

## 3.9 Notepad

Often you need to make notes of “things to do” or for many other purposes. This option provides rapid access to the Windows Notepad. A “TroopMaster Notes” file has already been created for you. You can use that or you can create as many others as you like. Notes you create can be edited and printed. See your Windows documentation for more information on Notepad.

## 3.10 Create New Archive

The archive created during program installation will store up to 250 scouts and 250 adult members. If that fills up, use this option to create a new archive.

## 3.11 Create TroopLedger Import Files

TroopLedger cannot import data directly from the TroopMaster ME database so you must use this option to create a set of data transfer files. These can be created on a diskette, a zip cartridge, hard drive folder, etc. To complete the data transfer, start TroopLedger, select the *File>Import* option, and point it to the location where you saved these files.

## 3.12 Database Management

TroopMaster allows you to divide your database into as many as eight different functional areas so that different leaders can be assigned responsibility for updating specific area(s). This is accomplished by defining “profiles” for the different leaders. Once these are defined, you can distribute the data profiles to selected leaders creating what are called “Satellite Systems”. Each satellite has “view” access to the entire database but each leader can only update his assigned area(s). On dialogs where update authorization is denied, the **OK** button is deactivated and the button text is changed to **Locked**.

The central database is called the “Master” system. The leader responsible for the master system is the database manager and s/he is the only person allowed to:

- (1) Add/delete people (scouts, adults, counselors, etc.) to/from the system.
- (2) Define patrols and make patrol assignments.
- (3) Define, distribute, and merge satellite profiles.
- (4) Make entries on the *Unit General Information* dialog.

The database manager can also update any functional area that has not been distributed to a satellite.

**If you modify the profile name or settings for a specific satellite while that satellite is distributed, you will no longer be able to merge data from that satellite.**

**Because of the internal links between the various data files, the database manager cannot add/delete people to/from the system while any profiles are distributed.**

- a. Defining a Profile. To define a profile, enter a profile name and select the functional area(s) you wish to assign to that satellite. The available areas are as follows:

- (1) Activities (including scout/adult attendance)
- (2) Advancement (including scout training and special awards)
- (3) Fundraisers
- (4) Order of the Arrow (scout and adult)
- (5) Adult Members (including training, special awards, and leadership)
- (6) Merit Badge Counselors
- (7) Points of Contact
- (8) Scout Membership (i.e., personal/parental data, vehicles, leadership, etc.)



To create a “read only” copy of the database, define a satellite profile that has no functional area authorizations. The satellite will be able to view any of the data and print any of the reports, but will not be able to make any changes..

**If you are using the family links, you must take care when defining your satellite profiles. These links provide a way to tie family members together between four of the functional areas: scouts (and parents), adult members, merit badge counselors and points of contact. Since these four areas are “linked”, you must assign all four areas to the master system or to a single satellite. If you decide to divide responsibility for these areas among two or more leaders, you must first disable the family links. The *Database Management* dialog has a radio button that allows you to do that.**

- b. Distributing a Profile. There are two ways to distribute data files to a satellite. Select the desired profile from the drop-down list. Then, do one of the following:

- (1) Path. Enter a location to which to send the satellite files. The files can be sent to any location desired. If you plan to give a diskette to the satellite, enter *A:* as the distribution location. TroopMaster will remember the location you enter and use that as the default the next time you distribute or merge this profile.
- (2) Email. To email the files, click this button and then select the desired recipient from the drop-down list of adult members.

When ready, click the **Distribute Files** button. TroopMaster will compress the data files into a single, small backup file. If you entered a path, TroopMaster will save the backup file to the specified location. If you chose the email option, TroopMaster will attach the backup file to a new message and bring up the *Send Email* dialog. If you like, you can add other recipients before you click the **Send** button.

Each satellite must already have installed the TroopMaster program. SETUP always creates a master system. To convert the system to a satellite system, the satellite user selects the **File>Restore Data Files** option and enters the location of the compressed satellite backup file given to him by the database manager. If the file was emailed to the satellite user, he must use his email system to save the message attachment to a diskette or hard drive folder; s/he then restores the data from that location.

- c. Merging a Profile. When you are ready to update the master database, have each of the users with a satellite system give you a backup of his database. This can be accomplished via either the **File>Backup Data Files** option or the **File>Email Data Files** option. Each profile must be merged separately. To do that, select the profile name from the drop-down list, enter the location of the satellite files, and click the **Merge Files** button. TroopMaster will read the source files and merge that data with the other data in the master database.

**Whenever a satellite user provides a database backup to the master system for merging, the satellite user must refrain from making any changes to his database until after s/he has received and loaded a new set of distributed data files from the master system. Otherwise, when s/he loads the newly distributed files, s/he will overwrite his recent changes.**

**Merging data files is a very complex procedure and the potential for error exists. For example, one or more of the source files could be damaged or unreadable. If that is the case, the merge process will almost certainly corrupt your master database. For this reason, it is critical that you backup your master database before merging any profiles. We recommend maintaining at least two backups of your master database.**

**The database manager should never attempt to merge data from a satellite using the *File>Restore Data Files* option. Doing so will convert the master system into a satellite.**

### 3.13 Preferences

This dialog is used to adjust system-wide settings and to customize TroopMaster to your personal preferences. The dialog has four tabs:

- a. Default Settings. This tab lets you set default values for city, state, zip code, area code, and phone types. Setting these values will save you time whenever you add new scouts and adults to the system. If you are operating in a foreign country that does not use U.S. formatted zip codes and phone numbers, you should de-select the “U.S. phone/zip format” checkbox. TroopMaster processes overseas addresses, zip codes, and phone numbers differently than it does for stateside units. A list of countries and associated country codes is available through the **Help** button.

This tab also has several button and checkbox options:

- (1) Display ‘Tip of the Day’ on Startup. When you no longer want to see these tips, turn this off.
- (2) Save Location of Report Display Window. If this box is checked, TroopMaster remembers the size and location of the last report window displayed and uses those settings as defaults for the next report. If this box is unchecked, TroopMaster will bring up the report display window using the same location/size as the main application window.