RALLY MODEL

MANUAL

VERSION 1.0

COPYRIGHT © 2015

ALL RIGHTS RESERVED.

TABLE OF CONTENTS

INTRODUCTION 4
OVERVIEW 4
INSTALL AND SET UP RALLY MODEL 4
COCKPITS 5
COCKPIT: TRIAL AND EXHIBITOR INFORMATION 6
COCKPIT: DOCUMENT AND FORM PUBLISHING 7
DATABASE MAINTENANCE 8
DOG DATABASE RECORD 8
ENTER A NEW DOG DATABASE RECORD 9
ENTER A NEW DOG DATABASE RECORD (ADD ANOTHER DOG/SAME OWNER) 11
UPDATE DOG DATABASE RECORD (OWNER INFORMATION/JUMP HEIGHT/ETC.) 15
DELETE DOG DATABASE RECORD 17
VIEW DATABASE RECORDS REPORT 19
TRIAL INPUT AND MAINTENANCE 20
PREPARE DATABASE FOR NEW TRIAL 20
SEARCH FOR DOG DATABASE RECORD 23
ENTER TRIAL ENTRY FOR DOG 25
VIEW TRIAL ENTRY FOR DOG 28
DELETE TRIAL ENTRY FOR DOG 30
VIEW CURRENT TRIAL DATABASE RECORDS 32
PRINT TEMPORARY TRIAL DATABASE CHECKLIST 34
PREPARE, EMAIL AND PRINT DOCUMENTS 36
DOCUMENTS 36
CREATE AND SEND CONFIRMATION LETTERS USING MAIL MERGE 36
PRINT ARMBANDS 44
CREATE RUNNING ORDER AND PRINT GATE SHEETS 46
PRINT TRIAL SCORE REPORTING SHEETS 53
PRINT TRIAL SCORE REPORTING SHEETS BY CLASS PER TRIAL 53
PRINT TRIAL SCORE REPORTING SHEETS BY TRIAL (TOTAL) 55
APPENDIX A 57
SAMPLE CONFIRMATION LETTER 57

SAMPLE RUNNING ORDER GATE SHEET.....58
SAMPLE TRIAL SCORE REPORTING SHEET.....59

INTRODUCTION

OVERVIEW

The Rally Model is a user-friendly administrative tool developed in Microsoft Excel intended for use by those who organize and run World Cynosport Rally Limited (WCRL) trials.

It provides Trial Hosts with the ability to:

- Create, edit and maintain a personalized master database as a data source for future trials (up to 300 individual records per database)
- Manage exhibitor entries for current trials (up to four trials at once)
- Create a trial confirmation letter with exhibitor-specific details using the Microsoft Word mail merge feature
- Create and print various trial documents from the exhibitor entry data per level and trial
- Print label armbands with exhibitor-specific details per trial
- Analyze entries per level and trial

Installation requirements for the tool are listed below:

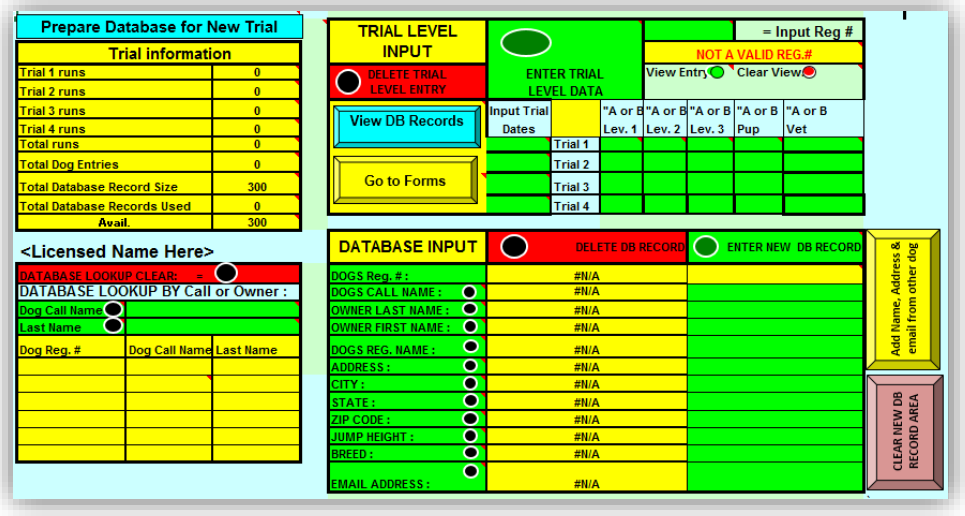
- Microsoft Excel 2010 or higher
- Microsoft Word 2010 or higher
- Microsoft Outlook or other email program
- Printer

NOTE: It is recommended that the steps in this document be reviewed prior to using the Rally Model tool for the first time. Review of this manual may prevent errors during trial entry data input. If the steps in the manual are not followed, it could result in errors during trial entry data input or how the model performs which could result in deletion and re-entering of any or all data.

INSTALL AND SET UP RALLY MODEL

Follow these steps to save the Rally Model tool and its supporting files on your local computer or laptop:

Step #	Instructions
1	On your computer or laptop, create a folder in which to save all of the files used by the Rally Model tool. *For example*, create a folder titled ***WCRL Rally Model Tool*** in your **My Documents** folder location on your **C:** drive.
2	Save the Rally Model **.xlsm** file to the folder created in **Step 1**. **NOTE:** The file name will contain the name of the club or person to who the Rally Model is licensed. It is highly recommended to save a master copy of the initial file (e.g. named **<Club> Rally Model Master**) in case the original purchased file is ever required again.

Step #	Instructions
3	Save the two Word document files (.doc/.docx) to the folder created in **Step 1**. **NOTE:** One file is a sample confirmation letter to be used with the Microsoft Word mail merge functionality to manually email confirmations to each exhibitor. Refer to ***Create and Send Confirmations Using Mail Merge*** to set up the mail merge functionality. The other file will be used by the tool to create trial running order gate sheets.
4	*OPTIONAL* – Save the **Rally Model Manual** (this document) to the folder created in **Step 1**.
5	Double-click the Rally Model **.xlsm** file to open the tool on the initial screen and enter WCRL trial data. **INITIAL SCREEN**  **NOTE:** The initial database will arrive "empty" – with space for 300 records at one time. Once records have been entered, a master database can be saved for future use. Refer to ***Prepare Database for New Trial*** for instructions on how to save your master database. When opening the **.xlsm** file, be sure to enable macros and editing, if asked. These options are necessary for the tool to work correctly.

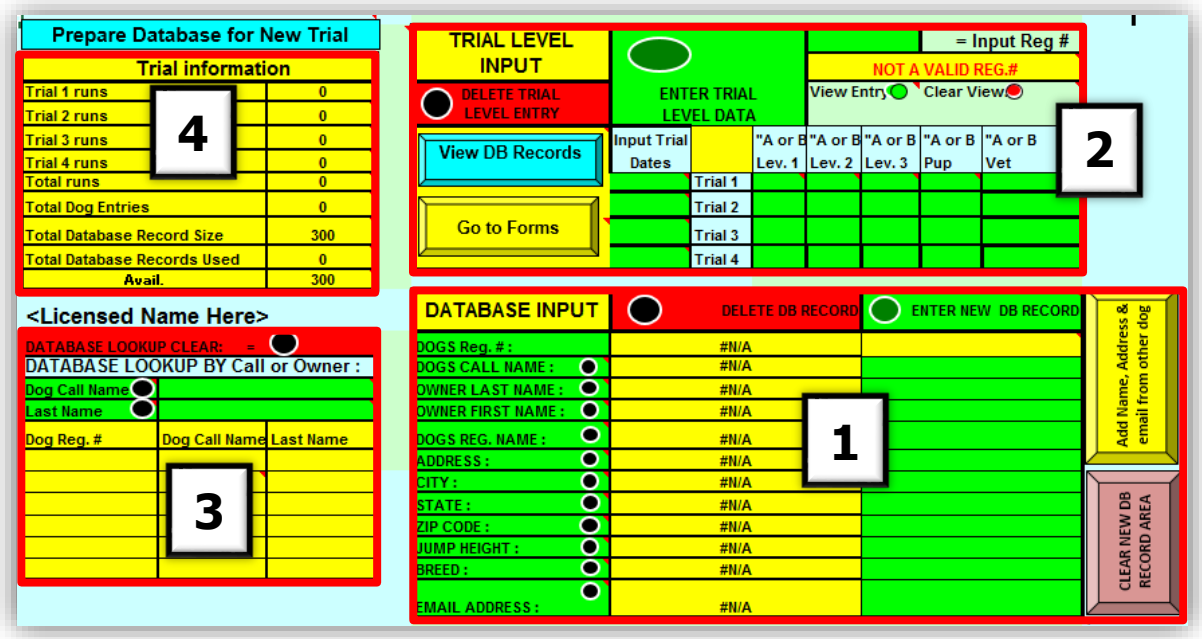
COCKPITS

The Rally Model tool has two main screens, or "cockpits", from which transactions occur:

- **Trial and Exhibitor Information Cockpit**:
  - Accessed when **.xlsm** file is opened (initial screen)
  - Controls maintenance of the database with reusable data records which can be used for current and future trials
  - Controls maintenance of current trial-specific data used for up to four trials at a time

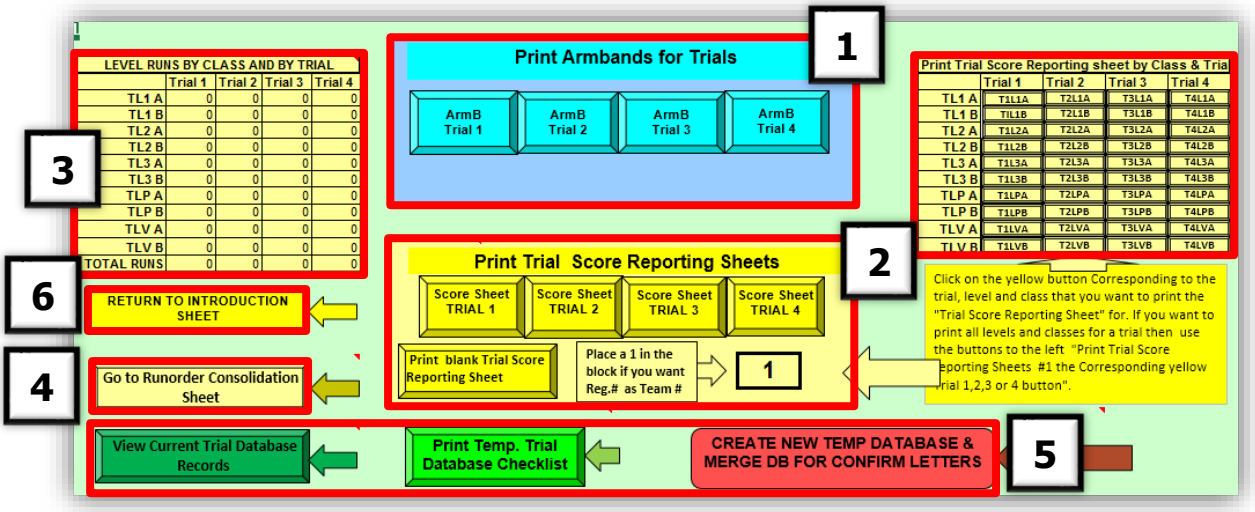
- **Document and Form Publishing Cockpit**:
  - Accessed when **Go to Forms** button is clicked from the initial screen
  - Controls printing of various documents required to successfully run a WCRL trial
    - Trial Score Reporting Sheets
    - Running order/gate sheets by level per trial
    - Armbands per trial (Avery labels #8163 or any 2"x 4" label)

COCKPIT: TRIAL AND EXHIBITOR INFORMATION



1	*Database Input*	Use this section to enter a new dog record, including owner information, or to update/delete an existing dog record. Includes buttons to right: • **Clear New DB Record Area** - Clears the current record being viewed from the *Database Input* area • **Add Name, Address & Email from Other Dog** – Allows creation of a new dog with the same owner
2	*Trial Level Input*	Use this section to enter and modify current trial entry data received on WCRL trial entry forms. Includes buttons on left: • **View DB Records** – Displays a list of current database records (only dog registration number, dog's call name, owner's last name) • **Go to Forms** – Access the **Document and Form Publishing Cockpit**
3	*Database Lookup*	Use this section to search for a database record by dog's call name or owner's last name.
4	*Trial Information*	Use this section for a quick view of current trial and database statistics.

COCKPIT: DOCUMENT AND FORM PUBLISHING



1	*Print Armbands for Trials*	Use this section to print armbands for each exhibitor per trial (preset to print on standard 2" x 4" labels)
2	*Print Trial Score Reporting Sheets*	Use these sections to print Trial Score Reporting Sheets (preset to print standard WCRL format as viewed on their web site). May print an entire trial at once (left) or by class per trial (right). Also includes a button to print a blank sheet (e.g. use for Judge's class entries).
3	*Level Runs by Class & Trial*	Use this section for a quick view of current trial statistics by class and trial which can help determine quantity of maps and judge score sheets to print
4	*Go to Runorder Consolidation Sheet*	Use this button to access the screen where running order/gate sheets are created and printed
5	*Various Database Buttons*	Use these buttons to access database records in various formats: • **View Current Trial Database Records** – Displays the current trial entries in spreadsheet format (all data included) • **Print Temp. Trial Database Checklist** – Prints the current trial data to check for accuracy before sending confirmations • **Create New Temp Database & Merge DB for Confirm Letters** – Creates a temporary database used for mail merge to create the confirmation letter
6	*Return to Introduction Sheet*	Use this button to return to the initial screen

DATABASE MAINTENANCE

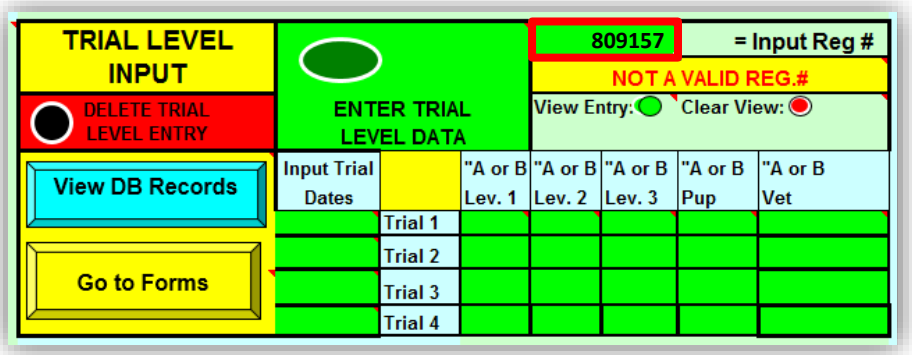
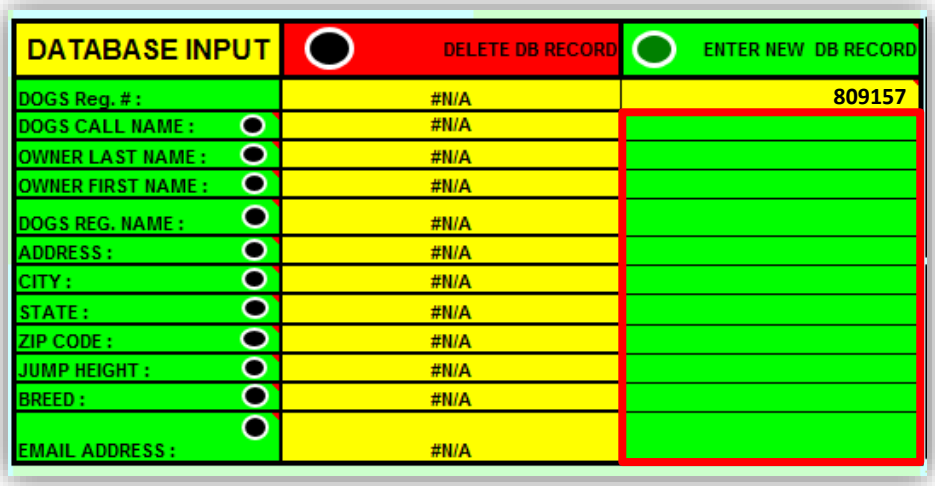
DOG DATABASE RECORD

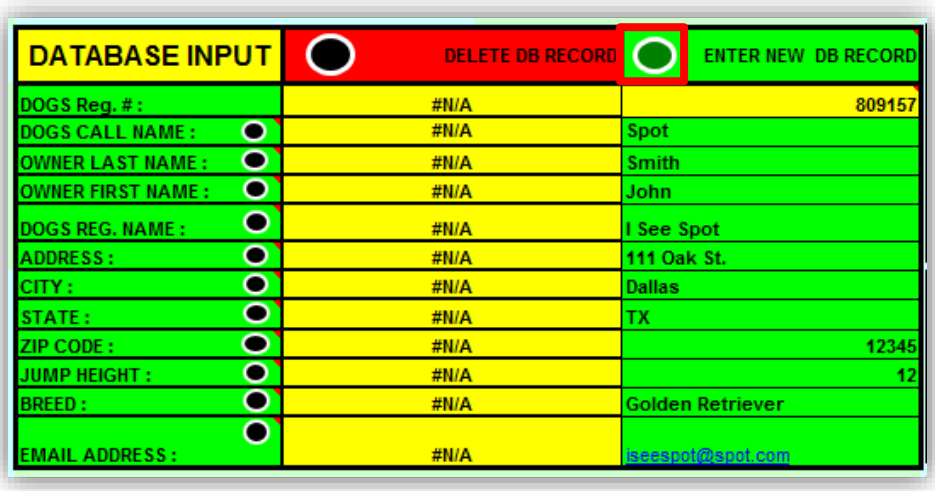
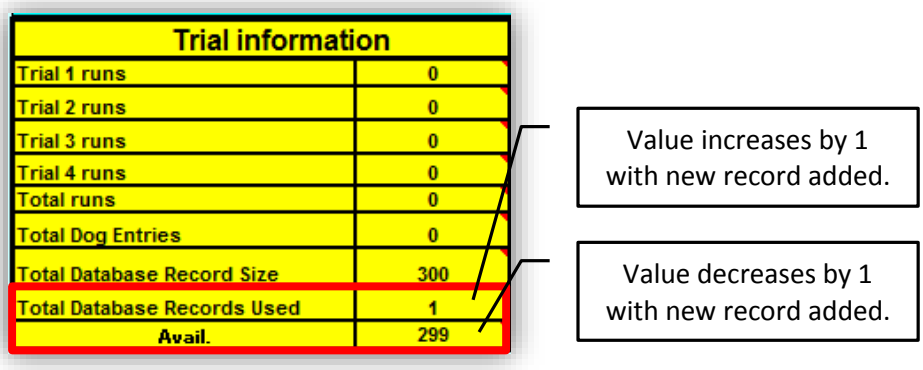
Before trial entry details can be entered for an active trial, a dog record must be maintained in the database. Each record requires the following information which can be obtained from the WCRL entry form received by the Trial Secretary:

<table>
<tr><td>Dog's WCRL Registration Number</td><td>A valid WCRL registration number is required for all database entries. A number is unique to each dog and this tool uses the number to identify, store and sort the trial data. The tool will only accept WCRL registration numbers (converted from APDT or newly issued from WCRL – see examples below):
<table>
<tr><th>APDT Issued Number</th><th>WCRL Number</th></tr>
<tr><td>R-10-123</td><td>800123</td></tr>
<tr><td>R-11-1234</td><td>801234</td></tr>
<tr><td>R-12-10312</td><td>810312</td></tr>
</table>
The <u>FULL</u> numeric portion of the registration number must be entered.</td></tr>
<tr><td>Dog Information</td><td>Dog information required for each record includes: dog's call name, dog's registered name, breed, and jump height</td></tr>
<tr><td>Owner Information</td><td>Owner information required for each record includes: owner's first and last name, mailing address, and email address</td></tr>
</table>

ENTER A NEW DOG DATABASE RECORD

Follow these steps to enter a new dog database record:

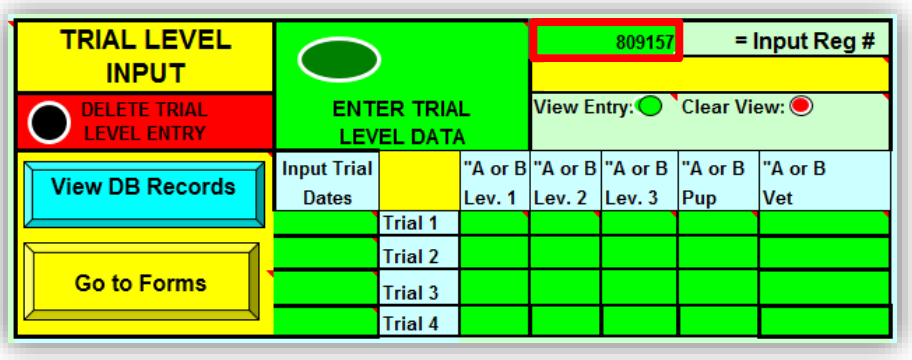
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number in the **Input Reg #** field**.** Press the **Enter** key.  **NOTE:** If the dog record already exists in the database, the dog record details appear in the ***Database Input*** section (yellow fields) and the message **NOT A VALID REG. #** disappears below the number. Refer to ***Update Dog Database Record*** to update the dog database record, if needed.
2	In the right column under the dog registration number, type each value required for the record in its respective field. Refer to the field name in the first column to determine where each value should be entered. 

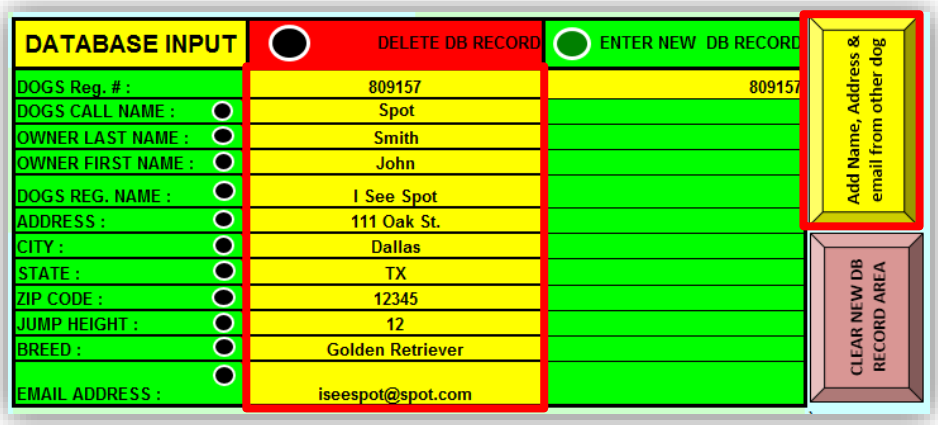
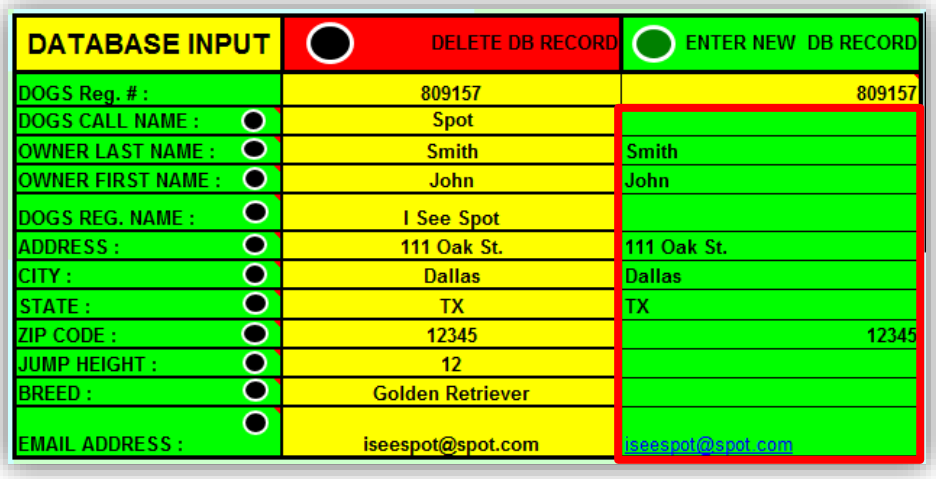
Step #	Instructions
3	Click the **ENTER NEW DB RECORD** green button to save the new record which adds it to the database. 
4	In the ***Trial Information*** section, the **Total Database Records Used** value increases by one and the **Avail.** value decreases by one with each new record added to the database.  **NOTE:** The database allows a maximum amount of 300 records in it at one time. This number does not change in the ***Trial Information*** section.

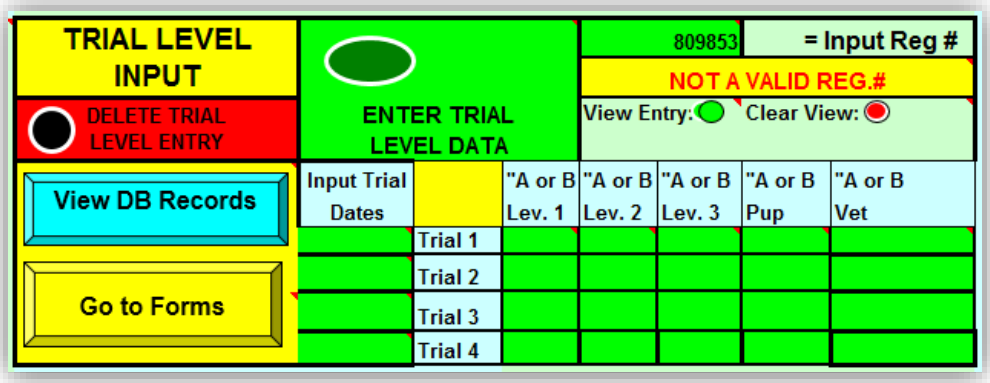
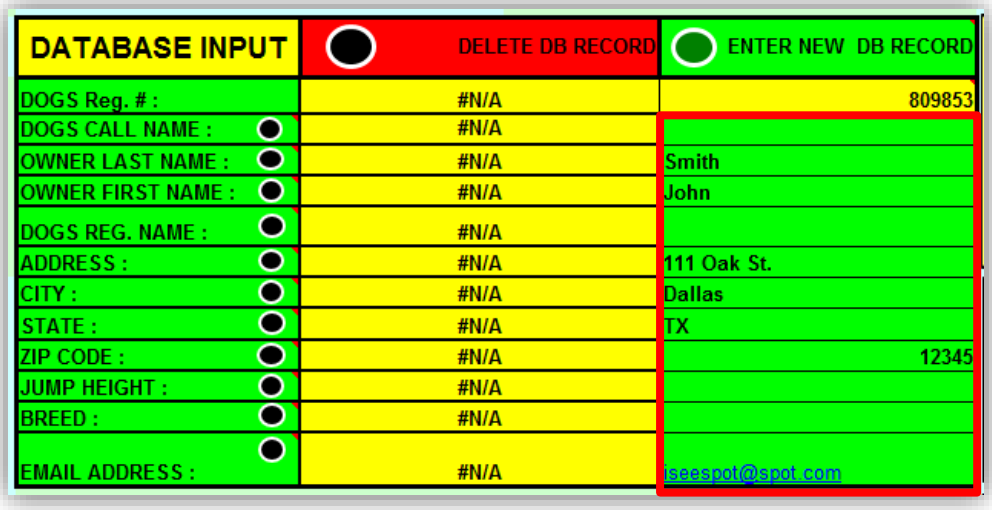
ENTER A NEW DOG DATABASE RECORD (ADD ANOTHER DOG/SAME OWNER)

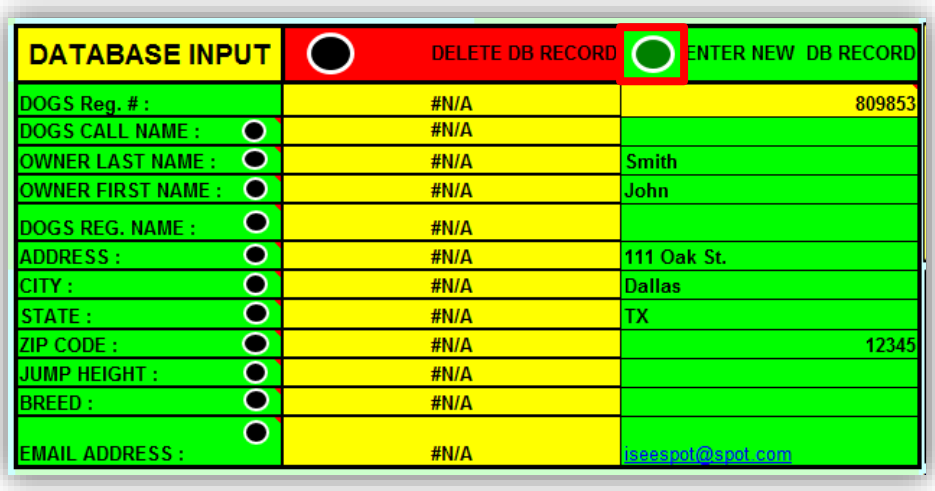
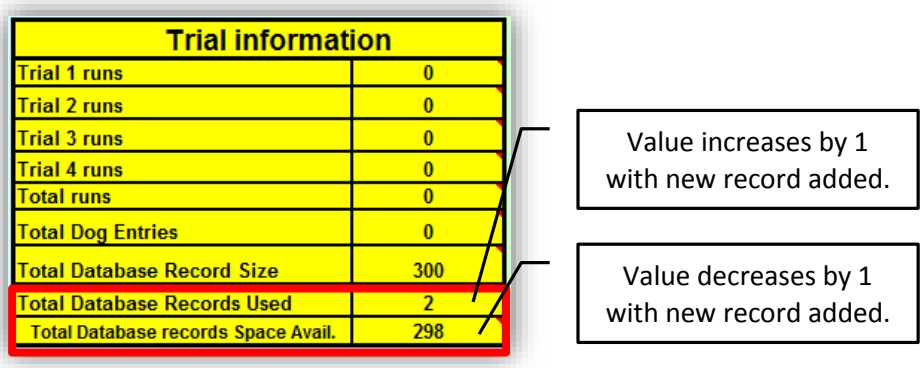
If there are multiple dogs owned by the same person, an already entered dog record which has the same owner can be copied to create the additional dog records. This functionality will save time and may decrease entry errors during database input.

Follow these steps to enter a new dog database record where owner information is copied from an already entered dog record:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number from which you are copying in the **Input Reg #** field**.** Press the **Enter** key. **NOTE:** The message **NOT A VALID REG. #** disappears below the number. 

Step #	Instructions
2	The dog record details appear in the ***Database Input*** section (yellow fields). Click the **Add Name, Address & email from other dog** button (yellow button located to the right of the empty green fields) to populate the new database record with the owner information from the record being copied (as pictured in 2nd screen shot below).  

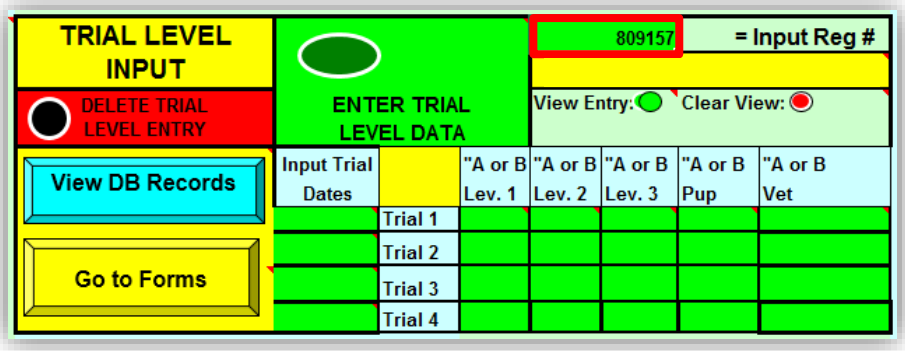
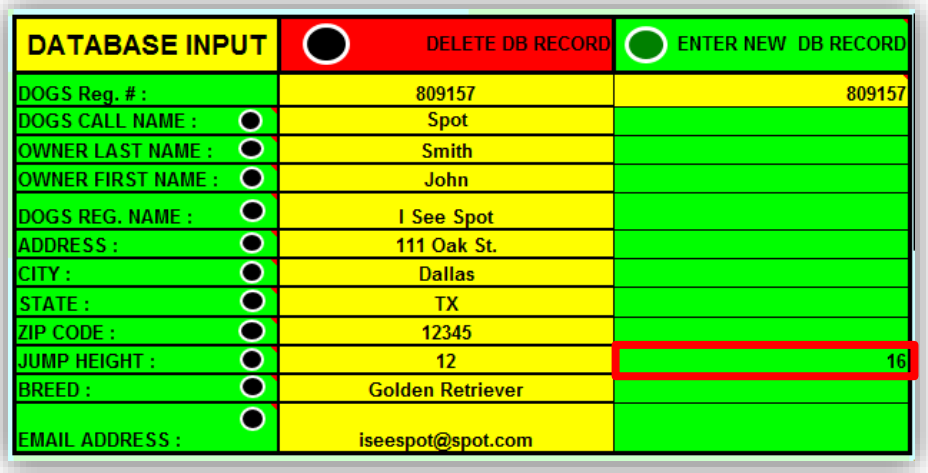
Step #	Instructions
3	Return to the ***Trial Level Input*** section and type the new dog's WCRL registration number in the **Input Reg #** field**.** Press the **Enter** key. **NOTE:** The message **NOT A VALID REG. #** appears below the number. 
4	Click In the right column under the dog registration number, type each value required for the record in its respective field. Refer to the field name in the first column to determine where each value should be entered. 

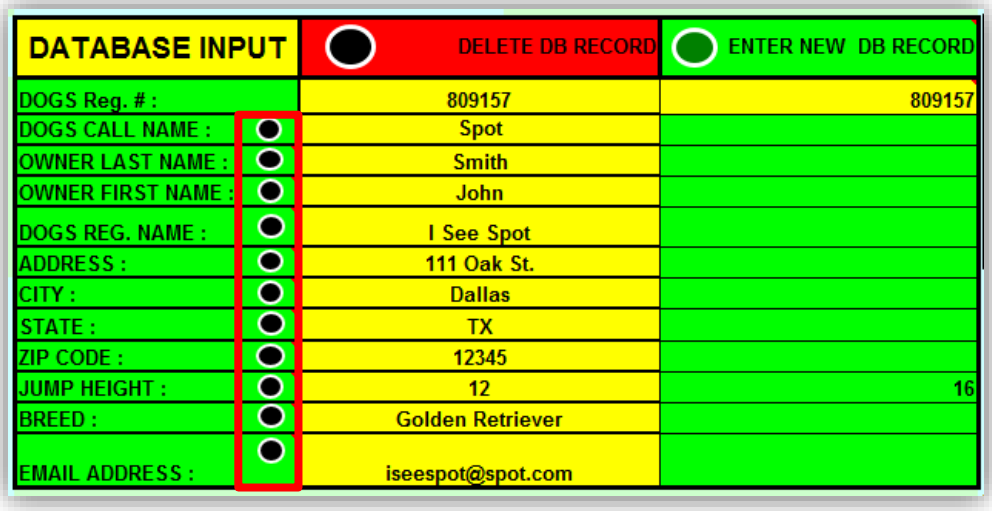
Step #	Instructions
5	Click the **ENTER NEW DB RECORD** green button to save the new record which adds it to the database. 
6	In the ***Trial Information*** section, the **Total Database Records Used** value increases by one and the **Avail.** value decreases by one with each new record added to the database.  **NOTE:** The database allows a maximum amount of 300 records in it at one time. This number does not change in the ***Trial Information*** section.

UPDATE DOG DATABASE RECORD (OWNER INFORMATION/JUMP HEIGHT/ETC.)

Any of the information in a dog record, except the dog's registration number, can be updated in the database. If the dog's registration number was entered incorrectly, a new database record will need to be created and the original (incorrect) record deleted from the database. Refer to ***Enter New Dog Database Record*** and ***Delete Dog Database Record*** to perform these steps.

Follow these steps to update a dog database record:

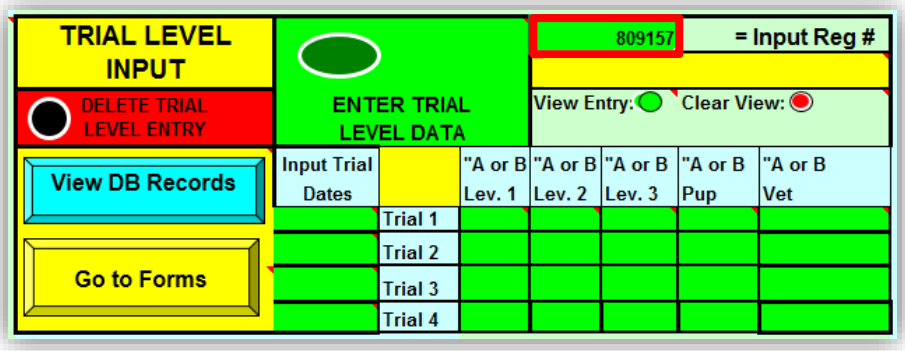
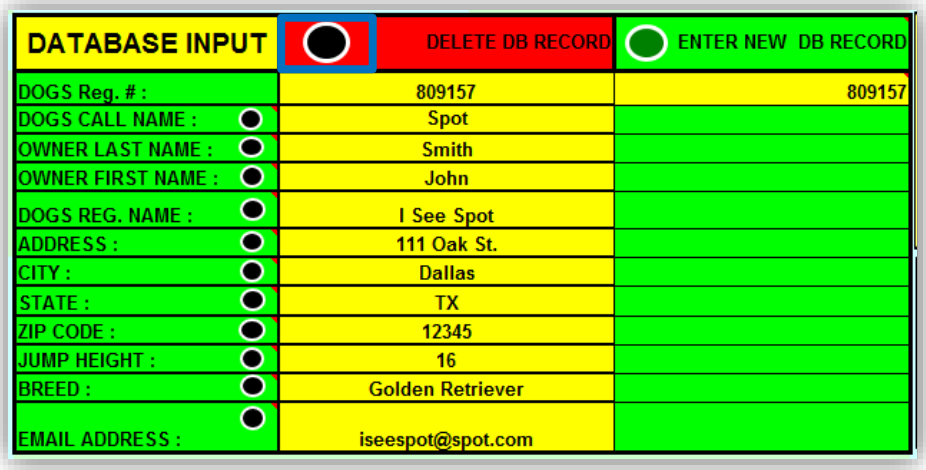
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number of the record to be updated in the **Input Reg #** field**.** Press the **Enter** key. **NOTE:** The message **NOT A VALID REG. #** disappears below the number. 
2	The dog record details appear in the ***Database Input*** section (yellow fields). Type the new value (e.g. jump height needs to change from *12* to *16*, as pictured below) in its respective green field to the right of its yellow field. 

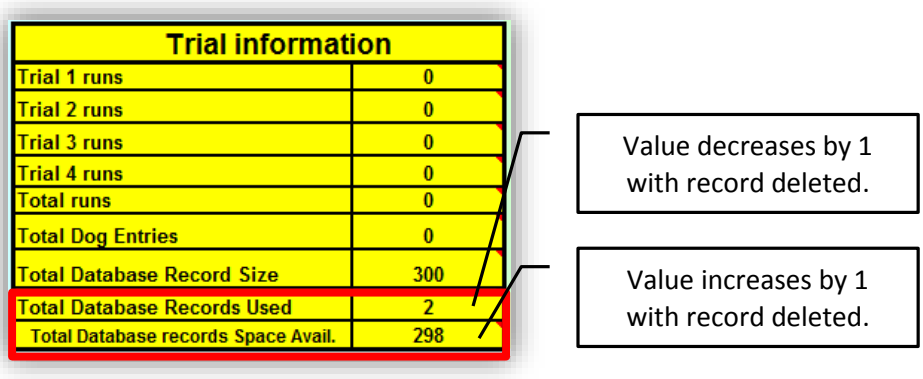
Step #	Instructions
3	Click the black button next to the value being updated to save the record with the new value (e.g. click the black button for **Jump Height** to update the jump height from *12* to *16,* as pictured below). **NOTE:** Each value must be updated individually with its respective black button. There is no mass update functionality.  The next time the dog record is viewed it will display the updated values.

DELETE DOG DATABASE RECORD

There are multiple reasons a dog database record may need to be deleted (e.g. incorrect entry of dog registration number; dog has stopped competing in WCRL due to age, moving, etc.; dog has passed away). It is recommended to keep the database cleaned up by maintaining dog records since it can only store 300 records at a time.

Follow these steps to delete a dog database record:

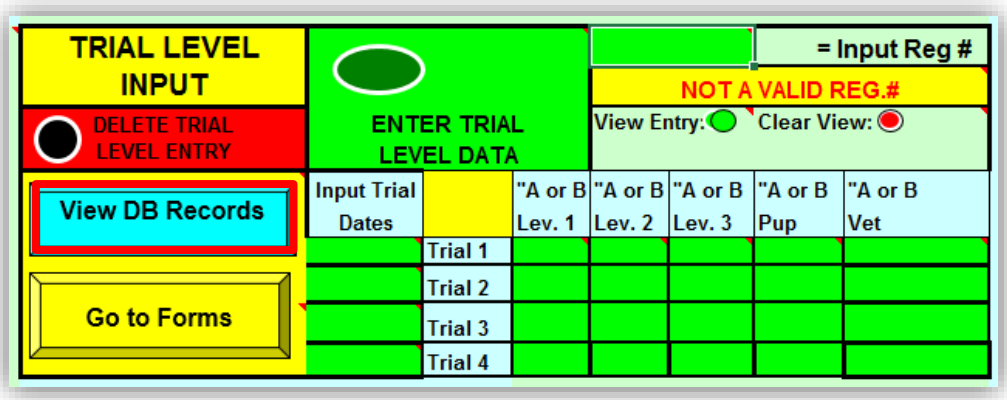
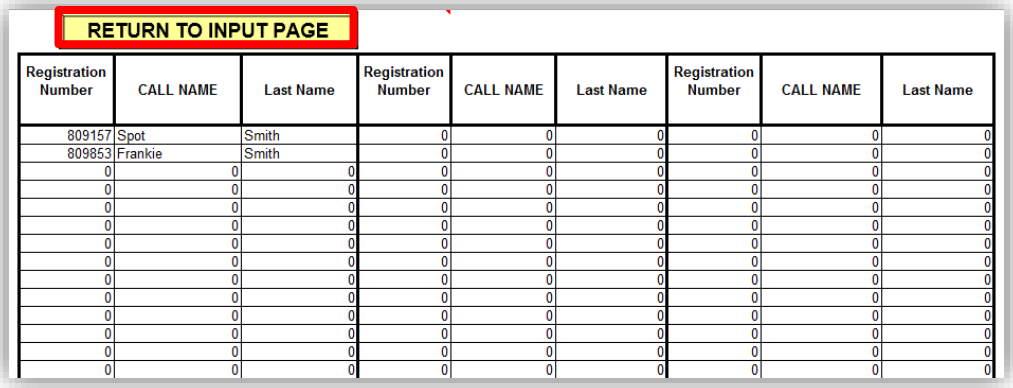
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number of the record to be deleted in the **Input Reg #** field**.** Press the **Enter** key. **NOTE:** The message **NOT A VALID REG. #** disappears below the number. 
2	The dog record details appear in the ***Database Input*** section (yellow fields). Click the **DELETE DB RECORD** black button to delete the record from the database. 

Step #	Instructions
3	In the ***Trial Information*** section, the **Total Database Records Used** value decreases by one and the **Avail.** value increases by one with each record deleted from the database.  **NOTE:** The database allows a maximum amount of 300 records in it at one time. This number does not change in the ***Trial Information*** section.

VIEW DATABASE RECORDS REPORT

A condensed list of existing database records can be viewed directly from the **Trial and Exhibitor Information Cockpit**. The condensed list contains the dog's registration number, dog's call name, and owner's last name in a spreadsheet format which can be printed or saved locally, if needed.

Follow these steps to view the report:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **View DB Records** button (light blue button located on the left side of the ***Trial Level Input*** section). 
2	A list of existing database records appears in a spreadsheet format (multiple columns). From this screen, the report can be viewed, printed or saved locally, if needed. When finished viewing, click the **Return to Input Page** button to return to the **Trial and Exhibitor Information Cockpit** screen. 

Registration Number	CALL NAME	Last Name	Registration Number	CALL NAME	Last Name	Registration Number	CALL NAME	Last Name
809157	Spot	Smith	0	0	0	0	0	0
809853	Frankie	Smith	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0

TRIAL INPUT AND MAINTENANCE

PREPARE DATABASE FOR NEW TRIAL

Prior to entering a new trial (single or multiple), the database must be prepared to accept the new trial(s) data. Preparing the database involves clearing the previous trial's data but leaving the dog database records fully intact.

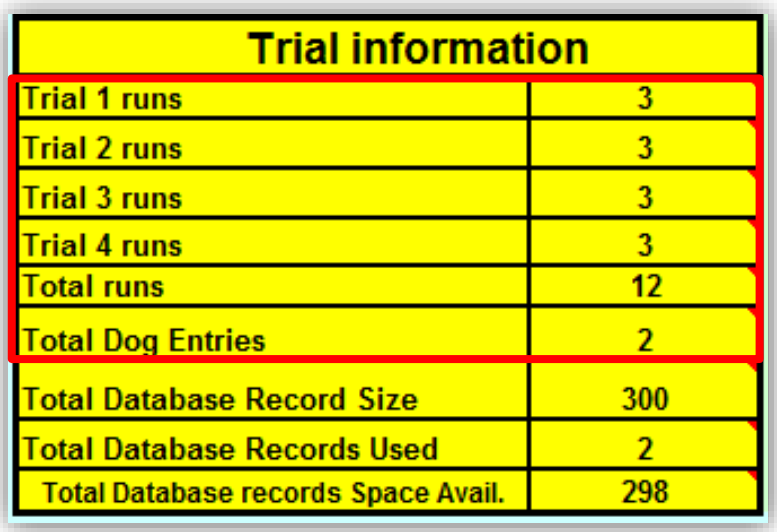
It is recommended that the database and trial data be saved for a period of time in case it needs to be used as a reference for any errors, issues, etc. after the trial has been completed. Use the *Save As* functionality in Microsoft Excel to save the file with a different name from the master database (e.g. named **<trial date>.xlsm**). This will ensure that the master database is kept separate from processed trials.

IMPORTANT: After the **first** trial has been completed and the database has been prepared for the next trial, it is highly recommended to save the file as the master database so that the Tool contains all of the current database records (but no trial data). This can be used as a backup copy in case it is needed in the future.

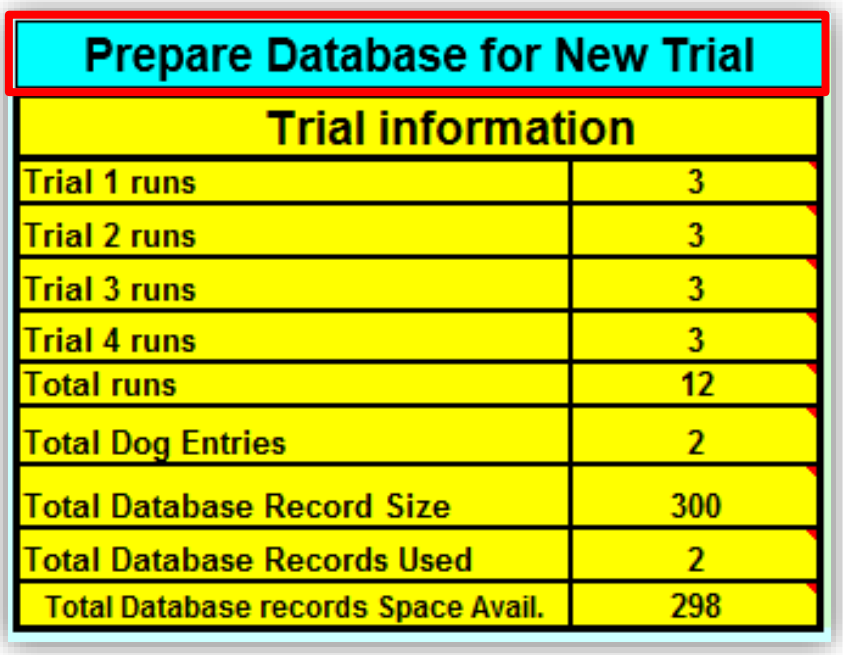
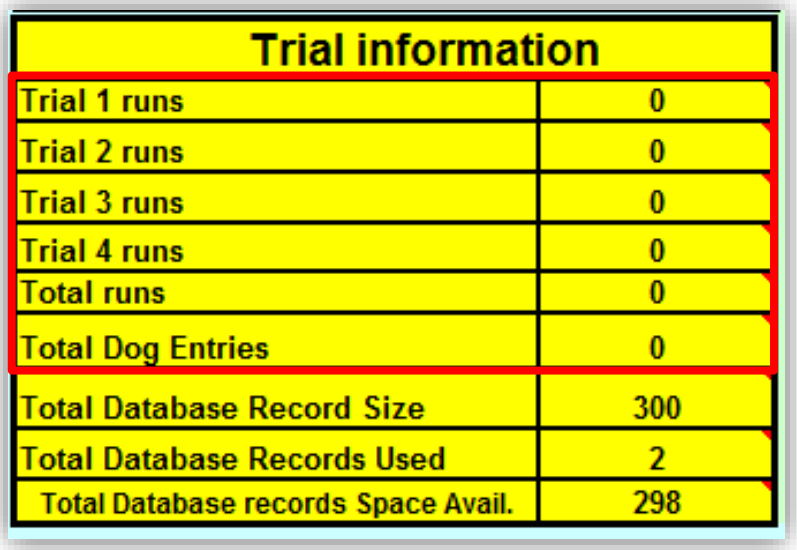
Save the database after each trial as a new master database to ensure the most current, active dog records are being used for the next trial. This should be done after the database has been prepared but before the next trial data is entered in the Tool.

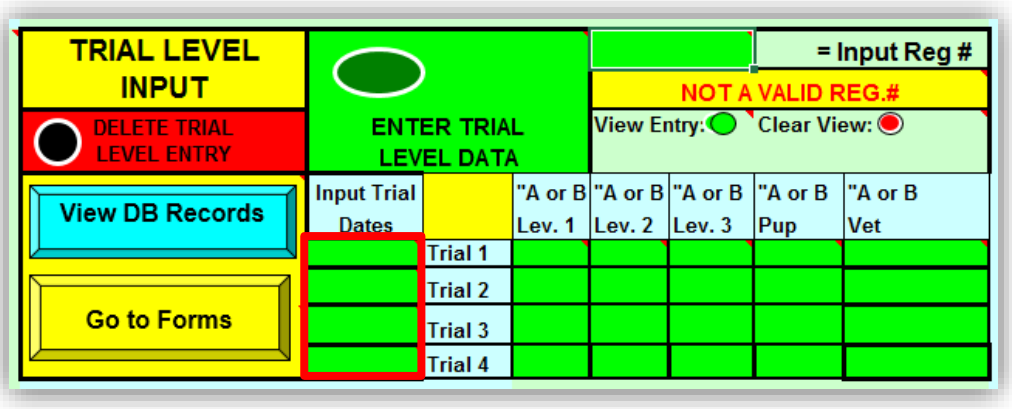
NOTE: This process does not need to be performed until AFTER the first trial has been completed.

Follow these steps to prepare the database for a new trial:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Information*** section, notice the statistics appear for the current trial. This is the information that will be removed when preparing the database for the next trial. The database statistics (last three lines in the table) will not change during database preparation. 

Trial information	
Trial 1 runs	3
Trial 2 runs	3
Trial 3 runs	3
Trial 4 runs	3
Total runs	12
Total Dog Entries	2
Total Database Record Size	300
Total Database Records Used	2
Total Database records Space Avail.	298

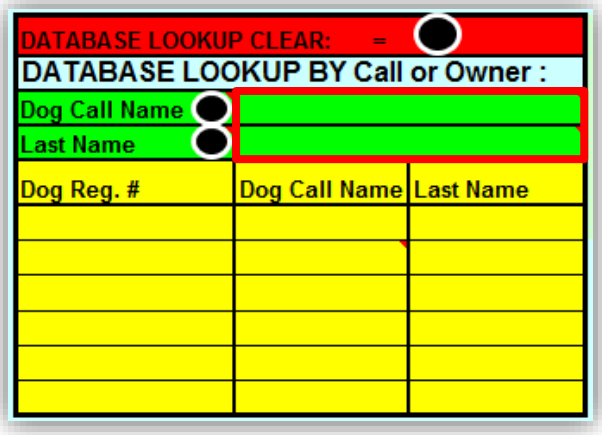
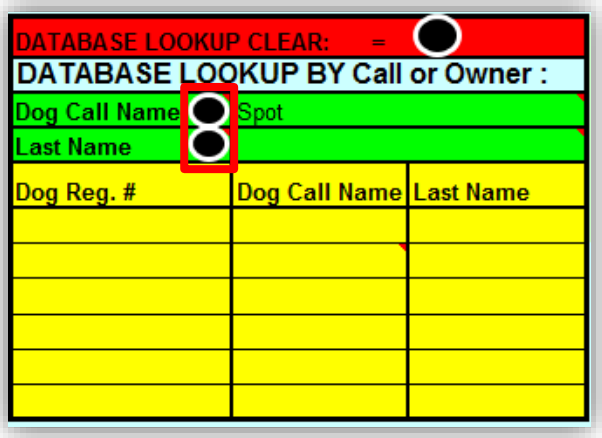
Step #	Instructions
2	Once the completed trial has been saved, if needed, above the ***Trial Information*** section, click the **Prepare Database for New Trial** button (light blue button) to remove all of the trial data.  Prepare Database for New Trial Trial information Trial 1 runs 3 Trial 2 runs 3 Trial 3 runs 3 Trial 4 runs 3 Total runs 12 Total Dog Entries 2 Total Database Record Size 300 Total Database Records Used 2 Total Database records Space Avail. 298
3	The ***Trial Information*** section now appears with all of the trial data removed (values are *0*) but the database records data unchanged.  Trial information Trial 1 runs 0 Trial 2 runs 0 Trial 3 runs 0 Trial 4 runs 0 Total runs 0 Total Dog Entries 0 Total Database Record Size 300 Total Database Records Used 2 Total Database records Space Avail. 298

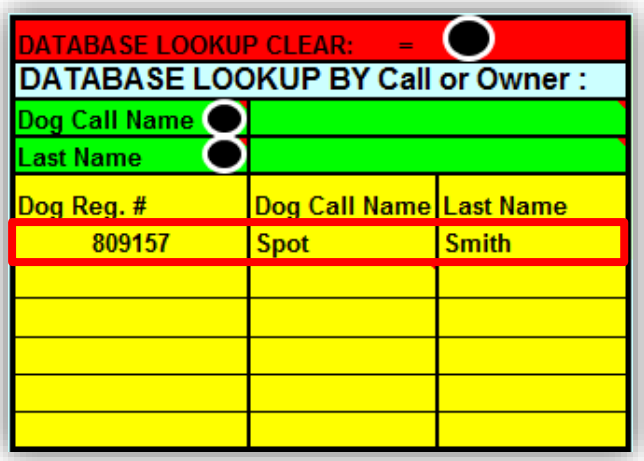
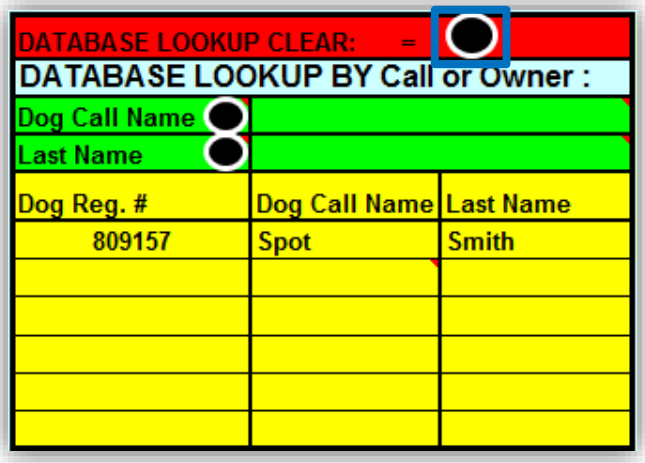
Step #	Instructions
4	At this time, it is recommended to perform a *Save As* function to save a copy of the database as a master copy (e.g. named **<Club Name> Master Database Backup.xlsm**). This will contain only dog database records, not trial data, which can then be used as a backup copy in the future, if needed. After each trial has completed and the database has been prepared again, a new master database can be saved over the old backup to keep the database records current.
5	In the ***Trial Level Input*** section, type the date for each individual trial to be held in the **Input Trial Dates** field(s). There may be a total of four trials maintained at one time (e.g. two trials on a Saturday and two trials on a Sunday or just two trials on a Saturday and no trials on a Sunday). **NOTE:** If a trial date field will not be used for the current trial(s) being entered, type the date **01/00/00** in the unused field(s).  The Tool and respective database are now ready for new trial data.

SEARCH FOR DOG DATABASE RECORD

When entering new trial entry information received on a WCRL entry form, the dog's database record must already exist in the database. If the dog's registration number does not appear as a valid number in the database when entered in the **Input Reg #** field, but the record was entered – maybe the number on the entry form is incorrectly written or the number was incorrectly entered in the database - there is a search function available to search by the dog's call name or owner's last name.

Follow these steps to search for a dog database record:

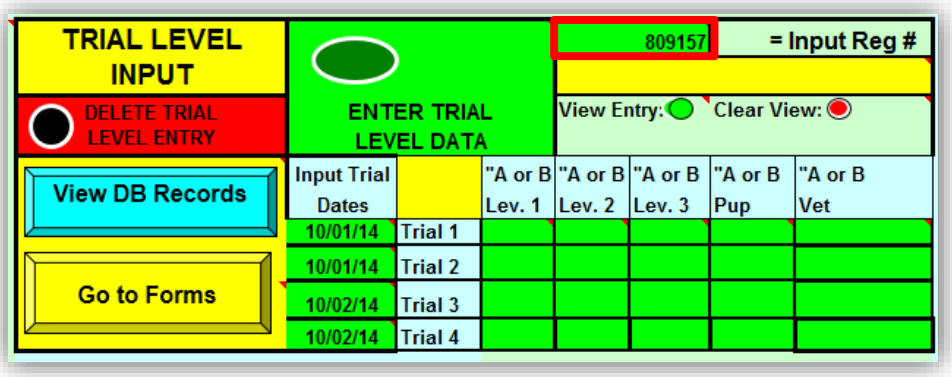
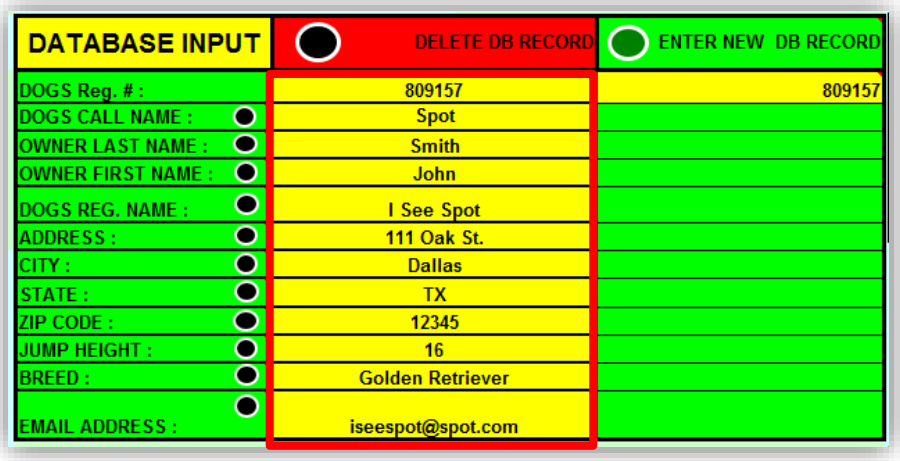
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Database Lookup*** section, type the dog's call name in the **Dog Call Name** field or type the owner's last name in the **Last Name** field. 
2	Click the **Dog Call Name** or **Last Name** black button for the respective search term being used for the search (e.g. since the dog's call name is entered in the example below, click the **Dog Call Name** black button to perform the search). 

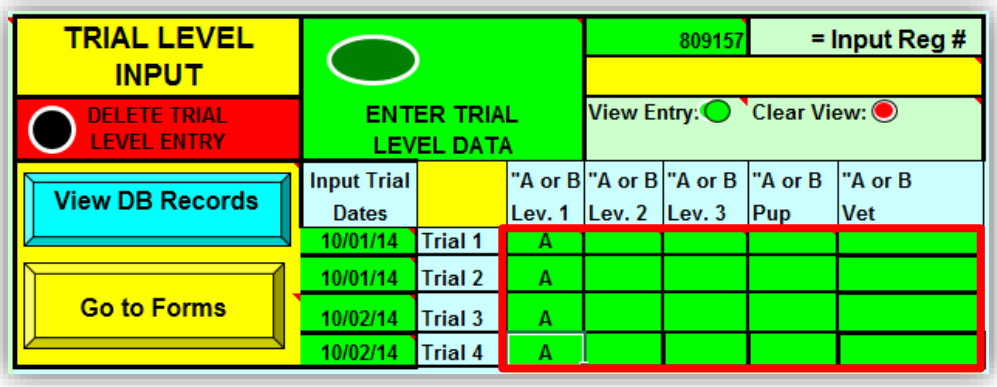
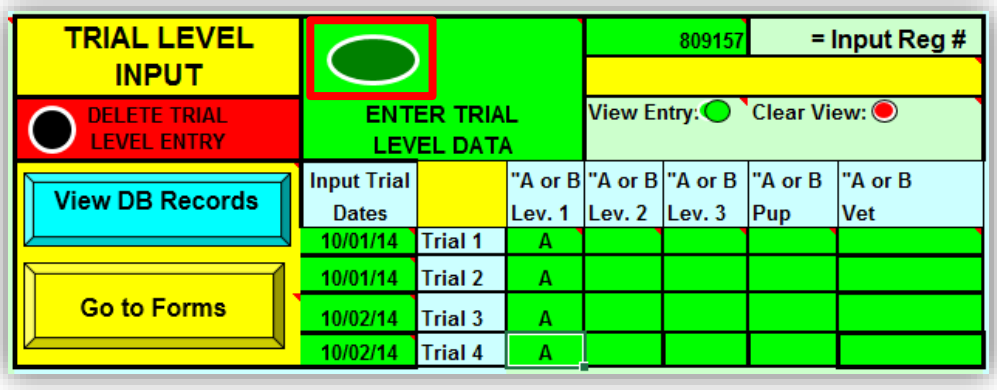
Step #	Instructions
3	If a record exists in the database which matches the search term, the dog's registration number, dog's call name and owner's last name will appear in the yellow fields below the search criteria fields.  If a record does not exist in the database which matches the search term, try using the other search term to search for the record. If neither search term option produces a result, it is probable the record does not exist in the database and must be added. Refer to ***Enter New Dog Database Record*** to add the record.
4	When finished searching or if another search needs to be performed, click the Database Lookup Clear black button to clear the search terms and search results. 

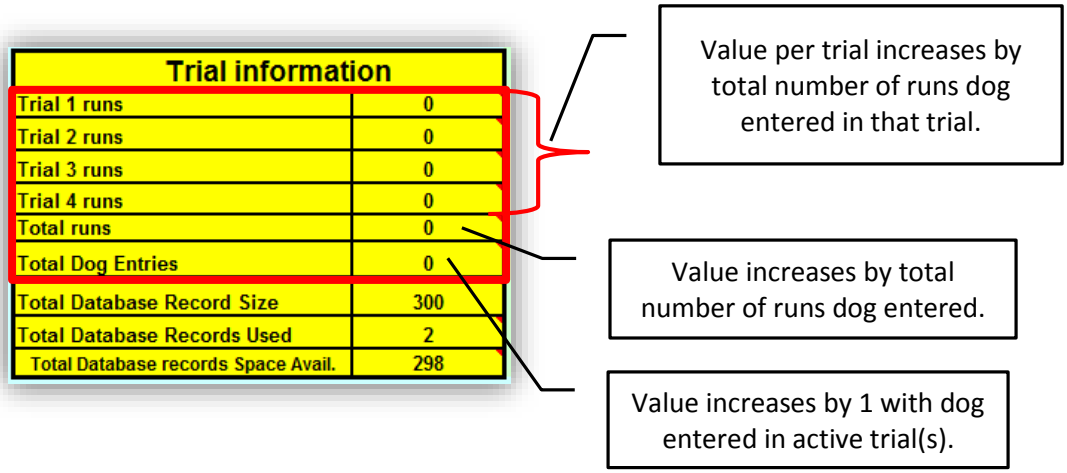
ENTER TRIAL ENTRY FOR DOG

Once a dog database record has been confirmed as existing in the database, the specific trial entry information can be entered for the dog using the information provided on the WCRL entry form.

Follow these steps to enter the trial entry details for a dog:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number for which the trial data is being entered in the **Input Reg #** field**.** Press the **Enter** key. **NOTE:** The message **NOT A VALID REG. #** disappears below the number.  The dog record details appear in the ***Database Input*** section (yellow fields). Before continuing with the trial data input, confirm the database record values match the information provided on the WCRL entry form. **NOTE:** If the information does not match, refer to ***Update Dog Database Record (Owner Information/Jump Height/Etc.)*** for steps on how to update the record. 

Step #	Instructions
2	After confirming the dog database record information, type the letter *A* or *B* in the appropriate green field for the trial and class for which the dog is entering (e.g. if the WCRL entry form indicates an entry in the *Level 1A* class for all four trials, the entry should appear similar to the screen below). Dogs may enter multiple classes in multiple trials on one entry form and all entry data can be entered at one time for the dog (e.g. a dog may enter *Level 2B* and *Level 3B* in every trial which means all of those fields can be populated at one time and saved together in the Tool). 
3	Click the **ENTER TRIAL LEVEL DATA** green button (in the top middle of the section) to save the trial entry information for the dog. 

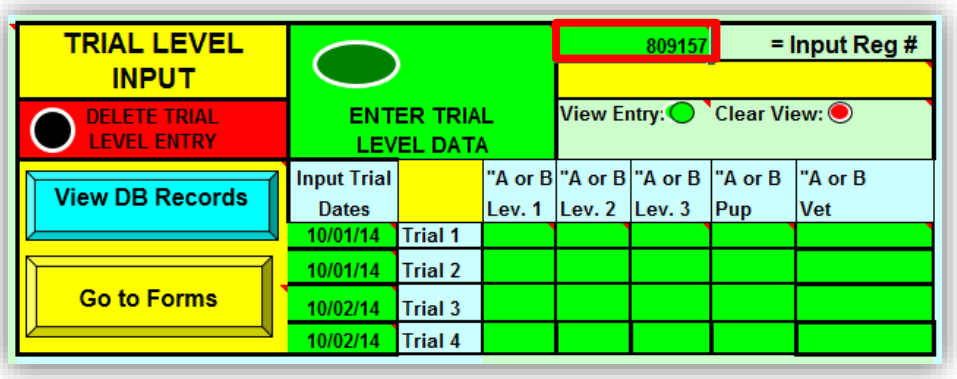
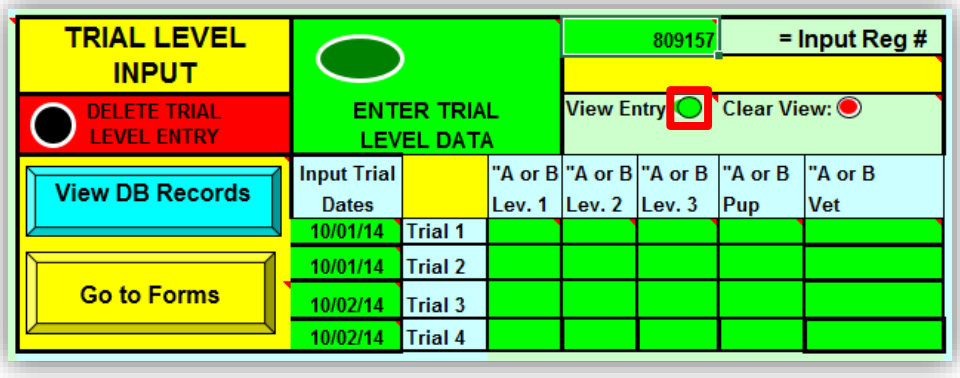
Step #	Instructions
4	In the ***Trial Information*** section, • The **Trial <#> runs** value(s) increase(s) by the total number of runs entered for the dog in each specific trial • The **Total runs** value increases by the total number of runs entered for the dog in ALL trials • The **Total Dog Entries** value increases by one to indicate the dog is entered in the current active trial(s) 

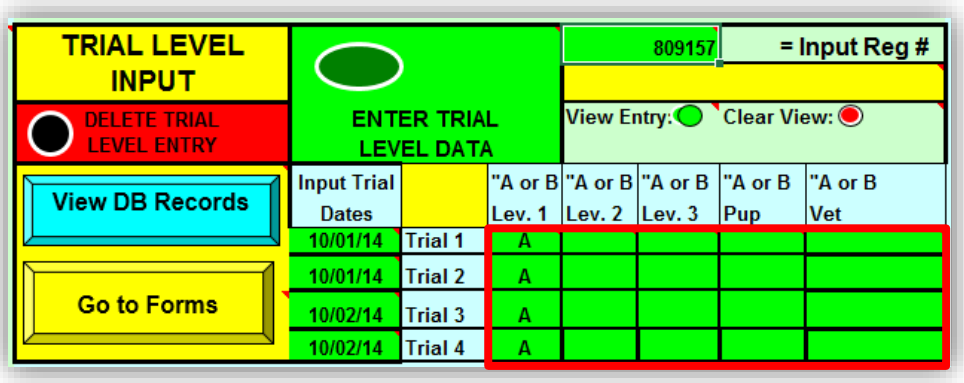
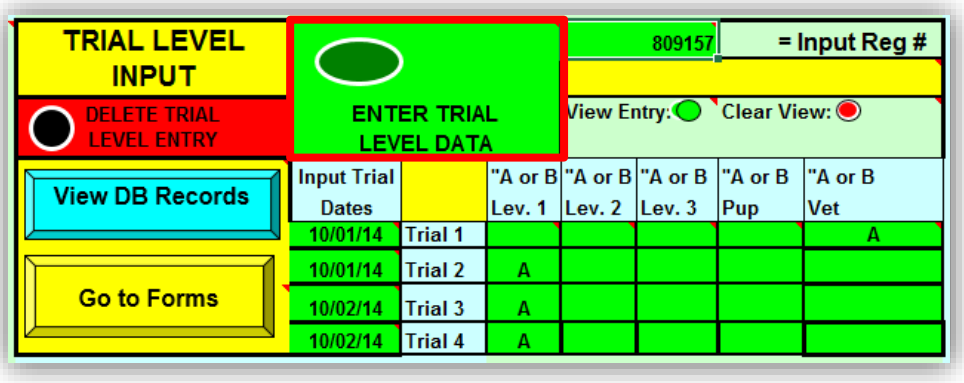
VIEW TRIAL ENTRY FOR DOG

After a dog's trial entry runs have been entered, there may be a need to view the entry and even change it (move up/down, add/delete run entry data, etc.).

If all runs entered for the dog need to be deleted (e.g. the dog is pulling out of the trial completely), refer to ***Delete Trial Entry for Dog*** to delete all entered runs for a single dog at one time.

Follow these steps to view the trial entry details for a dog:

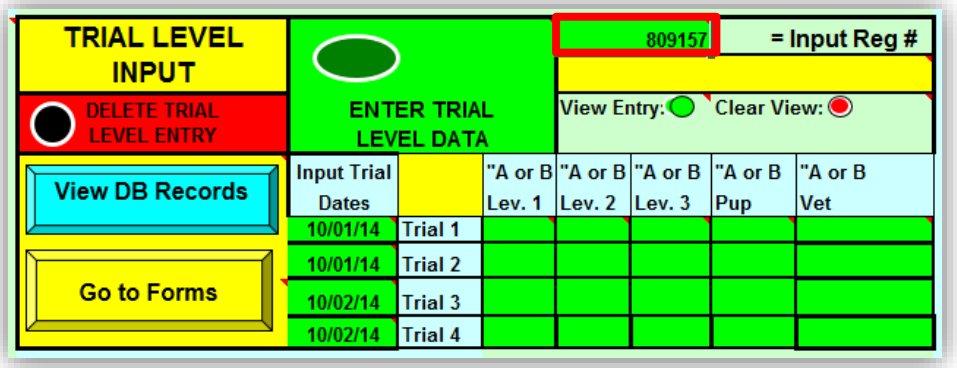
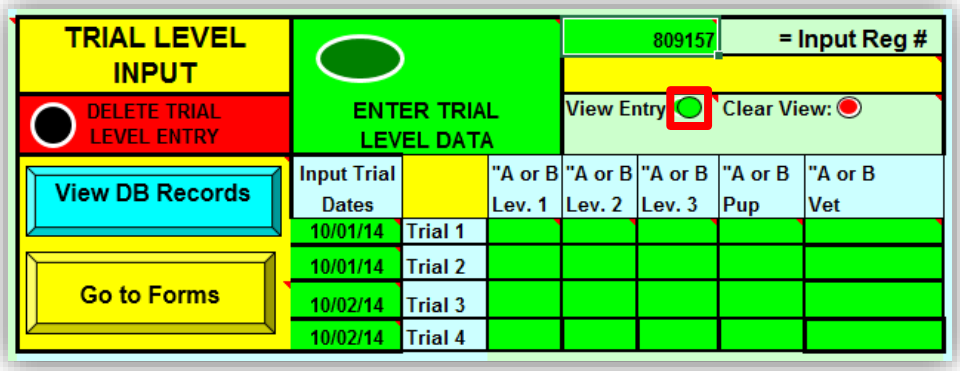
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number whose trial entries are to be viewed in the **Input Reg #** field**.** 
2	Click the **View Entry** green button to display the trial entry data for the dog. **NOTE:** The message **NOT A VALID REG. #** disappears below the number. 

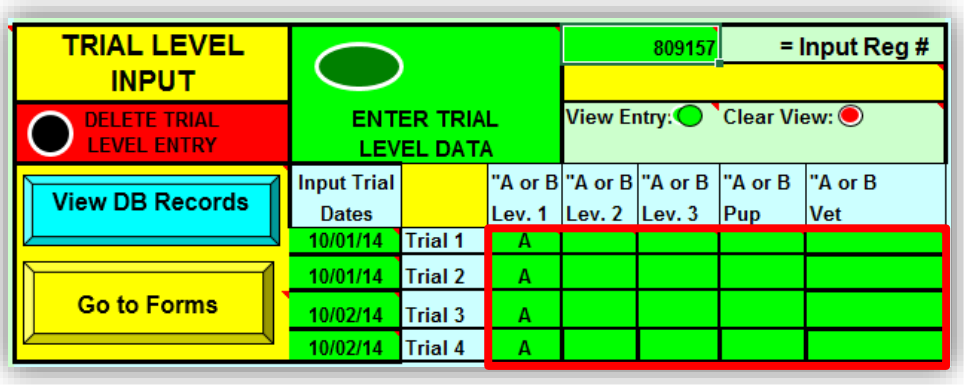
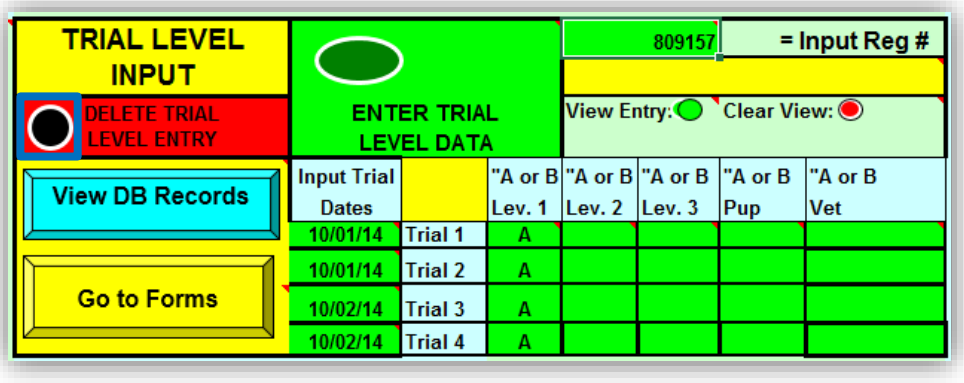
Step #	Instructions
3	All of the trial entry data entered for the dog displays in the green fields. 
4	If any of the entry data needs to be changed, make the change(s) as needed: • Change from *A* to *B* or *B* to *A* • Add another trial run to the dog entry (e.g. dog now wants a run in *Vet A* for Trial 1) • Delete a trial for the dog entry (e.g. dog does not want to run in *Level 1A* for Trial 1) Click the **ENTER TRIAL LEVEL DATA** green button to save the changes to the trial entry. **NOTE:** The ***Trial Information*** statistics section will be updated automatically to reflect the increase/decrease for each trial. 

DELETE TRIAL ENTRY FOR DOG

Occasionally, an exhibitor will request to pull a dog completely from a trial which means that the dog's trial entry runs should be deleted from the current trial data. If the dog entry information is not removed, all of the runs for that dog will be included in the trial statistics and on all of the paperwork printed from the database for the trial(s). The tool provides an easy way to delete all trial runs for a single dog at one time.

Follow these steps to delete all of the trial entry details for a dog:

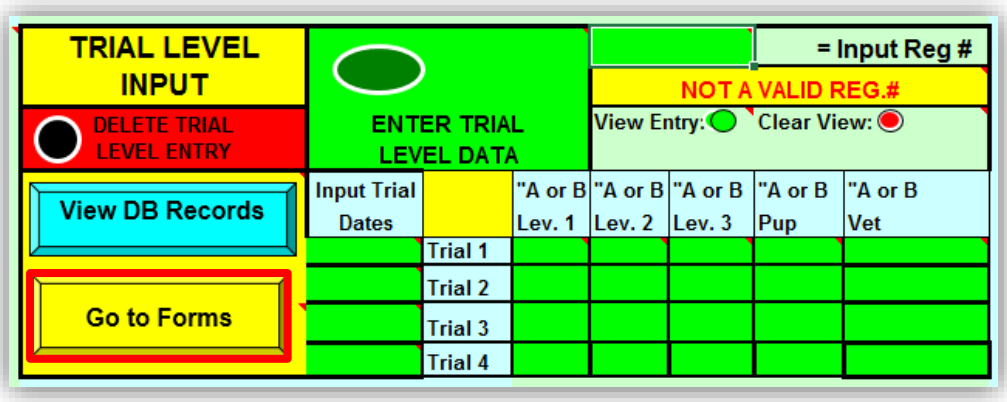
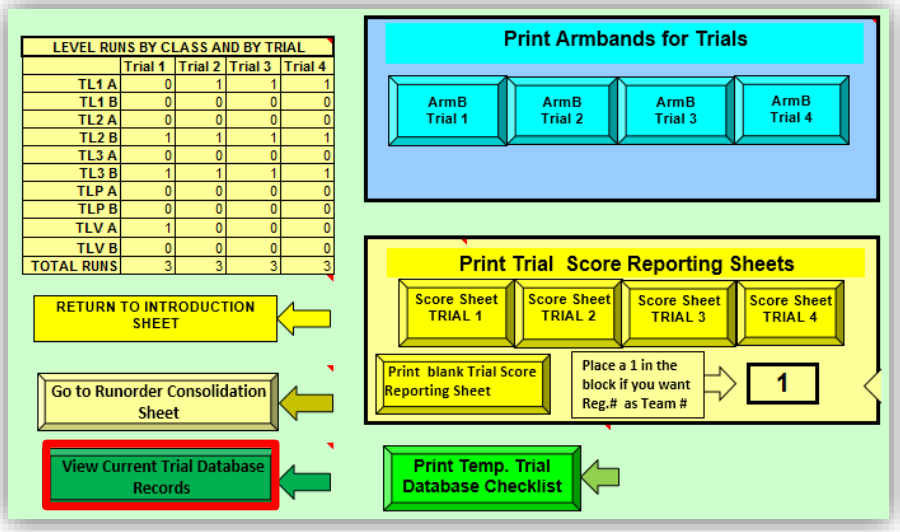
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, type the dog's WCRL registration number whose trial entries are to be viewed in the **Input Reg #** field**.** 
2	Click the **View Entry** green button to display the trial entry data for the dog. **NOTE:** The message **NOT A VALID REG. #** disappears below the number. 

Step #	Instructions
3	All of the trial entry data entered for the dog displays in the green fields. 
4	Click the **DELETE TRIAL LEVEL ENTRY** black button to delete all of the displayed trial level entries for the dog being viewed. **NOTE:** The ***Trial Information*** statistics section will be updated automatically to reflect the decrease for each trial and the number of dogs entered. 

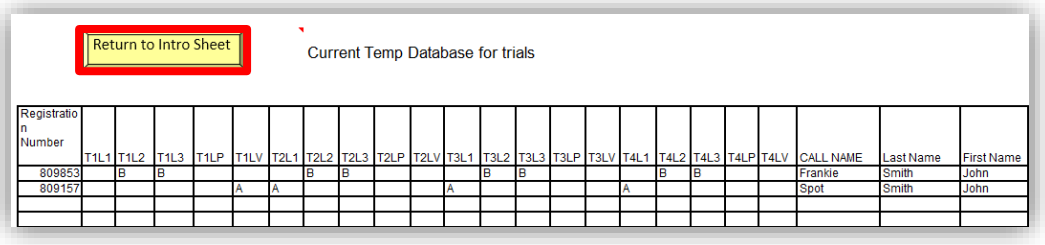
VIEW CURRENT TRIAL DATABASE RECORDS

There may be occasion to check the trial entries before the trial closes and paperwork is printed or to view the full list of trial entries before preparing the paperwork. There is a report available in spreadsheet format which displays the dog database record information and the trial entry data entered for each dog.

Follow these steps to view a list of current trial database records:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 
2	On the **Document and Form Publishing Cockpit**, click the **View Current Trial Database Records** button (dark green button located on the bottom left side of the screen). **NOTE:** The trial entry data is displayed on this screen in the light yellow table in the upper left corner. This table displays all runs by class and by trial. 

Step #	Instructions
3	A list of all data entered for all trials is displayed in a spreadsheet format with multiple columns (see list below split into two screens for display in this manual). When finished viewing, click the **Return to intro Sheet** button to return to the **Trial and Exhibitor Information Cockpit** screen.



Registration Number	T1L1	T1L2	T1L3	T1LP	T1LV	T2L1	T2L2	T2L3	T2LP	T2LV	T3L1	T3L2	T3L3	T3LP	T3LV	T4L1	T4L2	T4L3	T4LP	T4LV	CALL NAME	Last Name	First Name
809853		B	B				B	B				B	B				B	B			Frankie	Smith	John
809157					A	A					A					A					Spot	Smith	John

First Half of Columns: Dog Registration Number, Trial Entry Data, Dog's Call Name, Owner's Last Name and First Name

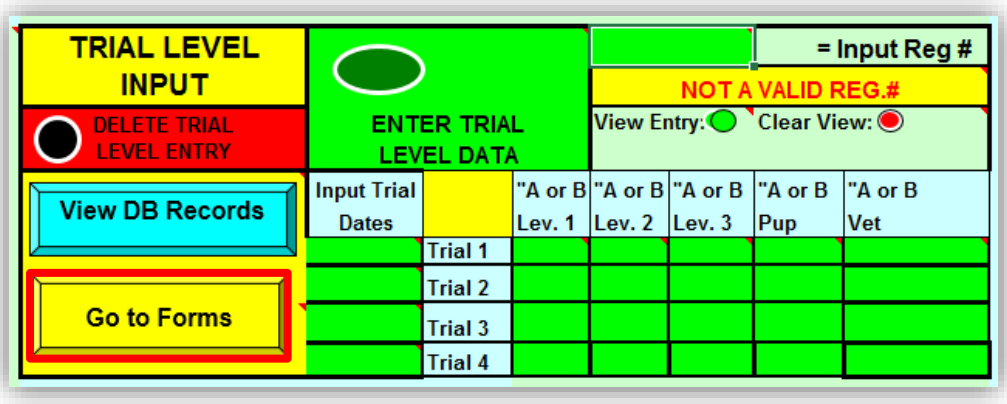
DOGS REG NAME	ADDR	CITY	STATE	ZIP	JUMP	BREED	Email Address
Frankie Goes to Hollywood	111 Oak St.	Dallas	TX	12345	12	JRT	iseespot@spot.com
I See Spot	111 Oak St.	Dallas	TX	12345	16	Golden Retriever	iseespot@spot.com

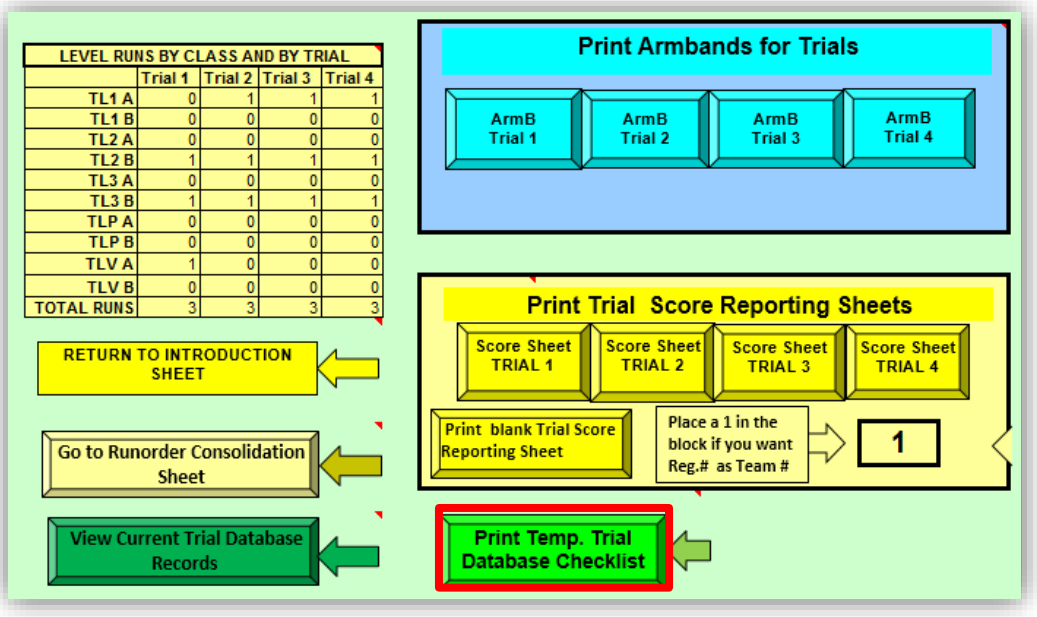
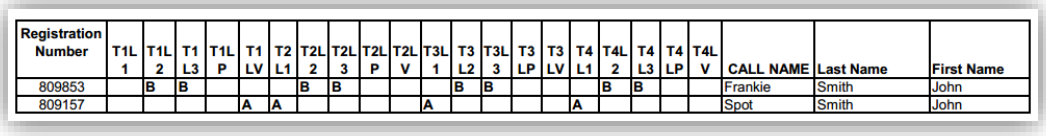
Second Half of Columns: Remainder of Dog Database Record Information

PRINT TEMPORARY TRIAL DATABASE CHECKLIST

It is recommended that the trial entry data be reviewed prior to preparing the trial paperwork to minimize incorrect trial entry information appearing on the paperwork or using incorrect trial entry data to create trial running orders/gate sheets. A report containing the dog's registration number, trial entry data, dog's call name, and owner's first and last name is set up to print automatically when executed from the tool.

Follow these steps to print the temporary trial database checklist:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 

Step #	Instructions
2	On the **Document and Form Publishing Cockpit**, click the **Print Temp. Trial Database Checklist** button (bright green button located on the bottom of the screen). **NOTE:** The trial entry data is displayed on this screen in the light yellow table in the upper left corner. This table displays all runs by class and by trial. 
3	The report prints automatically and does not appear online. **NOTE:** The report will print automatically to the default printer set up for the computer where the tool is being used.  **Example of printed temporary trial database checklist**

Registration Number	T1L 1	T1L 2	T1 L3	T1L P	T1 LV	T2 L1	T2L 2	T2L 3	T2L P	T2L V	T3L 1	T3 L2	T3L 3	T3 LP	T3 LV	T4 L1	T4L 2	T4 L3	T4 LP	T4L V	CALL NAME	Last Name	First Name
809853		B	B				B	B				B	B				B	B			Frankie	Smith	John
809157					A	A					A					A					Spot	Smith	John

PREPARE, EMAIL AND PRINT DOCUMENTS

DOCUMENTS

After trial entries have been entered and checked, the trial host can then begin to prepare the paperwork needed to run the trial. Each exhibitor must receive a confirmation to ensure the trial entry information has been correctly received by the trial host. In addition to the exhibitor confirmation, exhibitors should receive an "armband" to wear which should be handed out during trial check-in, a running order/gate sheet for each class should be posted to keep the trial running smoothly and quickly, and WCRL requires the submission of Trial Score Reporting Sheets which contain a consolidated list of each entry for each trial separated by trial and class.

CREATE AND SEND CONFIRMATION LETTERS USING MAIL MERGE

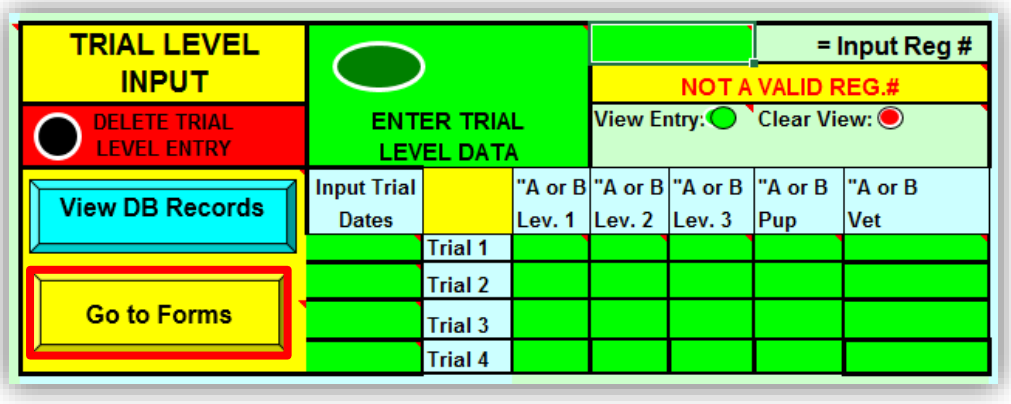
Typically, a confirmation letter is sent to each exhibitor individually with only that exhibitor's trial entry details provided in it. It may contain general details about the trial site (e.g. parking rules, time when doors open for exhibitors, trial start time(s)) along with the exhibitor-specific information.

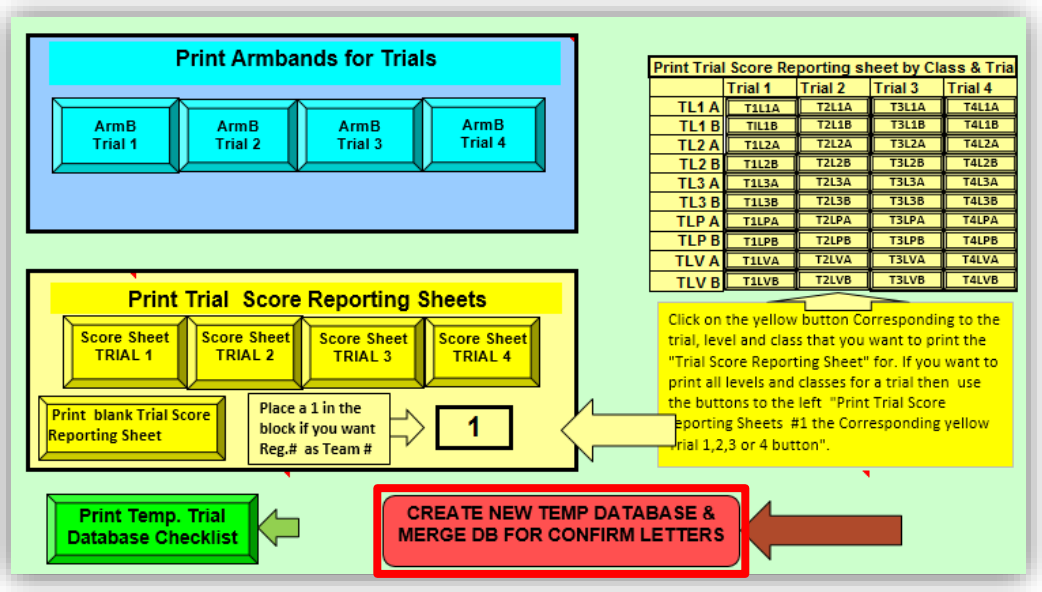
A sample confirmation letter in Microsoft Word format has been provided to modify and send out via email to each exhibitor (**Appendix A** *Sample Confirmation Letter*). The letter may be modified with trial specific information and saved to use for future trials. It is recommended to complete the modifications to the letter prior to starting the mail merge steps.

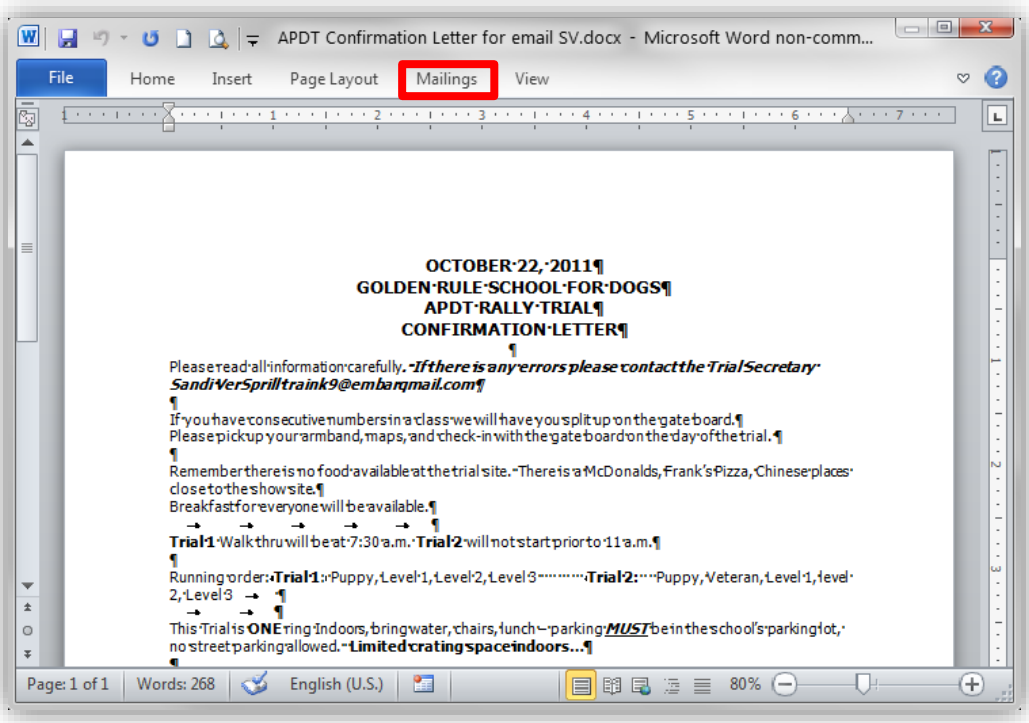
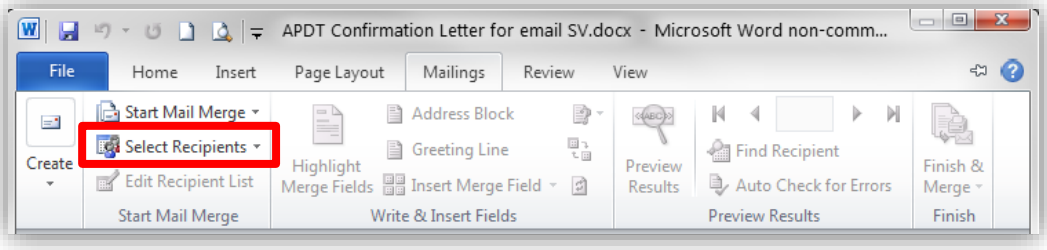
When opening the letter to make updates to the content and not perform the mail merge, click the **No** button when asked to run the SQL command which connects a database to the letter. This is not needed at this time and the database will be connected during the steps below.

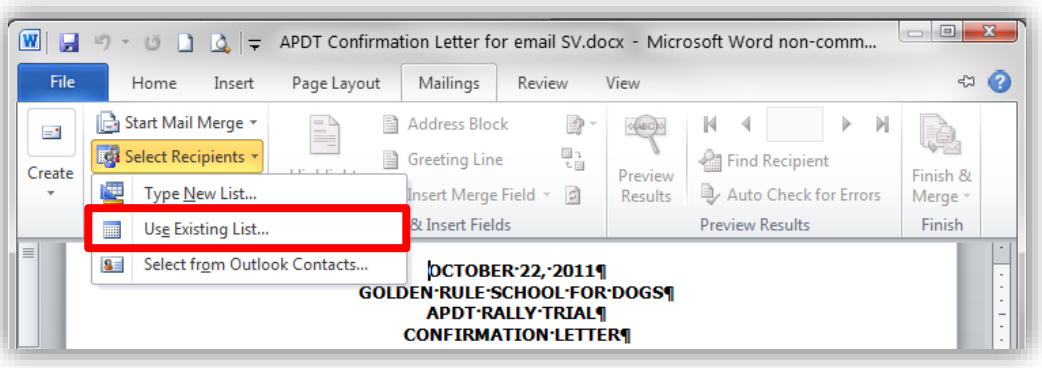
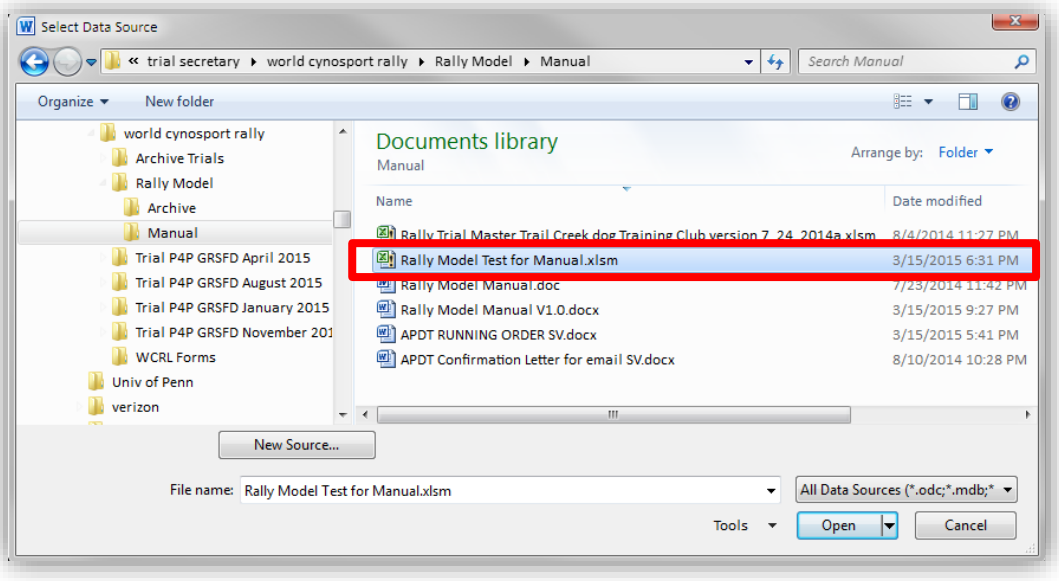
It's important not to change the field identifiers for the trial entry data in the letter or the data will not merge correctly into the document from the trial entry database.

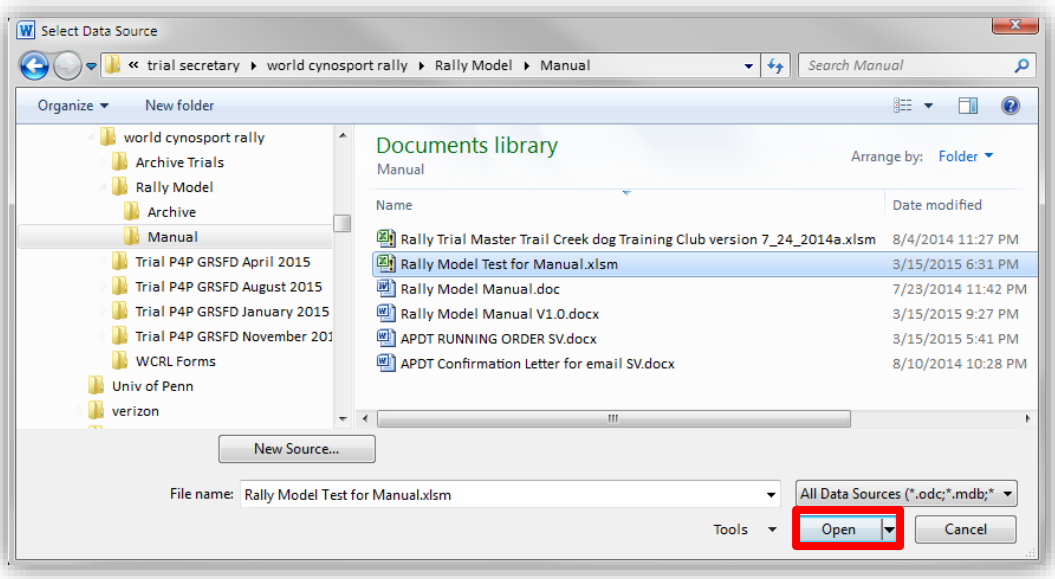
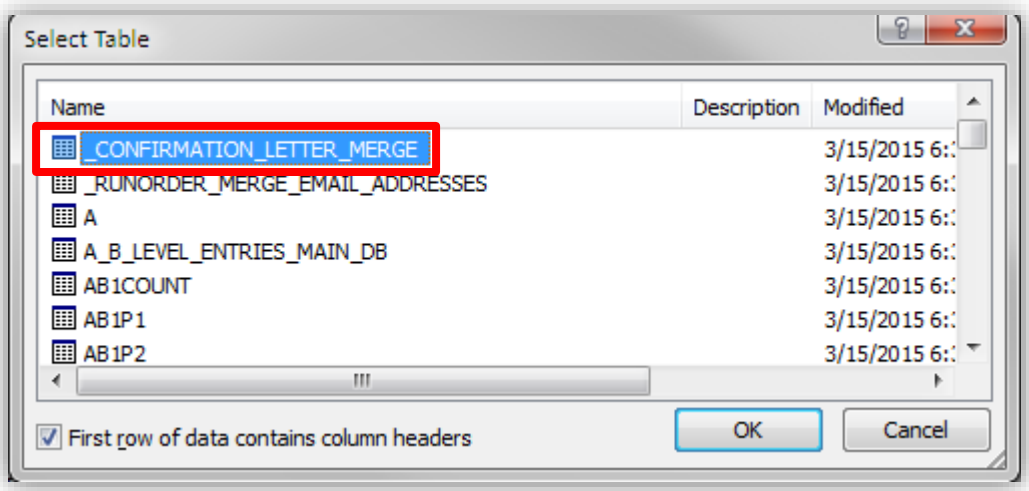
Follow these steps to create and send confirmation letters using Microsoft Word mail merge:

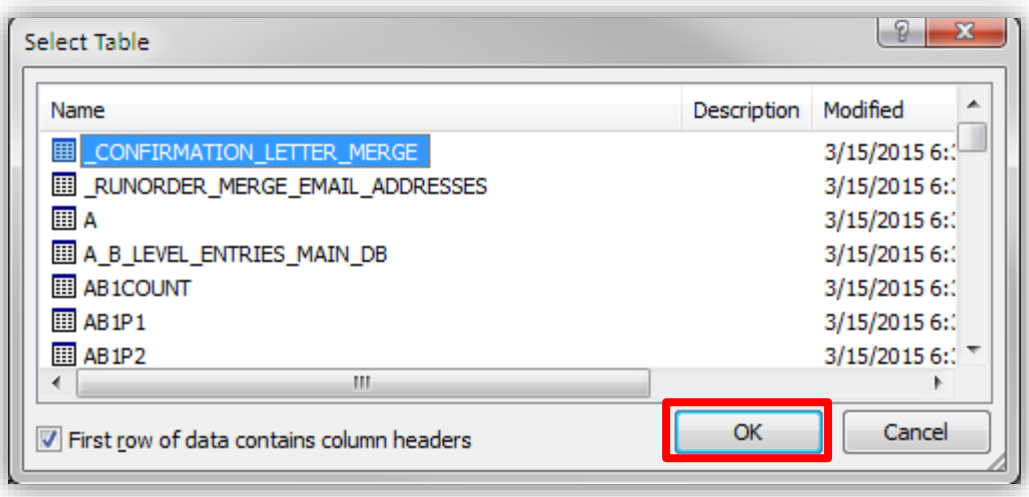
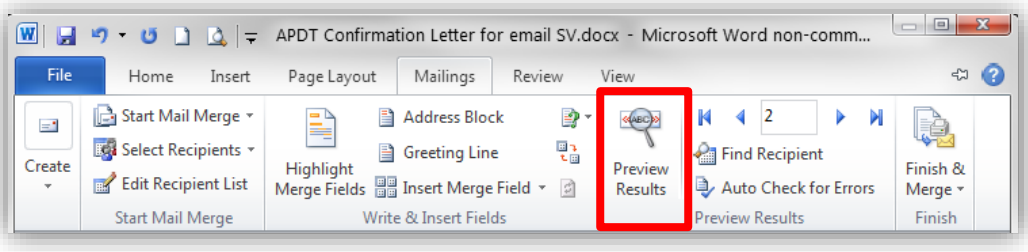
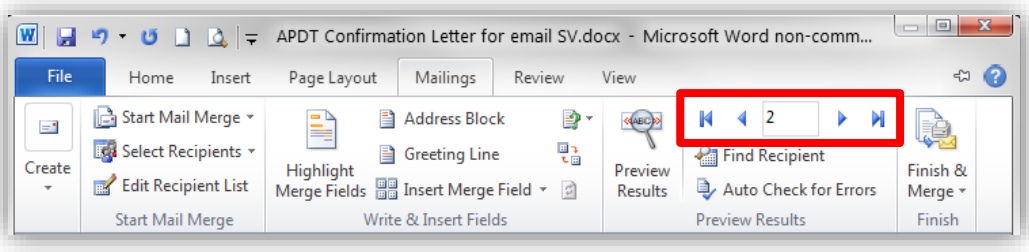
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 

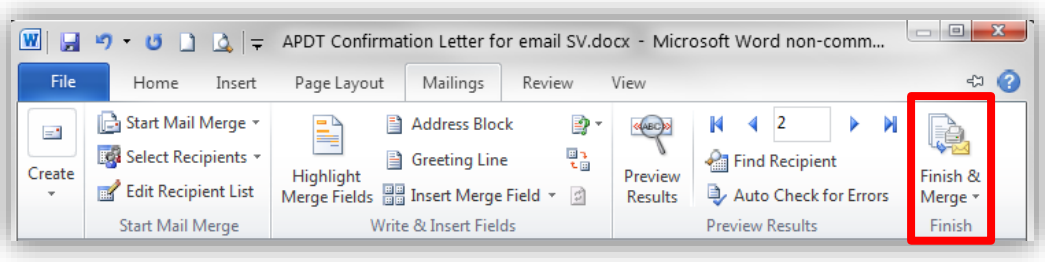
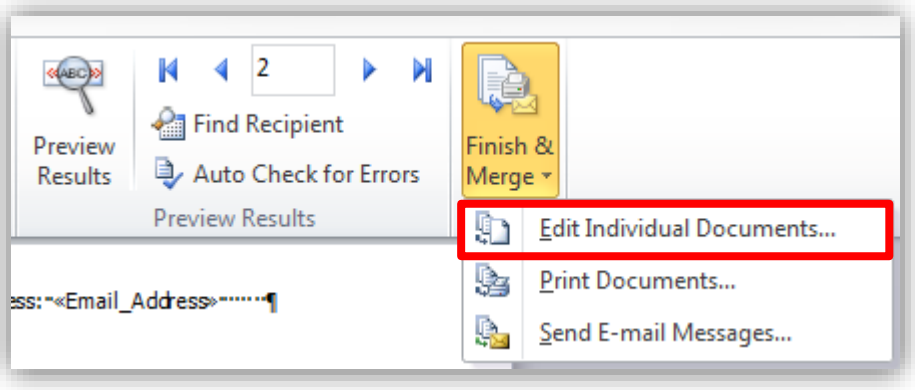
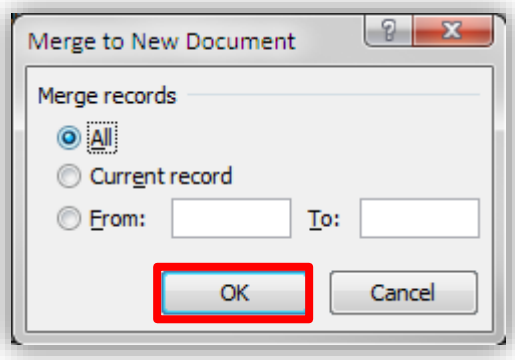
Step #	Instructions
2	On the **Document and Form Publishing Cockpit**, click the **CREATE NEW TEMP DATABASE & MERGE DB FOR CONFIRM LETTERS** button (red button located on the bottom of the screen). 
3	Save and close the Rally Model **.xlsm** file. **NOTE:** The file must be closed before the confirmation letter mail merge can be completed.
4	Double-click the confirmation letter Word document **.doc/docx** file saved to the folder created in **Step 1** of ***Install and Set up Rally Model***.

Step #	Instructions
5	On the **Word menu bar**, click the **Mailings** menu. 
6	On the **Mailings** menu, click **Select Recipients**. 

Step #	Instructions
7	Click **Use Existing List…** from the drop down list. 
8	Navigate to the Rally Model **.xlsm** file in **Windows Explorer** and select the file. 

Step #	Instructions
9	Click the **Open** button to display the list of data sources within the file. 
10	Select **_CONFIRMATION_LETTER_MERGE** from the list of tables. 

Step #	Instructions
11	Click the **OK** button to confirm the selection and merge the Rally Model entries for each exhibitor into the confirmation letter Word document. 
12	The exhibitor information will now be merged into the confirmation letter Word document with each team from the Rally Model creating **<u>one</u>** confirmation letter record.
13	In order to preview the merge results for each record, on the **Mailings** menu, click the **Preview Results** button. 
14	Click the **right** and **left** arrows to page through the records and view the populated confirmation letter for each exhibitor. 

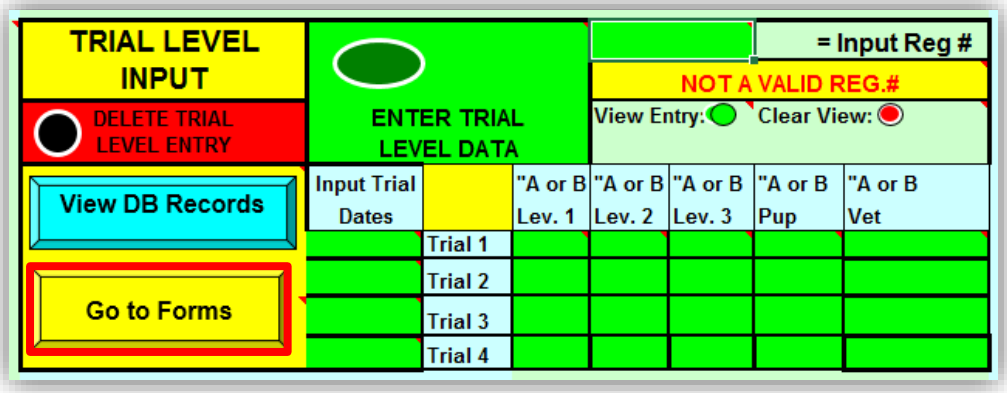
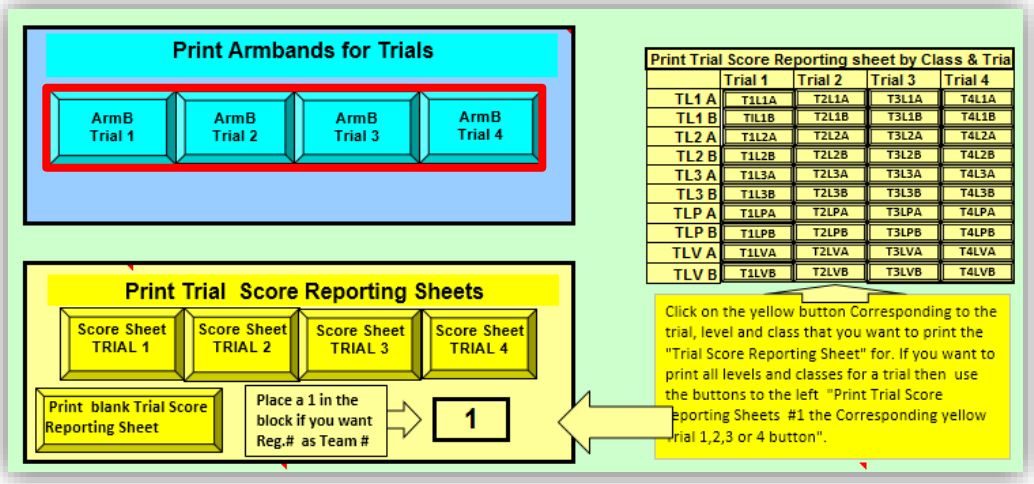
Step #	Instructions
15	Once the records have been checked, click the **Finish & Merge** button to create individual documents of each record. 
16	Click **Edit Individual Documents…** from the drop down list to create a new Word document containing each confirmation letter record on its own page with the data fields populated with exhibitor information. 
17	Click the **OK** button merge all records into the new document. 

Step #	Instructions
18	In the email program on your computer, start a new email and perform the following steps for each exhibitor confirmation letter: a. Copy the exhibitor's email address from the confirmation letter to the **To:** address box in the email message. b. Copy and paste the entire confirmation letter for the exhibitor to who the message is addressed in the body of the email message. c. Send the email to the exhibitor. **NOTE:** Repeat this step for each exhibitor ensuring you copy and paste the correct confirmation letter for each exhibitor.

PRINT ARMBANDS

The database is automatically configured to print each armband on a 2” x 4” label (e.g. Avery #8163) for each exhibitor per trial. In addition to the trial number, each label contains the dog’s registration number, call name, breed and jump height.

Follow these steps to print armbands for each trial:

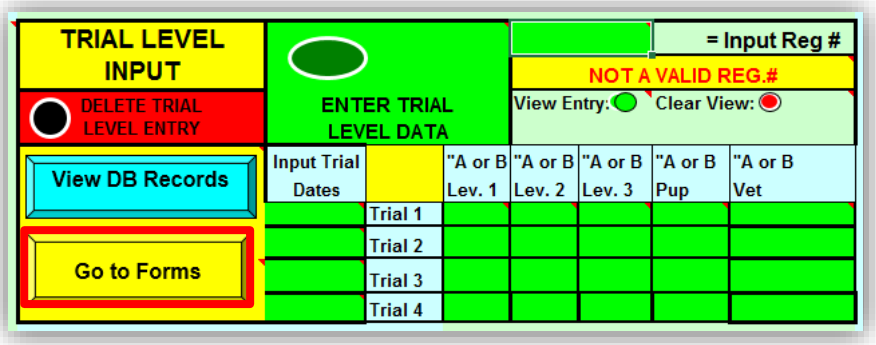
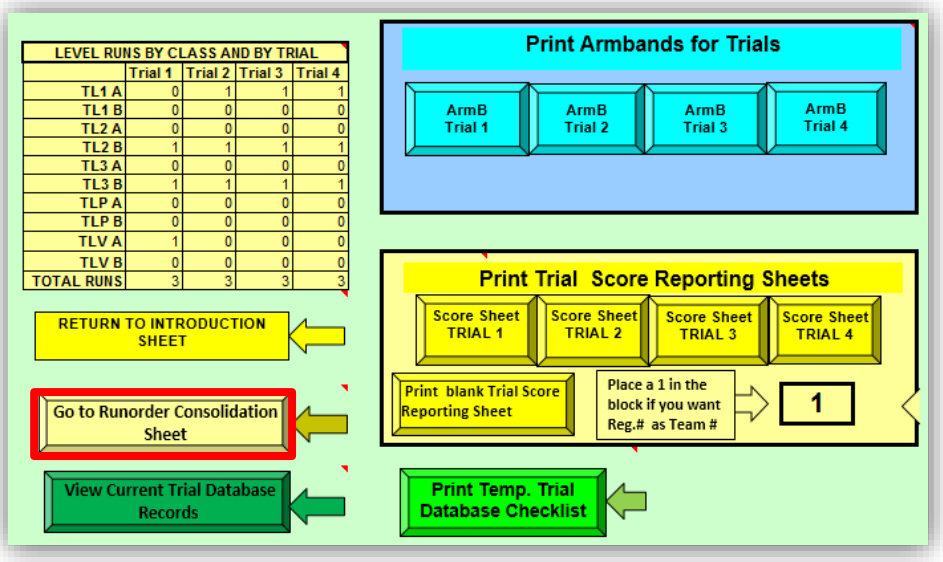
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 
2	On the **Document and Form Publishing Cockpit**, click the **ArmB <Trial #>** button (blue button located in the ***Print Armbands for Trials*** section) of the trial for which the armbands need to be printed. **NOTE:** Repeat this step for each trial. Follow the usual printing process for the default printer to print the armbands. 

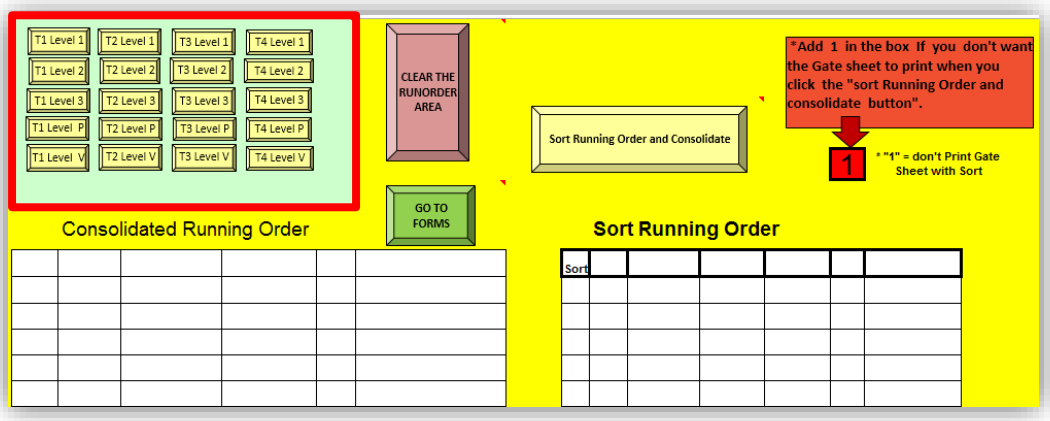
Step #	Instructions
3	Ten (10) armbands will print on each label sheet. **Example of printed armband**

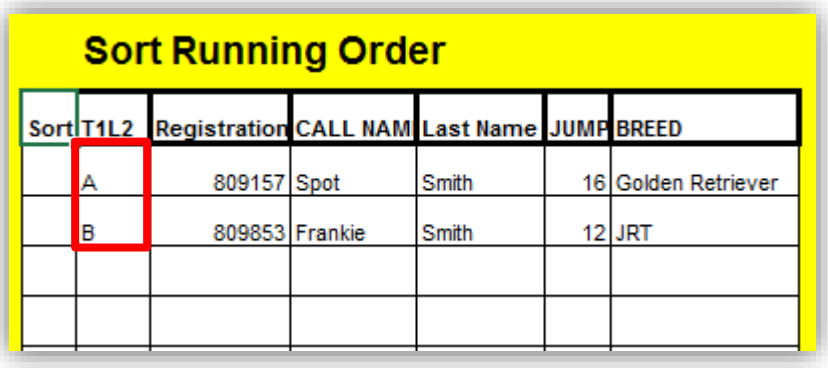
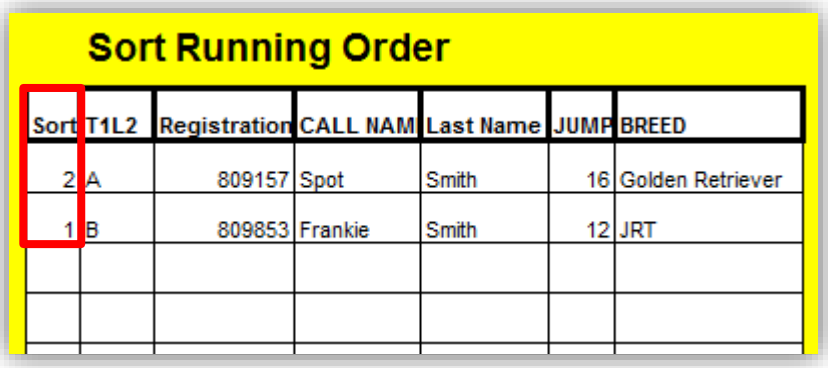
CREATE RUNNING ORDER AND PRINT GATE SHEETS

A running order displays the list of entered teams for a trial in the order each team will run during the trial. Usually the running order is grouped by class (A or B) within each level (Puppy, Level 1, Level 2, Level 3 and Veteran) but this is not a requirement. If an exhibitor has more than one dog entered in the same class and/or level, the trial host should separate the exhibitor's dogs in the running order to allow the exhibitor time to switch dogs between runs. The trial database provides the ability to create custom running orders which can then be printed and posted at the gate on the day of the trial (**Appendix A** *Sample Running Order Gate Sheet*).

Follow these steps to create and print a custom running order per level for each trial:

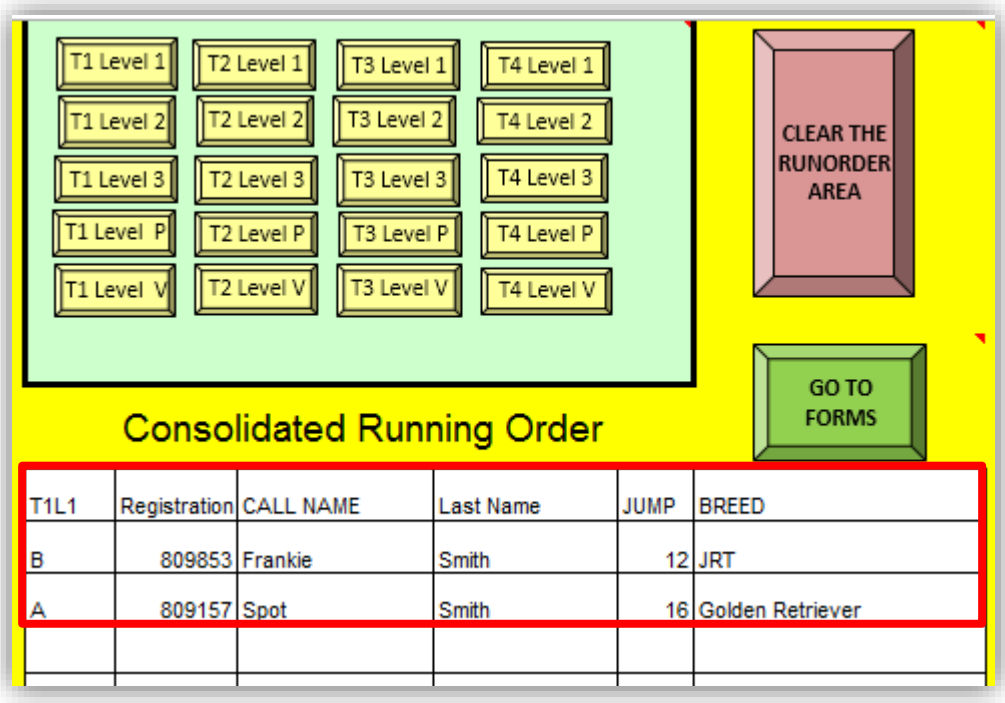
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 
2	On the **Document and Form Publishing Cockpit**, click the **Go to Runorder Consolidation Sheet** button (light yellow button located on the left side of the screen). 

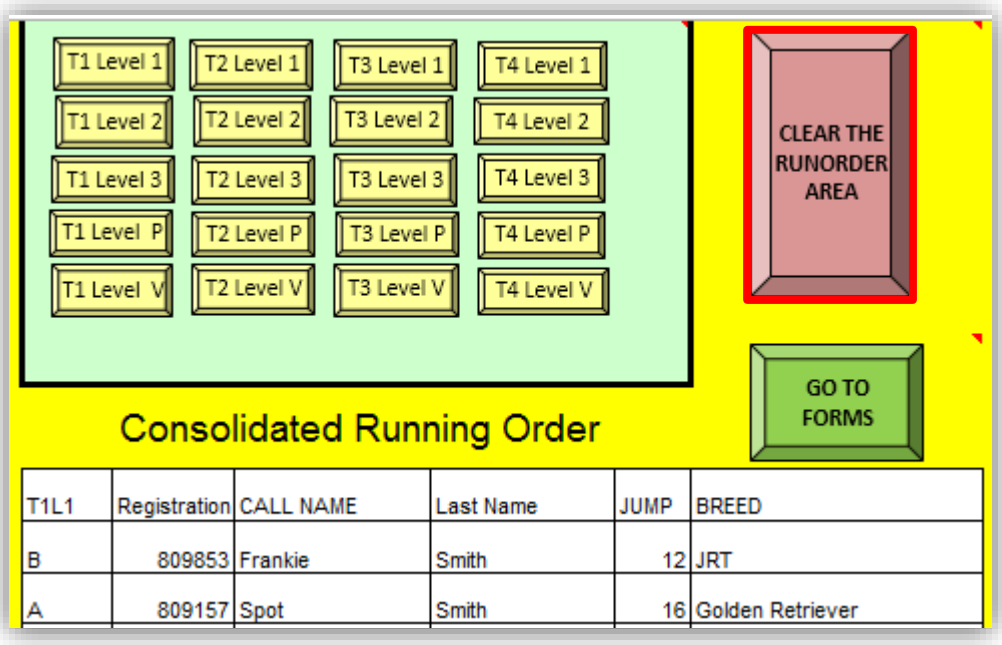
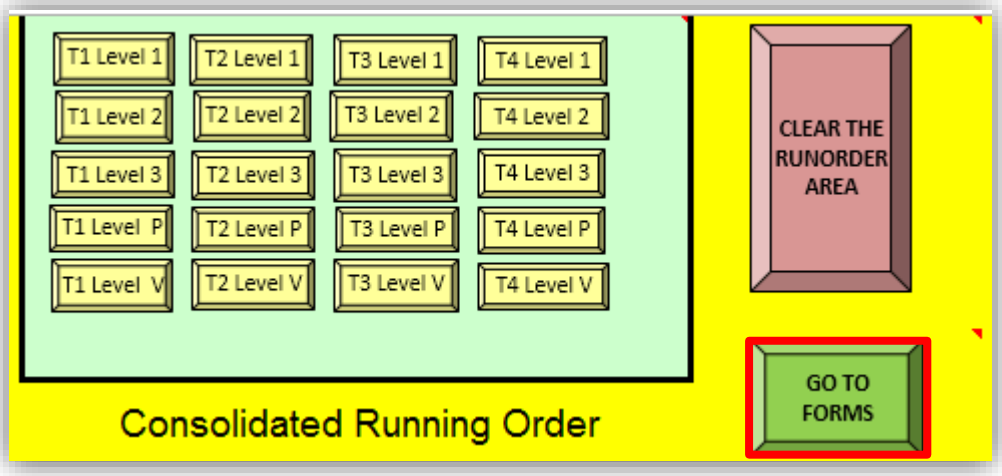
Step #	Instructions
3	The entries for each level of a trial are accessed using the light yellow buttons in the upper left of the screen. Each column in this section represents the levels in a trial. For example, the levels for Trial 1 are listed in the first column, the levels for Trial 2 are listed in the second column, etc. 
4	Click the **<Trial # Level #>** button of the trial and level for the running order that requires sorting. **NOTE:** Each level contains all classes (A and B) to be sorted together.

Step #	Instructions
5	The entries in the selected trial level appear in the **Sort Running Order** table on the bottom right of the screen. Notice the A and B class entries appear in the list together.  **Sort Running Order** Sort | T1L2 | Registration | CALL NAM | Last Name | JUMP | BREED A | 809157 | Spot | Smith | 16 | Golden Retriever B | 809853 | Frankie | Smith | 12 | JRT
6	If the list requires re-ordering from the order as shown (e.g. one exhibitor has two dogs which must be separated in the running order), type the desired number order in the **Sort** column for each entry.  **Sort Running Order** Sort | T1L2 | Registration | CALL NAM | Last Name | JUMP | BREED 2 | A | 809157 | Spot | Smith | 16 | Golden Retriever 1 | B | 809853 | Frankie | Smith | 12 | JRT

Step #	Instructions
7	OPTIONAL – Type **1** in the red box on the screen if the gate sheet/running order should <u>not</u> be printed when the displayed list is sorted and consolidated to the left table.

Step #	Instructions
8	Click the **Sort Running Order and Consolidate** button to transfer the sorted list to the **Consolidated Running Order** table.

Step #	Instructions
9	The running order appears in the **Consolidated Running Order** table on the left side of the screen in the order in which it was numbered. **NOTE:** If the running order was set to print, it also prints to the default printer at this time. If the running order was not set to print and now it requires printing, follow **Steps 1 - 8** in this section again except do not enter **1** in the red box as noted in **Step 7**. 

Step #	Instructions
10	In order to create the next running order/gate sheet, click the **Clear The Runorder Area** button to clear the processed running order level from the **Consolidated Running Order** table. 
11	Repeat **Steps 4 - 10** in this section to create the running order/gate sheet for each level of a trial.
12	Once all of the running orders have been created and the gate sheets printed, click the **Go To Forms** button to return to the **Document and Form Publishing Cockpit**. 

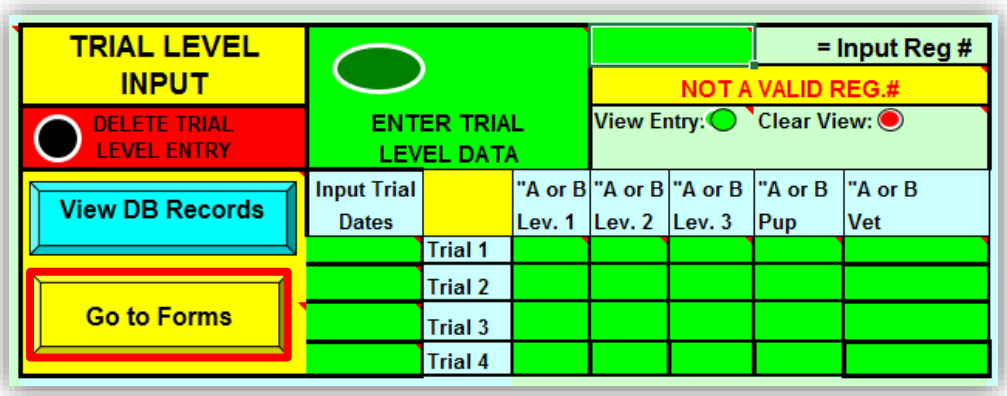
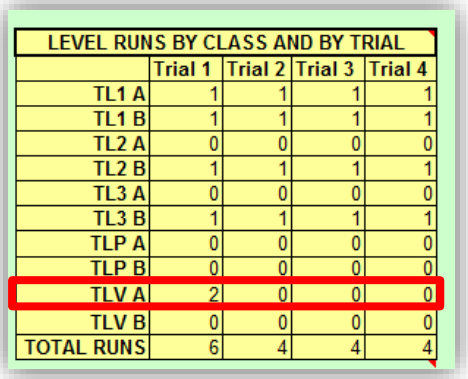
TRIAL SCORE REPORTING SHEETS

In order to submit trial results to WCRL, a Trial Score Reporting Sheet for each class and level must be sent to WCRL. The document contains the trial and host specific details in addition to the individual results for each entry in the trial.

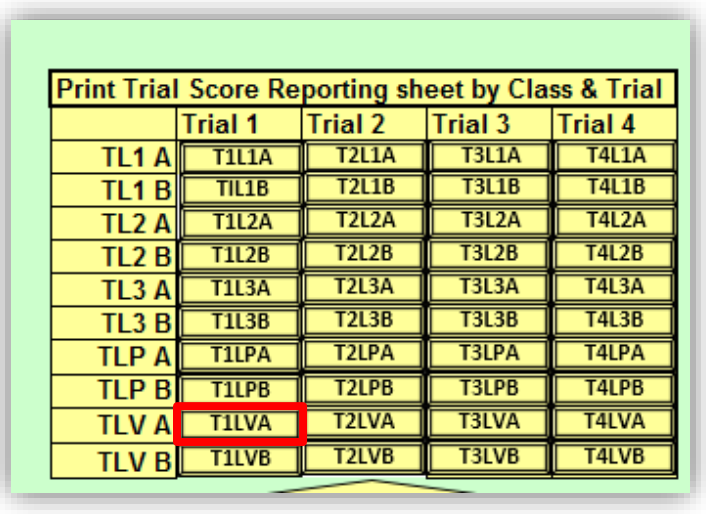
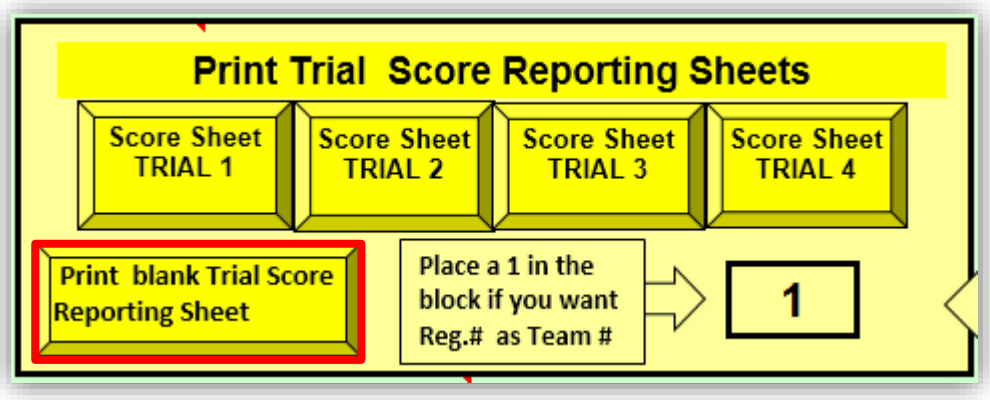
The judge for the class must sign Trial Score Reporting Sheet so it is highly recommended that the documents be printed prior to the trial date and completed during the trial in preparation for the judge's signature at the end of the trial.

TRIAL SCORE REPORTING SHEETS: PRINT BY CLASS PER TRIAL

Follow these steps to print Trial Score Reporting Sheets by level and class for each trial:

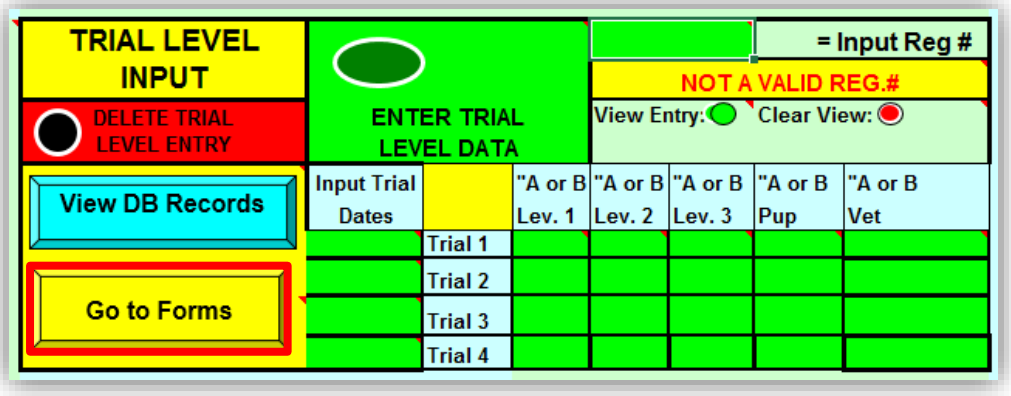
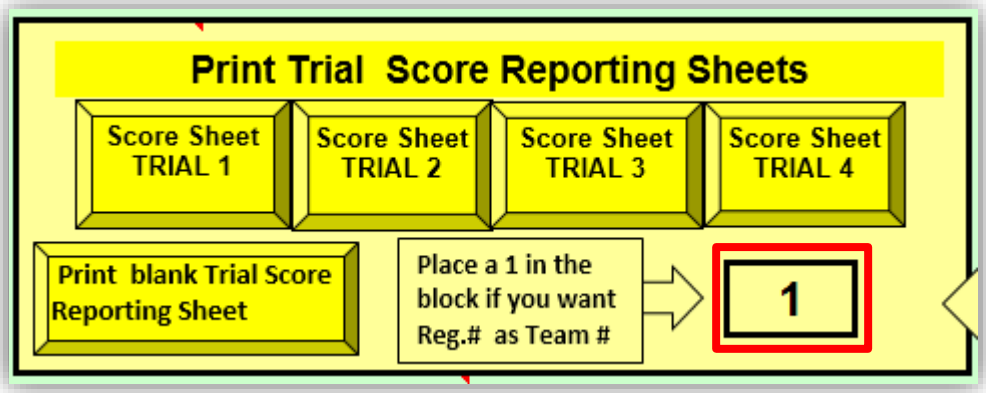
Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 
2	On the **Document and Form Publishing Cockpit**, the light yellow table in the upper left corner displays the total entries by class, level and trial. Use this table to confirm the number of entries in the table match the number of entries printed on each Trial Score Reporting Sheet. 

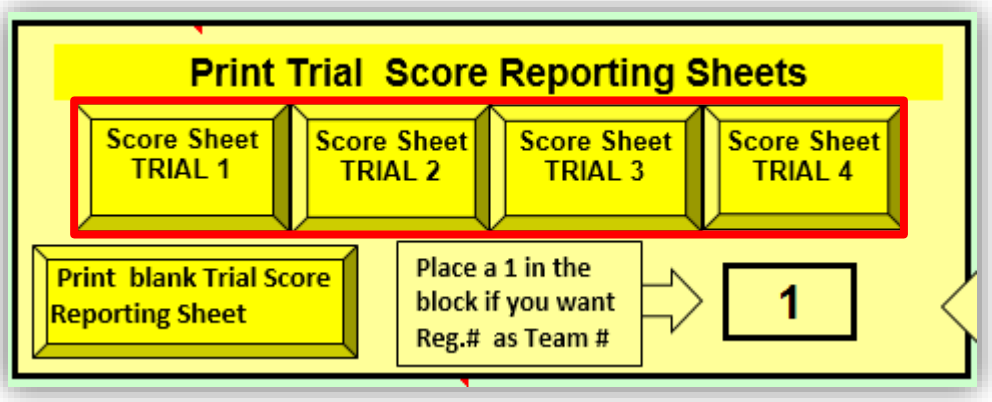
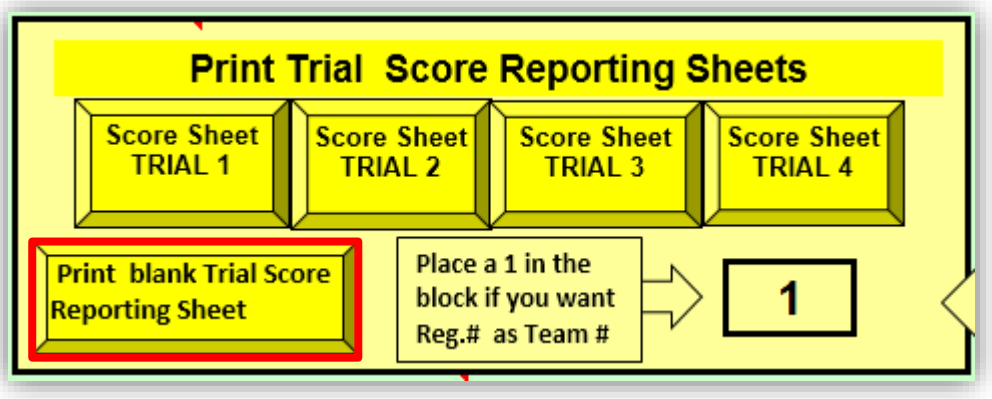
LEVEL RUNS BY CLASS AND BY TRIAL				
	Trial 1	Trial 2	Trial 3	Trial 4
TL1 A	1	1	1	1
TL1 B	1	1	1	1
TL2 A	0	0	0	0
TL2 B	1	1	1	1
TL3 A	0	0	0	0
TL3 B	1	1	1	1
TLP A	0	0	0	0
TLP B	0	0	0	0
TLV A	2	0	0	0
TLV B	0	0	0	0
TOTAL RUNS	6	4	4	4

Step #	Instructions
3	In the light yellow table in the upper right corner, click the **<Trial # Level # Class #>** button to print the Trial Score Reporting Sheet for that class. 
4	The Trial Score Reporting Sheet prints immediately to the default printer (**Appendix A** *Sample Trial Score Reporting Sheet*). **NOTE:** Follow the usual printing process for the default printer to print the documents.
5	Repeat **Steps 2 - 4** in this section to print the Trial Score Reporting Sheet for each level and class of a trial.
6	OPTIONAL – If a blank Trial Score Reporting Sheet is needed (e.g. for Judge's class), click the **Print blank Trial Score Reporting Sheet** button to immediately print a blank document. 

TRIAL SCORE REPORTING SHEETS: PRINT BY TRIAL (TOTAL)

Follow these steps to print all Trial Score Reporting Sheets for a trial at one time:

Step #	Instructions
1	On the **Trial and Exhibitor Information Cockpit**, in the ***Trial Level Input*** section, click the **Go to Forms** button (yellow button located on the left side of the ***Trial Level Input*** section). 
2	OPTIONAL – Type **1** in the large box in the ***Print Trial Score Reporting Sheets*** section if the registration number of each dog should also be used as the team number for each team. 

Step #	Instructions
3	In order to print all of the Trial Score Reporting Sheets for one trial, click the **Score Sheet Trial <#>** button of the trial for which the documents need to be printed (**Appendix A** *Sample Trial Score Reporting Sheet*). **NOTE:** Repeat this step for each trial. Follow the usual printing process for the default printer to print the documents. 
4	OPTIONAL – If a blank Trial Score Reporting Sheet is needed (e.g. for Judge's class), click the **Print blank Trial Score Reporting Sheet** button to immediately print a blank document. 

APPENDIX A

SAMPLE CONFIRMATION LETTER

Database values will replace the database field contained within double brackets. They must not be changed but they can be moved as long as the field name is not changed and it is kept between the double brackets (e.g. *<<First_Name>>* will be replaced by the exhibitor's first name supplied by the database).

OCTOBER 22, 2011
GOLDEN RULE SCHOOL FOR DOGS
APDT RALLY TRIAL
CONFIRMATION LETTER

Please read all information carefully. ***If there is any errors please contact the Trial Secretary Sandi VerSprill traink9@embarqmail.com***

If you have consecutive numbers in a class we will have you split up on the gate board.
Please pick up your armband, maps, and check-in with the gate board on the day of the trial.

Remember there is no food available at the trial site. There is a McDonalds, Frank's Pizza, Chinese places close to the show site.
Breakfast for everyone will be available.

Trial 1 Walk thru will be at 7:30 a.m. **Trial 2** will not start prior to 11 a.m.

Running order: **Trial 1**: Puppy, Level 1, Level 2, Level 3 **Trial 2:** Puppy, Veteran, Level 1, level 2, Level 3

This Trial is **ONE** ring Indoors, bring water, chairs, lunch – parking ***MUST*** be in the school's parking lot, no street parking allowed. **Limited crating space indoors...**

For inclement weather please call the school phone (973)786-5229.....there will be a message on the phone.

Exhibitor Name: «First_Name» «Last_Name» Email Address: «Email_Address»
Address: «ADDR»
«CITY» , «STATE» «ZIP»

Dogs Registered Name: «DOGS_REG_NAME» **Call Name: «Call_Name»**

APDT NO.: «Registration__Number_____» JUMP HEIGHT: «JUMP»

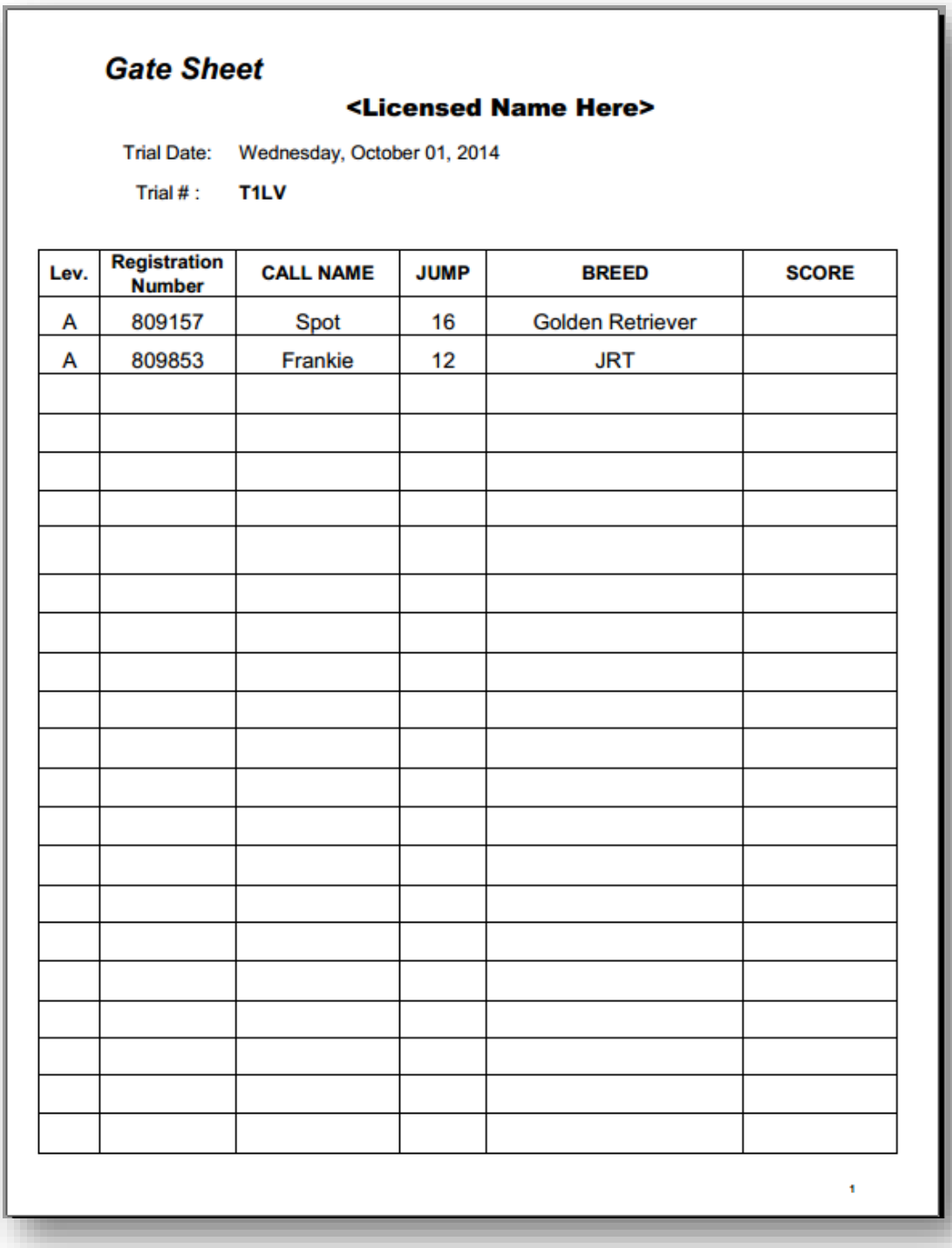
ARMBAND #: «Registration__Number_____» (Arm Band # is your APDT #)

	Sat. 10/22/2011	Sat. 10/22/2011		
	Trial 1	Trial 2	Trial 3	Trial 4
Level 1, A or B	«T1L1»	«T2L1»	«T3L1»	«T4L1»
Level 2, A or B	«T1L2»	«T2L2»	«T3L2»	«T4L2»
Level 3, A or B	«T1L3»	«T2L3»	«T3L3»	«T4L3»
Puppy, A or B	«T1LP»	«T2LP»	«T3LP»	«T4LP»
Veteran, A or B	«T1LV»	«T2LV»	«T3LV»	«T4LV»

Example of field name from database to be replaced when database connected to the document.

SAMPLE RUNNING ORDER GATE SHEET

The printed gate sheet contains the running order for the selected trial and level. It displays the name of the trial host in addition to the date of the trial. Each row in the list displays the class, registration number, call name, jump height and breed of each entered dog. In addition, the **SCORE** column can be used to record the dog's score during the trial.



Gate Sheet

<Licensed Name Here>

Trial Date: Wednesday, October 01, 2014

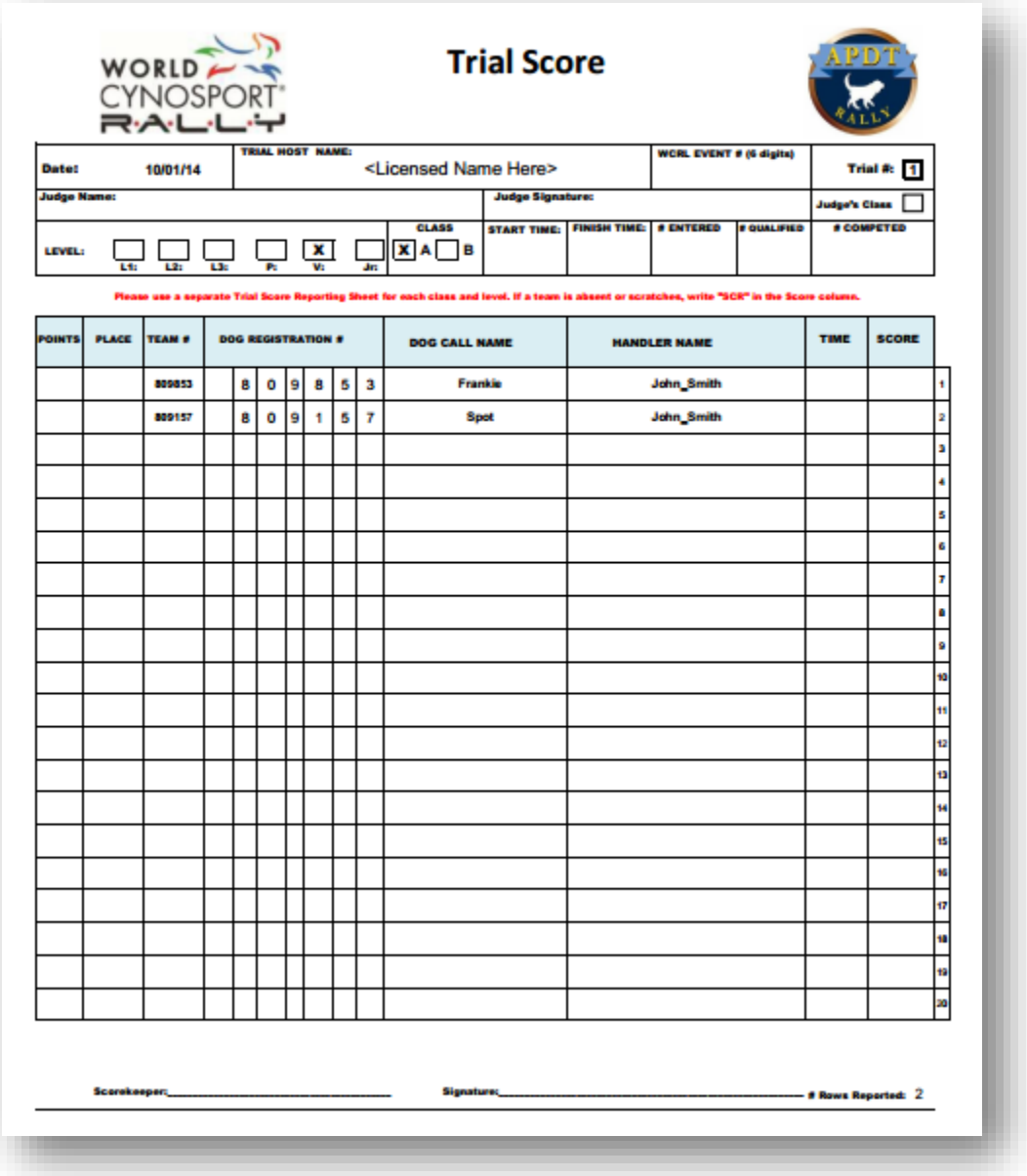
Trial # : **T1LV**

Lev.	Registration Number	CALL NAME	JUMP	BREED	SCORE
A	809157	Spot	16	Golden Retriever	
A	809853	Frankie	12	JRT	

1

SAMPLE TRIAL SCORE REPORTING SHEET

The Trial Score Reporting Sheet printed from the Rally Model program mimics the same document located in the document library on the WCRL web site. It contains trial, host and judge information in addition to the individual exhibitor information per row. Each row contains fields for entering the run time and score for each exhibitor. In addition, if the exhibitor placed in the class, the placement number can be entered in the PLACE column. The document also displays the total rows being reported at the bottom. The judge and scorekeeper must also sign the document in the designated spaces.



WORLD CYNOSPORT RALLY

Trial Score

APDT RALLY

Date: 10/01/14	TRIAL HOST NAME: <Licensed Name Here>	WCRL EVENT # (6 digits)	Trial #: 1
Judge Name:	Judge Signature:		Judge's Class ☐

LEVEL:	CLASS	START TIME:	FINISH TIME:	# ENTERED	# QUALIFIED	# COMPETED
L1: ☐ L2: ☐ L3: ☐ P: ☐ V: ☒ Jr: ☐	☒ A ☐ B					

Please use a separate Trial Score Reporting Sheet for each class and level. If a team is absent or scratches, write "SCR" in the Score column.

POINTS	PLACE	TEAM #	DOG REGISTRATION #	DOG CALL NAME	HANDLER NAME	TIME	SCORE	
		809853	8 0 9 8 5 3	Frankie	John_Smith			1
		809157	8 0 9 1 5 7	Spot	John_Smith			2
								3
								4
								5
								6
								7
								8
								9
								10
								11
								12
								13
								14
								15
								16
								17
								18
								19
								20

Scorekeeper:_____ Signature:_____ # Rows Reported: 2