Lesson 8

The Set Up Screens

In this lesson, you will learn how to:

- Access the Setup Menu Screen
- Set default options for:
  - Your County-specific Defaults;
    - County Name
    - Township Name
- Project
- Clubs
- New Schools/Organizations
- County (don’t forget the Township code)
- Mail Groups
- Division Descriptions
- Zip Codes
- Activity Points
- Affiliation Codes
- Project Placement Points
- Manuals
- Townships
- Area Phone Numbers
- Passwords

Richard, The field title “Township” needs to be taken off of the Clubs New setup screen. There is no entry field available for townships.

Did you move the County and Township setups to the Admin Setup section?

How do you get into the Admin Setup section? When I tried I got “No Access” message. Do I need to log in as Administrative user if I plan on going to the Admin Setup?

My ED Project Codes does not have the State Fair Dept and Section fields so I did not put your new info in the project codes section. If Projects are still like your document, then when you replace my ED with the newest version I will need to rewrite the Adding a New Projects section. Right now I can’t add or enter # of labels or Find Group or the State Fair Dept or Section fields.

Read the section on “Editing a Schools/Organizations name, you do not have a Name Change button for this section. Simply finding the record and changing the text then using the back button will change the name.
On the Mail Group screen: When you click on the “Update Project Name Change button you get: (Should this not say “Mail Group Name Change”). You will get a new screen with a portal having 5 blank lines and a scroll bar.

I don’t think the Changing an existing Mail Group is working right. Please go through this with me on my program. Page 13.

The flags on the Setup should be moved to the Admin Setup. I don’t think you want some users looking at this and then clicking one it and changing their type of user.

Shouldn’t the Donor setup button be moved inside the Fair Setup turquoise box? It is really part of the fair?

On the Donor info Screen: there is no back button, although a user can use the “General info” button to go back to the General Info screen. The Back button is what all the other screens use.

If you use the tab key to enter fields you will also be taken to two small field that appear to not be used by the general user. (to the right side of the screen). Even though I used Rabbits as my donor type, these numbers all say 116 and Swine.

Why do you not have a Trophy Shop field in the Setup for donors?

I put several descriptions in the Donor “Category” field and only one show up in the Donor Info screen. There is a field beside the Category with a 400 in it what does that mean?

I entered a dollar amount in the set up but still have to enter dollar amounts in the members Donor info screen.

There is no drop down list in the Trophy field on the Donor Info screen. Yet, there is a list set up in the set up screen.

When I went to work on the Manuals setup it took me to the Data Entry section and not the Setup screen. Therefore, I have not changed anything on this section yet.

I did notice the “Delete button on this screen is Peach and not Red.

Signature is mis-spelt in the E-Mail Setup screen.
The Set Up Screen

This is the section where you would change, add, or delete shared information used as defaults, in drop-down lists, pull-down lists, and fields with data to be shared in all sections of the database. Because it is historical information, it should not be altered without great care. The shared information is used in all sections of the database for all users of ED. The nice features of the information stored in the setups is

- Users can quickly enter data from pull-down lists
- Users can quickly enter data from drop-down lists
- Some fields use the defaults, thus saving time entering data in these fields.
- Data that needs to be consistent will be entered correctly.
- Setup data can be used for all the demographic information for all sections of the database, i.e., 4-H, CFS, ANR, Leaders, Parents, and Mailing Groups.

Although you can get to the Setup screen from other screens that have the Setup button displayed, we will select the Setup button from the Main Menu.

Accessing the Setup Menu Screen

Use these steps to work on any of the Setup options in the Setup screen.

1. Click on the Setup button from the Main Menu screen. The Setup menu screen is displayed.
2. Click on the button for the type of codes you wish to work with. The setup sub-menus you can work in are: Projects/Groups, Zip Codes, Clubs/General Area, Activities, Schools/Organizations, Affiliation codes, Mail Groups, Project Placement Points, Divisions, Manuals, Donor, and E-Mail.
The Setup Screen

The following buttons will take you to individual screens where you will be able to enter the codes:

- The *Projects* button
- The *Clubs/General Area* button.
- The *Schools/Organizations* button
- The *Mail Groups* button
- The *Divisions* button
- The *Donor* button
- The *Zip Codes* button
- The *Activities* button
- The *Affiliation codes* button
- The *Project Placement Points* button
- The *Manuals* button
- The *E-Mail* button

The *Fair Setup* buttons will be covered in the Administrative Functions in another ED lesson.

The *Administrator Setup* button will be covered in the *Administrative Functions* in another ED lesson.

The *Straight to Print Outs* options are used when doing a *Find* only in Member Print Outs:

- Selecting **Yes** will take you straight to the *Print Outs* menu.

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Selecting **No** will take you to a *Pre View screen* before actually printing out your reports/labels.

**The No Mail options:**
- When doing a *Find only in Member Print Outs*:
  - Selecting **Yes** will sort out records that have used the *No Mail* option and they will not be found and printed.
  - Selecting **No** will cause all records with this flag to be found and printed
- Selecting **Omit** will mean you will not use either of the above settings.

**The Inactive options:**
- When doing a *Find only in Member Print Outs*:
  - Selecting **Yes** will sort out records that have used the *Inactive* option and they will not be found and printed.
  - Selecting **No** will cause all records with this flag to be found and printed
- Selecting **Omit** will mean you will not use either of the above settings.

The default fields allow you to enter data specific to your county so you won’t have to continually re-enter that information. When creating new records, this information will automatically be displayed in the field. You will still be able to go to that particular field and change the information for that one particular record if needed, i.e., if you are a border county to another state you can change the *county*, *township*, *city*, *zip*, and *area codes* just for that record.

The *Age date month* field is used for the *Age Calculation* field.

- The **Default Complete** field is used for.
- The **Auto Sort** is a Yes/No toggle. Selecting **Yes** will automatically do sorts for your finds. Selecting **No** will not do an automatic sort after a find.
- The **4 Label** fields are extra entry fields that are generally used for the ANR section of ED.
- The **County address** box is used to enter your County return address. The *Check for Duplications* button will check all your records to see if there are any duplicate records. If duplicate records are found a message, “These records might be the same. Please check them over. OK” will be displayed. You will then need to visually check each found record to make sure they are not duplicates. If they are of the same person, then take great caution to combine all data from one record into the other before deleting the unneeded record.
- The **Flags** button is new and allows the Administrator to set the type of user level for each individual user. The levels are: Normal, Limited, Admin.
- The **E-mail** button will take you to the E-mail Set-up Screen.
- The **Donor** button will take you to the Donor Set-up Screen where you can establish trophy donor information.
The Project Codes screen

You can edit, add, or delete projects from this screen. History information is stored in other files. When you use the Description update button, you change the Historical information in other files.
Select the Projects button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

- The Back button will return you to the previous screen, in this case the Setup menu screen.
- The Exhibit # back button will return you to the Project/Affiliation Print Outs screen.
- The New Project button will start the new record procedure so you can enter a new project.
- The Description update button will display the project codes screen and allow you to update a project name change. Be sure to read the caution message on this screen before proceeding!
- The Delete button will always allow you to delete record(s). Use with caution!
Finding the Record You Need

These procedures are all the same for every Setup menu screen. You will need to refer to this section anytime you want to work in any of the Setup screens. We will use Project Codes button as an example for this procedure. You will use this procedure to find out one of two things: is your record already in the database or is the record not entered. This helps prevent duplicating records.

1. Click on the Find button to make sure the project description is not already entered. The Project Codes drop-down list will automatically appear.
2. Scroll and click on the needed Project Code Description field, or type in the Project prefix if you know it, i.e., Computer Technology.
3. Press the Find button to finish the Find sequence, or, press the Enter key.
4. Press the Sort Button next if there are several records found. Click on the Sort key in the Sort dialog box to complete the sort and return to the Project Codes setup screen.
   - You can press the Sort Button if there are several records found. A Sort dialog window is displayed. The Description field is already in the sort order list so just click on the Sort button in the dialog window. This will complete the sort and return to the Project Codes setup screen.
   - If the record is not there, a dialog box message will be displayed, No records match this request, Click on the Cancel button. You can now add the needed record. Now you can proceed to the “Adding a New Project Description” section.

5. If found, click on the one record you need to work with.
   - The black bar will be displayed beside the record to show that this is the active record. Then proceed to the “Editing a Project Description for an Existing Project Group” or “Deleting a Project Description” from a Group sections.

Adding a New Project Description

The following steps will show you how to enter a new project description (level) if requested by the state office or your individual county office. The Project Codes themselves are not modifiable. Whenever a new Project Code is necessary, the State Office will add it to our list. We will then be able to add Project Code Descriptions (levels) to our database. We will use HCDZ for the group example and “New ED Computer Training” as the description example for this procedure.

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New Project button.
4. Click on the New button. Caution! This is a very important step. Because you are creating a new Project Description you must make sure you press the New button and have blank fields showing before typing any information in any of the fields.
5. Enter a unique description name in the Description field, i.e., ED Training.
6. Scroll and choose the Project Group + Description from the drop-down list, i.e., HCDZ (Computer Technology). The Project description and title will appear in their respective fields.

7. Tab to enter either the Yes/No option for the drop-down list, i.e. Select Yes so this listing will appear in the drop down list. For this lesson enter Yes.

8. Tab to enter the Yes/No option for the Project needs exhibit#. This will appear in the Exhibit section of the database. For this lesson enter No.

9. Click on the Back Button.
   - Repeat the above steps to add another new project description to a group.
   - The new project description will appear on the list in the Projects Codes screen when you click on the Back button.

Editing a Project Description for an Existing Project Group

The following steps will show you how to edit a project group description already in the database. Use caution when editing descriptions because they will also change historical records. We will use the project group HCDZ--Computer Technology and the record you just added. (ED Training . . ).

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on the needed record found.
   - The black bar will be displayed beside the record showing this is the active record.

3. Click on the Description update button. The Project Codes screen is displayed.
4. Scroll to select the description from the drop-down list, i.e., for this example use the description record you just added.
5. Click on the Continue button to finish the find sequence.
   - Only one Project Description record should be changed at a time because there are many records to be updated for each description change.
6. Click in the Description field to type in your text change.
7. Click on the Update Project Name Change button.
8. Click on the Back button.
   - Notice the button is now yellow and not blue.
9. Scroll or find the record you just changed to make sure it is correct. If you have “Needs Updated” displayed beside the record you did not do this procedure correctly. You will need to start over again.
10. Repeat these steps to change more descriptions.
Deleting a Project Description from a Group
Use **CAUTION** in deleting any type of record!

You can use this procedure to delete records in other Set Up buttons. We are using Project Description records as an example. Use with Caution! When you delete a setup record you will also delete historical records. Simply adding the record again will not link the historical records with the new setup record.

1. Complete the steps in **Accessing the Setup Menu Screen** and **Finding the Record You Need** sections.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the Red **Delete** button.
   - The message dialog box will appear asking if you want to “**Permanently Delete this entire record**”?
4. Click on the **Delete** key in the message dialog box **if you are certain you want to delete this record**. Otherwise, click on the **Cancel** key.
   - The number of records changes in the **Rolodex** as you delete records.
5. Repeat the above steps to delete any other record.
6. Click on the **Back** button to return to the Setup screen when you are finished deleting records.

You can use this procedure to delete records in other Set Up buttons. Use with Caution! When you delete a setup record you will also delete historical records. Simply adding the record again will not link the historical records with the new setup record.
Adding New Club Codes for 4-H/CFS or General Area (ANR)

Select the Clubs (4-H/CFS)/General Area (ANR) button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You will need to follow the steps in the section Finding the Record You Need to make sure you do not already have the club entered.
2. Click on the New Club button to display the Clubs (4-H-CFS) or General Area (ANR) screen.
3. Click on the New button. **Caution!** This is a very important step. Because you are creating a new Club/General Area you must make sure you press the New button and have blank fields showing before typing any information in any of the fields.
4. Enter a unique description name in the Club/General Area field, i.e., Post-ED Training Club.
5. Select a club Type (4-H only) from the drop-down menu. Club types are; Organized Club, Specialized Interest Group, Overnight Camps, School Age Child, Individual Study, School Enrichment, and Instructional TV.
6. Select a County name (4-H only) from the drop-down menu.
7. The Township name (4-H only) field is no longer required.
8. Select a Group from the drop-down menu. Groups are 4-H, CFS, and ANR.
9. Choose Yes or No for the Integrated community.
10. Choose Yes if you want to use this information in a pull down list. Choose No if you do not.
Editing an Existing Club Name

The following steps will show you how to edit a Club name already in the database. Use caution when editing names because they will also change historical records. We will use the club name of *Post-ED Training Club* on the record you just added.

1. Complete the steps in **Accessing the Setup Menu Screen** and **Finding the Record You Need** sections.
2. Click on the needed **record** found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the **Name Change** button. The Name Change screen is displayed.
4. Type the **Club name** in the Club/General Area field. i.e., for this example use the club name record you just added.
5. Click on the **Continue** button to finish the find sequence.
   - Only one Club record should be changed at a time because there are many records to be updated for each description change.
6. **Click** in the **Club/General Area** field and type in your text change.
7. Click on the **Update Name Change** button.
8. Click on the **Back** button.
   - Notice the button is now yellow and not blue.
9. Scroll or find the record you just changed to make sure it is correct. If you have “Needs Updated” displayed beside the record you did not do this procedure correctly. You will need to start over again.
10. Repeat these steps to change more descriptions.

- Refer to the section *Deleting a Project description* to review how to delete a Club/General Area.
Adding New Schools/Organizations

Your Schools/Organizations descriptions were converted for use in ED. You may want to add new Schools/Organizations descriptions to your database.

Select the Schools/Organizations button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding the Record You Need to make sure you do not already have the Schools/Organizations entered.
2. Click on the New button to display a blank record.
3. Enter a new School/Organization name.
4. Select a School Type 4-H or Other.
5. Click on Yes or No to have this school in the Pull down list.
6. Click on the Address button if you want to expand the record to enter the address.

7. Enter the Address, City, State, Zip information.
8. When finished, click on the Yellow Data Entry button to return to the Schools/Organizations listing screen.
   - Repeat the above steps to add other new Schools/Organizations to a group.
   - The new School/Organizations will appear on the list in the Schools/Organizations screen when you click on the Back button.
Editing an Existing School/Organizations Name

The following steps will show you how to edit a School/Organization name already in the database. Use caution when editing names because they will also change historical records. We will use the name of **AAA ED Training School** on the record you just added.

1. Complete the steps in *Accessing the Setup Menu Screen* and *Finding the Record You Need* sections.
2. Click on the needed **record** found.
   - The black bar will be displayed beside the record showing this is the active record.
3. **Click** in the *Schools/Organizations* field and type in your text change.
4. **Click** on the **Back** button.
5. Repeat these steps to change more descriptions.
   - **Click** on the **Back** button again to return to the Setup screen.

- Refer to the section *Deleting a Project description* to review how to delete a School/Organizations record.
Adding New Mail Groups
You may want to add a new description for your mail groups. The following steps show you how to add new Mail Groups to your database.

Select the Mail Groups button from the Setup screen.

1. You will need to repeat the steps in the section Finding The Record You Need to make sure you do not already have the Mail Groups record entered.
2. Click on the New button to display a blank record.
3. Click in the blank field to enter the new Mail Groups name.
4. Tab to the Yes/No Pull down List and select either Yes/No.
5. Repeat the above steps for other new Mail Groups you want to add to the Database.
6. Press the Back button when done adding Mail Groups.

Changing a Mail Groups Description

The following steps describe how to change an existing Mail Groups Description. Select the Mail Groups button from the Setup screen.

1. Click on the Update Mail group Description button.
2. Scroll and select the mail Group you want to change in the Description field.
3. Click on the Continue Button.
4. When the Mail Group Description appears, you can click in the record description field and change the description.
5. Click on the Update Project Name Change button.
6. Click the Continue button.
7. Click the Back Button to return to the Setup menu.
Adding New Division Descriptions

You may want to add a new code for your Division Descriptions to your list. Select the Division Descriptions button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding the Record You Need sections to make sure you do not already have the Division Descriptions record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New button to display a blank record.
4. Click in the blank field to enter the new Division Descriptions name.
5. Tab to the Yes/No Pull down List and select either Yes/No.
6. Repeat the above steps for other new Division Descriptions you want to add to the Database.
7. Press the Back button when done adding Division Descriptions to return to the Setup Screen.

Editing an Existing Division Description

The following steps will show you how to edit a Division Description already in the database. Use caution when editing Division Descriptions because they will also change historical records.

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on the needed record found.
3. The black bar will be displayed beside the record showing this is the active record.
4. Click in the Description field and type in your text change.
5. Repeat these steps to change more descriptions.
6. Click on the Back button again to return to the Setup screen.

- Refer to the section Deleting a Project description to review how to delete a School/Organizations record.
Adding New Donor Information

The Donor setup screen allows you to enter Trophy information when you work on the Donor screen. Select the Donor button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding the Record You Need sections to make sure you do not already have the Division Descriptions record entered. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.

2. Click on the New button to display a blank record.
3. Click on the Group number field and select an option from the drop down list.
   - If your Group number is not already in the drop down list, enter a new group number.
   - Enter a number in the range of 100 through 998.

4. Click on the blank Group Description pull down field and select an option from the drop down list.
   - If your Group Description is not already in the drop down list, enter a new group description. For example, Rabbit Trophy.

5. Click on the Award Type field and enter a number from the drop down list.
   - If your Award Type is not already in the drop down list, enter a new Award Type.
   - For example, BOB.

6. Click on the blank Award Type Description pull down field and enter a new Award Type description. For example, Best Of Breed.

7. Click in the Amount field and enter the amount this award brings. For example enter 2.00 for two dollars; the Dollar sign will automatically be displayed when you click in another field and you must use the dismal point.

8. The current Year is automatically entered in the year field. You can change this field if needed.

9. Click in the blank Description field and enter the Description from the drop down list.
   - If Your Description is not already in the drop down list, enter a new Description now.
   - For example, Best of Breed.

10. Tab to the Yes/No Pull down List and select either Yes/No.

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11. Repeat the above steps for other new Donor types you want to add to the Database.
12. Press the Back button when done adding Donor types to return to the Setup Screen.

Editing an Donor Description

The following steps will show you how to edit a Donor Description already in the database. Use caution when editing Donor Descriptions because they will also change historical records

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on the needed record found.
   • The black bar will be displayed beside the record showing this is the active record.
3. Click in any field(s) and type in your change.
4. Repeat these steps to change more descriptions.
5. Click on the Back button again to return to the Setup screen.

• Refer to the section Deleting a Project description to review how to delete a School/Organizations record.
Adding New Zip Codes

You may want to add a new code to your Zip Codes pull down list. You can now have multiple towns for the same zip code. In order to make this feature available we added another zip code field (Key) to the Zip Codes set up record. We realize the majority of you will not need to use this feature, yet we needed to make it available for those Indiana towns that do use the same zip codes. The Procedure below describes how to enter zip codes and zip codes with multiple towns.

Select the Zip Codes button from the Setup screen.

1. You may need to repeat the steps in the section Finding the Record You Need to make sure you do not already have the Zip Codes record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New button to display a blank record.
4. Click in the blank **Key Zip Code** field to enter the new zip code number.
   - If this zip code does not have multiple towns enter the zip code. For example, see the 46135 zip code record below.
   - If this zip code is the same as another town in your area, you will need to append an alpha character to the end of the zip code. For example, see the 45555A zip code record below.
   - The next zip code record you create using this same zip code append a different alpha character to the end of that zip code. For example, see the 45555B zip code record below.

5. Tab to the **Display** (zip code) field and enter the actual zip code the town would use. See the above example.

6. Tab to the **City, State** and enter the city and state information.

7. Tab to the **Yes/No** pull-down list question and make a choice.

8. Repeat the process or click on the **Main** button to return to the **Setup** Screen.

### Editing an Existing Zip Code

The following steps will show you how to edit a Zip Code record already in the database. Use caution when editing these records because they will also change historical records.

1. Complete the steps in **Accessing the Setup Menu Screen** and **Finding the Record You Need** sections.
2. Click on the needed **record** found.
3. The black bar will be displayed beside the record showing this is the active record.
4. **Click** in the **any** field and type in your text change.
5. Repeat these steps to change more Zip Code records.
6. Click on the **Back** button again to return to the Setup screen.

   - Refer to **Deleting a Project description** to review how to delete a Zip Code record.
Adding New Activity Points

You may want to add a new description to your Activity Points list. Select the Activity Points button from the Setup Screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding The Record You Need to make sure you do not already have the Activity Points record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New button to display a blank record.
4. Click in the blank Description field and enter the new Activity Points description.
5. Tab to the Points fields and enter the Activity Points information.
6. Tab to the Yes/No pull-down list question and make a choice.
7. Repeat the process or click on the Back button to return to the Setup Screen.

Editing an Existing Activity Points Record

The following steps will show you how to edit an Activity Points record already in the database. Use caution when editing these records because they will also change historical records.

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on the needed record found.
3. The black bar will be displayed beside the record showing this is the active record.
4. Click in the any field and type in your text change.
5. Repeat these steps to change more Activity Points records.
6. Click on the Back button again to return to the Setup screen.

- Refer to Deleting a Project description to review how to delete a Activity Points record.
Adding New Affiliation Codes

You may want to add a new description to your Affiliation Codes list. Select the Affiliation Codes button from the Setup Screen.

The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding The Record You Need to make sure you do not already have the Activity Points record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New Affiliation button.
4. Click on the New button. Caution! This is a very important step. Because you are creating a new Affiliations Codes record you must make sure you press the New button and have blank fields showing before typing any information in any of the fields.
5. Click in the blank Description field and enter the new Affiliation Codes description.
6. Tab to the Leader Code and select an option if you are entering a 4-H Affiliation code. Leave this field blank if you are entering an Affiliation code for CFS or ANR group. The leader codes are: Indirect Volunteer, Direct Volunteer, and Middle Manager.
7. Tab to the Group field and Select 4-H, CFS, or ANR
8. Repeat the process or click on the Back button to return to the Setup Screen.
**Editing an Existing Affiliations Code Record**

The following steps will show you how to edit an Affiliations Code record already in the database. Use caution when editing Records because they will also change historical records.

1. Complete the steps in **Accessing the Setup Menu Screen** and **Finding the Record You Need** sections.
2. Click on the needed record found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the Description change button.
4. Scroll to select the description from the drop-down list.
5. Click on the Continue button to finish the find sequence.
   - Only one Project Description record should be changed at a time because there are many records to be updated for each description change.
6. Click in the Description field to type in your text change.
7. Click on the Update Affil Name Change button.
8. Click on the Back button.
   - Notice the button is now yellow and not blue.
9. Scroll or find the record you just changed to make sure it is correct. If you have “Needs Updated” displayed beside the record you did not do this procedure correctly. You will need to start over again.
10. Repeat these steps to change more descriptions.

- Refer to **Deleting a Project description** to review how to delete an Affiliation Code record.
Adding New Project Placement Points

You may want to add new Project Placement Points to your list. If your County plans to use the Bar Coding section or the Newspaper printout option of ED you MUST use the Project Placement Points setup correctly. Select the Project Placement Points button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

<table>
<thead>
<tr>
<th>Code</th>
<th>Ribbon</th>
<th>Placement Points</th>
<th>Premium</th>
<th>Comment</th>
<th>Sale order</th>
<th>Bar Code Inc</th>
</tr>
</thead>
<tbody>
<tr>
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<td>CH</td>
<td>8</td>
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<td>10</td>
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<td>Grand Champion</td>
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<td>18</td>
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<td>7</td>
<td>1.00</td>
<td>Reserve Champion</td>
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</tr>
<tr>
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<td>Res Grand Champion</td>
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<td>1.50</td>
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<td>20</td>
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</tr>
<tr>
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<td>20</td>
<td>0</td>
<td>Showed</td>
<td>20</td>
<td>☐ Yes ☐ No</td>
</tr>
</tbody>
</table>

1. You may need to repeat the steps in the section Finding The Record You Need to make sure you do not already have the Project Placement Points record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click on the New button. Caution! This is a very important step. Because you are creating a new Codes record you must make sure you press the New button and have blank fields showing before typing any information in any of the fields.
4. Click in the blank Code field and enter the code. The Code field is used only for the pull down list. For example, enter C for Champion.
5. Tab to the Ribbon field and select an option from the drop-down list if this is a new description. If this description is listed in the drop down list select it from the list.
6. Tab to the Placement Points field and enter the number this placement points is worth.
7. Tab to the Premium field and enter the amount this premium is worth. Remember to use the decimal point.
8. Tab to the Comment and add any comment that will be needed for the newspaper. This is also used for Exhibit results so make sure it is correct before you start to enter Exhibit results.
9. Tab to the Sale order fields and enter the needed information if your county uses sale order.
10. Tab to the Bar Code Yes/No toggle button and select one if bar coding is to be included. The Bar Code Inc is a way to efficiently use the pull down list that will be used on your handheld device.
11. Repeat the process for any new records or click on the Back button to return to the Setup Screen.
Editing a Project Placement Points Record

The following steps will show you how to edit a Project Placement Points record already in the database. Use caution when editing these records because they will also change historical records.

1. Complete the steps in Accessing the Setup Menu Screen and Finding the Record You Need sections.
2. Click on the needed record found.
3. The black bar will be displayed beside the record showing this is the active record.
4. Click in the any field and type in your text change.
5. Repeat these steps to change more Project Placement Points records.
6. Click on the Back button again to return to the Setup screen.

_refer to Deleting a Project description to review how to delete a Activity Points record._
Adding New Manual Codes

You may want to add new Manual codes + titles to your list. Select the Manuals button from the Setup screen.

- The black bar beside the record is a visual indicator that this is the active record.

1. You may need to repeat the steps in the section Finding The Record You Need to make sure you do not already have the Manuals record entered.
2. Click on one of the records found.
   - The black bar will be displayed beside the record showing this is the active record.
3. Click the Project Prefix field and select an option from the drop-down list.
4. Click on the New button to display a blank record.
5. Tab to the Description field and enter the needed title information.
6. Repeat the process or click on the Main button to return to the Setup Screen.
The E-Mail Set-up Screen

When you use the new E-Mail feature of ED you will need to have your return address, E-mail address and Signature file already entered in the setup section. Select the E-Mail button from the Setup screen.

1. Click in the Email Host field and enter: purdue.edu if it is not already entered.
2. Tab to the Your E-mail field and enter your email address.
3. Tab to the Signature field and enter what you would like to see automatically attached to the end of your email message. For example, your name, Department/County, Address, and your email address.

Editing the E-Mail Setup

The following steps will show you how to edit the E-Mail Setup screen that already may have text entered. Use caution when editing this screen because it will also change historical information.

1. Click in the any field and type in your text change.
2. Click on the Back button to return to the Setup screen.

Fair Setup buttons

These buttons will be covered in a later training session.

Administrator buttons

See the lesson on Administrative Functions for ED for information on these buttons.
Exercises 8 --

Exercise 1

1. List three types of codes you can work with in the Setup menu.
2. Enter a new club name.
3. Enter a new Affiliation Code for the Project Description; ED TRAINING using your newly entered club name.

Enter at least one code for each of the Projects, Clubs, Schools/Organizations, County, Mail Groups, Divisions, Zip codes, Activities, Affiliation codes, Project Placement Points, and Manuals.

Bonus Exercise

Enter more Setup codes as you wish and as time permits.

Finally!

You won!

No, not one of the new Dodge PT cruisers!!!

Just the vast knowledge of working in a fun, fun, application!

And to think you are getting paid to do this . . .