

Instructions on use of the Observation Collection Excel workbook

STARTING THE WORKBOOK

1. Open the MS Excel workbook file *Observations Collection.xls*. The workbook file implements macros to assist the user in the process of entering observation information, and consequently Excel may generate an error or warning about the presence of macros.

Enabling the macros / active content

2. The action that needs to be taken to enable the content depends on the version of Excel that is being used:

a. In Excel 2003, if a Security Warning dialog appears, click the 'Enable Macros' button.

b. In Excel 2007, if a message 'Security Warning Some active content has been disabled' appears in a box above the worksheet, click on the Options button and in the Security Alert dialog select the 'Enable this content' option and then click on the OK button.

c. In Excel 2010, if a message 'Security Warning Some active content has been disabled Click for more details' appears in a box above the worksheet, click on the Enable Content button.

3. If Excel generates a warning that Macros are disabled because of the security setting, Annex A to this document contains guidance on how to change the security setting to enable the macros.

ENTERING OBSERVATIONS

4. On opening the Excel workbook, there is an *Observations* worksheet containing various column fields for the entry of the observations data. It is possible to enter data directly into the *Observations* worksheet cells; note that some of the cells have restricted entry formats (e.g. for date).

USING THE COMMAND BUTTONS

5. Alternatively, there are a number of command buttons at the top left of the *Observations* worksheet for:

a. Adding an observation (*Add Observation*).

b. Editing the currently selected existing observation (*Edit Observation*).

c. Entering a comment to an existing observation (*Enter Comment*).

6. Clicking on these buttons produces Excel dialog forms that assist the data entry process. Note that for adding a new observation, the only mandatory fields that need to be completed are the originator, the applicable issue, and the actual observation.

7. The *Enter Comment* command enables other observers to provide additional comments and details regarding the observation.

Using the menu bar

8. In addition to the command buttons in the *Observations* worksheet, the Excel dialog forms used to enter observation data may be accessed by using the Excel menu bar. Exactly how this is implemented depends on the version of Excel being

used. In Excel 2002 and 2003, a new (temporary) menu item will appear at the right side of the menu bar, titled 'Observations'; in Excel 2007 and 2010 (depending on the macro security level, see above), there will be an additional menu item 'Add-Ins' that allows access to the 'Observations' menu item. The Observations Menu contains the command buttons as described above; additionally, there is the possibility of deleting observations.

ENTERING OBSERVATION DATA INTO THE MAIN DIALOG

9. In addition to a Classification drop down box at the top of the main dialog, there are OK and Cancel buttons at the bottom of the main dialog. Clicking on the OK button saves to the Observations worksheet all the data entered into the main dialog. Clicking on the Cancel button discards all the entered or changed data without saving to the worksheet.

10. There is also a multi-page form in the main dialog box; the four pages are selected by clicking on the tabs at the top. The four pages are as follows:

a. **General Information**: This page contains fields for a numeric id (not editable); a control to choose the applicable date for the observation, which by default for a new observation displays the current date; a drop-down box to select the originator of the observation, or to enter a new originator if your name does not appear in the list; a drop-down box to select your organization, or to enter a new division if necessary; and finally a drop-down box to select the applicable issue that the observation relates to; for new observations, the value in this Issue field defaults to Issue A. Note it is mandatory that entries must be provided for the originator and Issue fields.

b. **Observation Data**: This page is the main data entry page for the observation. Free text is entered for the Observation, Discussion, Conclusion and Recommendation. Something must be entered into the Observation field; entry into the Discussion, Conclusion and Recommendation fields is optional. (See the NATO Lessons Learned Handbook Second Edition available from www.jallc.nato.int for more information on what sort of information needs to be entered into these fields).

c. **Action Body**: On the left-hand side of this page is a selectable list of all current action bodies stored in the Excel workbook. Select all that you consider to be relevant. Additionally, you may also enter an action body that is not already on the list in the text box on the right-hand side of the page.

d. **Comments**: This page is used to provide any further comment on the observation. If you are not the originator of the observation, you can select or enter your name in the Author drop-down box at the top of the page. Comments are tagged with the author's name; if you do not enter anything in the Author field, the comment will be tagged as 'Anon' for anonymous.

e. **References**: This page is used to add references to your observation—for example a document—to assist in further analysis of the observation or to provide additional information. A reference can be specified in two ways: either as text and/or as a hyperlink: for the latter, click on the 'Select a file to add to the reference' field on the References page.

11. Remember to click on the OK button at the bottom of the main dialog box to save all your entries or changes to the Observation worksheet.

12. If your PC screen resolution (or Excel application window) is not sufficient to display the entire main dialog box, a vertical scroll bar will appear on the right. This scroll bar can be used to access all the data entry fields and the OK and Cancel buttons.

SAVING

13. Once an observation has been entered or edited, save the Excel workbook using the regular MS Excel methods (e.g. <Ctrl-S>) as no automatic saving has been implemented.

Annex A

Change Macro Security Settings

EXCEL 2003

14. Click on **Tools**, point to **Macro**, and then click **Security**. Select the **Medium** option. Alternatively, use **Tools**, click **Options**, and then click the **Security** tab.
15. Exit from Excel and re-open the Workbook.

EXCEL 2007

16. You can change macro security settings in the **Trust Center**, unless a system administrator in your organization has changed the default settings to prevent you from changing the settings.

17. Click the Microsoft Office Button , and then click **Excel Options**. In the **Trust Center** category on the left sidebar, click **Trust Center Settings**, select **Macro Settings** from the left sidebar, choose the **Disable all macros with notification** option and click on OK.

18. Exit from Excel and re-open the Workbook.

EXCEL 2010

19. First click the **File** tab and select **Options** from the left sidebar. In the **Trust Center** category on the left sidebar, click **Trust Center Settings**, select **Macro Settings** from the left sidebar, choose **Disable all macros with notification** option and hit OK.

20. Exit from Excel and re-open the Workbook.