

## **Guidelines for using the English Heritage Insect Pest Monitoring Sheet**

The quarterly insect pest monitoring sheet is intended as a simple means of collecting information from traps set up at various sites and for that information to be retrieved. It is not intended as a reporting tool but as an intermediate stage between site staff and the administrator responsible for reporting on or in charge of monitoring the quarterly insect pest data.

Included in this document are brief instructions which come in two parts and are intended to give simple help and guidelines to both the administrator in charge of collating returns and to the site staff responsible for creating individual returns. These parts are on separate pages to allow for simple cutting and pasting to a bespoke document which would include specific help for the person involved. The topics covered by each part are given below:-

### **Part 1. Administrator's Help**

This is the administrator's version which covers the configuration, maintenance and issuing roles and which includes assistance on the following topics.

1. Protecting or editing the data sheet.
2. Adjusting the threshold levels of the warning system used to highlight various levels of insect pest counts. This feature allows clear and fast appraisal of returns to highlight any problems.
3. Maintenance of the lookup tables used to determine the site details.
4. Hints on automation of returns.

### **Part 2. End User's Help**

This is the end users version which covers the data entry necessary to process the form and return it to the administrator in charge of the insect pest monitoring programme. It is assumed that the person using the monitoring sheet is familiar with opening; saving and using a basic MS Excel spreadsheet and that they also are familiar with sending and receiving emails with attachments. Topics covered are:

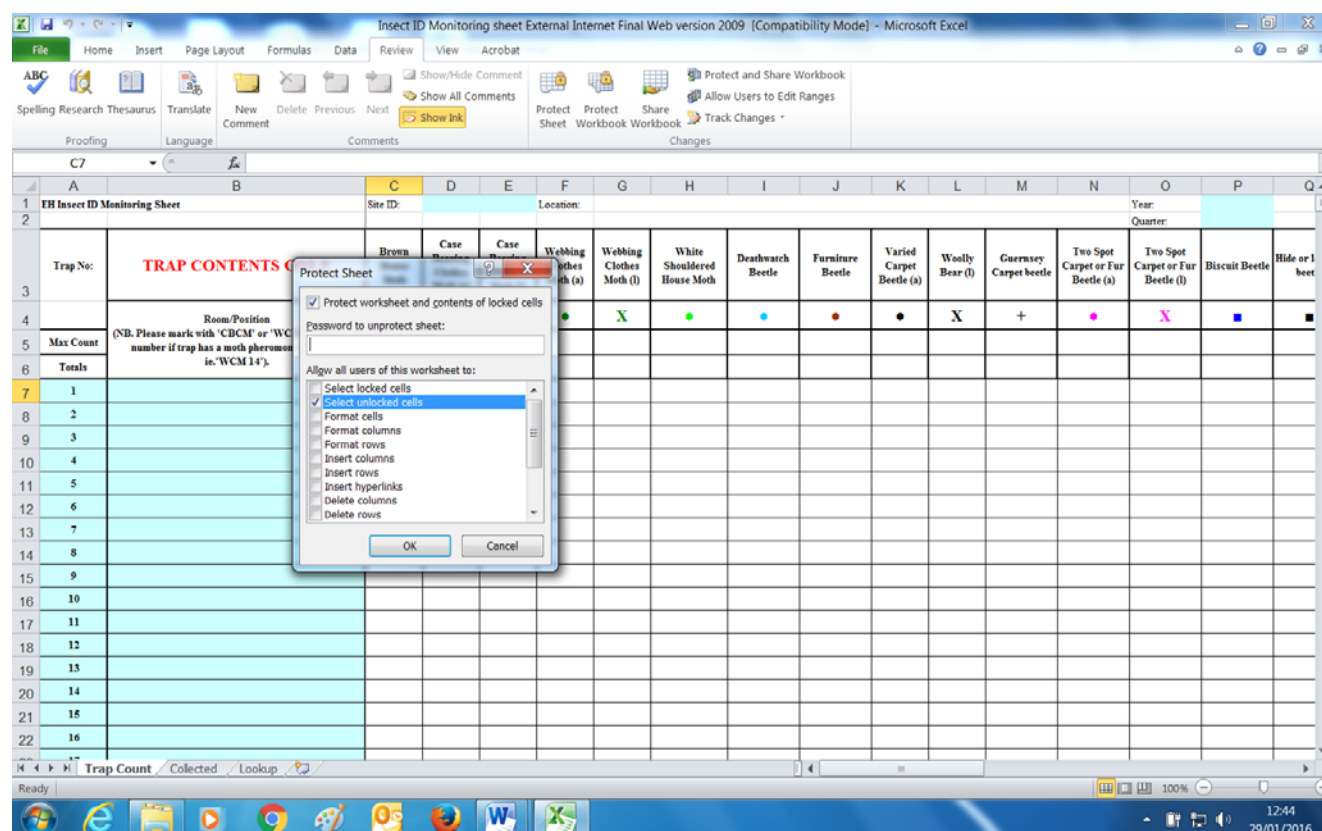
1. Opening the quarterly data sheet.
2. Entering and guidance on the data required.
3. Saving the return.
4. Sending the return to the administrator.

## ADMINISTRATOR'S HELP

Before embarking on any of the following maintenance tasks it is advised that a copy of the data sheet is first made so that if any problems occur you can retrieve the original file and start again.

### 1) PROTECTING THE DATA SHEET

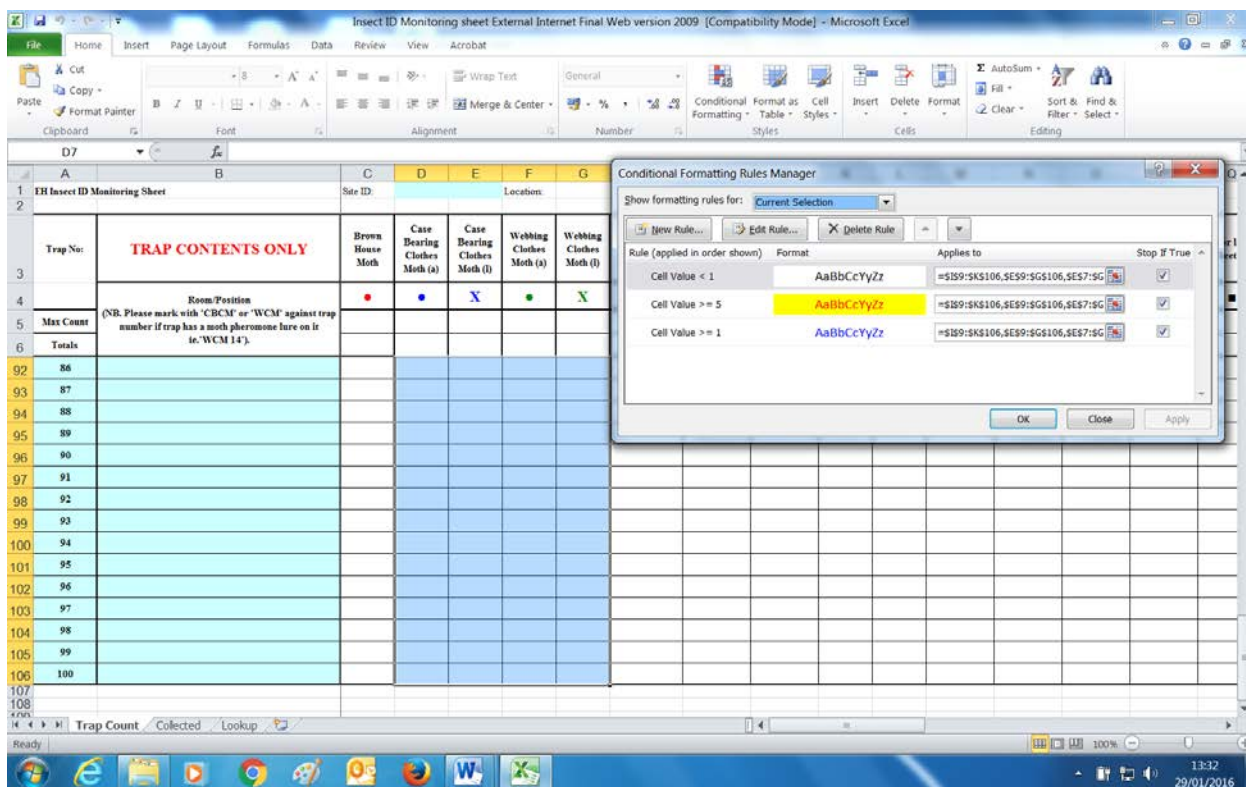
The data sheets should always be protected before transmitting to the end user for data entry. This prevents unauthorised alterations from being made which may cause problems and impair data integrity. The workbook as issued by English Heritage will not have protection enabled but will have designated protected areas defined. To enable or disable the protection it is advised to use a secure password which is only known to yourself and other senior colleagues responsible for the monitoring administration. For enabling or disabling the protection, open the workbook using Excel, (the original will be in 2002/03 format), and select from the menus at the top of the screen 'Review'/'Unprotect sheet'. If turning protection off this will ask for the password which should be entered and which is case sensitive. If turning protection on, you will be presented with a drop-down window and several tick boxes. Only the 'Protect worksheet and content of locked cells' and the 'select unlocked cells' options should be ticked before a password is entered in the box at the top. Having selected the correct boxes and typed a password in the box, select OK which will then ask for the password to be verified. This process should be completed on all three work sheets.



## 2) SETTING THE THRESHOLD LEVELS

One of the features of the data sheet is to use a 'traffic light' system consisting of three levels of warnings when certain limits are reached of each of the insect pest species caught. Each of these levels may be set individually by selecting the cell or blocks of cells concerned. This edit process is not recommended for anyone who only has a passing knowledge of MS Excel as to explain the process in depth is far too lengthy for these brief instructions, therefore a short explanation follows.

The threshold levels are set at up to three levels ("No problem", "Alarm", and "Warning"). These levels should be set according to the advice of the administrator or a Consultant Entomologist as they are ultimately responsible for reporting on the insect pest data as it is their experience which will define acceptable limits. This feature is invoked by using Excel's "Conditional Formatting" function and supplying it with the limits and formats applicable. To use this feature first select the cell or cells to be set and then go to "Conditional Formatting" on the menu toolbar. The example below will flag any reading of 1 or more as a "No Problem" signal and any of over 5 as a "Warning". Only readings of zero will not be flagged. The first condition 'Cell Value < 1' gives the number starting at the "No Problem" level and finishing over any possible likely count (i.e. 1000). The second condition 'Cell Value >= 5' sets the "Warning" level at 5 or more and the third condition 'Cell Value >= 1' sets the "Alarm" level at 1.



On the downloadable version from the EH website, you will find that the threshold levels are already set as agreed between David Pinniger, our Consultant Entomologist, and ourselves. It is strongly recommended that each user checks with him, or the relevant Consultant Entomologist used, as to whether these levels are to be kept to.

The formatting styles can be altered at any time to your own needs by selecting the 'edit rules' box and setting your own limits required. For further information on Condition Formatting, use

the help button found on MS Excel worksheets where you can find guidelines as well as videos giving various demonstrations.

Remember once you set the levels for all necessary cells, don't forget to switch protection back on (see previous section).

### **3) MAINTENANCE OF THE 'LOOKUP' TABLE**

The 'lookup' sheet (selected at the bottom left of the page) has been designed to contain a list of sites and their short codes if applicable. This allows the administrator to only enter the short code and the full site name to appear on the quarterly return and is also included purely to reduce the number of spelling mistakes when entering the details. Under the column headings enter the relevant short code and the site information as required. When the short code is entered by the user it should automatically fill in the full site details. The short code may be any text or number so you may wish to use a site number with a suffix to denote a specific building within a complex. For example, your site code may be '001' for 'The Houses of Parliament' and for 'St Stephens Tower', (that's where 'Big Ben' lives), you may have a code of '001.02'. Alternatively you may use HOP.SST as a short code.

Without knowing at this time who is using this system and how they define their buildings, we cannot advise on how you use the abbreviations. Suffice to say that the short codes above are faster and less prone to error than typing in the full site name each time.

### **4) HINTS ON AUTOMATION**

With modern database systems it is quite easy to access both the excel spreadsheet and your e-mail system. By creating a database of sites and contact e-mail addresses it is possible for the database to then modify the sheet and fill in any details as necessary. Having done this it is then possible to lookup the contact details and create an e-mail with the excel file attached and a covering note automatically. Following on from this your database may be able to check your inbox for returns, read them and add the data to your reporting system (whatever you use) rather than them being manually retyped. The down side is that this does need some degree of literacy in programming but may be possible if you have IT staff available who can advise. A starting point for information on these techniques would be to search Microsoft's website for "office automation" which should point you towards using ADO or DAO (data access) methods.

## **END USER'S HELP**

Before entering trap data, it is advised that you read the following instructions:

### **1) OPENING THE QUARTERLY RETURN**

You may receive the quarterly return by email as an attachment. Assuming you use MS Outlook for your email you should right click on the attachment and save it on your computer. We can't tell you where – that is for you to decide. Having saved it you need to start Microsoft Excel and open the saved file as usual.

### **2) ENTERING THE DATA**

You should be presented with a standard form for your quarterly return. Only areas of the form to be filled in will be selectable so if your cursor won't go to a cell it is for a reason. The form is best done in the following order:-

- a) Select the "TRAP COUNT" page at the bottom of the screen by clicking on the tab.
- b) Enter the short site ID for your site (Cell D1). This will result in your site details in full appearing in cells G1 and G2.
- c) Enter the Year and Quarter for the monitoring data sheet (Cells P1 and P2).
- d) Enter the current date (Cell X1).
- e) Enter the actual trap data from each trap (Columns C through Z) along with a total for any other non specified pests (Column AA) and a description and breakdown of these (column AB).
- f) If you are also required to report any insect pests found outside these traps, (for example collected up from window sills, floors or on collections), then select the "COLLECTED" work sheet at the bottom of the screen. All of the site and date details should already be filled in so just enter in the collected totals for any insect pests found near each of the traps as in e) above.

That should complete all data recording required. If any of the trap values appear in red or blue text or are otherwise highlighted, it is worth double checking your values.

### **3) SAVING THE FILE**

Simply select FILE/SAVE from the menus at the top of the page to save your quarterly return.

#### 4) **SENDING THE QUARTERLY RETURN TO THE ADMINISTRATOR**

Assuming you are using Outlook for emails, create an email to the administrator. Type your covering message and then click on the 'Attach file'/paperclip symbol at the top of the screen. If the symbol is not available, click on 'Insert'/Attach File. This will ask you to select the file to attach, find the excel sheet you have saved and double click on it. This then takes you back to your email where you will see it in the 'Attached' section. Once you are sure the relevant file has been attached, send to the administrator along with any covering note.

Dee Lauder,  
February 2018.