Lesson 4 –

Entering CFS Members in the Database
(Consumer & Family Sciences)

In this lesson, you will learn how to:

- Enter CFS members
  - Open the CFS General Info Screen
  - Find a Member
  - Sort a Record
  - Delete a Record
  - Add a New Record
  - Duplicate a Record
  - Edit an Existing Record
  - Enter/Edit Data in a Record
  - Enter Data in The Second Address Screen
  - The CFS Affiliations’ Screen
  - Enter Data in the CFS Affiliations Screen
  - Updating All CFS Tenure Field and Year Field
  - Reenroll CFS Affiliations as a Group
  - The Spouse’ Screen
  - Enter and/or Delete a Spouse
  - The Interest Screen
  - Enter Data in the CFS Interest Screen
All programs begin with the *Extension Database (ED) Main Menu*. You learned in Lesson 3 how to enter 4-H data; now you'll need to know how to enter CFS member data. We'll use the CFS section for this lesson, so let's jump in! To begin entering CFS members you'll need to be at the *CFS General Info* screen (from *Main Menu*, click on *CFS*).

Although you can enter CFS, ANR, and Mailing groups member demographic data in the *General INFO* screen, you may also enter their data here. However, there are some specific fields only available via their respective (ANR and CFS) General Info screens that will need data entered. You will need to be in those screens to enter that specific data.

**Opening the CFS General Info Screen**

Click on the **CFS** button on the main menu. The *CFS General Info* screen shown below is displayed.

![CFS General Info Screen](image)

NOTE: Refer to “*Entering 4-H Members in the Database*” for explanations on the Main, Print, Setup, Labels, E-Mail, Find, Find All, Sort, New, and Delete button.
Finding a Member (Always the First Step)

You need to use the *Find* procedure on every person/family 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.

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 (the tool palette) of the screen to complete the *Find* sequence (or press the **Enter** key on the keyboard).

   - When the first record is displayed, notice how many records are found. They will be displayed just under the *Rolodex* 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*.

   You can scroll among the records found to see if the person you want to work with is already in the database. Or, you can sort the records to make finding the needed member easier. See the following section, *Sorting a Record*.

This version of the program features an Auto Sort which is turned on in the Setup screen. If you do not want to sort because of this built-in Auto Sort, you can move directly to Duplicate, or Edit a record if the record is already in the database. You can also move directly to Add a record if the record is not found.
Sorting a Record

After using the *Find* function you can sort the records you found. Any type of a sort will allow you to move through alphabetically sorted records easily. You may have found several records and want to sort them for an easy, organized way to move through the list of found records.

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

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 last 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*).
   - Other custom sorts will be described later.
Deleting A Record
You can delete any records you have found. Because the previous database (CODB) has been imported into Extension Database you may find a need to delete some records. Some of these 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!

Click on the Last name field, and then click on the 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. Records will delete more than the current record on the screen. Do not delete:

- If you are not the ED Administrator.
- If you do not have permission from the ED Administrator.

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 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 deleted them.
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 can 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, zip and area codes, and type of member/Group.

2. Enter the information using the following section on Entering Data in a Record.

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

You may also just duplicate a family member’s record and then edit the duplicate record.

1. Click on the Last 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.

HINT: Generally the fields duplicated are: First, Last, Township, Gender, Tenure, and Type of Member. The vertical scroll beside the Rolodex will be at the last record (bottom). The number of records will increase by one.

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, all data you type is automatically saved. Also, when you type over text there is no way to retrieve the original text except to re-enter the text.

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 as you go so you no longer need to commit or save the changes.
Entering/Editing Data in a Record

Once you have added, 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. Click in the Title field and enter a title i.e. Mr., Mrs., Miss.
2. Enter the person’s First name field.
3. Enter the person’s Middle name field. This field is optional.
4. Enter the person’s Last name field.
5. Enter the Suffix field, i.e., Sr., Jr., Dr., and PhD. This field is optional.
6. Enter the person’s Nickname field.

HINT: In order to use the nickname on reports and labels select Yes on the Use nickname field at the lower right in the peach box.

7. Enter the address in the information address fields Line 1, Line 2, Line 3, using all three fields if necessary; then press the Tab key.
8. Enter the zip code; if help is needed, click on the zip code field to the right. Choose one of the zip + City choices from the drop-down list.

HINT: If you know the city, click in the Light Blue outline field to quickly choose from the drop-down list.

- Once you have made a choice, the City, State, and zip fields will automatically be filled in—a big advantage when you have several enrollments to enter into the database.
- If your zip data is not in the drop-down list, or you receive an error, you will have to click on the Setup button to go to the Setup section of the database and enter the data in the zip section before it will show up on a drop-down list. This will be covered in the Setup Lesson.

9. The County field may already have the default county name entered; just tab past this field if it is correct. Otherwise, click to bring up the drop-down list and scroll and click on the correct county name.
10. Tab to the Township field and select a township name from the drop-down list.
11. The home (HM) and work (WK) Phone fields will have the default area code for your county displayed. Tab to the next phone field and enter the prefix and phone number.
12. Choose Yes or No from the pop-up list for the Unlisted (phone) field.
13. The Extension (Ext) field is optional.
14. The Cell Phone, Beeper, and Fax fields are all optional and self-explanatory.
15. The Override Eliminate Duplication is a Yes/No field. Click on Yes, if you do not want to eliminate duplication for this record based on duplication and No if you want to eliminate any duplicate records with the same last name, phone number, the zip, and zip+4. For example, if you have the Smith and Jones members living in the same household you normally would produce two labels even if you eliminated dups. When you set the “Override Eliminate Duplication” to “Yes” on all of the records for this household you now would only get one label. If you need to produce a label for a certain member in the family, leave this option set to “No”.
16. The Use nickname fields, is a Yes/No field. Click on Yes, if you want to use a nickname and click on No if you do not want to use a nickname.
17. The Override Last Name is a Yes/No field. Click on Yes, if you do not want to eliminate this record based on duplication and No if you want to eliminate duplication based on last name.
18. The E-mail only is a Yes/No field. Click on Yes, if you want to use only E-mail addresses for any record that has an email address and don’t create a label for them. You will still get a label for members who do not have email. Use No, if you, want to use the actual address label for everyone on your list.
19. The Guardian Pull down List Include button is selected if this is a Guardian record and you want to have the Guardian displayed on the Last Name drop down list on the Guardians screen. The Guardian will not show on the drop down list in the Guardian screen if you do not click on the Include button or press the Delete button. This is a new feature to keep the Guardian drop down list short and quicker to retrieve Guardian names.
20. The Mailing Status is a drop-down list. Scroll and click on one of the following options: Use Family address, Use mail label, Inactive Member, No mail. You need to use these flags if you want to omit from an option in a General Find.

HINT: See the Pre-Print screen section and Setup screen section for more information on mail flags.

- The Use Family address option is used to put “The ______ Family” on the first line of the label for this person.
- The Use mail label option will result in the placement of this person’s information on the first line on the label.
- The Inactive Member option is used in a General Find and will omit these people from reports if that option is selected on the “Setup” screen.
- The No Mail option is used in a General Find and will omit these people from reports.

21. The Mail Label field is used to enter the text you want on the first line of any mailing label for this record as long as you have the mail flag set to use the mail label option.
22. The **Residence Code** field is a drop-down list used to describe the type of populated area where this person resides. Scroll and click on one of the following options: *Central city > 50K, Farm, Rural/Town < 10K, Suburb > 50K, and Town/City 10-50K.*
23. The **Gender** Field is a pull-down menu. Click to choose either *Female* or *Male* from the drop-down list.
24. The **Race** field is a drop-down list used to enter the race of this person. Click to choose one of the following options: *American Indian, Asian, Black/African-American, Hispanic, or White.*
   
   - These drop-down options are determined by federal law.
25. The **birthday** field is used to enter this person’s birthday in the format of: *MM/DD/YYYY.* As an example, for a birthday of September 3, 1991, you would enter: *09/03/1991.*
   - The **Age** Field will automatically calculate and display the person’s age.
26. The **E-mail** field is for the person’s e-mail address, if available. This field is optional.
27. Enter the number of Years this person has been in CFS in the **Tenure** field.
28. Enter this year in the year field, i.e., 2003.
   - There is a script (Update CFS member tenure) that can be run after all the data is entered to calculate the data for this field. See the *Administrative* lesson for more information.
29. The **Education** field is a drop-down list and is used to enter this person’s education. Scroll and click on one of the following options: *Some High School, High School, Trade School, Some College, College degree, or Graduate degree.*
30. The **Employment** field is a drop-down list and is used to enter this person’s type of employment. Scroll and click on one of the following options: *Employed full time, employed at home, Full Time Homemaker, or employed part time.*
31. The **Marital Status** field will also display a drop-down list. Scroll and click on one of the following options: *Married, Divorced, Single, or Widowed.*
32. The **Pre-School, Grade School** and **High School** fields are used to enter the number of children for this person and the total is displayed in the **Number of Children** field.
   - The total will appear in the Number of Children field after you enter data in the Pre-School, Grade School and High School fields.
29. The **Comment** field allows you to enter any necessary information about this person that will be helpful only to the Extension office. This information can be printed only in reports from the *General List/Comment* or *General List/Rels/Comment* option. There is more discussion in the *Member Printout* section.
Entering Data in the Second Address Screen

To display this screen choose the **2nd Address** button on the CFS General Info screen only.

Use this section if: a child will be living with another relative or is in college for the months designated on this screen; or an adult may be on vacation for several months or living at a winter home and wanting mail forwarded for a period of time.

- You may have to use the Tab key instead of the arrow or mouse to display the zip, zip+4 and the city fields.

1. You use this screen to enter a second address for a person. Enter the data in the fields much like the CFS General Info screen.
2. You will have to enter the **Start Month** from the pull-down list
3. Enter the **End Month** from the pull-down list.
4. Select **Yes** for 2nd Address field for this field to become active.
5. Once you are finished entering data on this screen, press the yellow back button to return to the CFS General Info screen and to proceed to the CFS Affiliations Screen.
The CFS Affiliations Screen

When you click on the Affiliations button (on the CFS General Info screen) you will display the screen below.

NOTE:

- If you press the General Info button you will return to the CFS General Info screen for entering CFS members, etc.
- Pressing the Affiliations button will display this screen.
- Pressing the Mail groups' button will take you to the Mail Groups screen. You would press this if you wanted to enter this person in a mail group.
- Pressing the Spouse button takes you to the Spouse screen. You would press this button if you wanted to add a husband, or wife to a CFS member record.
- If you press the Interest button will take you to the Interest screen. Pressing this button allows you to enter interest data for this CFS member. You would press this button if you wanted to add Arts & Crafts, Community Involvement, etc to a CFS member record.
- Pressing the Forms button will take you to the Forms screen. You can use this screen to enter and track information about day trips.
Entering Data in the CFS Affiliations Screen

Notice the person’s demographic information is automatically carried over to the green area of this screen. The portal file (the white sub-window) has fields that will allow you to enter information on these fields: Affiliation, Year, and Club.

Notice in the Year field, the most recent year of activity is displayed first with past years in calendar-year order.

As you enter data, the fields will be drop-down lists and you can select the data from that list. Remember it is better if you use the Tab key to go from field-to-field. Using the tab key will automatically display drop-down lists when you tab to those fields.

1. Click on the members last name field. Enter a number in the CFS tenure field for the number of accumulative years this adult has been a member of a club. For example, Mrs. Benson has been a member in one or more Clubs for 5 years. Mind you the 5 years have not always been the same Club. So, I would enter 5 in this Tenure field.
2. Enter the current year in the year field, i.e. 2003.
   - Or you can use the Script to automatically update all Leader tenures for the current year by using the section on “Updating Total leader tenure field and year field”.
3. Click on the New Affiliation button to add a new affiliation record for this member. The blank affiliation record will be displayed at the top of the list with the current enrollment year already entered.
4. Press the Tab key to display the drop-down list in the Affiliation field.
   - Don’t forget you can use the speed search on this field, i.e., if you want to quickly get to the President Affiliation, type Pres and it will display that option.
5. Scroll and Click on the Club name drop-down list.
   - You can use the speed search on this field, i.e., If you want to quickly get to a Club name, type the first few characters and it will display that club.

Updating All CFS Tenure Field and Year Field

This is a feature that will allow you to automatically update the accumulative “tenure and/or year” fields for several members at one time. I can update everyone in the CFS database at the same time. In doing this the CFS tenure field will increase by 1 for whatever is in the field and the Year field will then display the current year. Both of these fields are found in the green area of the screen.

Although, I can also do a find first I will then be able to update the accumulative “tenure and/or Year” at one time for just the found records. An example is, finding all the members with 9 years of tenure in the year 2002 then use this feature to update them to 10 years and 2003.

1. Find what CFS group you wish to reenroll. For example, if I were going to update every member from last year I would enter “>2002” in the Year field. (The green area). If I
were going to update everyone with 9 years of tenure in the current of 2002 year, I would enter 9 in the CFS tenure field and 2002 in the Year field (again, in the green area.

2. Use the Rolodex to scroll through the found records and then click on the blue Omit button on any record you do not want the tenure and year updated. For example, you would omit any member that is not going to be in a club this year.

3. Click on the Update CFS Member Tenure menu option found on the Script menu which is located on the Standard menu bar. A message will be displayed:

![Message window]

- 4. Click on the Both button. A confirmation window will appear: “You are about to reenroll your current CFS Member tenure to the next Year. Are you sure you want to do this? Select Yes or No.
  - Notice that the records will briefly display on the screen as they are updated.

Reenroll CFS Affiliations as a Group

This is a feature that will allow you to update the previous year tenure and previous year fields for several members that are in the same group, i.e. member. For example, Mrs. Benson has been a member for the Wildflower Club for the past 3 years. Mrs. Christianson also has been a member in the Wildflower Club for the past 10 years. Using this procedure will change the 3 to a 4 and enter 2003 in the year field for Mrs. Benson. It will also change the 10 to 11 and enter 2003 as well for Mrs. Christianson. The nice feature of this procedure is it is done all at the same time.

5. Find what club and/or affiliation you wish to reenroll. For example, a member for the Wildflower Club.

6. Use the Rolodex to scroll through the found records and then click on the blue Omit button on any record you do not want the tenure and year updated. For example, you would omit any person that is not involved with this affiliation for this year.

7. Enter the previous year in the Year field and the Affiliation in the affiliation field in the orange box. Because I want to update all the 2002 members as my affiliation code I would enter 2002 in the Year field and Member in the Affiliation field.

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Be careful here if you leave the year field blank it will reenroll all the 2002 affiliations.

8. Click on the orange Reenroll button. A confirmation window will appear: “You are about to reenroll your current Leader Affiliation to the next Year. Are you sure you want to do this? Select Yes or No.
   - Notice that the records will briefly display on the screen as they are updated.
   - You can also use the Reenroll Leaders menu option found on the Script menu which is located on the Standard menu bar.

Once you are finished entering data on this screen, go to the Spouse screen to enter spousal information. The Mail groups button is covered in Lesson 6 - Mail Groups.
The Spouse Screen

When you click on the Spouse button you will display the screen below. You will use this screen to enter any Relationship record for the CFS member. Other relationships are; Aunt, Father, Foster Father, Foster Mother, etc.

NOTE:

- If you press the General Info button you will return to the General Information screen for entering CFS member information.
- Click on the 2nd Address button if you want mail forwarded for a period of time for this member.
- Pressing the Affiliations button will display the CFS Affiliations screen. You would press this if you wanted to enter CFS club affiliation information.
- Pressing the Mail groups' button will take you to the Mail Groups screen. You would press this if you wanted to enter this person in a mail group.
- Pressing the Interest button will take you to the Interest screen. Pressing this button allows you to enter Interest data for this CFS member. You would press this button if you wanted to add Arts & Crafts, Community Involvement, etc to this member’s record.
- Pressing the Statistics button will take you to the Statistics screen. The Statistics screen is generally used for ANR members and will be discussed in that section.
- The Duplicate button is used when you need to make a copy of a record. After duplication you generally change at least the first name of the duplicated record.
- The Omit button is used when you want to omit this one record from further involvement during this find.

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Entering Data in the Spouse’s Screen

Notice the person’s demographic information is carried over to the green area of this screen. The portal file (the white sub-window) has fields that show information about a related record. If there are already names (Relationships) entered, they will be displayed in the white portal section.

1. Click in a blank Last Name (in the portal area) field to bring up the drop-down list of available Guardians.
2. Click on one of the guardians listed to select the correct one.

   - If the person is not listed:
     - Check to make sure the Guardian is not on the Last Name list.
     - Click on the Full list field. The last name may not be the same as the CFS member so check the entire list.
     - If the person is still not listed, go to the following section "Adding a Spouse Not Listed"

3. Scroll and click to select a relationship option from the relationship pop-up list.
4. Repeat the process for other Relationships as needed.

Adding a Spouse Not Listed
(In Step 1 above)

1. Go to the CFS General Info Screen (by clicking on the General Info button).
2. Click on the Find button.
3. Position the Cursor in the Last Name field and type in the Spouse’s last name.
4. Press the Continue button.
5. If the spouse’s record is not found, click on the New button.
6. Enter all the demographic information for this spouse.
7. Click on the Find button again and find the CFS member’s record.
8. Click on the Spouse Button.
9. Click on the Last Name field in the portal area.
10. Scroll and select the Spouse’s record listed.

   - If the spouse’s last name is different than the CFS member, click on the Full field to bring up the entire database names. Scroll and select the needed Spouse record.

11. Click on the Relationship field to add the Relationship from the drop-down list.
12. Repeat the process for other records as needed.
Deleting a Spouse

Occasionally you will have to delete only a Spousal record from a member.

1. Click in the portal row in the Spousal record (the white portal file area) of the member record.
   - The row will become black to indicate it is only the relationship record selected and the not members entire record.
2. Click on Delete button and the following message will appear:

   - If you select the Delete button just the record in the white portal file area will be deleted.
   - If you select the Cancel button no part of the member data will be deleted and the delete sequence will stop.

   - If you do not have the affiliation record highlighted and click on the Master button the entire master record could be deleted. This includes all the historical member data. If you should get this message then you should be very careful and select the Related or Cancel buttons.

Once you have finished entering, adding, or deleting a guardian, press the Back button or the General Info button to return to the General Info screen.
The CFS Interest Screen

When you click on the Interest button you will display the screen below.

NOTE:
- If you press the General Info button you will return to the CFS General Info screen for entering CFS members, etc.
- Pressing the Affiliations button will display the Affiliations screen.
- Pressing the Mail groups button will take you to the Mail Groups screen. You would press this if you wanted to enter this person in a mail group.
- Finally, pressing the Interest button will display this screen.
Entering Data in the CFS Interest Screen

Notice the person’s demographic information is automatically carried over to the green area of this screen. The portal file (the white sub-window) has fields that will allow you to enter information on the fields: Interest, Year, and Club.

Notice in the Year field, the most recent year of activity is displayed first with past years in calendar-year order.

As you enter data, the fields will be drop-down lists and you can select the data from that list. Remember it is better if you use the Tab key to go from field-to-field. Using the tab key will automatically display a drop-down list when you tab to that field.

1. Click on the New Interest button to add a new interest record for this member. The blank interest record will be displayed at the top of the list with the current enrollment year already entered.

2. Scroll the drop-down list in the Interest field to select the interest you need. Don’t forget you can use the speed search on this field, i.e., if you want to quickly get to the Energy interest, type “ene” in the drop-down list.

3. Repeat the process for other interests as needed.

4. When finished entering Interests click on the General Info screen or any other available button to go to other screen if needed.
Exercise 4 –

1. Enter one of the CFS members from the enrollment forms
2. Enter data for the spouse.

Bonus Exercise 4 –
Enter more member enrollment forms as time permits.