Lesson 7A –
Generating Print Outs From (ED)
Member

In this lesson, you will learn how to:

- Open the Print Outs Screen
  - Member Print Outs
- Use The Find Screens
- Use the Pre Print Out/Custom Screen
- Use The Sort Screen
- Use The Labels Screen
- Use The General List Screen
- Print to the Printer
You have learned in Lesson 1 to open ED and in Lesson 3, 4, 5, and 6 you entered member records. Now you need to know how to print data in the form of Labels and Reports. ED has several built in Labels/Reports buttons that have a Find/Sort already included.

Several screens will be displayed to prepare and complete the Print Out procedure. The general flow is: Find, Pre Print, Sort and Printout. To help you follow the steps in the order they should be performed, the buttons are displayed in this order. The current screen button is Green with the Black bar above it.

We will use the Member section for this lesson. You can get to the Print Outs Screen by pressing the Print button on various screens; for this lesson we will press the Print Outs button from the Main menu.

Opening The Print Outs Screen

1. To begin you will need to be at the Extension Database Main Menu screen.
2. Click on the Print Outs button. The Print Outs Screen is displayed.

NOTE: Pressing the:

- Main button will take you to the main menu screen.
- Back button will take you to the previous screen.
- More Info/Examples button will display the Print Outs Information screen and provide you with information on each of the Print Outs sections. Click on the Back button to return to the Printouts screen.

3. Click the Member option button. The Find screen is displayed.
The Member Print Outs

The Member option is generally used for printing mailing labels. You can search on any field, but the only information displayed will be the name and address of the individual(s) in the form of labels, i.e., Avery labels, 5160, 5161, and 4013. The Member print out is the only option that keeps your current *Find* results after the sort and print are finished.

Because we chose to start this print out from the *Main* menu, we may not have found the records we want to print. We may have to find them, so the *General Find Menu* screen is displayed when you click on the *Member* button from the *Print Outs* screen. If you have already found your set of records from a previous find, you can bypass the find section.

**NOTE:** If you lose your way, you may return to the *Find Menu* screen by clicking on *Main* | *Print Outs* | *Member* at any time.

**NOTE:** The black bar above the screen button indicates the current screen being displayed.

**NOTE:** Pressing the:

- **Back** button will return you to the previous screen.
- **Find** button will return you to the *Find Menu* screen (this screen).
- **Pre Print** button will display the *Pre Print Out/Custom* screen.
- **Sort** button will display the *Sort Menu* screen with sort options.
- **Labels** button will display the *Labels Print Outs* screen with label options.
- **General List** button will take you to the *General List Print Outs* screen with report options.

NOTE: Pressing the:

- **General Find** button will take you to the *General Find* screen where you can choose to find records for 4-H, CFS, ANR, Statistics or Donor from their respective screens.

- **All 4-H Find** button will take you to a find screen where you will be asked questions on finding all 4-H Leaders, Members, minis and Guardians Include listings.

- **4-H Member** button will display the *4-H Member General Find* screen where you can ask for a general find that could include mail groups and signed forms.

- **4-H Leader** button will take you to the *4-H Leader General Find* screen which will enable you to ask for a leader general find that could include mail groups and signed forms.

- **All 4-H Guardian find** button will take you to the *All 4-H Parent find* screen which will allow you to find all guardian (Generally parents) for a specific year or a range of years.

- **General Mail group** will take you to a *Mail group General Find* screen.

- **All CFS find** button will take you to the *All CFS Find* screen which will allow you to find all CFS member for a specific year or a range of years.

- **CFS Affils/Club** button will take you to the *CFS General Find* screen.

- **All 4-H/CFS/Mailgrpoup find** button will take you to the *All 4-H/CFS/Mailgroup find* screen so you can do a find on Leaders, 4-H, Mini, Guardian Include Listing, CFS for a specific year or a range of years.

- **Current find Parent find button** is used in conjunction with the other buttons on this screen. After completing a find, pressing this button will also find the Parents of your current find.

- **Just Mail Groups** button will display a *Mail group General Find* screen.

- **All ANR find** button will take you to the *All ANR Find* screen.

- **ANR Affils/Club** button will take you to the *ANR General Find* screen so you can do a find on ANR members, Forms, and Mail Groups.
NOTE: The Orange Box contains Three options that will expand your General Find and any of the 4-H members finds.

- The “Include Leaders” is a Yes/No question based on the project, club, year find, and if you have an affiliation associated with a leader record. If you select Yes any 4-H project/club/year record that has a Leader associated with it will be included in your original find request. If you select No your general/4-H member finds will not include any Leader records. To display the Leader Affiliation screen go to Main menu, 4-H button, find a 4-H leader, click on Affiliation, and click on Leader Affils button.

- The “Include all Guardians in current find” is a Yes/NO question based on the 4-H members Guardians. If you want the Guardians to also be included in this find, then select the Yes option. If you do not need to have the Guardians included in this find, then select the No option.

- The “Guardian Include Listing” is a Yes/No question based on a Project and Year find for those member records that also have Guardian Included records. If you select Yes, any 4-H member who you have also added information to his Guardian Include Listing record will be included on the find. If you select No, the Guardian Include Listing records will not be used with this find. To display the Guardian Include Listing screen go to Main menu, 4-H button, Find a 4-H member record that has a guardian, click on the Guardians button, Click on the yellow Include mailings button. Remember, the 4-H member must have a guardian in order to go to the “Include mailings” screen.

NOTE: The Yellow Box contains three options that will expand your find. Before you select any of the Blue Find buttons, selecting one of the options from the drop down field will result in different kinds of finds:

- The Replace option is what we have used in the past although you did not have to select this option. This starts a new find looking at the entire database.

- The Extend option keeps your current find and then adds an additional find to the first. For example, if you want do to a find on a project then also on just one individual person you can first find the Project and then do a find for the person.

- The Constrain option looks only at your current found records and will look only in the current found records for your next find request. For example, if you want to find a project on the first find and then within the second find you want only those records that contain a particular township.
The Find Screens

You will display one of the Find screens if you press any one of the 4-H, CFS, ANR, Statistics, or Donor buttons on the General Find screen.

They are available by clicking on Main | Print Outs | Member | General Find buttons.

NOTE:

- The lime green button indicates the current find screen being displayed.
- All the find screens have the same information in the green area of the screen. The white portal areas contain the individual information for each program area.

The 4-H Screen:

![4-H Screen Image]
The CFS screen:

The ANR screen:

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The Statistics screen

The Donor screen

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Now that we have described the Find screens and buttons let's remember all Find screens follow a general procedure for doing a find. There are so many variations of a find; we are describing the General steps of a Find here. For these general procedures we are looking for members in 4-H to print out reports and labels as an example. To complete this process we need to follow the steps below.

1. Determine what options you want to use in the Orange and Yellow boxes.

2. Click on the General Find button from the Find Menu screen. The 4-H General Find screen will be displayed.
   - When you want to do a find in any other program area, first click on the appropriate yellow button; CFS, ANR, Statistics, or Donor. Remember for these general find procedures we are using the 4-H Find screen.

3. Click on the Project field (in the white portal area of the screen); scroll on the drop-down list and choose the Beef Project (as an example project).
   - For other finds, type in any information in the fields you want to use on a general find. For example, you can use the Last (name), Primary club, or Project year fields for a find.
   - If you don’t want your query limited by a field, just leave it blank. For example, if you want to find people in all clubs, leave the Club field blank. The same goes for the Township and all other fields.

4. Click on the Additional button if you want to find an additional project, i.e., use Swine club for the additional find. This step is optional.

5. Or, click on the Duplicate button if you want to duplicate the find and make minor changes. This step is optional.

6. Click on the Continue button in the left-hand column to complete the find sequence.

7. If the General Find steps found records, the Include “No Mail” and “Inactive member flags” screen is displayed. These are both Yes/No questions. Both of these questions depend on you selecting an option at the “Mailing Status” drop down field on the Info Screens during enrollment. Click on the Continue button.
   - These are both Yes/No questions. Both of these questions depend on you selecting an option at the “Mailing Status” drop down field on the Info Screens. Click on the Continue button.
   - If the General Find steps did not find any records, you will have to repeat the find again using valid information or more fields for the find.

8. The Pre Print Out/Custom screen is displayed.
Pre Print Out/Custom Screen

This screen will be displayed after finding your records. Once we have described the Pre Print Out/Custom screen and buttons, we can press the Sort button or any other Screen buttons that are available. We will then continue getting our reports/labels for the Beef records we found earlier.

- Notice the number of records found in the left (gray) column of the screen. Also, notice the records found are not sorted.
- The Black bar above the screen button indicates the current screen being displayed.

NOTE:
- Pressing the Back Button will return you to the previous screen.
- Pressing the Find button will return you to the Find Menu screen.
- Pressing the Pre Print button will display the current screen where elimination of duplication is performed along with custom labels (discussed later). You also have Email and Export options available.
- Pressing the Sort button will take you to the Sort Menu screen where you can sort the records found.
- The Labels button will take you to the Print Outs screen where you can select and browse the different pre-defined label formats before sending to the

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printer. There are Yes/No questions you select before choosing any of the label buttons.

- The **General List** button displays various report buttons along with screen options that need a Yes/No selection before you select any of the buttons.
- The **Whole Family Line length** uses 40 for 4013 and 50 for 5161 to set the character length so the 4013 labels will issue a return after 40 characters, and the 5161 labels will issue a return after 50 characters. This allows the labels to be printed on the formatted peel-off labels.

Each one of the buttons on the *Pre Print Out/Custom* screen will take you to a new screen. If you click on the:

- **Blue Household dup eliminate** button, you will be taken to the Sort screen. The household duplicate records are then eliminated so only one per household remains. This elimination is based on the zip and zip+4 codes and phone number.

- **Yellow Test Household dup eliminate** button, a listing will be displayed on the screen in the browse mode. Pressing the Continue button will return you to the *Pre Print Out/Custom* screen. When you press this option ED will show you which labels are eliminated. For example, the label marked “main” is the one that will be printed, the “duplicate” will not be printed. You can also use this button if you are having problems with some extra labels.

  (This is a way for you to visually see what’s happening. Use this if you are not sure and want to just test the results. No duplicate has been eliminated using this button.)

- **Multi Labels** button will go to the **Whole Family Label** screen. You can then select different types of labels to print, Envelopes, the Zip Code Count report. You can also use the Export for Donor button to export your donor labels information. There are three Sort buttons available. This will allow you to choose your own sort options. Click on **User defined**. A dialog box will display a list of fields; you may choose which fields you wish to sort on and move them to the list. Then click on the dialog box **Sort** button. After the sort you will return to the **Whole Family Label** screen.

  (This will print X number of labels for the same record (person), i.e., you have a 4-H member and four labels, one to put on each of a 4-H member’s four projects.)

Click on the **Back** button to take you back to the *Pre Print Out/Custom* screen, not the **ED Main** menu.
The County Address Label will produce the Return Address you have indicated in the Setup menu in the County address box.

The Email Group button will take you to the Email screen where you can send a message to just one record or the current find as a group.

If you click on the Custom button, you will go to the Whole Family Label menu.

Whole Family label button will produce only one label per family with all names listed on the label. The Whole Family (5161) and Whole Family (4013) will prepare the label using the whole family name instead of the last name, i.e., Chris/Ben Roberts & Grace Michaels. If you first use the Whole Family Label button from the Pre Print out screen.

This option will sort in the order of member, Adult Member, Mini, and Other. You will need to run this once per each find. The exception would be if you need to run in any other order than this default order, then you will need to resort in the order you need.

The Whole Family label now has its own print out Screen. You have a button to preview:

- Whole Family (5160) labels
- Whole Family (5161) labels
- Whole Family (4013) labels
- Envelope (left)
- Envelope (Center)
- Zip Code Count
- Sort by Last Name
- Sort by Zip Code
- User Defined Sort

When you select the Envelope button you will get the Print Setup window. You will need to select the correct Size envelope from the drop down menu in the Paper section, Landscape in the Orientation section and the printer Name from the Paper section. Click on the OK button when finished.

The Envelope button will print your Return address and Member address on an envelope. You need to have a printer that is envelope compatible.

The Omit No Mail/Inactive label button gives you the option to omit by either the Inactive or No mail flags.

The three Export Buttons give you the option to export your whole family, name/address or e-mail address records. You will then be able to import them in other valid applications.
Now that we have described all the *Pre Print Out/Custom* screen buttons, let's click on the *Sort* button to go to the *Sort Menu* screen to continue our procedure.
The Sort Screen

Once you’ve found your records and eliminated any duplicates, it’s time to sort the records. This is an optional feature; it just makes it easy for you to work with the reports or labels that are printed. Notice the records found are not sorted.

NOTE:
- Pressing the Main button will take you back to the ED Main menu.
- Pressing the Back button will take you back to the Print Outs Menu. This button is yellow to distinguish its function from the blue Back button.

NOTE: Pressing the following sort button will sort by:
- **Last Name** to automatically sort by name and take you to the Print Outs screen.
- **Grade** automatically sorts by grade and takes you to the Print Outs screen.
- **Zip Code** automatically sorts by zip code and takes you to the Print Outs screen.
- **School** automatically sorts by school and takes you to the Print Outs screen.
- **Tenure** automatically sorts by tenure and takes you to the Print Outs screen.
- **Random** automatically sorts records randomly and takes you to the Print Outs screen.
- **User defined** will allow you to make your own sort options. A dialog box will display a list of fields; you choose which fields you wish to sort on, Move them to...
the list, then click on the Sort button. After the sort you will automatically return to the Print Outs screen.

- **Last Name/Labels** button sorts by last name and takes you to the Print Outs menu.

- **Primary Club** button sorts by the Primary Club field and takes you to the Print Outs screen.

Now that we have described all the Sort screen buttons, let’s click on the Last Name button. Remember you will automatically be taken to the Pre Print Outs/Custom screen. Now let’s press the Yellow Labels button to go to the Labels Print Outs screen.
The Labels Screen

This screen will automatically be displayed after pressing the *Labels* button from any of the *Print Outs* screens.

(Once we have described the *Labels Print Outs* screen and buttons we will press the *General List* button to continue our procedure to print out reports/labels for the Beef find and sort we did earlier.)

- The Black bar above the screen button indicates the current screen being displayed.

**NOTE:**

- The *General Label* title bar is one of the best features created in *ED*. You can type your own text in this area to describe the type of print out you are wanting. The title will also print nicely on the labels sheets, i.e., 5160, 5161, etc.

- The 5160, 5161, 4013 buttons will print out labels on these types of peel-off labels. Don't forget the title text, which will print in the top non-label area. You can also print on plain paper.
- The **Envelope** button will print your Return address and Member address on an envelope. You need to have a printer that is envelope compatible. You will need to change the Print setup dialog box to; Landscape mode and the correct Paper Size envelope drop down option.

  When you select **Envelope** button you will get the Print Setup window. You will need to select the correct **Size** from the drop down menu in the Paper section, Landscape in the Orientation section and the printer Name from the Paper section. Click on the OK button when finished.

- The **Zip Code Count** will list the number of records found in each zip code. You can then use this for your report for bulk mailing to your post office.

- The **Contact labels** (5161 and 4013) are listings of contacts (people) for the sale at the fair for the 4-H member who has livestock to take to auction.

- The **Use Mail flag** is a Yes/No option. If you use the **Yes** option then the first line of the label will be replaced with what you have typed in the Mail Label field. The Mail flag works with the Mailing Status option “Use Mail Label” and the text you have typed in the Mail label field. If you use the **No** option then the members name will appear on the first line of the label. The Mailing Status and Mail label fields can be found on any General Info screen.

- The **Use Family Label on all but Mail label flag** option is a Yes/No option. If you select the **Yes** option then all the labels will be printed with “The xxxxx family” with the exception of the ones that use the Mail flag. For example, “The Jones Family” or “The Smith Family”. If you use the **No** option then the members name will appear on the first line of the label.

- The **Yes/No Straight to Printouts** is a toggle between (Yes) going directly to the printer dialog box to print the report/label or (No) first going to the preview mode to display the report/label on the screen before printing your labels/reports. The preferred toggle is **No** because you can first view your report/labels to make sure they are correct before actually printing your results. If you choose not to print click on the **Continue** button to return to any Print Outs screen.

Press the **General List** button to continue our procedure to print out reports for the Beef find and sort we did earlier.
The General List Screen

This screen will be displayed when you select the General List button from any Print Outs screen. The General List screen will print many pre-formatted reports. We will describe these reports then continue our procedure to print out reports for the Beef find and sort we did earlier.

- The Black bar above the screen button indicates the current screen being displayed.

- The General List button will print out a report listing the Name, Phone, Unlisted, Township, and Tenure.

- The General List/ReIs/Comment will print out a report listing Name, Relationships, Phone, Unlisted, Township, and Tenure and the comment field.

- The General List/Comment will print out a report listing the same as the General List but add the Comment field.

- The 4-H General List prints the 4-H member/leader Name, Phone number, unlisted info, Township, Age, Tenure, Grade and Type of Member.

NOTE:

- The General Label title bar is one of the best features created in ED. You can put in your own text in this area to describe the type of print out you are wanting. The title will also print nicely on the labels sheets, i.e., 5160, 5161, etc.

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Release date: 10/1/2000
Revised: 5/7/2003
The General List E-Mail prints Name, Phone number, unlisted option, and E-Mail address.
The Contact Listing will list Sale buyer list information for each 4-H member who have livestock to take to action.
The Exhibit # will be listed by; None, Exhibitor number or Last name after you have selected your choice.
The Tenure and Tenure by Pri-Club will print tenure reports on 4-H, Leader, or CFS when you make a from the “Which tenure” field.
The Grade, Age, School, Township will print their respective reports.
The Zip Code Count will list the number of records found in each zip code. You can then use this for your report for bulk mailing to take to your post office.
The Short Form is a Yes/No option button. If you select Yes, then you will get just a name listing. If you select No, you will get the address and phone number included in the report.
The Yes/No Straight to Printouts is a toggle between (Yes) going directly to the printer dialog box to print the report/label or (No) first going to the preview mode to display the report/label on the screen before printing your labels/reports. The preferred toggle is No because you can first view your report/labels to make sure they are correct before actually printing your results. If you choose not to print click on the Continue button to return to any Print Outs screen.
The Phone number on report is a Yes/No option. If you select Yes then any phone number that is not marked as unlisted will be printed on the report. If you select No then phone numbers will not be printed for any report.

Printing to the Printer

Now that we have reviewed the Print Outs screen, let's print out a report/label.

1. Enter a title in the title bar, for example, Training Report for MM/DD/YY.
2. Click on one of the label/report buttons, for example, Labels 5160 or General List.
3. Scroll and review the labels/report to see if they are OK.
4. If you would like to have a labels printout, make sure you have paper or labels in the printer. If you use the HP printer, lower the front cover of the printer and install the labels in the front drop-down tray (Tray 1). The HP printer will then automatically take the labels from tray 1. If you are printing on paper, Tray 2 or Tray 3 will work.
5. To print, Click on the icon or select File | Print to display the print dialog box.
6. Click Records being browsed.
   Other selections are: Current Record and Blank Record, showing fields.
7. After printing any of the above reports remember to press the Continue button to return to the Print Outs screen.
Exercise 7 –

Exercise 1

1. Find all the Craft projects for one township using the General Find.
   How many records did you find____________?  

2. Sort the records by projects.
   What does the status read now ______________?  

3. Sort the records by Name. 

4. Print the 5160 labels on paper. (Don't forget to add the title to the reports title field.)

Exercise 2

Find, sort, and print member enrollment forms from CFS. (Don't forget to add the title to the reports title field.)

Exercise 3

Find, sort, and print member enrollment forms from ANR. (Don't forget to add the title to the reports title field.)

Exercise 4

Find, sort, and print member enrollment forms from the Mail Groups. (Don' forget to add the title to the reports title field.)