Trinity one year on

Getting benefit from the system
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Outline presentation

- Objectives and Key principles
- Why add on to the base system?
- Design of additional functionality
- Benefits:
  - Visibility of data;
  - Enrichment of data;
  - Improved queries;
  - Reporting and mail merge
- Issues, problems and caveats
- Key learning points
- Usage questions
- What next?

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Objectives and key principles

- Single version of the Truth: at last!
- Desire to get maximum benefit from the system, but…

  …without reinventing it.

- Acid tests should be:
  - Does it make a COfSec's life easier?
  - Does it replace "legacy" locally developed systems and processes?

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Why add on to the base system?

- Things that we can't see **on screen** within Trinity (e.g. Licences held: Levels and Disciplines), but can export.

- Limitations / drawbacks to **Downloads** (Export) from Trinity.

- **Data** not on Trinity.

- Desire for other **searches**.

- Enhanced **reporting** (e.g. mail merges)

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Design of Additional Functionality

- This is <u>just one </u>possible solution: it may not suit all.

- Two key elements:
  - Reformatting the Trinity Export (Excel macro), to create a single record for each official;
  - Import into Access Database.

- The first could easily be used in isolation.

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Reformatting Trinity Download

- Trinity Export spreadsheet will currently produce **several rows for each official** with more than one qualification.

- This is not ideal if the download is to be used for subsequent analysis or reporting: **one row per individual** is needed.

- This may be addressed in a future Trinity enhancement.

- Steve Marshall has devised an interim solution, using Excel: clever stuff!

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Excel Macro: one row per official

Three key steps:

- Run a full Excel download from Trinity: all records and all fields;

- Copy and paste the download into an Excel workbook containing the macros;

- Run the macros (two stages).

Result is a (much "wider") Excel spreadsheet, which can be used more flexibly.

Takes only a few minutes each time.

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Overall process – 3 steps

1 • File exported from Trinity

2 • Trinity Export Reformatted in Excel
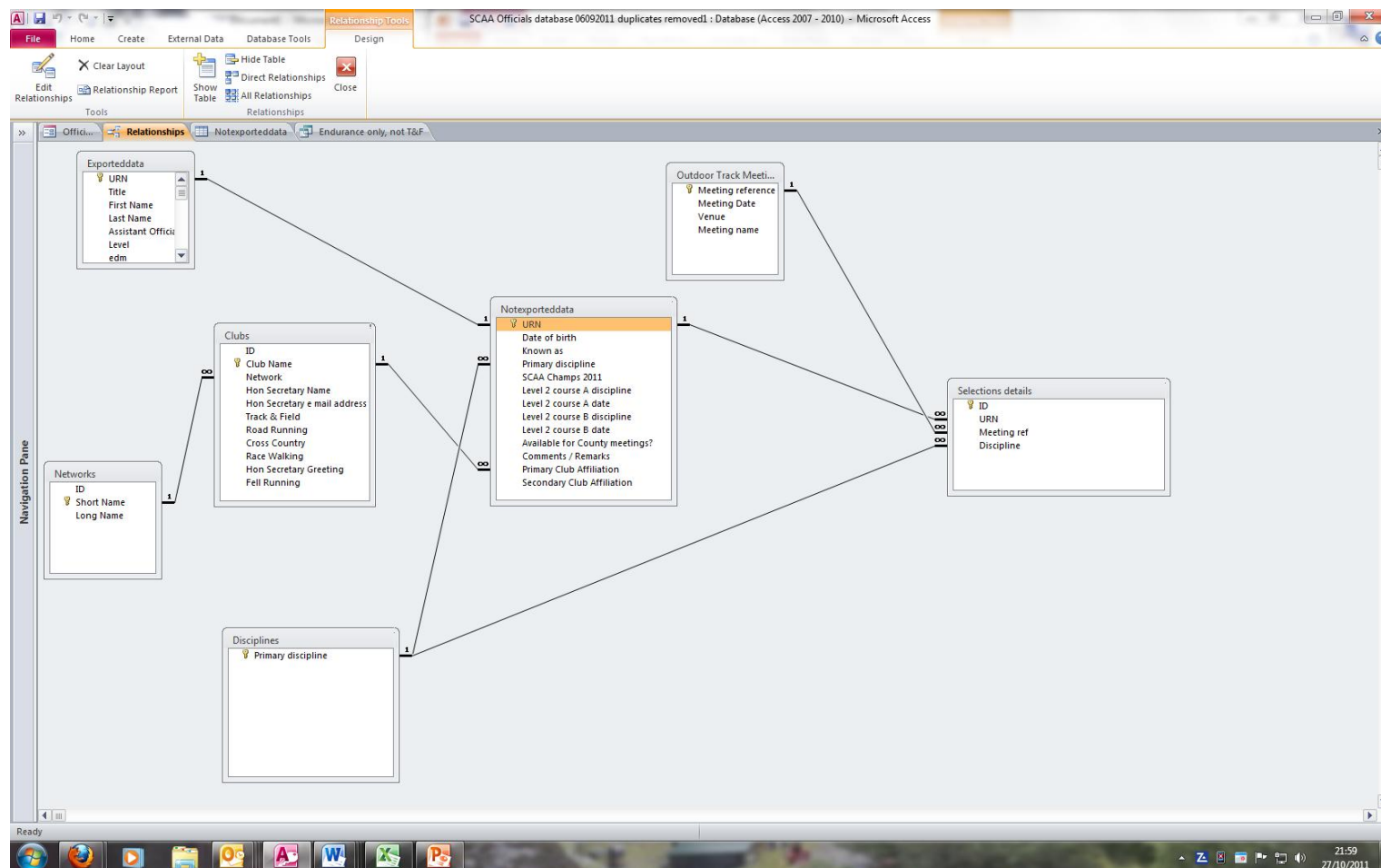
3 • Reformatted Excel file imported to Access

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Import to Access Database

- Database Structure

Database: basic structure

Trinity Export

Non-exported Officials data

Other tables (e.g. Clubs)

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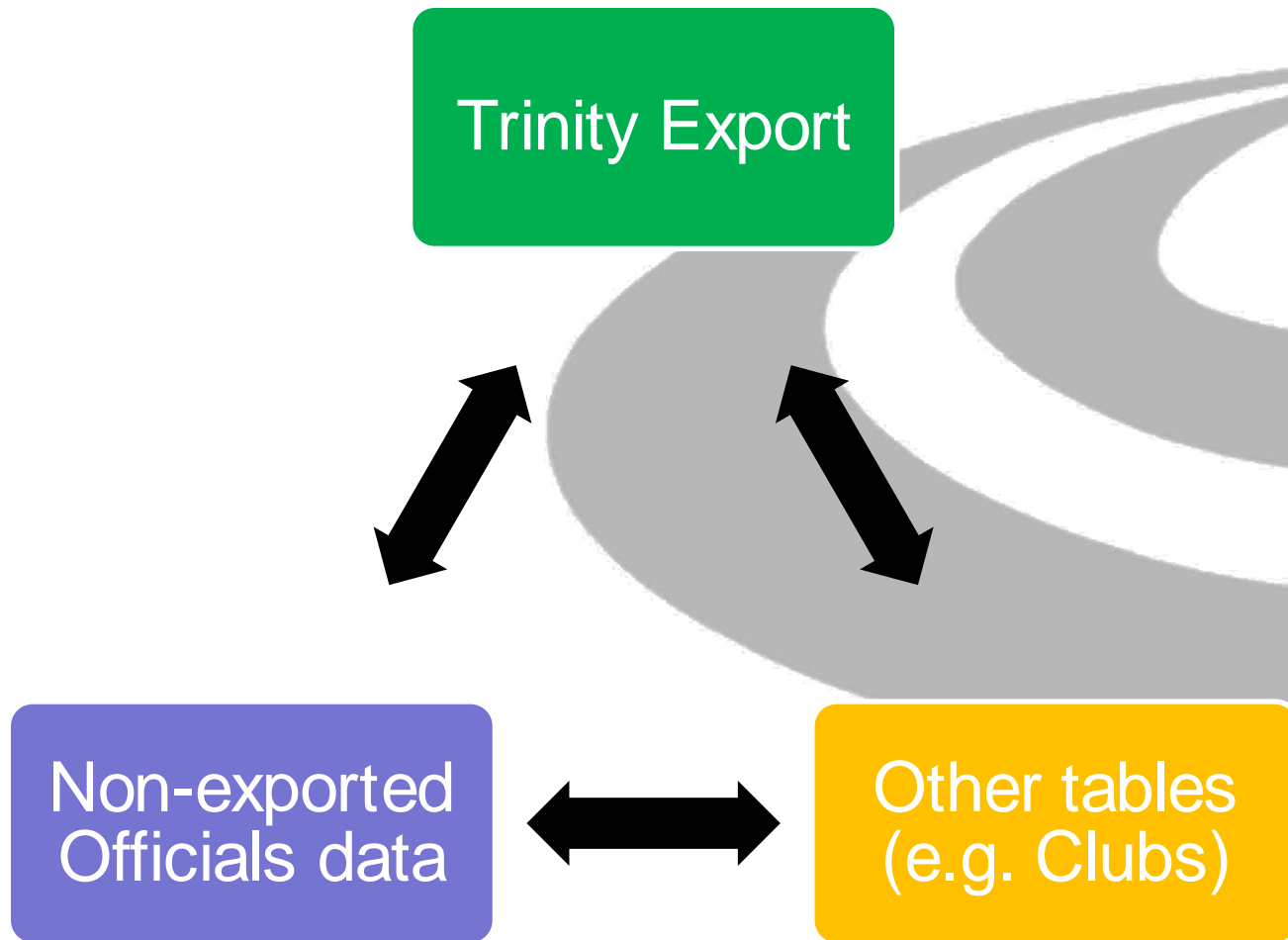
Database design: more detail

Import to Access Database

- Database Structure
- How often to import?
  - Roughly monthly?
- Is it worth the trouble?
  - Benefits
  - Practice makes perfect
  - Good discipline to know what has changed month on month (*understand* the data)

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Non-exported data: examples

- "Known as"
- Date of birth (visible on screen via Trinity but not downloadable)
- Club affiliation
- Availability for County events
- Course attendance
- Primary discipline
- Out of county / ancillary officials?

URN can provide the key link

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Form basics

Improved queries: why?

- Trinity "search" facility is necessarily limited;
- COfSecs will have their own specific requirements;
- The "enriched" data can often be a key component;
- Ease of use with Word Mail Merge (either as Excel or Access)

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Queries - examples

- Officials with no e mail address;
- Officials with no Current CRB;
- Endurance licence but not Track & Field;
- Endurance licence or available for County events

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Issues / problems / caveats

- Issues with Trinity download:
  - Upgradings within discipline: Old Level not removed;
  - CRB renewals

  Both can lead to duplicate records / most current data not used when macro is run.

- Risk of building parallel data via use of non-Exported / enriched data: confine to permanent / near-permanent data?

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Issues / problems / caveats (cont.)

- "Provisional" Level 2 Officials still not visible on / exported from Trinity.
- Added fields (e.g. Endurance Risk Assessment) in Trinity Exports require maintenance to Excel macros.
- Address field format inconsistencies.

Key learning points

- Trinity Export data is always the cornerstone: add to it, but <u>never</u> change it!
- Understand month on month changes in numbers of officials.
- Data security: physical/password protection
- "Single Version of the Truth" is paramount.

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Usage points: what's working?

- Using the system for <u>everything</u> helps to build data quality.

- Much of the maintenance is done by UKA: no need for COfSec to do it too!

- "One stop shopping" for circulation of officials.

- Applications emerging all the time (e.g. Autumn / Winter availability)

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Usage points: more thought needed?

- Incorrect / missing data: who amends Trinity?

- CRB renewals: who should chase up?

- Sharing of data with other stakeholders: where to draw the line?

- How aware are users of Trinity and how to access it?

What next?

- Ultimately depends on pace of Trinity enhancements. Need to:
  - Be realistic re capacity for change;
  - Prioritise.
- *Add-on* spread-sheets / databases look likely to have a role for foreseeable future.
- Sharing of best practice among COfSecs and other users.

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Questions?

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