the active (selected) cell. They are not deleted.
Delete Hidden	This will delete all hidden rows. Use this with extreme caution!
Reset/Show All	This will reset all the rows. All rows will be visible.
Flip Colours	This will flip the colours of the selected cells. The foreground colour will change to the background colours and vice versa.
Tick the box	This will place a tick mark into the selected cells. Warning The existing data in the cells will be overwritten!
Move Row	This is the option that will move a record to the appropriate worksheet.
Check For Duplicate	This will check for a duplicate entry on both the “To Order” sheet and the sheet matching the “Type” field.
Move Valid Event	This will move a record from either the “Incorrect” or “Unsure” sheet onto the appropriate sheet
Move To Unsure	This will move a record onto the “Unsure” worksheet from the “Births”, “Deaths” or “Marriages” worksheets.
Move To Incorrect	This will move a record onto the “Incorrect” worksheet from the “Births”, “Deaths” or “Marriages” worksheets.
Backup	This will allow you to backup a worksheet or worksheets either to the current workbook or a different workbook.
Import	This will import a sheet or sheets from another workbook into the current workbook. This is how to migrate to the new version of the GROSpreadsheet without losing your data.

Menu Text	Action Performed
Apply Formatting	This will apply formatting to all the worksheets.
Recalculate Cost	This will recalculate the costs on the current worksheet.
Sort the Sheet	This will sort the data on the current worksheet into date order.
Change Right Click	This will allow you to change the option for the right click menu based on the information contained on the "RightClick" worksheet.
Disable Right Click	This will disable the ASL right click menu options.

The "RightClick" worksheet, as supplied, looks like:

Menu Text	Command	Tooltip
Show Only	ShowOnly	Show all rows with the text.
Hide All	HideAll	Hide all rows with the text.
Delete Hidden	DeleteHidden	Delete all hidden rows.
Reset/Show All	ShowAll	Show all the rows.
Flip Colours	InvertColours	Flips the colours of the selected cells.
Tick the box	TickThem	Place a check mark in the selected cells.
sep		
Move Row	MoveRow	Move the row from "To Order".
Check For Duplicate	DupCheck	Check to see if this is a duplicate record.
Move Valid Event	ValidRow	Move from "Incorrect".
Move To Unsure	MoveUnsure	Move row to "Unsure"
Move To Incorrect	MoveIncorrect	Moverow to "Incorrect".
sep		
Backup	SheetBackupRoutine	Create a backup of this worksheet.
Import	ImportFrom	Import from another spreadsheet.
Apply Formatting	doit	Apply formatting to all spreadsheets
Change Date Format	DateChange	Change the date format on all sheets.
Recalculate Cost	Recalculate	Recalculate cost
Sort the Sheet	SortSheet	Sort rows on sheet by date and surname
sep		
Change Right Click	ChangeRight	Change to new right click options.
Disable Right Click	DisableRight	Disable right click menu options.

Figure 1 : Right Click Menu Options

The leftmost column shows the text as it will appear in the right-click menu. Notice that "sep" will force the right click menu to have a separator defined in that position.

The middle column is the actual command that will be executed.

The rightmost column is what will be shown as a tooltip (when you hover over the option in the menu). The figure below show the actual results for the table defined in Figure 1

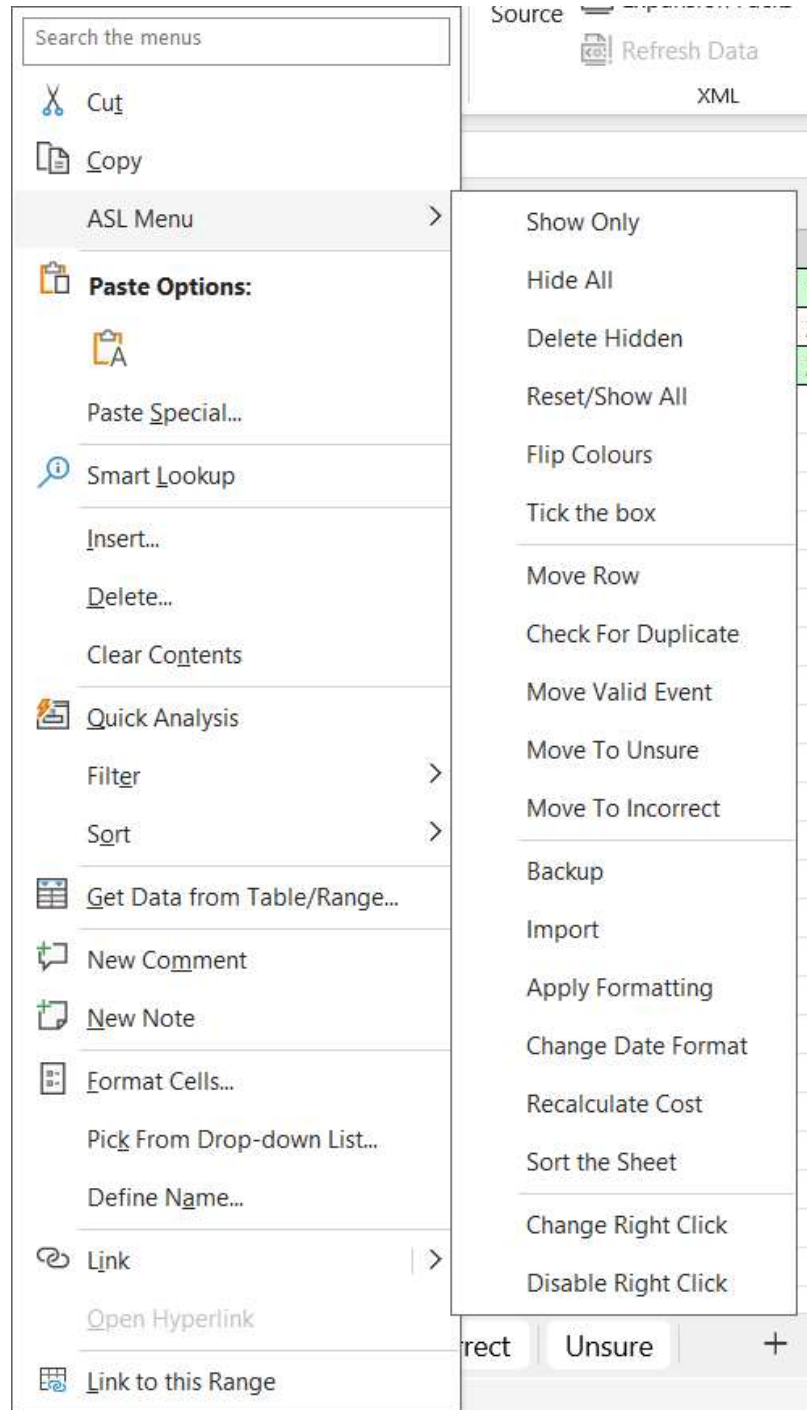


Figure 2: The Right Click Menu

If you make changes to the menu you can implement them by clicking the “Change Right Click” option or closing and re-opening the workbook.

6 Dropdown Options

The dropdown boxes for the cells under the column headings “QTR”, “Type”, and “Media” are populated from fields on the hidden worksheet, “Options”.

Column Header	“Options” Column	Values as Shipped
Types	A	Birth, Marriage, Death, Incorrect, Unsure
QTR	C	MAR, JUN, SEP, DEC
Media	E	Cert, IMG, PDF, Other

In addition to the above column there are three additional columns that can be used to change the colouring of the pertinent sheets. The columns **must** be in columns G, H and I, where column G is the name of the sheet to be coloured and column H is filled with the colour to be used. And column I is the colour to be used for the worksheet tab. The colour of the text will be black unless column H contains text in a different colour. In this situation the colour of the text in the cell will be used. If specified, the colours for Male and Female (Blue and Red respectively) will still be honoured.

The default colours for the sheets are:

G	H	I
Births		
Deaths		
Marriages		
Incorrect		
To Order		
Unsure		

Figure 3 : Default Sheet Colours

To change a tab colour using the spreadsheet function simply fill the “I” column with the colour to be used. In the example in figure 3, the tab for the “Births” worksheet will be changed to a green colour. If no colour is specified for the tab, then none will be used. If you decide to use colour tabs in the usual Excel manner, then leave the “I” column blank or the colour in column “I” will replace the one you used. This feature was added for people who are unsure of how to change a tab colour the conventional way.

7 General Flow and Usage

The overall flow of the spreadsheet is that an entry is made on the “To Order” sheet. An entry on the sheet does not cause any action to be taken other than allowing you to document the artefact you are interested in along with the GRO reference information. (Year, quarter, reference number). This sheet can be sorted into any of the column heading order. It can also be filtered using the right click mouse button.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Surname	Qtr	Year	GRO Reference	Type	Reason	Sex	Cost	Ordered	Arrived	Priority	Media
4	Belinda Mary	BUFFALO	JUN	1961	Hogwarts 1a 195	Death	Great Aunt		£12.00				Cert
10	Peter	Crocodile	SEP	2008	Trumpton (344-13) Entry#401049752	Death			£12.00	3 Jan 2024	3 Jan 2024		Cert
11	Hannah	ELEPHANT	DEC	1840	Brigadoon 25 277	Birth		Female	£2.50	15 Dec 2023	15 Dec 2023		IMG
12	John	ELEPHANT	SEP	1847	Brigadoon 25 285	Birth		Male	£2.50	15 Dec 2023	15 Dec 2023		IMG
13	Ann	GOOSE	DEC	1852	Trumpton 97x 47	Birth			£2.50	15 Dec 2023	15 Dec 2023		IMG

Figure 4 : The "To Order" Worksheet

In Figure 4 (above) we see that the first 6 columns (A-F) have been filled in on each row. The remaining columns are in various stages of completion. We see that the record for Belinda Mary BUFFALO hasn't been ordered yet, but that the only GRO artefact available is as a certificate. We have entered a reason for the record is that we believe it is our Great Aunt's death certificate. You can also see that four artefacts have been ordered and they have arrived (images from the GRO tend to be sent the same day as they are digital).

At this point it is important to note that **we will only move records that have a date in the “Arrived” column.**

Once you are ready to move a record to the appropriate sheet right click on the row with the record you want to move. Select the “ASL Menu” and the right click options will be displayed.

The choices you have “Move Row”, “Move to Unsure” or “Move to Incorrect”. The “Move Row” option will move the row to the appropriate sheet as identified under the “Type” field for the selected record. “Move to Unsure” and “Move to Incorrect” will move the record to the appropriate sheet.

On the “To Order” sheet, regardless of the certificate type, when you select “Move Row” you will be prompted for the date of the actual event. This should be the date on the certificate itself. The date prompt input form will be automatically set to the first day of the registration quarter. Use the navigation arrows to change months. The date prompt input form will display the event and name of the person to whom the event belongs.

The date prompt input form looks like:

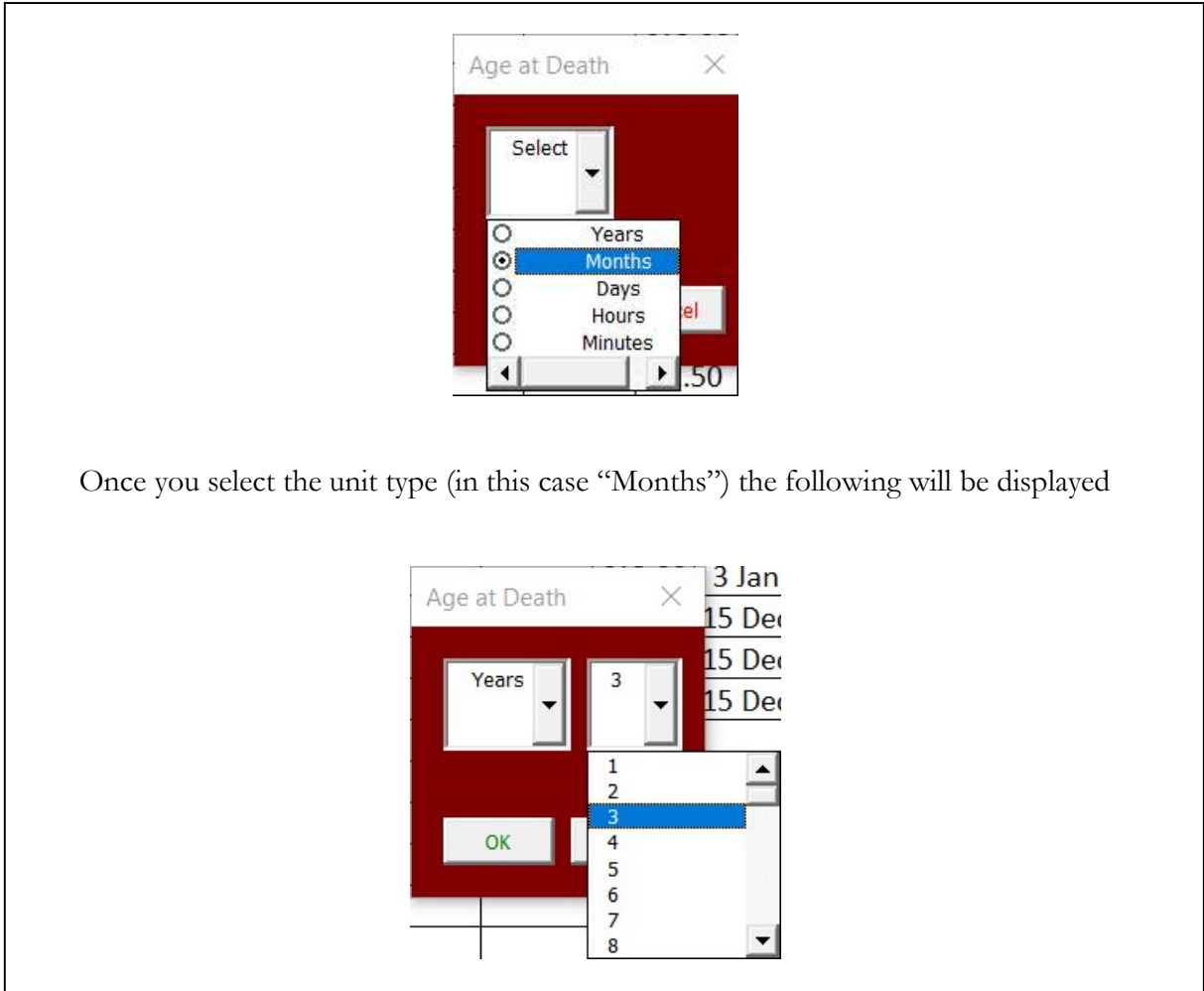


Figure 5 : The Date Prompt Input Form

Once you have selected the appropriate date click the “OK” button

If you are entering a death record, you will be prompted for the ‘Age at Death’. The form for this has two selectors on it. The first one is for ‘Units’. You can select: Years, Months, Days, Hours, or minutes. Once you select one of these options the second selector will be displayed so you can add value.

Here is a display of the Age input form:



Once you select the unit type (in this case “Months”) the following will be displayed



Figure 6 : Age of Death Entry Form

Once all the information has been entered the data will be moved to the relevant worksheet. You will then be prompted on whether to delete the row from “To Order” or not. The prompt looks like:

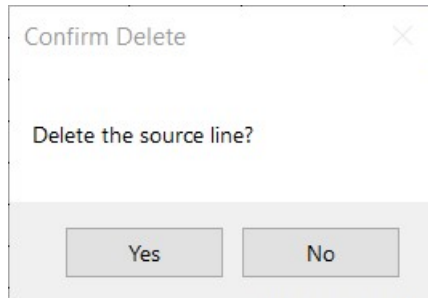


Figure 7 : The Delete Confirmation Prompt

The record should now be on the desired, relevant sheet. The record being moved will automatically place the data under the correct headings regardless of the column positions on either worksheet.

You can always manually move, copy, or delete records if you prefer by using Excel's in-built functions, however, this will require that the column be in the same position or you will have to manually manipulate the data.

8 Handling Incorrect/Unsure Records

Inevitably you will eventually acquire a record that is incorrect or that you are unsure relates to your research thread. You don't just want to delete all trace of them as that can lead to purchasing duplicate information down the line. This is where the "Incorrect" and "Unsure" worksheets come in. To get a record to move to the "Incorrect" or "Unsure" worksheets you use either the "Move to Incorrect" or "Move to Unsure" right click option or you can change the record "Type" (using the dropdown box in the "Type" column) and then using the "Move Record" right click option.

GRO Reference	Type	R
Brigadoon 25 277	Birth	
Brigadoon 25 285	Birth	
Trumpton 97x 47	Birth	
Dingly Dell 66w 459	Marriage	
Coventry 97x 297	Death	
Coventry 97x 305	Incorrect	
Coventry 97x 299	Unsure	
Coventry 10 272	Birth	

Figure 8 : The Type Field Dropdown

If you select "Incorrect" or "Unsure" from the dropdown box the spreadsheet will change the value of the cell to "Incorrect *type*". 'type' be the original value of the "Type" field. i.e. Incorrect Death" if it was a death certificate. There are two reasons for this.

1. It informs the program what type to display in the target worksheet.
2. It allows you to undo the change if needed and reminds you what it used to be!

Once the "type" field has changed you can use the "Move Row" right click option.

If you use the "Move to Incorrect" or "Move to Unsure" then the "type" field is left unchanged.

Regardless of the method used, you will be given the option to delete the row from the active worksheet.

I recommend that once you are happy that the spreadsheet is working as expected, that you delete the source row to keep things ‘uncluttered’ and reduce manual effort.

Any record being moved will ask you for the date of the event, the assumption being that you have the collateral with the date on it.

A sample of what the “Incorrect” (and indeed the “Unsure”) worksheet looks like is:

Year	Qtr	First Names	Surname	Date	GRO Reference	Cost	Type	Sex	Ordered	Arrived	Media
1840	DEC	Hannah	ELEPHANT	15 Dec 1840	Brigadoon 25 277	£2.50	Birth	Female	15 Dec 2023	15 Dec 2023	IMG
						£2.50					

Figure 9 : The "Incorrect" Worksheet

Note that the “Type” has been transferred to this spreadsheet.

If, later on, you decide that a record on either the “Incorrect” or “Unsure” worksheets do indeed belong in your tree, then you can use the “Move Row” from either worksheet and the record will be moved to the appropriate worksheet.

If the record on the “Unsure” or “Incorrect” is a death record and the age column has a value in it, then the record will carry that date onto the “Deaths” sheet. If, however, the age column is blank, you will be prompted for the age at death.

9 The Backup Feature

The new version of the GRO Spreadsheet provides a backup feature. This will backup (copy) one, more or all the worksheets into either the same workbook, or into a different workbook. When you click on the “Backup” option on the right-click menu you will see the backup options form. This form looks like:

Figure 10 : The Backup Option Panel

This panel will have the defaults shown every time it is invoked. The defaults are to backup all the worksheets indicated on the panel. Any worksheets not on this panel will **not** be backed up . You will need to manually copy those sheets.

By default, the backups will be made into the current workbook (as indicated by the checkmark in the box). If you uncheck this box, you will be prompted for the target workbook to use.

By default, the workbook will remain on the worksheet that you were on once the backup is finished.

By default, the number of backup ‘generations’ will be three. You can select up to ten. Once the limit is reached the oldest generation will be ‘rolled off’. The lowest numbered is the most recent backup.

Once your selections are made click the ‘OK’ button and the process will begin.

If you opt to backup the sheets into a different workbook then when you click “OK” you will be presented with a workbook selection panel. The selected workbook will be treated in the same manner as if it were the active workbook. Worksheets will be named and rolled in the exact same manner.

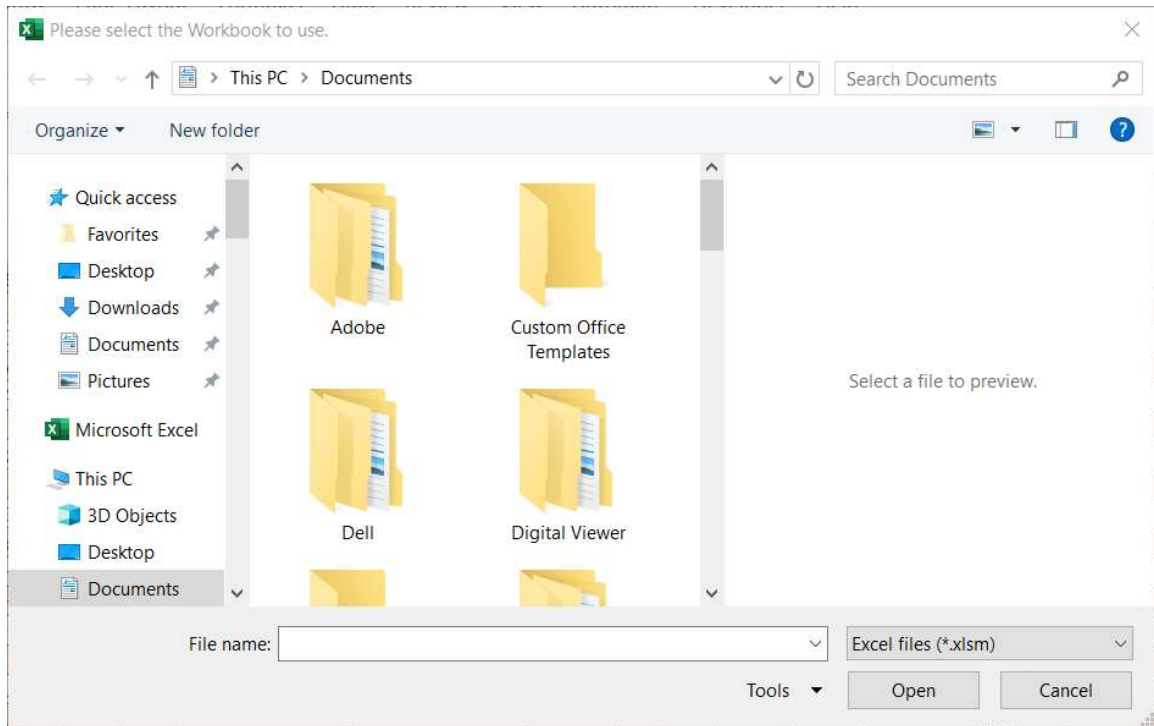


Figure 11 : Workbook Selection Panel

The workbook can be on any disk drive connected to the system, including removable drives and network drives.

10 The Import Feature

The import feature will import a worksheet (or worksheets) from a different workbook into the current workbook.

We recommend importing from the earlier version into this version of the spreadsheet as the first step for using the new workbook in earnest. As shipped the new version contains entirely fictitious records and, by importing from the previous release, the new code on the worksheets will be preserved.

When you select "Import" from the right-click menu you will have a workbook selection dialogue panel displayed (see below). Use this panel to navigate to the folder containing the workbook to import **from**. Select the desired workbook and then click the "Open" button.

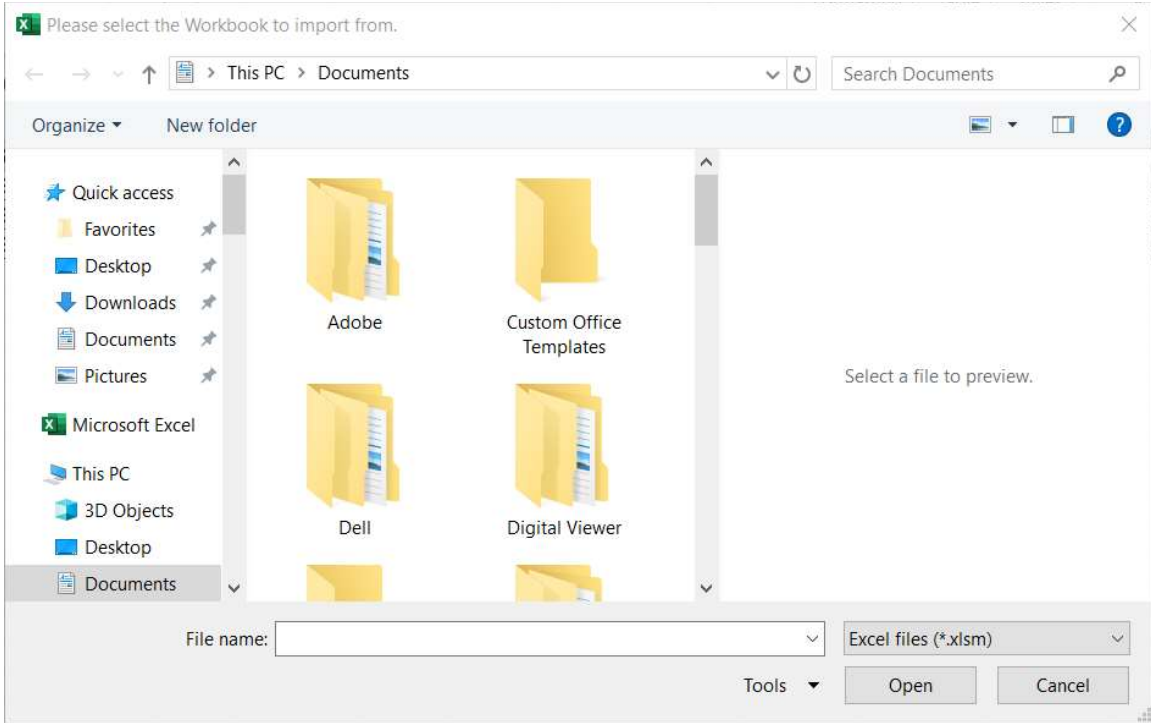


Figure 12 : The Import File Selection Dialogue

Once you have selected the desired workbook and clicked the “Open” button you will be presented with a form that lists all the worksheets contained in the workbook. You can select one or more sheets to be imported by using the ‘alt’, ‘ctrl’ or ‘shift’ keys in the usual Windows fashion.

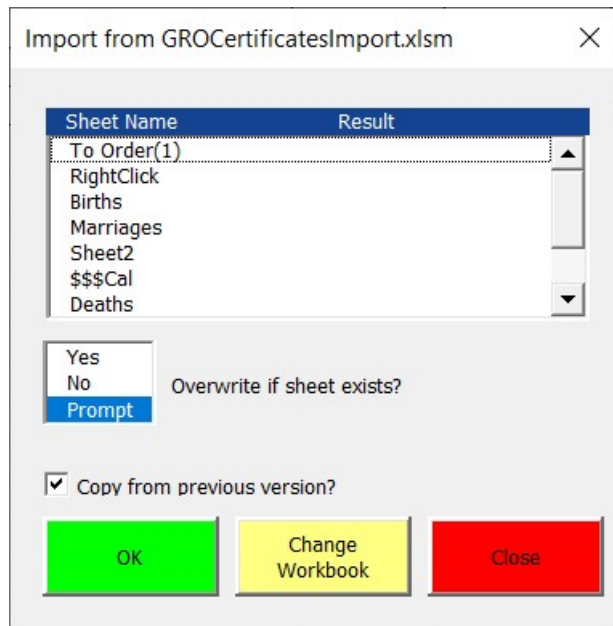


Figure 13 : Input Worksheet Selection Form

The form is used to select the worksheet(s) to be copied.

The source worksheets are never deleted.

The source workbook is identified in the title of the form. The worksheets in that workbook are listed except for any sheets that have their names start with three-dollar signs (i.e. \$\$\$) or named “Options”.

The “Overwrite” option will be used for every selected sheet name and are as follows:

Option	Result
Yes	The target sheet name will be renamed to <i>sheetname(2)</i> and the source sheet copied into the target workbook.
No	The source sheet will not be copied if there is a sheet with the same name in the target workbook.
Prompt	You will be prompted to overwrite a sheet if the name of the source worksheet matches that of one in the target workbook.

The option (which is checked by default) “Copy from previous version” will make the code treat the input (source) worksheet as one from the previous version of the GRO spreadsheet and will copy the data only. It is the recommended migration technique for migrating to the new GRO workbook from the previous version. Failure to use this for migration may result in the underlying code failing due not having the correct worksheet code. The old worksheet code has been updated and so the best way to maintain the new code is to use this migration technique. Remember the source data is never changed so you always have your data in the old workbook if needed.

Once you are ready to copy the worksheet data click the “OK” button.

If you need to change the source workbook, click on the “Change Workbook” button.

If you decide to not do anything, click the “Cancel” button.

11 Applying Formatting

Because a busy worksheet can be hard to read, the rows in the worksheets will be alternately coloured using the appropriate colour from the “Options” worksheet (see above for the default values). You can, at any time, re-apply the colours to your worksheets by utilizing the “Apply Formatting” option of the right-click menu.

When you click “Apply Formatting” all the appropriate worksheets will be formatted.

The tab colours will be changed when you click “Apply Formatting”. Any tab colours that have been made to the worksheet tabs will be changed by this action.

Note: Any conditional formatting on the sheets will be erased by applying formatting

12 Change Date Format

The ability to change the date formatting enables you to change all dates on all sheets into the format of your choice. It is a good way to ensure all your dates are presented in a uniform fashion. Existing dates will be converted to the new, chosen format if they are not already in that format.

The choices for the format are:

Format	Examples	Note
dd mmm yyyy	01 Jan 1972	The day will always be two digits.
d mmm yyyy	1 Jan 1972 11 Jan 1972	If the day has two digits both will be shown, otherwise just a single digit will be displayed. (This is the default style)
mmm dd yyyy	Jan 01 1972	The day will always be two digits.
mmm d yyyy	Jan 1 1972 Jan 11 1972	If the day has two digits both will be shown, otherwise just a single digit will be displayed.
dd/mm/yyyy	27/12/1972	The day will always be two digits.
d/mm/yyyy	6/12/1972	If the day has two digits both will be shown, otherwise just a single digit will be displayed.
dd/m/yyyy	04/7/1972	The day will always be two digits. If the month has two digits both will be shown, otherwise just a single digit will be displayed.
d/m/yyyy	16/12/1972	If the day or month has two digits both will be shown, otherwise just a single digit will be displayed.
mm/dd/yyyy	12/25/1972 07/24/1972 01/01/1972	This is the US date format; days and months will always have two digits.
mm/d/yyyy	07/4/1972	This is the US date format; months will always have two digits, but days will only have two digits when appropriate. The leading zero will be removed
m/dd/yyyy	7/04/1972 12/25/1972	This is the US date format; days will always have two digits, but months will only have two digits when appropriate. The leading zero will be removed
m/d/yyyy	7/4/1972 12/6/1972 12/25/1972	This is the US date format; both days and months will only have two digits when appropriate. The leading zeros will be removed

Format	Examples	Note
dd mmmm yyyy	01 June 1972 15 May 1972	The day will always be two digits.
d mmmm yyyy	1 June 1972 15 May 1972	If the day has two digits both will be shown, otherwise just a single digit will be displayed.
mmmm dd yyyy	June 01 1972 May 15 1972	The day will always be two digits.
mmmm d yyyy	June 1 1972 May 15 1972	If the day has two digits both will be shown, otherwise just a single digit will be displayed.

When you request to change the date format you will be presented with the selection panel as shown below.

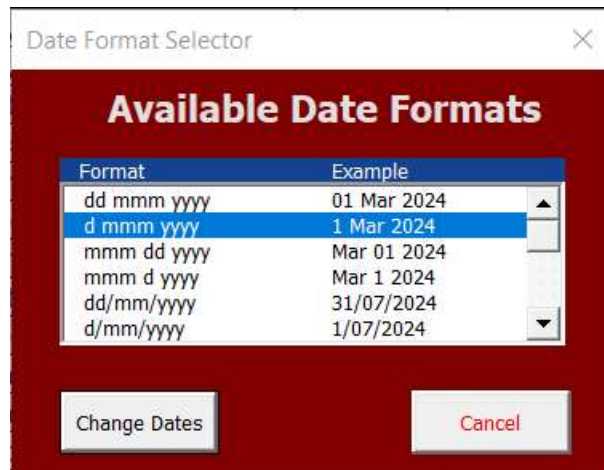


Figure 14 : Date Format Selection Form

Notice that “d mmm yyyy” is selected as the default. This would result in dates being in the format of day, month name abbreviated to three letters and a four-digit year.

Once the date is selected the format will be saved on the “Options” worksheet so that the desired date format will be retained over restarts.

13 Recalculating Costs

If you change a cost in the worksheet, Excel should automatically adjust the total at the bottom of the cost column on the worksheet. If, for some reason, this doesn’t happen, then clicking the “Recalculate Cost” will redo the cost column calculation for the sheet.

Costs will be in Great British pounds.

14 Sorting the Worksheets

You can sort a worksheet by using the “Sort the Sheet” option. The worksheet will be sorted by date then surname.

You can use the Excel sort and filter functions, but the record move function will insert a record based on date, so it is recommended that the worksheet be sorted before attempting to move a record.

The sort function of Excel doesn't handle merged cells very well so the preferred method is to use the method included in the spreadsheet right click menu.

The inbuilt sort function uses a work column which is defined on the “Options” spreadsheet. By default, this is column 22. If any data is located in the workcol then an error message is produced and the sort will fail.

To work around this either:

- Delete the data in the work column and retry the sort.
- Change the work column to be used on the “Options” worksheet and retry the sort.

15 Summary of Amendments

Date	Version	Fix Id.	Comment
14 th December 2023	1.1	n/a	Initial GRO release
7 th February 2024	2.0	n/a	Major update to the right click menu and formatting options. We also added a function for moving records to various worksheets, including the new "Unsure" worksheet.
25 th March 2024	2.1	n/a	Added date format change function.
5 th June 2024	2.2	n/a	Reworked the sorting functions to use a work column (by default column 22) to aid in sorting worksheets.

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