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From: Johnson, Nancy D
Sent: Friday, May 19, 2006 10:13 AM
To: . IFAS-4HBR-L; . IFAS-4H-Agents-L
Subject: 4HBR Cleanup #1 Remove Inactive Members & Parents, verify Family members' links, review Inactive Leaders and Others
Attachments: InactiveGPAR_OtherList.pdf; ParentsLinkedtoMembers.pdf

To: 4-H Agents and Support Staff for Individual Enrollment
From: Nancy Johnson, 4-H Youth Development
Re: 4HBR Cleanup #1 Remove Inactive Members, Cloverbuds, & Parents, and verify Family members' links

The final FY06 Blue Ribbon Youth Enrollment data/ES237 reports will be due in Gainesville on Tuesday, August 15, 2006. We need to clean up the Blue Ribbon Youth Enrollment data before we transfer it into the new reporting program. This is the first of a series of emails to help you through the transition process.

These steps affect only the Individual Enrollment parts of Blue Ribbon.

Once you have re-enrolled all your Returning Members and Leaders, any Member or Cloverbud who still has Inactive Status can be deleted--but don't delete members if you haven't finished re-enrolling for this year. Inactive Parents can be deleted at any time.

****Backup First****

Make a backup of your data files before deleting records, so you'll have it if you should need it (label folder/floppy " with Inactives" & date of backup). The what to backup and how to do it information is at <http://4h.ifas.ufl.edu/4hbr/#backups>.

1. Go to Utilities|Member Charts|Members by Status to see if you have Inactive Members or Cloverbuds. If none, skip to #4, if you have some,
2. Go to Utility|File Utilities|Utilities and pick Delete Inactive, then pick Member to remove them. If you also had Inactive Cloverbuds,
3. Go to Utility|File Utilities|Utilities and pick Delete Inactive, then pick Cloverbud/Mini to remove them.
4. Go to Utility|File Utilities|Utilities and pick Delete Unlinked Parents. This removes parents not linked to any Member/Leader record (whose children were already deleted)
5. Go to Utility|File Utilities hold down the Ctrl key and click on youth2a.db, youth2b.db, and youth2bl.db (3 should be highlighted), then click on the File menu and pick Pack Table.

See the attached [ParentsLinkedtoMembers.pdf](#) for screens and example reports.

6. Go to Report|Parent Lists| pick "Family Report" for an alphabetical list of parents showing linked children (and volunteers linked to themselves).

- "Print All Parents" would include any Inactive Leaders, or Other, or Alumni-linked parents.
- "Print Only Parents of Active Members" should include Active Leaders.

Please take a look at your parents and the youth who are linked to them. Parents should be linked to all of their children from a single parent record. There are some duplicate parent records, often

with different address/phone # and links to only some siblings.

Parents who have different addresses/phone numbers should have separate parent records, each linked to all of their children. If a parent is a 4-H Volunteer, their Member/Leader screen should link to their parent record (spouse's too, if also a volunteer).

Adding a Parent-

In Blue Ribbon, you start from the Member/Leader screen of the person you want to link to a parent record. The Parent tab near the bottom of the Member/Leader screen lists the Parent records already connected to that Member (if any).

- 1. Highlight the displayed parent you wish to view and**
- 2. click on the Parent Contact button near the bottom of the screen to open the Parent record. A blank record will open if no parent is linked yet.**

The Parent record shows all the Member/Leader records linked to it, which should be all the children in the family, and even the parent(s) if they are 4-H volunteers.

- 3. click Find and look for the last name of the person you want to add as a parent, because they may already be in the database (sibling, volunteer)**

If Found,

4. click on the name to open it and verify the address and phone are correct. Separated/divorced parents address and phone may be different than their child's. If the whole family moved but the parent screen address wasn't corrected, it's a problem. We expect to use the Member/Leader screen address for both the child and the first parent record, and to add another address line as we convert the data to the new program.

- 5. update the rest of the parent information, then**
- 6. click on the Link button to connect the parent to the original Member/Leader screen person.**

If Not Found,

- 4. click Cancel or press Escape key, which takes you back to the blank parent screen.**
- 5. Then click on the "Get" button to bring in the last name and address from the Member/Leader screen.**
- 6. update the rest of the parent information, then**
- 7. click on the Link button to connect the parent to the original Member/Leader screen person.**

Removing a Link to a Parent-

- 1. From the Parent screen, you double-click on any name displayed in the Children/Family box at the bottom left to open that Member/Leader record.**
- 2. From the Member/Leader screen, you can click on the parent name to highlight the parent link, then click on "Remove Parent Contact Link" button (bottom right) to delete a link to a Parent.**

Deleting a Parent Record completely from the program-

From the Parent screen, you can click on the "Delete" button to delete the parent record completely (If there are other family member links displayed on the parent record, those links will be gone, once the Parent record has been deleted).

Review Inactive Leaders and your "Other" category members, see attached InactiveGPAR_Otherlist.pdf

Inactive Leaders? General, Project, Activity, and Resource categories are Volunteer Leaders who are Inactive. They may belong in your data, but should be looked at—you may want to update

their information.

Other category? This is often used for newsletter mailing lists or donor lists. Inactive status people may belong in your data, but should be looked at—you may want to update their information, or you may want to delete ones that are obsolete.

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