Module 2 –
Understanding The Basic Functions of the Database

In this lesson, you will learn how to:

- Understand the basics of:
  - The General Screen Buttons
  - Opening the Member Screen
  - The Member Demographic Fields
  - The Tab Screens
  - Finding a Member (Record)
  - Sorting a Record
  - Deleting a Record
  - Deleting a Portal Record (A Related Record)
  - Adding a New Record
  - Duplicating a Record
  - Editing an Existing Record
All programs begin with the *Extension Database (ED) Main Menu*. You learned in Module 1 how to open *ED*; now you'll need to know how to enter member data. We'll use the 4-H section for this module, so let’s jump in! To begin entering 4-H members you'll need to be at the 4-H Member screen (from *Main Menu*, click on 4-H button or the Data Entry button).

Although you can enter Adult, CFS, and ANR member demographic data in their own member screen you may also enter their data here. However, there are some specific fields and tabs only available via their respective member screens that will need data entered. You will need to go to those screens to enter that specific data or select a specific tab.

You can set any field that is needed by the Federal ES237 Reports to be required entry fields. To turn on this feature you need to go to the *Defaults* tab in the Set-up screen. See the Module for The Setup Screens for more information on this feature.

**General Screen Buttons**

There are 4 major sections that make up the Data Entry screens; the Filemaker Pro function buttons described in Module 1, the Demographic Data section; the Tab screens which contain area specific data, and the General Screen buttons.

There are certain General Screen buttons that appear on all screens, these buttons and their functions will be described in this section.

- The **Main** button takes you back to the *Main Menu* screen.
- 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 category; 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.
- The **Youth** 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 **Leader** button will take you directly to the 4-H Leaders screen. This is where you will enter information about 4-H Leaders and the clubs, projects they work with.

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 **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 **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 **General Find** button will take you to the General Find window where you can make a find in any genre or use the Duplicate or Additional keys to make any combination of Finds (requests) all at once.

The Red button is the **Delete** button and means *use with caution* and is to be used sparingly. Deleting text and records are covered further in.
Opening the Member Screen

There are 4 major areas that make up the Data Entry screens; the Filemaker Pro function buttons described in Module 1, the General Screen buttons described above in this Module, the Demographic Data area; and the Tab screens which contain area specific data. We will describe each one of these 4 areas using the 4-H portion of the database as our example although these principals apply for all the sections in ED.

Click on the 4-H button on the main menu. The 4-H Member screen shown below is displayed with the General tab as the active tab.
The Member Demographic Fields:

You can display the 4-H Member screen by clicking on the 4-H button from the Main Menu. By default, when you click on the **Data Entry** button you will also display the 4-H Member screen.

The blue area of the 4-H member screen contains the demographic information of a member.

- **The First** field is used to enter a 4-H member’s first name.
- **The Middle** field is used to enter a 4-H member’s Middle name.
- **The Last** field is used to enter a 4-H member’s Last name.
- **The Grade** field is a drop-down list and is used to enter this person’s grade in school. Scroll and click on one of the following options: *PK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, PH, NS and S.* *PK* is Pre-Kindergarten, *K* is Kindergarten; *PH* is Post High School, *NS* is Not in School and *S* is Special.
- **The Grade Range** field automatically displays different grade levels when you select one of the grade ranges; you do not enter data here.
- **The Tenure** field is used to enter the number of years a 4-H member has been in 4-H in the **Tenure** field. This number will increase for each year this person is in 4-H.
- **The Tenure Year** field is used to enter the year associated with the tenure. Please note that this year should not be used for general finds. This field is only here for finding members who have not re-enrolled.
- **The Type of Member** field is a drop-down list. Scroll and click on one of the following options: *4-H, Mini, Cloverbud, Adult, or Other (Business).*
- **The Exhibit Info** and **Year** fields are used to transfer this current find to the Exhibit screen where you will enter the member’s final results of judging the project. How the member did on their project(s). The Exhibit Info Orange Box data will be explained in further detail in the Module on entering Exhibit data.
The Tab Screens:

By default, when you enter any Member screen, i.e. in the 4-H screen the General tab will be displayed as the active tab. You will notice that the Youth button is Green and the Adult, CFS, ANR buttons are yellow. When you click anyone of these to move from Member screen to Member screen the active screen will be represented by the Green button.

- The General tab will allow you to enter the more demographic information for the 4-H member being displayed on the screen.

- The Federal tab will go to the Federal area where you will be able to enter the Federal Reports data as part of ES237.

- The 2nd Address tab allows you to enter another address if this person lives somewhere else for part of the year.

- The Affil/Year tab will allow you to enter project data associated with any 4-H member. When this tab is pressed the current projects and associated data will be displayed sorted by the year the project was taken. The data will be displayed by the latest year in descending order.

- The Affil/Project tab will also let you enter project data associated with any 4-H member. When this tab is pressed the projects and associated data will be displayed sorted by the project in alphabetically order. The data will be displayed by the project description then year in ascending order. The only difference between Affil/Year and Affil/Project is the way they are sorted.

- The Mail group tab takes you to the Mail group’s area to enter, reenroll or Group enroll this person into any mail group(s).

- The Activity tab will take you to the Activity screen. Pressing this tab allows you to enter and track this 4-H’er’s activity and activity points during his/her career.

- The Guardian tab displays the Guardians screen which will allow you to establish guardian records for any 4-H’er.

- The Form tab will take you to the Form screen. You would press this tab if your 4-H’er were going on a field trip and needed to have a signed form, etc.

- The Award tab will take you to the Award screen. Pressing this tab allows you to enter any award data this 4-H member has received.

- The E-mail tab will take you to the Email screen. Pressing this tab allows you to send email messages and attachments to any member that has provided a valid email address on their enrollment. You can send email to groups of people or to a single person.

- The Print Outs tab you will go to the Print menu to print reports and labels screen.
Finding a Member (Record)

This is always the first step when you want to work with a member record. You need to use the Find procedure on every person/family or set of records you intend to edit or add to the database. Using the Find procedure ensures that the person is not already in the database before you enter them as a new user. This also ensures that data on people you want to edit is really in the database. You will need to find them to make changes to their information already stored there.

1. Click on the Find button. The Find screen is displayed. Notice you are now in the Find view mode and are restricted to only specific screens and the record is blank.

2. Click in the field you want to do the Find in and type in the needed text. Usually this is the Last (last name) field. For this procedure let’s use Adams.

3. Click on the Continue button found in the left column.

Scroll among the records found to see if the person you want to work with is in the database. Or, you can sort the records to make finding the needed member easier.

When the first record is displayed, notice how many records are found. They will be displayed just under the Rolodex (Notebook) icon in the left column (the tool palette) of the screen.

Notice the Find view mode has automatically changed to the Browse mode. You can now decide to Sort, Add, duplicate, or Edit a record.
Please note that unlike the old version of ED, you can now go to any screen while in Find mode. This allows you to find groups in all sections of ED. Also, for each new group or project you want to find you must create a new request by clicking either the New button or the Additional button.

**Sorting a Record**

You can sort the records you found. After using the Find function you may have found several records and want to sort them for an easy, organized way to move through the list of found records. If you have the Auto Sort set to “Yes” in the setup section, ED will sort the find automatically by last name after each find.

We have several methods of doing a sort. Depending upon where you are in the Extension Database you could experience one of the three methods show here.

**Method One:**

1. Click on the Sort button and the Sort is completed. You can look at the left column under the Total records found. The text under Found (records) now says Sorted (as opposed to Unsorted).

**Method Two:**

1. Click on the Sort button. The Sort screen is displayed.

![Extension Database Sort Menu](image)
2. Click on one of these sort options; Last Name, Grade, Zip Code, School, Tenure, or Random to automatically perform a programmed sort.

3. After selecting one of these sorts the General Info screen will be re-displayed with the requested information (Last Name, Grade, etc.).

   - The text under Found (records) now says Sorted (as opposed to Unsorted).

Method Three:

1. Click on the Sort button. The Sort Records window is displayed.

2. Scroll the list displayed in the left column to find and highlight the needed field.

3. Click on the >Move> button to move the field to the right column (the Sort Order).

   Note: click on the layout drop-down list to display other layouts and their respective fields if needed.

4. When you have moved all of your fields to the Sort Order column, you can move them to reorder how you want the sort to happen.

5. When you are ready for the sort to begin, click on the Sort button.

6. Displayed in the left column under the Found (records) is the word; Sorted (as opposed to Unsorted).
Deleting A Record

You can delete any records you have found, because some records may be duplicates, incomplete, or just completely wrong records. Whatever the reason, deleting records is described below. Remember, the delete is permanent and the record is gone!

The best way to begin is to click on the Last name field, then click on the red Delete button. This ensures you are on the actual record to be deleted.

Press the Cancel button and the record will not be deleted if you are not sure the record needs to be removed from the database. The record will not be deleted.

The message to permanently delete the current found set will be displayed. Delete Records will delete more than the current record on the screen. Do Not delete multiple records:

Press the Cancel button and the record will not be deleted if you are not sure the record needs to be removed from the database. The record will not be deleted.

This message will be displayed when you click on the Delete button.

Caution: There is no un-delete of any records that are deleted. They will have to manually be re-entered if you accidentally delete them.
Deleting a Portal Record (A Related Record)

1. Click on the **Project Record** to Highlight the record. (This will tell Filemaker Pro this is the record you want deleted and leave the other records alone). You will see this message displayed when you are deleting a portal record. i.e. a project record displayed in the Affil/Year, Affil/Project screens Mailing Group record, or Leader, CFS, and ANR Affiliation record. This will delete only the project record and not the persons demographic or other data from the database.

   ![Highlighted Portal Record]

   ![Portal Record not highlighted]

When you delete a person’s record you will see this “Check before Delete” and Message box for a confirmation that you really do indeed want to delete this persons record and any related records. This screen shows you if this person has data in other sections of the Database. If they do indeed have records in other sections you need to Cancel and go to the section to view the data there before deciding to really delete this record.

   ![Extension Database Check before Delete]

   ![Message]

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If you do decide to click on the **Delete** key, you will get yet again the message to confirm your delete request. You will have to choose from the **Delete** or **Cancel** keys. Again, if you are not sure about what will be deleted in the database you should probably go ahead and click on the **Cancel** key. Then ask someone in the office familiar with ED to do the delete.

There is one final way that you can **Delete a record** without you even realizing that you have deleted the record. This is what I call “deleting a record by osmosis”. When you start to type text, in any given field, which already has text then that record as it was known, has been altered, thus deleting the original record. There is absolutely no way to get the record back if the text was not remembered or written down somewhere so that it can be re-entered. This is a feature of **File Maker Pro**; the fields need to be blank in order for this to be considered a **New** record.

**Adding a New Record**

Once you have searched the database using the **Find** function and did not find the person or any of his/her family’s records you want to add, you will need to enter this person’s information as a new record.

1. Click on the **New** button and a new blank record is displayed.

HINT: When starting to add a new record, the only data that should be displayed on the screen are the default fields of; **City, State, County, County Number, County Return Address, zip and Area codes, and type of member/Group**. And these will only be set if your ED Administrator has gone into the Setup section and set them

2. Enter data in the appropriate fields. Module 3 will explain in more detail information needed in each field.

HINT: If you are not typing in a blank record and you are typing over text displayed on the screen, you are not in a **New** record. Remember, this is a feature of **File Maker Pro**; the fields need to be blank in order for this to be considered a **New** record.
Duplicating a Record

Now having just explained that you must be cautious when typing over text in a field, you actually may need to do that when you duplicate a record. You may also just duplicate a family member's record and then edit the duplicate record. ED data entry people use this feature to save time when they have several members of one family that they need to enter into the database and the major information on all the records are the same.

1. Click on the **Last** (last name) field of the record you want to duplicate to ensure you are duplicating the correct record.
2. Click on the **Duplicate** record button; a copy of the record is displayed.
3. You can now change any field you need which will then make this a unique record.

HINT: Generally the fields duplicated are: **First, Last, Township, Gender, Grade, School, Tenure, and Type of Member**. The rolodex will be increased by one record. The vertical scroll beside the **Rolodex** will be at the last record (bottom). The number of records will increase by one. Please be aware that this record is not a blank record. The sub-windows (i.e. Affiliations, Guardians, etc.) will be blank.

HINT: When you have the cursor on a portal record (Project record, affiliation, or mail group record) and click the Duplicate key, you will make a copy of that record also. Keep in mind you will have to have that particular record selected to duplicate it.

Editing an Existing Record

You may need to change information on an existing record. The following steps will let you change information in a record. Keep in mind, when you start to type over text all data is automatically changed and the changes are saved.

1. Click in any field you need changed and type in needed information.
2. Use the **Tab** key to go from field to field, or use the left mouse key to click in any field, making necessary changes. Refer to the section **Entering Data in a Record** for further details on each field.

HINT: Use the **Shift-Tab** key to go back to a previous field(s).

HINT: **Filemaker Pro** saves the newly entered data as you go.
**Entering Data in a Record**

Once you have selected a new, duplicated, or edited a record, you may need to enter the demographic information for that record (person). Remember you need to use the **Tab** key or the **left** mouse button to move from field-to-field while entering data. When you use the **Tab** key to enter data you will automatically display any drop-down list if available for that field. If you press the **Enter** key, you will add another line to that field, which is not recommended except for the comment field. For this procedure I am using the **Tab** key because I want to take advantage of the automatic drop-down lists and pull-down menus. Also, after making a selection, the fields will automatically fill.

- After entering data in a field, press the **Tab** key to go to the next field.

1. Enter the Demographic fields referring the **4-H Member Demographic Fields**: section for more specific information to each field if needed.
2. Next enter data into the **General** tab screen followed by any of the other **Tab screens** described earlier in this Module.
3. You will notice that the rolodex (notebook) will be increased by one record.
4. Repeat the process for the next record if needed.

This concludes the basics you will need to work in the Extension Database (ED). Using this module you will be able to move from screen to screen, add, edit, or delete records. Module 3 will give you further detail on *Entering 4-H members in the Database*. This will cover the 4-H specific Tab screens. Other modules will explain in detail the other sections of the database.