PELHAM Training update
Update Achievements and Tests

Objective: how to add and update member achievements and tests.

Members:
- Individual Achievements and Badges
  - Deactivate in case of error
- Individual tests
- Bulk Upload of Badges and Tests

Overview

- BADGES in Pelham are known as "Achievements"

- Categories currently are:

  - Mini Achievement

  - Achievement

  - Advanced Achievement

  - Progressive Awards

- Unfortunately, as many mini and achievement badges have the same name, each badge has to be prefixed "Mini Achievement – xxxx" or "Achievement – xxxx" to ease searching

- When searching, use the * and then type the badge name and correct options should be displayed.

- TESTS in Pelham are categorised as "Efficiency Tests"

  - Introduction to Steps to Coaching is categorised as a Coach qualification, but is added in the normal member achievement process.

Update Achievements / Tests

Step 1: find the contact whose achievement you wish to update using the various search options available (you will have a preferred option).

Update Achievements

Contact summary page. Select the **Achievements** tab

Emma Stringer
Contact

Summary Addresses Family Membership Achievements Coach/Volunteer Preferences Related

Member Tests & Achievements

total mini badges passed

total achievement badges passed

No. of Mini Achievements   2

No . of Achievements   1

Last updated: 17/05/2021 02:47

Last updated: 17/05/2021 02:47

No. if Blue Cross Eligible Badges   0

Last updated: 17/05/2021 02:47

Latest Test (Passed)   Test - B Standard

Date of Last Test (Passed)   22/08/2018

click to add new badges or tests

+   New Achievement His...

✓	Pony Club Number... ∨	First Name (Contact) ∨	Last Name (Contact) ∨	Qualification Type ∨	Qualification ∨	Date Achieved ∨	Branch (Contact) ∨	Centre Name (Cont
				Mini Achievement	Mini Achievement Badge - Road Rider	01/09/2013	Atherstone Hunt	---
				Efficiency Test	Test - C Standard	09/06/2014	Atherstone Hunt	---
				Achievement	Achievement Badge - Lungeing Equipment	19/02/2019	Atherstone Hunt	---
			E	Mini Achievement	Mini Achievement Badge - Fire Safety	03/10/2011	Atherstone Hunt	---
				Efficiency Test	Test - Road Rider Test	25/02/2017	Atherstone Hunt	---
				Efficiency Test	Test - C+ Standard	05/11/2017	Atherstone Hunt	---
				Efficiency Test	Test - B Standard	22/08/2018	Atherstone Hunt	---
			E	Efficiency Test	Test - D+ Standard	07/05/2012	Atherstone Hunt	---

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Update Achievements / Tests

+ New Achievement History opens a new screen. In Qualification tab, search for the relevant badge/test by name.

Search for D, D selected:

Use the ***** for quicker search of achievements

Update Achievements / Tests

Once the test/badge is selected, add date passed:

Contact *

Qualification * ⊡ **Achievement Badge - Farming**

🔒 Blue Badge Eligible? No

information only

🔒 Qualification Type **Achievement**

Date Achieved * ---

use calendar or type in

May 2021	↑ ↓	2021	↑ ↓
Su Mo Tu We Th Fr Sa		Jan Feb Mar Apr	
25 26 27 28 29 30 1			
2 3 4 5 6 7 8		May Jun Jul Aug	
9 10 11 12 13 14 15			
16 **17** 18 19 20 21 22		Sep Oct Nov Dec	
23 24 25 26 27 28 29			
30 31 1 2 3 4 5			

Expiry Date

Owner *

General

Contact *

Qualification * ⊡ **Achievement Badge - Farming**

🔒 Blue Badge Eligible? No

🔒 Qualification Type Achievement

Date Achieved * 03/05/2021|

no expiry date for Badges/Tests

Expiry Date ---

Owner * ⓘ 👤 **Branch Heythrop Hunt**

Once complete, press **Save & Close**

← 🗎 ⬈ 💾 Save 🗗 Save & Close ＋ New 🗋 Deactivate

Test - Lungeing Test - Saved
Achievement History

General Related ⌄

Contact *

Qualification * ⊡ **Test - Lungeing Test**

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Update Achievements / Tests

If you have saved the achievement and then realise it is a mistake, you must DEACTIVATE that achievement and create another
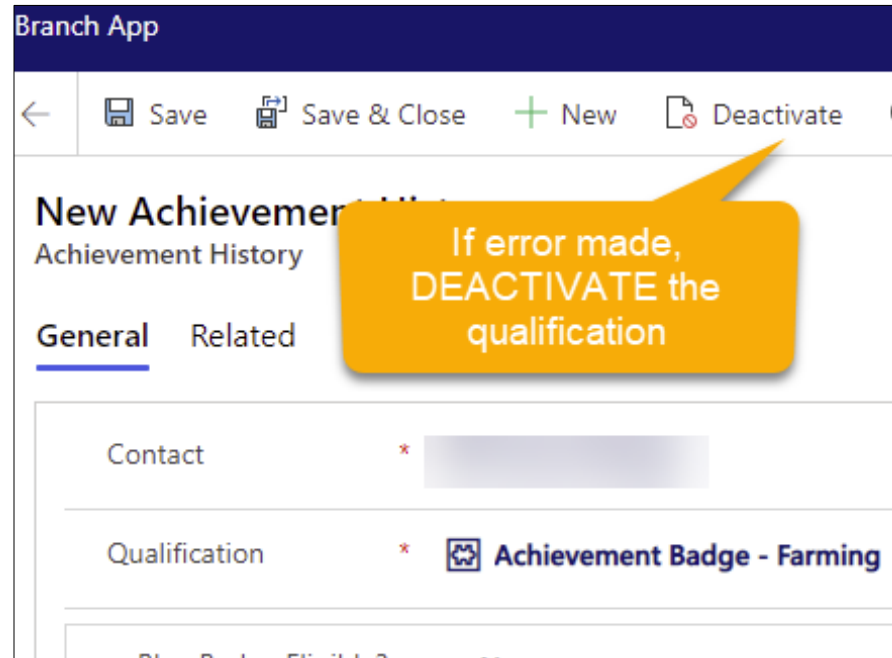
Bulk upload Achievements / Tests

If you have a lot of badges/tests to add, you may wish to use the bulk upload feature. Specific user guide and template for this on the Pelham site.

The import uses an excel file, so it is probably best to start using it as you are setting up your rallies and tests.
However, the only data permitted in the file for upload is Pony Club number, Qualification name, Date Achieved and Expiry date (left blank for badges/tests)

Top tip:
If you use an excel spreadsheet including the above fields AND the member name to track who is doing what, you can then delete the columns with the member name, save as CSV and you have your upload file.

Pony Club Number	Qualification	Date Achieved	Expiry Date
579235	Mini Achievement Badge - Points of the Pony		
581638	Mini Achievement Badge - Points of the Pony		
588250	Achievement Badge - Bandages and Rugs		
581638	Achievement Badge - Bandages and Rugs		
593232	Achievement Badge - Bandages and Rugs	19/04/2021	
1002215	Achievement Badge - Bandages and Rugs	19/04/2021	
566683	Achievement Badge - Bandages and Rugs	19/04/2021	
588250	Test - D+ Standard	15/03/2021	
588249	Test - D+ Standard	15/03/2021	
581638	Test - D Standard	15/03/2021	
593232	Test Road Rider Test	30/03/2021	
588250	Mini Achievement Badge - Horse Clothing	03/04/2021	
581638	Mini Achievement Badge - Horse Clothing	03/04/2021	
579235	Mini Achievement Badge - Horse Clothing	03/04/2021	

Badge name must be exactly as it is in PELHAM

Badges 220421

Excel Workbook (*.xlsx)

Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel Binary Workbook (*.xlsb)
Excel 97-2003 Workbook (*.xls)
CSV UTF-8 (Comma delimited) (*.csv)
XML Data (*.xml)
Single File Web Page (*.mht, *.mhtml)
Web Page (*.htm, *.html)
Excel Template (*.xltx)
Excel Macro-Enabled Template (*.xltm)
Excel 97-2003 Template (*.xlt)
Text (Tab delimited) (*.txt)
Unicode Text (*.txt)
XML Spreadsheet 2003 (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)
CSV (Comma delimited) (*.csv)
Formatted Text (Space delimited) (*.prn)

Once completed, it MUST be saved as a CSV (comma delimited) file (default if using the template)

e name: Test bulk upload v1

as type: CSV (Comma delimited)

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Bulk upload Achievements / Tests 2

Now your file is ready, you can upload it into PELHAM. This looks complex, but after a few imports you will get used to it.

First, click on the Achievement History tab in the Navigation Menu:

Achievements/Tests

Achievement Hist...
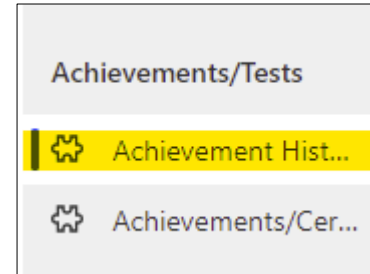
Achievements/Cer...

Then select "Import from Excel" in top menu

Export to Excel | Import from Excel | Create view

Import from CSV

Import from XML

ved | Branch (Contact) | Centre Name (Co...

Next, select the file you wish to import (from wherever saved on your device):

Import from CSV

File Upload | Choose File | No file chose

Owner For Imported Records

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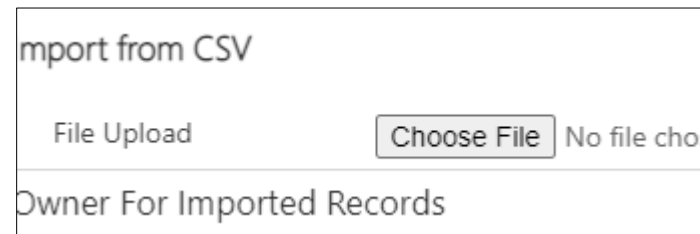
Bulk upload Achievements / Tests 3

Step 1

Import from CSV

(i) You're about to import Badges 220421.csv   186 Bytes

Import Settings

Alternate Key

Select An Alternate Key

Delimiter Settings

Data Delimiter

Quotation mark (")

Field Delimiter

Comma (,)

☑ First row contains column headings

Duplicate Data Settings

Allow Duplicates   ⊙ No

At the bottom of the
next screen, select
Review Mapping

Back   Review Mapping

Step 2
Select the type of data map.
Click the down arrow next to Name
Your Data Map and select
Achievement History Import

mport from CSV

(i) You're about to import Badges 220421.csv   186

Map each column from your source file to an entity field in Dynamics

Name Your Data Map   ⌄   🗑D

Name Your Data Map

Achievement History Import

Direct Debit (test)

DM - Achievements

For BCM 2010

For Contact and Account Report Export

For Full Data Export

Step 3

Import from CSV   ×

(i) You're about to import Badges 220421.csv   186 Bytes

Map each column from your source file to an entity field in Dynamics 365.

Achievement History Import   ⌄   🗑 Delete

Map Attributes		Show All
Primary Fields		
Date Achieved *	⊘	Date Achieved
Contact (Lookup) *	🔍	Pony Club Number
Qualification (Loo... *	🔍	Qualification
Optional Fields		
Source Fields	Dynamics 365 Entity Fields	
Expiry Date	⊘	Expiry Date

Then select FINISH IMPORT at
bottom of the screen

Back   Finish Import

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This concludes the video on adding Member Achievements and Tests within PELHAM

For more detailed guidance, use the user guides to be found on here
https://pelham.pcuk.org/index.php