Module 1 –
Starting the Extension Database (ED)

In this module, you will learn how to:

- Define Users and Passwords
- Open the Extension Database
  - Enter your Password
- Understand the Main Menu
- Understand the Screen Layout Formats
  - The General Format
  - The Left Column Format
  - Different Modes
  - Moving From Record to Record
  - Other Features of the Left Column
- Exit the Database
Defining Users and Passwords

- Make it a “best practice” to always open ED before any other Filemaker database programs.

There are two types of users for the Extension Database (ED). The different types of users determine what type of access rights a particular user has. Your Office Administrator determines what type of user you are. The types defined are; The General user(s) who have the right to read, add, delete, edit, and print data. Read only user(s) who have the right to read and print data and none of the other options above. The type of user is determined by the password issued to you. Your Administrative User will determine what type of password is issued to you. The chart below displays the types of access rights to ED.

<table>
<thead>
<tr>
<th>Type of User</th>
<th>Custom Layout</th>
<th>Read Only</th>
<th>Add</th>
<th>Delete</th>
<th>Edit</th>
<th>Sort</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read Only User</td>
<td></td>
<td>✔</td>
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<td></td>
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<td>✔</td>
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<tr>
<td>General User</td>
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<td>✔ ✔ ✔ ✔ ✔ ✔</td>
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<td>✔</td>
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There are two accounts available for each office to use while in ED. One account will allow the user to read, write, and edit records. The other account will allow a user to read and print records. This account is usually for a person who will only look up information in ED. These accounts are created and maintained by the Programmer in the State Office. Both passwords can be changed however if that occurs the programmer will notify each office in a timely manner. If you need to know the passwords, please send a message to the AgIT help desk and we will then call your office and convey the account to you. This procedure is a security procedure to ensure that the proper people obtain the ED account.
Opening Extension Database (ED)

The Extension Database is a program developed using FileMaker® Pro 8, a database application. Extension Database (ED) uses a server version of FileMaker so you can have as many users accessing ED as you have machines in your office. To access the Extension Database:

1. Double click on the shortcut icon **ED_login.FP5** on your desktop. Should the icon disappear from your desktop, you can have your ED Administrator create the icon. Or, you can create the icon by:
   - Open “My Computer on the Desktop” and **Double Click** on the L drive to open.
   - **Locate** and **Right Click** on the **ED_login ver 5.fp7** Shortcut icon.
   - Select **Send To** and then select **Desktop (create shortcut)** option.
   - **Close** the “My Computer” window. The **ED_login ver 5.fp7 shortcut** will appear on your desktop.

2. Change the “Account Name:” field to **ed** if it is not already listed. It is important that you login as **ed** and not your User ID or anyone else’s account name. When you first access the “Open “name”” box, your User ID should be listed because we use this to identify the updater on the files when changes are made.

3. Because you were asked to type in **ed** in the **Account Name** field, you will need to type the **ED Password** in the” **Password:**” field. If you do not have the password, ask your ED Administrator for the password to use.

4. When the next Login screen is displayed, click on the box and select your name from the drop down list followed by the **Continue** button.

   - Once all the files open the login is complete and the **Main Menu** will be displayed.
The Main Menu

Now that you have logged in, you will have displayed on your screen the Extension Database Main Menu, illustrated below. You can get to all other screens from this menu. The revision date is in the upper-right corner along with the Credits button. The Main Menu is also where you will return when you want to exit the Extension Database.

Each of the labeled buttons described below will open its own database sections.

When you press the Main button on other screens, the screen above will be displayed.

- The Data Entry button by default will take you to the Youth 4-H Member screen where you will then be able to choose which database section you want to work with. Or, if you prefer, you can select one of the three buttons below the Data Entry screen to go directly to that member portion of the database. The different member screens are: Youth = 4-H member screen, Adult = 4-H Adult screen, CFS = CFS Adult screen and ANR = ANR Adult screen. Depending on which member screen you select the associated button will be displayed as the green button if you have a color monitor. The green button also indicates that this is the active screen.
- The **4-H** button will take you directly to the 4-H portion of the database. This is where you will enter information about 4-H members, their guardians, and their projects.

- The **CFS** button will take you to the *Consumer and Family Sciences* (CFS) portion of the database. This is where you will enter the Home Extension Club members, their spouse, and their affiliations.

- The **ANR** button will take you to the *Agricultural and Natural Resource* (ANR) portion of the database. This is where you will enter the Agricultural and Natural Resource information.

- The **Mail Groups** button will take you to various mailing groups. *Mail Groups* lets you add, delete, and edit people in your general mailing groups.

- The **4-H Groups** button takes you to a listing of groups for tracking, plus it allows you to track your own school enrichments or special interest, for example, *Professor Popcorn* or group tracking. This data also becomes part of the Federal reports.

- The **Exhibit Info** button is used to enter the 4-H Fair Results for your county projects.

- The **ES-237** button is used to compile 4-H reports anytime for the State and Federal level. The most common reports are due in the fall and after the State Fair. However, you can use these reports throughout the year in the County level if needed.

- The **State Workshops** button is used for entering members for state workshops like Round-up or Science workshops.

- The **Setup** button is used when adding default (consistent) values or the information you enter here will be used for the pull-down lists. Also, when you enter a new record the default data will automatically be entered on the record. An example would be same zip codes, county names, and area codes used in your database. Please note in this version of ED all pull down list values are set from this screen.

- The **Check** button is used when you want to check how many records are related to a person’s record. These related records are in the following categories: 4H, CFS, ANR, Mail Group, Forms, Parent, Donor/Inventory, and Buyer.

- The **Utilities** button can be used when you want to find a count of “inactive members or records” in each of these categories: 4H, CFS, ANR, Mail Group, Forms, Parent, and Donor/Inventory. This may take several minutes so be prepared.

- The **Quick Menu** is for staff who occasionally use ED and only need a print out of information.
The **Fair** button takes you to screens that allow you to work with livestock as well as other projects during your County Fair.

The **Donor** button is used to keep lists of trophy donors and the amount they are willing to donate to your livestock show. You can also access the *Mail Group, Inventory, Judge, or Buyers screens*.

The **Inventory** button takes you to screens that allow you to keep track of your inventory on trophies and manuals.

The **Judge** button takes you to screens that allow you to keep track of your Judges for the fair. You can also access the *Mail Group, Inventory, Donor, or Buyers screens* from the Judge screen.

The **Exit** button is used to exit the Extension Database program. Unlike the old version of ED you can exit the Extension Database (ED) using the quick exit icon in the upper right corner of the window. The server version that you are using allows for this since no one is the host any more.

The **Credits** button takes you to a screen with information about this program's development plus current revision information. This screen also has handy buttons to get ED Help Docs, e-mail Richard in the YADE Department, or e-mail AgIT.

The **Help/Docs** and **Message Board** buttons are for more help with ED.
Screen Layout Formats

The General Format

The screens were all developed with the same function buttons so that when you go from screen-to-screen you will know what function the buttons perform. The General Info screen (click on 4-H on the Main Menu) below displays examples of some of these general buttons.

- Where you are when you select a **Dark Blue** with **White Letters** tab takes you to sections outside the current layout and determines what screen is displayed next.

That trait is common to the following buttons:

- The **Main** button takes you back to the Main Menu screen.

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The **Setup** button will take you to the setup layout and will display the Blue setup tabs. Also, if you are in the **Main Menu**, selecting this button will take you to the general Setup screen where you can then select the appropriate set-up tab.

The **Check** button is used when you want to check how many records are related to the current (or displayed) person’s record. These related records are in the following categories: 4H, CFS, ANR, Mail Group, Forms, Parent, Donor/Inventory, and Buyer. The **Check** button is also shown on the **Main Menu**.

The **Plug-in** button will take you to one of the following screen layouts: Mail Group, Inventory, Donor, Judge or Buyers. These screens are also accessible from the **Main Menu**.

- A **Yellow** button will take you to different member sections. For example, you can go from the Youth section to the Adult, CFS, or ANR section.

- A **Green** button indicates that this is the active member type. For example, the Youth is green in the above example to designate that this is the section you are currently working in.

- The button that is **Light Blue** with **Black Letters** performs executions. For example, clicking on the New button will create a new record or clicking on the Back button will execute a move to take you back to the previous screen.

- The **Find** button will change the layout mode to the Find mode allowing you to find a record or records. Once you have clicked on the Find button and entered the find text, you have started the Find condition. You will need to click on the Continue button (on toolbar pallet at the left of your screen) to complete the Find.

- The **New** button will display a blank New screen allowing you to enter new information while in the **Browse** mode. Only the default data will be displayed. Pressing the New button in the Find mode will create a new, blank find/request.

- The **Sort** button will sort the found records or take you to a Sort screen and will display any of the sort buttons.

- The **Duplicate** button will make a copy of the record you are presently viewing on the screen while in **Browse** mode. In Find mode, this will duplicate the current request with an option to change some part of the original request (i.e., "Sheep" to "Beef" in the project field).

- The **Omit** button will only include the record you choose to omit for the next condition you wish to perform.
The **Orange with Black Letters Additional** button allows multiple *Find* requests to be made while you are in the *Find* mode. Also, while in the *Find* mode the **New** button will allow another request to be made before you complete the *Find* request.

The **Green Tabs** take you to different sections within your selected member screens.

Where you are when you select a **Green Tab** takes you to sections within the current layout and determines what screen is displayed next.

That trait is common to the following tabs:

- A **Green Tab** will take you to different sections within the current member area. For example, while you are in the *(Youth)* 4-H Member section you can click on any one of the 12 different tabs to go to that particular section. For example if you clicked on the **Federal** tab, or the **Affil/Project** tab while on the *Youth 4-H Member* screen and you will go to only that section for *Youth*. You will not be taken to the *Adult Federal* section.

- When you click a field with a **Black Border**, pre-set options or a drop-down menu appears. You can select your information from the pull-down list or type the first unique characters to select your data. For example, the *Grade, Type of Member and County* fields are **Black Border** fields.

- If you lose the list on a pull-down field, click anywhere outside that field (preferably in the green screen area) then click back on the field to re-display the pull-down list.

- A **Triangle** field is a quick entry field, a speed drop-down list field. For example, the zip code field has a triangle indicator. You can use this field or the normal zip code field to enter zip code data. When you enter the zip code using this field the zip code, state, and the city will be displayed in their fields.

- A **Borderless** field will not have a drop-down, and you will need to type in the entire information. For example the **First, Middle, and Last Name** fields are borderless.

- Some tabbed sections will display areas in different colored boxes. Information contained within these boxes perform functions specific to that particular box.

A **Red** button is the **Delete** button and means *use with caution* and is to be used sparingly. Generally, the input screens display the **Red** delete button; the **Admin Setup** screen has several red buttons for different administrative functions. The **Delete** button will delete the current records you are viewing on the screen; you will get a confirmation before the deletion is complete. There are two different delete options depending on what delete option you choose:

- The **Delete General Record** option will delete the entire record and all related information. The confirmation message for this type of deletion is: This record has data attached to it. Are you sure you want to delete it? You then choose one of three options:
Delete, Cancel, or Check. The Check button will display the Check Before Delete screen showing what records are attached. If I were to select the Delete button, I would delete all related records attached to the record I want deleted.

- The Portal Row delete option: This will delete one related record, not the entire record. An example of a Portal Row delete is a Project record. The confirmation message will be: Delete this one related record?

**Function of a Portal**

The **Function of a Portal** is to display related records that are already stored in some other file. This creates a window to view portions of another file in a layout. The example of a Portal Row (record) is the Project record shown here because you need to know what a portal looks like on your layouts.

The white areas in this screen image are examples of a portal. AKA a record.

An example of a record (portal) that is ready to be deleted is the selected record (the black area). You will not delete the entire data on this 4-H'er when you delete a Portal Record.

While these fields contain data about this person shown here, the data is stored in a different file and is visible this opening in the persons record.
The Left Column Format

The screens were all developed with the **Left Column** function so that when you go from screen-to-screen you will know what function the **Left Column** performs. The **General 4-H Member Info** screen (click on 4-H on the **Main Menu**) below displays examples of some of these **Left Column** buttons.
The Different Modes

FileMaker Pro has four different modes for you to work in: **Browse**, **Find**, **Layout**, and **Preview**. There are different areas that you can locate these four modes from. At the top of the **Left Column** and at the bottom left of the screen.

- The top modes are located just under your usual menu bars. Notice when you click on any one layout, the mode will be printed just above the icons.
  - The **Pencil** icon indicates that you are in the **Browse** mode. This mode allows you to view and edit records.
  - The **Magnifying Glass** icon indicates that you are in the **Find** mode which allows you to find records. Although, when in ED you should use the **Find** button found in the window.
  - The **Square** icon indicates the **Layout** mode. This mode allows you to create different input/output screens within ED. Some users will not have the authentication to use this layout while in ED. The only place that county users are able to change a layout is in the custom section of ED.
  - The **Dog-eared Paper** icon indicates that you are in the **Preview** mode. This mode lets you view a report/label (layout) before you send it to the printer.

- The bottom modes are located just above the lower status line. When you click on the drop down menu you can select the:
  - **Browse** mode to move/view from one record to another.
  - **Find** mode to find records.
  - **Layout** mode to create new input/output screen if you have authentication to use this layout while in ED.
  - **Preview** mode to display/view a layout or before printing.

Moving From Record To Record

You can use the **Record Keys** several different ways to go from one record to another. We've listed some of these here; you are welcome to use any others that you find which will give you the same results. Notice the change in the **Records:** area as you:

- Click the **Rolodex** (also known as a **Notebook** or **Book Page**) to move from one record to another.
- Use the **CTRL-Up Arrow** keys to go to the next record.
- Use the **CTRL-Down Arrow** keys to go to the previous record.
- Use the **Slider** under the **Book** icon to go from one record to another.
- Use the **Mouse Wheel** to go from one record to another.

You can click on the **Rolodex** icon on the left column to move to the next record or the previous record in the **Browse** mode. If you are in the **Preview** mode it advances you a page at a time. If you are in the **Find** mode and have made multiple find requests it advances you one request at a time.
Other features of the Left Column

- You can use the slider (scroll lever) to move quickly from one record to another.
- The Symbols will be displayed when in a Find condition. This drop-down list helps you to find suit, if you wish… your Find when trying to locate records. The symbols can be used in every field except the Grade field. The Symbols are:

- You can click on the Record number, type in a new number, and press the Enter key to move to a new record.
- The Layout field displays the title of the current layout that you are in. Clicking in this field displays all the layouts available to this database.
- The Left Column displays the total number of records found for any given Find, the total number of records in the database.
- The Left Column also indicates if the records are:
  - Unsorted
  - Sorted
- The Status bar also holds the Size of the window you are viewing button (100, 75, or 50 %), The Zoom In, the Zoom Out, and the Hide/Display Left Column icons.
Exiting the Extension Database

The ED application now uses a FileMaker Pro * server which means you no longer have to be concerned when a person exits the database or in what order they exit. You can either exit ED by clicking the Exit button or by clicking on the X on the window.

**Do Exit** the database at the end of the working day or before you leave the office in order for all files to be backed up on the server. ED will automatically exit a user after 6 hours of inactivity in ED, but that may be after your system has already attempted to do a backup for that day’s activity. Therefore, ED may not get backed up for this particular day.