

How to Change Old Codes to New

Project Codes (in Florida)

- **Project Codes start with 2-3 Letters and many end with numbers**
- **use AA to ZZ to select them all on reports**
- use Member Query to Add Projects to many members at once
- use Additional Queries|Member Project Query to change Project codes on many members at once, or to Delete Projects

When Adding Projects on the Member/Leader Projects tab- **if youth is active in more than one club, the program automatically fills in the Primary Club code**, you must edit it to the correct club code, if different.

Project Report

The Projects by Club Code report can list a range of Project Codes by Club with subtotals for project and club. Report|Statistical Report|Member/Leader Projects, pick Members (& Cloverbuds), enter Project Code start and end (use same code for just one project), and pick Club Code (bottom of Sort Order list).

To Change Project Codes on many members at once

1. Go to File|Additional Queries|Member Project Query
2. click drop-down arrow on Index and pick Project ID
3. click filter button (?), ladder) and click on Project ID field, then click in Field Value box on the right and type in the old Project code you wish to change, and click OK.
4. When the list of results displays, pick Select|Select All to highlight all of them.
5. click on the Options menu and then click Edit Mode (check mark displays)
6. click on Action|Change Project ID Field, and click Yes that you really do want to change them.
7. click (...) button to pick the new Project code from the list (type first letters into the Search Characters box to jump down to relevant codes).
8. highlight new Project code and hit Enter or dbl-click it, then click OK to confirm the change.
9. Move your cursor off the smaller Member Projects Query window and wait until the hour glass changes back to the usual arrow (be patient). Bug? The hour glass doesn't go away if it is still over the query window.

Activity Codes (in Florida)

- **Activity Codes start with 2 Numbers and end with 2-3 Letters**
- **use 000-999 to select them all on reports**
- **use Member Query to Add Activities** to many members at once:
 - Select with Ctrl+mouse click,
 - Action|Add Activity, pick Activity code and Report year (2004 until 8/31/04), then click OK
- **use Additional Queries|Member Activity Query to Delete Activity codes** on many members at once.
- **use Member/Leader Activity tab to Add or Delete an Activity from an individual**

Do not use Group Youth Enrollment for Activities, Other, or Organized Club projects. (Florida rule, other states may do it differently).

Club Codes

- **Club codes are all 3 digit numbers 001-999 in Blue Ribbon program.**
- **A Club code must be added to the master Club file before it can be added to a Member/Leader entry, or a Group Youth enrollment record.**
- **All people entered Individually must have a primary club.** On the Member/Leader screen, the middle segment of the Member ID number is the primary club. Never type in Primary Club number at the top of the M/L screen. If it is blank or for the wrong club, you can fix it in on the Clubs tab of the **Member/Leader screen (click Clubs tab, Add Club|Add as Primary)** or in Member Query.

Club codes are not just for Clubs, any group of youth can be identified with a Club code—it organizes your data.

- **All Independent Study youth should be assigned to the same Club code as their Primary club.**
- **Group Youth Enrollment records are easier to find again if you associate a Club/unit code with the record.** You can only Find Youth Group entries by Date or Club/unit code, so it makes sense to use Club/unit codes when you have lots of Youth Group entries. Their club/unit codes must be entered in the master club file as “Not a Youth Group” type for units and youth to combine correctly on the ES-237 report.

Print or Preview your Master Club file in Club ID order to find available Club IDs (ones that have not been assigned yet) go to

Report|Print Data Files|Club Code File/Num (numeric by ClubID), and look for gaps in the number ranges.

Add Clubs to the Club file

Open the Clubs file (green clover button).

Example 1. Find the next available Club Number in the range ClubID 100-200. Add that club as a Community Club, with a Charter, a Bank account, but don't mark Community Service Project or Audit (of the bank account) until those have occurred in this report year. Pick Mixed Community, but not Integrated.

Example 2. Find the last available Club Number in the Data. Add that club as a Day Camp. Pick Mixed Community, Integrated.

Changing a Club for several Member/Leaders at once? —first use Member Query for Primary Club Changes

(index by Club ID, filter for Club ID of the old Club number)

Any Member/Leader entry can have additional clubs associated on the Member/Leader screen Clubs tab, however only one is “Added as Primary” and only the Primary club is displayed in Member Query. The new Club code must have already been added (or edited) in the Clubs file (green clover button).

--then use File|Additional Queries|Club Membership Queries

(index by Club ID, filter for Club ID of the old Club number) to find those who still have links to the old club number. These might be people in the Member/leader file with Inactive or Alumni status.

Open Member Query by clicking on the Spreadsheet button (or File|Member Query).

3 ways to Select Records (in Member Query, Additional Queries, and many Windows lists)

If the records you need to select are **all together**, use the **Shift key**

- 1) click on the first one to highlight it
- 2) push down the Shift key and hold it while clicking on the last record of the group, then release Shift. The whole group should be highlighted

If there are records you need to select are **not all together**, use the **Ctrl key**

- 1) hold the Ctrl key down while clicking on each record. Each should stay highlighted as you pick them.

OR if the records all share some field value in common, select with a Filter (ex. ClubID)

- 1) Index by ClubID (top center drop-down arrow to select different index =display order)
- 2) then filter for the ClubID (**Filter button** to left of Index box looks like a ladder with a ?)
 - a. On left side pick Club ID in field list
 - b. On right side, type in the 3 digit Club ID number --ex. 110
 - c. Click OK to filter the records only for the Club ID you entered

If Member Query now displays only the Club ID you want to change,

- 3) go to Select menu, pick Select All

To Change a Primary Club ID for several Member/Leaders at once:

- 1) select the people who need the same primary club code using one or more of the above methods
- 2) **with records selected, pick Action|Change Primary Club and use the drop-down arrow to select the correct Club code from the list (be very careful if you type it in).**

Example 1. Change Primary Club ID 100 to Primary Club ID 517 in Member Query for all the members and leaders in the Club

- 1) Open Member Query
- 2) Index by ClubID (top center drop-down arrow to select different index =display order)
- 3) then filter for the ClubID (**Filter button** to left of Index box looks like a ladder with a ?)
 - a. On left side pick Club ID in field list
 - b. On right side, type in the 3 digit Club ID number --ex. 100
 - c. Click OK to filter the records only for the Club ID you entered
 - d. If Member Query now displays only the Club ID you want to change,
- 4) go to Select menu, pick Select All
- 5) go to Action menu, pick Change Primary Club and use the drop-down arrow to select the correct Club code from the list.

Deleting a Club from the Club File

Before deleting a club code from the master file, remove the club code from any members or leaders that were in it. Note that Member Query does not display Club ID of members who have added the Club as their 2nd or 3rd Club. You can print a report -- Members/Leaders List by Club to find these others. File|Additional Queries|Club Membership Query, sort by Club ID, filter for Club ID you want to examine.

Add the Member Query Button to your Button Bar

To display the Member Query button, click on the drop-down arrow at the far right end of the button bar, pick Add or Remove Buttons, then click the box in front of Member Query.

If Member Query isn't in that list

1. pick Customize,
2. then Button Group,
3. then click the Commands tab at the top
4. click on File and you'll see the Member Query button on the right side
5. click and hold down the left mouse button on the Member Query button, drag it up to the Button Bar and release (drag & drop it).
6. click somewhere off of the Customize window to close it.