

Instructions & Notes on Milk Reconciliation Automated Form

- 1) Open the Milk Recon attachment by double-clicking on the icon (it's a Microsoft Excel spreadsheet).
- 2) IMMEDIATELY SAVE the file as a Template, as follows:
 - a) Click on File on the menu bar and click on Save As...
 - b) At the bottom of the Save As window you will see a box labeled "Save as type:"
 - c) Click on the arrow at the right side of the box and select "Template" from the list.
 - d) Above the "Save as type" box is a box labeled "File Name:" If you prefer a name other than Milk Recon, type it in the File Name box.
 - e) Click on Save in the upper right hand corner.
 - f) CLOSE THE FILE. You have now saved the Milk Recon template to the C: drive on your computer.

To Use the Form:

- 3) In Excel, click on File and then click on New.
- 4) Select Milk Recon (or whatever name you gave the Template).
- 5) Notice that it opens a new file named Milk Recon1 - this is a COPY of the Template.
- 6) If you were working in the field, you would at this point IMMEDIATELY SAVE the file with a name identifying the institution or facility you are working on (e.g., "Becky's 1234 Milk").
- 7) The purpose of using a template is to keep a perfect original by always doing your actual work on a copy of the original.

Comments

I learned something handy the other day in the field. After completing the milk form and saving it (Becky's 1234 Milk), we found ourselves needing to examine individual weeks since the center advised they had a standing purchase order for 24 gallons each week. As a precaution, I saved a copy of the completed milk form under a different name ("Becky's 1234 Milk - Weekly"). Then, I deleted all the data in the body of the form **except the first full week**. I also replaced the milk available figure with 24 gallons for comparison purposes. Week 1 was 15% short. I then closed the file without saving it. Then I reopened "Becky's 1234 Milk - Weekly" and repeated the process for the second full week, got the answer, and then closed again without saving so that I could repeat the process for the final full week. It was a very quick way to get answers by the week, and I think it really helped convince the center they had been consistently under-serving their milk.