

University of Northern Iowa
UNI ScholarWorks

Graduate Research Papers

Student Work

1999

State-wide training sessions for county office personnel using the Blue Ribbon data management system

Rebecca L. Nibe

Copyright c1999 Rebecca L. Nibe

Follow this and additional works at: <https://scholarworks.uni.edu/grp>



Part of the [Curriculum and Instruction Commons](#), and the [Management Information Systems Commons](#)

Let us know how access to this document benefits you

State-wide training sessions for county office personnel using the Blue Ribbon data management system

Abstract

A statewide training initiative was necessitated by the upgrade of the statistical database management program required by the State 4-H Office. The upgrade was released in the fall of 1998, but was flawed and buggy, resulting in much frustration among users. Additionally, I was the newly-hired State Support Specialist, and had not established any credibility with the users I was hired to support. The Associate State Director and I decided that an ambitious early spring training program would be beneficial to all parties involved.

I believe that this project was both a personal and a professional success. I was able to effectively teach others to use the new program, formed personal and professional relationships, and gained a deeper understanding the clients I am hired to serve.

**STATE-WIDE TRAINING SESSIONS
FOR COUNTY OFFICE PERSONNEL
USING THE BLUE RIBBON™ DATA MANAGEMENT SYSTEM**

**A Graduate Project
Submitted to the
Division of Educational Technology
Department of Curriculum and Instruction
In Partial Fulfillment
Of the Requirements for the Degree
Master of Arts in Education
UNIVERSITY OF NORTHERN IOWA**

**By
Rebecca L. Nibe
April 19, 1999**

This Project by:

Rebecca L. Nibe

Titled:

Statewide Training Sessions for County Office Personnel Using the Blue Ribbon™ Data Management System

has been approved as meeting the research requirement for the Degree of Master of Arts in Education.

Sharon E. Smaldino

May 10, 1999
Date Approved

Graduate Faculty Reader

Lisa Hansen

May 12, 1999
Date Approved

Graduate Faculty Reader

W. P. Callahan

5-19-99
Date Approved

Head, Department of Curriculum
and Instruction

CONTENTS

Introduction	1
Methodology	3
The Project	9
Conclusions and Recommendations	16
References	25

Appendix A

Appendix B

Appendix C

Appendix D

Introduction

A statewide training initiative was necessitated by the upgrade of the statistical database management program required by the State 4-H Office. The upgrade was released in the fall of 1998, but was flawed and buggy, resulting in much frustration among users. Additionally, I was the newly-hired State Support Specialist, and had not established any credibility with the users I was hired to support. The Associate State Director and I decided that an ambitious early spring training program would be beneficial to all parties involved.

All county offices are required to make use of the program, and the upgrade moved the program from a DOS-based platform to a Windows environment, which was a significant change in the manner in which the program operated. Thus, the users in all county offices were in need of specific training. This was compounded by the fact of the high turnover in county office staff, resulting in many users who had received no training in any aspect of statistical database management. The database program is developed and marketed by Martech, Inc., based in Wausau, WI. Their support contract with the state 4H organization includes support for only the state support person, not all county office users, so it was imperative to have county users knowledgeable about the program operation. The county users did generally not regard the company documentation of the new program as effective or helpful, so additional materials were necessary.

The primary purpose of the training was to establish a common knowledge base among all county users of the program. Equally important was to establish rapport and a working relationship between the county office personnel and me. Since I am the primary contact for questions, problems, and information, it is critically important that the users feel comfortable in asking for help. Another goal of the project involved the statistical data that is maintained in the program. At the end of the fiscal year, all statistical information from each county is compiled and sent to the state office, where it is merged and compiled into a final report, required by the national office. In order for the final state statistical report to be accurate, each county-submitted statistical report must be accurate. It is also important that all counties by recording data in a consistent manner, so that the numbers generated are indicative of not only each county's programming, but also of the state as a whole. Conducting training sessions that involved 130 people from 93 of the state's 100 offices insured that a large majority of the users were being presented with the same information and instructions.

The goal of the project was to develop and implement an effective training plan for office assistants in all 100 County Extension Offices in the state of Iowa. Nine two-day training sessions were originally planned, scheduled for locations that would be within one-hour driving time for as many participants as possible. Ten sessions were actually conducted, as one of the sessions became overbooked, and caused another one to be added in the same area.

Methodology

The primary planning process employed in this project was an adaptation of a process developed by Newby, Stepich, Lehman, and Russell (1996). Each step in the process includes considerations from the perspective of the learner, the teacher, and the technology. It was from the framework that evolved from those considerations that the training manuals and events took shape. Listed in Appendix A are the considerations from each perspective for each step of the planning process, and the implications of those considerations in the planning of the training sessions.

While my experience in teaching in a public school setting facilitated much of the planning and writing process, it was important that the materials, activities, and method of instruction were appropriate for adult learners. Most adults feel they need to know only what is useful to them and will learn it when they feel it is important (Knowles, 1990). This was especially true for the office assistants that I proposed to train. My potential participants were likely to be women who were hired for a demanding job on a part-time basis, for minimal pay. They did not have the time, motivation, or skills to learn the program in an independent manner or to find solutions to their problems by reading the manual or experimenting with the program. Each one needed to know how to correctly and efficiently perform basic tasks. A few users were proficient

enough to desire more advanced knowledge that would benefit them in their specific office.

Knowles (1990) applies andragogy principles to the design of computer training that were particularly useful to me as I planned my training.

- There is a need to explain why specific things are being taught (e.g., certain commands, functions, operations, etc.)
- Instructions should be task-oriented instead of memorization—learning activities should be in the context of common tasks to be performed.
- Instruction should take into account the wide range of different backgrounds of learners; learning materials and activities should allow for different levels/types of previous experience with computers.
- Since adults are self-directed, instruction should allow learners to discover things for themselves, providing guidance and help when mistakes are made.
- Experience (including mistakes) provides the basis for learning activities.
- Adults are most interested in learning subjects that have immediate relevance to their job or personal life.
- Adult learning is problem-centered rather than content-oriented.

Lowery (1989) also assembled a long list of suggestions for modifying content and delivery of learning experiences designed for adult

learners. A partial list of those items that pertained to my planning are listed below.

- Create a partnership with the learner by negotiating a learning contract for goals, strategies, and evaluation criteria.
- Be a manager of the learning experience rather than an information provider.
- Teach inquiry skills, decision making, personal development, and self-evaluation of work.
- Help learners develop positive attitudes and feelings of independence relative to learning.
- Recognize learners' personality types and learning styles.
- Create an atmosphere of openness and trust to promote better performance.

Many of these considerations were addressed in the style of the training and learning environment that was planned. The activity packets to be utilized included not only specific instructions for each task, but also an example of a situation in which this task would be used, and screen prints of the various steps in completion of the task. This allowed learners who were either behind or ahead of the trainer and the majority of the group to continue independently until the group came together to discuss outcomes. Tasks were previewed before proceeding, directions were given orally as well as in written form, and additional diagrams and explanations were presented at the front of the room. Every effort was made to establish a personal relationship with participants, including

furnishing refreshments for morning and afternoon breaks, and eating lunch as a group at local cafes. During break times, other topics of interest and commonality were discussed, allowing all participants to know each other in other, more personal contexts. Additionally, I stayed overnight at all of the training sites, encouraging others to either stay also or to join me for supper before leaving. This proved invaluable in establishing positive personal and collegial relationships.

An important issue in conducting adult training is the role that anxiety plays in facilitating or hindering learning. Fajou (1997) describes some common elements of frustration, with regard to the learning process:

Common feelings associated with anxiety are irritation, frustration and bewilderment. These tend to be caused by an individual's recognition of their failure to understand. ... There are often times in computing studies where students, ... do not understand the reasoning behind why the computer may do certain things or why it responds in certain ways. (p. 2)

Other than a positive, supportive atmosphere with adequate written documentation of all tasks, an additional technique was employed to lessen the anxiety associated with the new program. Examples were deliberately placed in the training materials that created error messages or unexpected results. Discussions followed about not only how to avoid those problems, but also what to do to solve them after they occurred.

Many of these examples were constructed to reflect the problems most commonly reported in help line telephone calls.

Fajou (1997) goes on to state, "One of the leading causes of anxiety is the pressure imposed on students by time. Teachers often place emphasis on speed" (p. 2). The original training materials were revised and edited, pared down to essential tasks, especially for the first day training. This allowed the participants adequate time not only to complete the activities, but also to process the information and to discuss it with their peers and the instructor.

The final source of direction for the training was the help line. I have a toll-free telephone for the county office personnel to use when they are having difficulty with the Blue Ribbon™ program. After the program was introduced in October 1998, daily telephone calls approached 30 per day, a nearly unmanageable number. I maintained a log of these calls, noting the caller's name and county, as well as a description of the problem and the solution. Many of those problems and solutions became activities for the training sessions. Other activities were created by more advanced users who had specific requests about specialized ways in which to use the program. Nearly all of the second day training activities were originally suggested by county users.

As a management tool, I created lists of objectives for each activity in the activities packets (Appendix B). I included not only the learner objectives for each activity, but also any advance preparation that would be required of the teacher. This helped me be organized and prepared for

each training session, and helped the activities go smoothly. I also checked the list of objectives against the log of support calls to ensure that common problems were being adequately addressed.

Martech, Inc., the vendor, had provided no training for any state support personnel, so we learned by solving our users' problems and communicating with each other. I initiated a listserv for state support personnel in ten states, which allowed us to combine our knowledge to better serve our clients.

The Project

The final result is not only the set of five manuals (Appendix C) which were used at the training events, but also the training events themselves. Just as a great deal of research and planning went into the creation of the manuals, a great deal of planning went into scheduling and carrying out the training events. Equally as important as the information presented was the means used to present that information.

Considerations were time constraints, locations, knowledge base of the attendees, and a comfortable working atmosphere that would foster positive professional relationships.

Listed below are the final decisions that were made in regards to the physical location and scheduling of the training sessions.

- The training sessions were originally planned for nine counties in various locations around the state, with the goal that few participants would have more than a one-hour drive. The counties chosen were Clay, Crawford, Montgomery, Warren, Hamilton, Cerro Gordo, Fayette, Linn, and Wapello. Because the Linn and Fayette trainings grew to a high number of participants, an additional site was added in Black Hawk county.
- Each county office was asked to provide a room for the training that would accommodate up to 15 participants and computers. Most offices had access to a meeting room in their building, but

Crawford county used a community meeting room, and Black Hawk county used a meeting room at Hawkeye Community College.

- Each training was scheduled for two days. The first day was described as "Blue Ribbon™ Basics" and the second day included more advanced topics. Participants self-registered over the internet or by telephone or e-mail, and were free to choose either day, or both days.
- I reserved a mobile laptop computer lab from Extension Communication Services. This accomplished two important things: all computers were configured in the same way, with the same data; and participants were not required to bring their own machines from their office.

The content of the training was determined by two means: common questions to the help line, and upcoming tasks that would be performed by all county offices. I wanted all offices to have not only answers to questions that had already arisen, but also advance information about tasks with upcoming deadlines. I knew that there were problems that had not yet been addressed, because it was not the time of the year for those activities to take place.

- The order of the training manual roughly echoes the order in which various activities occur during the course of a year.
- The order of the activity packets parallels the training manual.
- The Basic Activity Packet, designed for use on the first day, includes only activities that are required of all counties. Those

activities are designed to answer the most common problems reported on the help line.

- Screen prints of the various dialog boxes for all tasks are included in the activity packets. There are two primary reasons for this: so that users can refer to these packets in their county office, following along with the packet; and to accommodate more visual learners, who do not prefer either to read directions or listen to oral directions.
- Activities contain the following components: a brief scenario describing a situation in which the task would be performed, a bulleted list of step-by-step instructions for completing the task, and screen prints of various dialog boxes that occur during the task.

The learning environment and teaching style was the third element of this training. It was equally as important as the scheduling concerns and the content. By maintaining a log of help line calls, I was able to identify some county offices that were having many difficulties. However, the counties that never called the help line could either be those who were having no trouble with the new program, or more likely, those who had yet to install and use it. I knew only a few of the users personally, and was largely unaware of the relationships that existed among different county office personnel. I also did not know which county offices had personnel who were experienced and proficient users, so could not effectively make use of them as mentors to newer employees. I felt that I

needed more information before I could design the most effective training for all participants.

- On the self-registration form, I added a field for the participant to describe their level of experience. I sorted and printed reports based on training location and level of experience, to determine the overall make-up of each training session. In Clay county, 11 of the 14 participants had less than eight months experience in their job. By contrast, the participants in Linn county included many women who had been in their job longer than the Blue Ribbon program had been in existence, and only two of the 17 had less than one year experience. These conditions presented a challenge to tailor the separate sessions to fit the predominant level of the audience.
- I called some of the county personnel that I was acquainted with personally, and asked them for a "wish list" of not only what issues should be covered in training, but also what methods would be most effective. This led to the decision to bring the laptop lab, and reinforced the idea that these trainings should be kept as informal as possible, allowing plenty of time for individual questions and for networking.
- I was determined that each user would have a computer in front of them, so that they could actively participate in the activities, rather than simply listening to me and taking notes. The activity packets were designed so that few additional notes were necessary.

- In the beginning, I had planned to use a computer projection device. Because of equipment limitations, that was not possible. However, it turned out to be a very positive development, as I did not operate a computer myself, but instead roamed the classroom, looking over shoulders as I was talking, and answered questions as we went along. This also allowed me to adjust the pace when some users fell behind, or when the machines did not work as quickly as the one I was accustomed to.
- I asked all participants to bring their "official Extension name tags" so that I could do a better job of connecting names and faces. I am a visual learner, like many of my students, so it helped to not only hear the names, but to see them on name tags for the two days.
- The second day activities were designed to allow users to choose the ones that are most relevant for their offices. East Central Iowa, for example, is heavily invested in FileMaker Pro™, so those activities were some that they had specifically requested. North Central, on the other hand, doesn't include many FileMaker Pro™ users, but they wanted to create customized reports, so asked for more information on Custom Report Writer™. Keeping the training activities flexible helped create the informal atmosphere that I desired.
- About two weeks before the training sessions, I sent out messages to all registered participants, confirming their registration. It included directions to the training site, materials that they should

bring with them, and a schedule for each day. The participants had all likely questions answered in advance, and I set a positive tone for the training by making the messages upbeat.

- Many of my clients had remarked both to me and to my superiors that they enjoyed the sense of humor I employed in my numerous e-mail messages about the program and its continuous updates. I relied heavily on that sense of humor as I designed the activities and planned the atmosphere in which I would teach. I hoped to defuse some of the frustration that the users were experiencing due to the defects in the original program. I wanted them to come away feeling that we were all in this together, and that I was competent to handle this debacle we had unknowingly become involved in.

The location and physical details, the content, and the learning environment were the most important decisions that I made while planning the training. I had many objectives to accomplish with this training, and they could only be achieved by having the right combination of these three aspects.

I knew when I undertook this project that my impressions of the training were not going to be sufficient evidence that it had succeeded from a user standpoint. I had learned from telephone calls and subsequent follow-up that just because I thought a problem had been addressed and solved did not mean that the user thought the same thing. Since this was my first year in a position that I plan to remain in for

several years, I needed to know if my decisions about the training had been correct. If this training was not in a format that was effective for the county staff, I wanted to be able to modify it for future trainings.

I designed evaluation instruments (Appendix D) based on key skills that were included in the training. I asked the participants to rank themselves on a scale of 1-5 in regards to their expertise on 5 key concepts for each day. I purposely avoided specific definitions for the 5 levels, allowing the user to place themselves on a continuum based on their own perception of the range of user competence. This may have resulted in some users ranking themselves higher or lower than I would have. However, it gave them the freedom to determine at the end of the day how much they felt they had gained toward achieving the goal of complete confidence in their ability to use the program. I also included some open-ended prompts, allowing the participants to express opinions about the training, either positive or negative.

Day	Concept	Ranking	Comments
1	1. Understanding the program	2.5	Good
1	2. Understanding the program	2.5	Good
1	3. Understanding the program	2.5	Good
1	4. Understanding the program	2.5	Good
1	5. Understanding the program	2.5	Good
2	1. Understanding the program	2.5	Good
2	2. Understanding the program	2.5	Good
2	3. Understanding the program	2.5	Good
2	4. Understanding the program	2.5	Good
2	5. Understanding the program	2.5	Good

Conclusions and Recommendations

The results from the ranking system indicated the participants' view of the success of the content matter training. Realistically, I could not expect a participant who had ranked themselves as a "1" to believe that they were a "5" by the end of one day of training. What I believed would be an indicator of successful training was an average increase of 1 point. The charts below summarize the results of the evaluations.

Day 1 Training

No. Respondents = 83	Average Pre-Training Ranking	Average Post-Training Ranking	Average Increase	Notes
Skill				
1. Installing data and program updates	2.67	3.76	1.09	
2. Maintaining data files	3.07	4.02	.95	
3. Entering member data	3.70	4.42	.72	All users do this daily
4. Using Member Query to update records	1.77	3.43	1.66	New addition to program; 42 = 1 (Pre)
5. Entering Group Enrollment data	2.67	3.64	.97	Not covered at all training sessions

Day 2 Training

No. Respondents = 108	Average Pre-Training Ranking	Average Post-Training Ranking	Average Increase	Notes
Skill				
1. Creating & saving reports in Blue Ribbon	2.53	3.83	1.30	
2. Compiling/entering Group Enrollment data	2.95	3.89	.94	
3. Completing Year-end Statistical processing	2.71	3.76	1.05	
4. Exporting BR data/reports to other apps.	1.74	2.96	1.22	Not covered at all training sessions
5. Creating & saving reports in Report Writer	1.21	2.59	1.38	New addition to program; 90 = 1 (Pre)

Although I did not achieve a 1-point increase for all skills, I was still pleased by the increases shown. The most positive result was that the post-training rankings in nearly all areas showed that the average user ranking was over a 3. This shows that all users gained confidence in their ability to efficiently use the program. Significant progress was indicated in especially Day 1 Skill 4, which went from 67 pre-training "1" or "2" rankings to only 12 post-training "1" or "2" rankings. Similarly, Day 2 Skill 4 showed a drop in "1" rankings from 62 pre-training to 11 post-training. Day 2 Skill 5 dropped "1" rankings from 90 pre-training to 15 post-training. That is a special case, however. The Report Writer™ has never been an option in this program before, so there were no users who had seen it before October 1998. There was also very minimal company documentation, so all information presented was new information.

There may have been reasons that some rankings did not increase that I did not consider prior to training. Some users ranked themselves as a "5" before training, which did not allow any room for growth. In fact, one user noticed that, and ranked herself as a "6" after training, to show me that even though she thought she was an experienced user, she had still learned new skills. Some users who thought they were moderately experienced at the beginning of training learned how many more tasks were possible, and decided that they still had a lot to learn. It was not that they did not learn anything new; they learned that there was more available than they had known about, so re-ranked themselves as the

same or lower than pre-training. Some users left early from some of the trainings due to prior commitments or bad weather, so they did not raise their ranking in all skill areas. Not all skills were covered at all training sessions, depending on the interests of the participants; so those skills showed less growth.

The answers to the open ended prompts were of even more interest to me. I hoped that as I examined answers from the first training sessions, I could adapt and modify future trainings. I used the prompts "The best thing I learned today was...", "I liked...", "I wish we had..." and "Next time, I would change..." hoping to get specific feedback, both positive and negative. I had chosen the prompt, "I wish we had..." hoping to get ideas for additional topics that I had not covered. Instead, during the first two trainings, the most common answer was "mice". It seems that the laptops with their rollerball input devices were difficult for the participants to use, and they were becoming frustrated by their lack of efficiency. I went back to Extension Communications, and asked them to find 11 mice for me, which they were able to do. The most surprising result of that change was that it reduced the time necessary for the first day training by a half-hour. It also reminded me that there are many possible explanations for a user's lack of competence, not just an unfamiliar program.

The most common response on the open-ended prompts was that Member Query was a very valuable new skill to learn, and that the participants appreciated having computers furnished to do hands-on

training activities. Many commented that the pacing of the training was very comfortable, neither too fast or too slow. Another common positive comment was that the participants appreciated having manuals and training packets to take back to their offices with them. The only suggestion for improvement that was noted, other than the mice in the early trainings, was from some experienced users who felt that the training sessions should have been divided into sessions based on the experience of the user. Allowing participants to self-select their training sessions resulted in some beginners at Day 2 sessions who were not ready for the topics presented. I have to balance the specialized needs of the experienced users with the belief that there is some value in having beginners see the more advanced topics, even if they are not prepared to accomplish them yet.

There are two things that have been the most gratifying for me in completing this marathon training session. The first one is being able to provide a common knowledge base to such a large percentage of the county office personnel. I believe that if everyone has been provided with the same information, and all are collecting and managing data in the same way, our resulting statistical reports will be much more accurate. The second one is much more personally satisfying. I have established some positive collegial relationships with my clients across the state, and I have facilitated the forming of a network of support between the county offices and the state office. The tone of the conversations when I get help line telephone calls now is much warmer and more personal. Callers are

much more patient and willing to work through solutions together. They are also more likely to report that they have tried to solve their own problem before calling me, using the training manuals. Calls have now declined to an average of three or four calls per day, a very acceptable number. Users who post a question on our Blue Ribbon listserv often have four or five answers within an hour. Many start with, "I remember Becky said at training..." which is especially gratifying. I believe that many users are not only more confident in their own ability, but also more willing to take a leadership role in helping colleagues with less experience.

I also learned a great deal at these training sessions. I learned what conditions are in county offices, and how that affects the amount of time that users have to spend on the Blue Ribbon™ program. That affects my attitude toward help line calls. If a user has already spent 30 minutes trying to solve their own problem, that is 30 minutes they are not able to spend on another task. It is faster and more efficient for them to spend five minutes on the telephone with me, and move on to something else.

I learned what effect the uneven wage and compensation system has on staff turnover. I really did not have a clear picture before training just how many users had been hired since the last training was held. Most of them had received what we came to call the "Here you go" training—were shown the computer station where they were to work, and told, "Here you go." Many of these people had minimal basic computer skills when they were hired, to say nothing of specific database management skills, or an understanding of statistical reporting procedures. It was soon

apparent to me why the statistical reports I had received in the fall were so inconsistent. It was enlightening and humbling. I welcomed the opportunity to reach so many employees with consistent information. I have high hopes that our statistical report will be much more accurate in coming years.

I learned that there is a real feeling of being disconnected from the state office on the part of the county staff. There is also a feeling that state office staff do not understand the operations of county offices, nor do we care. The county office assistants are the lowest-paid employees in our 4-H organization. They often feel that they are not a valued part of our operation, even though they are the ones who realistically represent Iowa State University Extension for most clients who use their offices. They felt that they had no advocate at the state level, and I was able to become that advocate for them because of connections that I have through my position. We are seeing some results of my advocacy already, in planning state- and area-wide events to either include or target office assistants.

I learned exactly what "Here you go" training is, and how that affects the morale of newly-hired employees. They were frustrated by not being able to accomplish their job tasks. It was not a case of not wanting to do the job correctly, but instead of not having any idea how to do it. They also did not know who to call, or how to get help. Some were not subscribed to the Blue Ribbon listserv, so were not even receiving all the messages that I had been sending out, blithely assuming everyone was reading them. There was crucial information included in many of those

messages, and I never considered the fact that someone might not be receiving them.

From experienced users, I learned the large number of tasks for which they depended on the Blue Ribbon™ program. Some options that were available in the "old program" were not included in the Windows version, and I learned how that affected the tasks that counties were performing. I learned that some of the experienced users had spent a great deal of time thinking about how the program could be improved to expedite some of their tasks, or to produce more usable and reliable data for them. Those suggestions were compiled and sent to Martech, Inc. as a list of changes that we'd like to see in the next major upgrade.

I also learned who the skilled users were, and have been able to connect them with new people in neighboring counties, establishing a better networking system. There was a great deal of sharing that went on at our sessions, not all about the computer program. Many suggestions were shared, and I believe that most people went back to their county office with at least one new idea to try. This should result in them feeling better about their job, and more confident in their ability to manage it.

The implications from the training that I conducted this year have led me to change the training schedule from the way it was conducted in the past. Instead of having a Martech employee come in to explain program changes in the fall, I am going to host a statewide training event in Ames. The target group will be users who have been hired since this spring's training was conducted. The 4-H program year begins on Sept.

15, so fall is when all new members are entered into the database. It is very important that users begin the year correctly, as all other activities in the program depend on that beginning. I plan to have an afternoon training session, followed by a fully-funded overnight stay in Ames, and a second full day of training. This plan will relieve the financial stress that might cause some county directors to not send their employees, and will allow the new employees a chance to form the all-important networking. It will also free them from the stigma of feeling that they are holding others back because of their lack of knowledge.

In the early spring, I will again conduct training sessions around the state, but may not hold two-day sessions in all locations. I will survey my clients to determine the interest in basic training, and in more specific advanced training, and plan my schedule from the results. A concern has always been that combining new users with experienced users has been detrimental to both groups, so this plan should alleviate that.

In the summer, I will host an ICN session devoted entirely to the statistical reporting system. Since I am responsible for all the data management at the State Fair, I would not be able to spend more time at this, but it is a valuable topic for which training should be provided.

Summer is also an extremely busy time in county offices, with county fairs and other activities, so the training must be efficient for participants.

Interested users should be able to travel to a reasonably close site and participate in a half-day of training. Statistical reports are due to the state office on September 1, so this will be an appropriate time for training.

Other changes in my position as a result of this training will be less noticeable. They will include changed attitudes, more patience, and a heightened sensitivity to accurate, clear, and complete directions. I will not assume any prior knowledge on the part of my clients, as there is no guarantee that they have even basic computer skills. There is no purpose to tell a person where to install a downloaded file if they do not even have the ability to perform the download. I will also be spending more time going out to individual county offices to solve particularly difficult problems. I have learned that sometimes the problem isn't the user, but may instead be a faulty computer setup, which can not be determined during a telephone call. I hope to enlist some experienced personnel around the state to help with problems in counties at a great distance.

In summary, I believe that this project was both a personal and a professional success. I was able to effectively teach others to use the new program, formed personal and professional relationships, and gained a deeper understanding of the clients I am hired to serve. Not only have I helped my clients to be more confident and satisfied in their jobs, but I have also found that I am more confident in my ability to handle my job. That makes me a more valuable employee, and a better resource for the people who count on me for information, training, and support. As a result of hoping that clients would feel more connected to me, I have found that I feel more connected to them. I believe that I have initiated a mutually beneficial relationship with the county office personnel.

References

Brockett, R.G. & Hiemstra, R. (1991). Self-direction in adult learning: Perspectives on theory, research, and practice. Routledge, New York.

Brookfield, S. (1995). Adult learning: An overview [On-line]. Available: <http://nlu.nl.edu/ace/Resources/Documents/AdultLearning.html>.

Fajou, S. (1997). Computer anxiety [On-line]. Available: <http://www.edfac.usyd.edu.au/projects/comped/Fajou.html>.

Knowles, M. (1990). The adult learner: A neglected species (rev. ed.). Houston: Gulf Publishing.

Lowery, C.M. (1989). Supporting and facilitating self-directed learning (Digest No. 93). Baltimore, MD: Office of Educational Research and Improvement. (ERIC Document Reproduction Service No. ED 312-457)

Newby, T., Stepich, D., Lehman, J., & Russell, J. (1996). Instructional technology for teaching and learning: Designing instruction, integrating computers, and using media. Englewood Cliffs, NJ: Merrill.

Rogers, C.R. & Freiberg, H.J. (1994). Freedom to learn (3rd Ed.). Columbus, OH: Merrill/Macmillan.

Page 1

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that proper record-keeping is essential for the success of any business and for the protection of the interests of all parties involved. The document also highlights the need for transparency and accountability in all financial dealings.

The second part of the document provides a detailed overview of the company's financial performance over the past year. It includes a comprehensive analysis of the company's revenue, expenses, and profit margins. The document also discusses the company's financial position and the steps being taken to improve its financial health.

The third part of the document outlines the company's strategic goals and objectives for the coming year. It discusses the company's plans for expanding its market reach, increasing its production capacity, and improving its customer service. The document also identifies the key challenges the company faces and the strategies being implemented to address these challenges.

The fourth part of the document provides a summary of the company's financial performance and a forecast for the coming year. It includes a detailed breakdown of the company's revenue and expenses, and a discussion of the factors that will influence the company's financial performance in the future. The document also provides a list of recommendations for the company's management and board of directors.

Appendix A

Page 2

This appendix contains detailed financial data and supporting information. It includes a list of all transactions recorded during the reporting period, along with a breakdown of the company's assets and liabilities. The appendix also provides a detailed analysis of the company's cash flow and a summary of the company's financial ratios.

The appendix also includes a list of all the company's contracts and agreements, along with a summary of the terms and conditions of each contract. It also provides a detailed analysis of the company's tax situation and a summary of the company's tax liabilities.

The appendix also includes a list of all the company's patents and trademarks, along with a summary of the status of each patent and trademark. It also provides a detailed analysis of the company's intellectual property and a summary of the company's intellectual property strategy.

The appendix also includes a list of all the company's employees, along with a summary of the company's employee benefits and compensation structure. It also provides a detailed analysis of the company's human resources and a summary of the company's human resources strategy.

The Teacher:

<p>What do the students already know that will assist/hinder the learning of this task?</p>	<p>Previous users were familiar with the tasks to be accomplished by the program. Windows™ users were familiar with programs using that interface. All commands and tasks were accomplished differently in the new program, resulting in little connection between the two platforms. A negative attitude toward the flawed early versions was a hindrance.</p>
<p>What information should be included in the instructional materials or activities?</p>	<p>Information about new additions via upgrades that was not documented in the company manual. Tasks specific to the state of Iowa, not documented in the manual. Instruction for all activities and tasks that are performed by all users. Information about new options available for experienced users.</p>
<p>In what order should the learning activities be sequenced?</p>	<p>The list of tasks which had been compiled was arranged in somewhat chronological order, and grouped by type of task. Basic (all users) activities were grouped into a first day of training; advanced and optional activities were grouped into the second day.</p>
<p>What can be done to help students transfer their learning to similar situations?</p>	<p>In addition to the original plan of a training manual, activity packets were planned. Those packets contained specific scenarios necessitating various tasks, and the step-by-step instructions for completing those tasks. It was hoped those would be a resource as users returned to their offices and performed the activities on their own data.</p>

The Technology:

<p>How can instructional technology be utilized by students and/or the teacher to improve learner attention and topic motivation?</p>	<p>One way to increase motivation is to include hands-on activities rather than relying on lecturing. The students would be more actively involved if they had a computer to work on during training.</p>
<p>How can instructional technology improve the efficiency of student learning and/or teacher preparation?</p>	<p>It seemed not to be efficient to have students provide their own computers. There are logistical concerns, as well as the fact that not all computers are configured the same, so users might face different options in completing the same task. This increases distractions and off-task time.</p>
<p>In what ways can instructional technology effectively impact how a teacher designs and creates instructional materials?</p>	<p>I decided that one way to reduce distractions and keep on-task time higher was to have each user completing activities using the same dataset. The teacher could design the dataset to demonstrate various tasks and potential problem areas.</p>

Consideration Sheet #2: The Learner

<p>How can the learner tell if learning is occurring?</p> <p>Is the activity/training going the way the learner anticipated?</p> <p>Does the learner understand what he/she is doing?</p>	<p>These questions involve making the learners active participants in the learning process. One way to accomplish that is to ask for examples from the learner's office. Another question posed by the instructor might be whether the current activity is a task that is being or has been performed in the county office. All activities should include time for learners to ask questions, and for the instructor to ask whether there is a related topic or difficulty that should be included.</p>
---	---

The Teacher

<p>Relevant to this instructional task, which instructional materials already exist? Which materials will need some adaptation? Which materials need to be created?</p>	<p>A manual published by the software company was available to each county office. However, some changes had occurred in the software since the manual was printed, and there was scarce documentation for some tasks, especially with respect to beginning users. More in-depth manuals were needed, and a set of step-by-step activities for common tasks or for advanced user tasks.</p>
<p>Based on need and practicality, what approaches and media should I include for instruction?</p>	<p>The activity packets would be useful for accommodating oral and written language style learners, and for keeping learners together as they progressed through tasks. In the upgrade process, it was necessary to have the downloads pre-loaded on the machines since internet access would be available at all training sites. There was also not an overhead projection device available at all sites, so the activity packets contained many graphics of the screen that the learner would see during the activity.</p>
<p>During the learning process, how will my students' attention and motivation be maintained?</p>	<p>Using activities that were typical of county office tasks kept the training grounded in reality. Adding exercises that caused error messages not only were a teaching device, but also maintained attention. Breaks were scheduled after particularly long or difficult activities.</p>

The Technology

In what ways can technology facilitate students' learning experiences?

In what ways can technology be employed to increase teacher effectiveness and efficiency during the learning experience?

While attending a training presented by my predecessor, I observed that he spent a great deal of time going around to individual users simply because each activity was being completed on a different machine, and using different records as examples. I also observed that by entering "practice" records into the database, the users were required to remember to delete those records once they returned to their offices. Logistics of transporting desktop machines to the training were also a problem. These observations and discussions with users led to my decision to furnish laptop machines, all with identical setups and datasets.

Consideration Sheet #3: The Learner

Was the quality and quantity of learning at the level the learner needed?	Responses to evaluation instruments indicate that learners gained new knowledge, and were satisfied with both the content and the method of instruction.
What did the learner gain from this experience that could be used for different tasks?	Help line telephone calls have decreased, and indicate that users are trying more tasks independently before calling for support.

The Teacher

How can I determine if students have learned the material and to what degree it has been learned?	Constructed an evaluation instrument, and summarized results. Also monitor the Blue Ribbon™ listserv for questions that arise. Noted decline in help line usage.
In what ways can this instructional material and these activities be improved for repeated or adapted use?	Packets have been sent to support personnel in other states for use at their training. Most packets will be adapted for continuing use in future years. Basic Activities Packet will need little changing for new user training.
What types of remediation or enrichment activities may be necessary for some students?	Planning for future training includes special help both for beginners and for advanced users.

The Technology

How can technology be used to generate teacher and student feedback?	Continued and expanded utilization of the Blue Ribbon™ listserv for cooperative problem solving, continued use of the toll-free help line.
--	--

Appendix B

Blue Ribbon Basics Activity Packet

Updates: Activity 1: Install program update

Leader preparation:

Have update loaded on machine in "updates" file.

Learner activities:

Check to see that Blue Ribbon is not running.

Locate the update, given the directory path.

Launch the update.

Set correct directory path.

Complete installation by overwriting.

Activity 2: Install data file updates

Leader preparation:

Have update loaded on machine in "updates" file.

Learner activities:

Check to see that Blue Ribbon is not running.

Locate the update, given the directory path.

Launch the update.

Set correct directory path.

Complete installation by unzipping.

Customizing: Activity 3: Customizing the toolbar

Leader preparation:

Set the toolbar back to normal before each training session.

Learner activities:

Add/delete buttons

Move/regroup buttons

Change position of toolbar

Activity 4: Setting preferences

Leader preparation:

Remove integration preferences set by each group before the next training session.

Learner activities:

Set preferred integration status

Set backup notification time

Change colors.

Utilities: Activity 5: Make backup

Leader preparation:

MS Backup must be installed on machine.

Blank formatted floppy disk

Learner activities:

Create a valid backup on floppy disk

Use standard name protocol with date

Activity 6: Restore from backup

Leader preparation:

Same as Activity 5

Learner activities:

Restore data files from backup created in Activity 5.

Activity 7: Make disk copy of data folder

Leader preparation:

Floppy disk

Learner activities:

Create a copy of data folder on floppy, using Windows Explorer or drag & drop from desktop.

Entering Data: Activity 8: Changing data files

Leader preparation:

Replace data files before each training.

Learner activities:

Make lit piece required for specific project only.

Change price on a piece of lit (all projects).

Link existing lit piece to new project number.

Add county-level activity code.

Add county-level award codes.

Activity 9: Adding/editing clubs

Leader preparation:

Replace data files before each training.

Learner activities:

Add a new club—youth group

Add a new club—not a youth group unit

Change info for an existing club

Activity 10: Entering members/parents

Leader preparation:

Replace data files before each training, re-set Preferences|Default Member Entry to blank.

Learner activities:

Add new member with new parents.

Add new member with existing parents.

Add a new set of parents to an existing member.

Unlink a set of parents from an existing member.

Activity 11: Entering member club info

Leader preparation:

Replace data files before each training.

Learner activities:

Add a club link to a member record.

Change a member's primary club.

Activity 12: Advanced club operations

Leader preparation:

Replace data files before each training.

Learner activities:

Use Member Query to find members of a club.

Delete club membership.

Change primary club membership.

Add new club membership.

Delete old club.

Activity 13: Entering member project info

Leader preparation:

Replace data files before each training.

Learner activities:

Add/delete projects to member record.

Flag for literature ordering.

Flag as JrLead.

Activity 14: Entering member activity info

Leader preparation:

Replace data files before each training.

Learner activities:

Add/delete activities to member record.

Activity 15: Entering member award info

Leader preparation:

Replace data files before each training.

Learner activities:

Enter award codes for members/leaders

Find members by award code—PQA3 certified

Group Enrollments: Activity 16: Less than 6 Hours Reports

Leader preparation:

Make copies of S-6 and S-7 forms (blank), sample S-6 filled out, and S-7 to be filled out at training.

Learner activities:

Compile data from S-6 forms to correctly fill out S-7.

Identify which form should be sent to the state office.

Activity 17: Group Enrollment

Leader preparation:

Make copies of S-3 forms (blank) and sample S-3 filled out.

Learner activities:

Enter data from S-3 into Group Enrollments.

Balance all duplicated and non-duplicated totals.

Identify the difference between duplicated and non-duplicated youth totals.

Identify activities to be reported for ES-237, and those that are not reported.

Reports Activity Packet

Data Files: Activity 1: Printing Project, Award, Activity & Initiative Codes

Leader preparation:

Award Codes from first day training must be added to machines not used on first day.

Activity Codes A0001—Safe Snow Shoveling must be added on same machines (not used on first day).

Learner activities:

Print/Preview Data files, including project, awards, activities, and initiatives files.

View Data files to verify information entered in.

Activity 2: Printing Literature Codes

Leader preparation:

None.

Learner activities:

Print/Preview Literature lists sorted by code and by project.

Identify numerical coding system for literature.

Activity 3: Club Lists

Leader preparation:

None.

Learner activities:

Print/preview club lists sorted by club name and by club number

Identify numerical and T/F coding system for club options.

Member/Leader Lists: Activity 4: Printing a list of members

Leader preparation:

None.

Learner activities:

Print/Preview a list of members by Member Status.

View report to verify information entered in.

Activity 5: Printing Attendance Forms

Leader preparation:

None.

Learner activities:

Print/Preview Attendance lists of members, sorted by club

Determine usefulness of Attendance Reports.

Activity 6: Printing a grouped list of selected members

Leader preparation:

None.

Learner activities:

Print/Preview a list of members meeting specific criteria, grouped and sorted.

Parent Lists: Activity 7: Complete report of all parent units, by club

Leader preparation:

None.

Learner activities:

Print/Preview list of Parent units, grouped by Member Club ID.

Member/Leader by Club: Activity 8: Print a list of selected members, by club**Leader preparation:**

None.

Learner activities:

Print/Preview list of members, sorted by specific club codes, meeting additional criteria.

Project/Activity/Awards: Activity 9: Print lists of members by project, activity, or award**Leader preparation:**

PQA certified data must be entered from first day training.

Learner activities:

Print/Preview a list of all members identified with specific project, activity, or award codes.

Literature Reports: Activity 10: Printing literature orders for EDC**Leader preparation:**

Club 201 must be re-flagged to LitNeed.

Learner activities:

Print/Preview EDC literature orders.

Identify all necessary information to be included with each EDC order.

Re-flag club literature needs if orders are not printed correctly.

Activity 11: Printing end-of year summaries**Leader preparation:**

None.

Learner activities:

Print/Preview the end-of-year literature summary.

Identify process for reconciling literature bills, literature received, and county allotment.

Identify reports which must be submitted, and to which office.

Statistical Reports: Activity 12: Printing statistical information**Leader preparation:**

None.

Learner activities:

Identify report styles which best answer statistical questions.

Print/Preview reports to provide specific statistical data to stakeholders.

Identify possible reasons for needing statistical reports, and uses for the information which is printed.

Enrollment Forms: Activity 13: Printing enrollment forms for returning members**Leader preparation:**

Be sure member #40101 is Active, and is enrolled in projects.

Learner activities:

Print/Preview an enrollment form for a returning member, complete with projects.

Identify which standard statements on the forms are necessary in their county.

Activity 14: Printing blank enrollment forms**Leader preparation:**

Printed copies of blank enrollment forms included in packet.

Learner activities:

Print/Preview blank enrollment forms for new members.

Determine which form style is most appropriate for their county use.

Mailing Labels: Activity 15: Printing mailing labels for specific groups

Leader preparation:

None.

Learner activities:

- Print/Preview mailing labels for club leaders through two separate means.
- Identify the differences in results between Club Mailing Labels and Mailing Labels—Organizational Leaders.
- Print mailing labels which are appropriate for bulk mail rates.
- Print mailing labels for specific groups of members/leaders.
- Determine appropriate print parameters to use, given specific criteria.

Activity 16: Printing mailing labels through Member Query

Leader preparation:

None.

Learner activities:

- Filter records using two separate criteria in Member Query.
- Recognize that records must be selected in Query before any action can be performed.
- Print/Preview mailing labels for members identified through Member Query.

Statistical Activity Packet

Under 6 Hours: Activity 1: Compile data from sign-in sheets to S-6 forms

Leader preparation:

Have sample sign-in sheets filled out.

Include blank S-6 forms in packet.

Learner activities:

Interpret data from sign-in sheets to fill out S-6 forms.

Correctly enter sign-in data in S-6 form.

Activity 2: Compile data from S-6 to S-7 forms

Leader preparation:

Include blank S-7 forms in packet.

Learner activities:

Interpret data from S-6 forms to fill out S-7 forms.

Correctly enter data in S-7 form.

Identify which forms are to be submitted to state office.

Group Enrollment: Activity 3: Compile data from sign-in sheets to S-3 forms

Leader preparation:

Have sample sign-in sheets filled out.

Include blank S-3 forms in packet.

Learner activities:

Interpret data from sign-in sheets to fill out S-3 forms.

Correctly enter sign-in data in S-3 form.

Activity 4: Enter data from S-3 forms to Blue Ribbon

Leader preparation:

Remove group enrollment data from previous training (replace Data folder).

Learner activities:

Interpret data from S-3 forms to enter data in Blue Ribbon.

Balance duplicated and unduplicated totals in all categories.

Recognize the importance of good record-keeping habits in managing group enrollment data.

Activity 5: Compile volunteer data to S-2 forms

Leader preparation:

Have sample volunteer sign-in sheets filled out.

Include blanks S-2 forms in packet.

Learner activities:

Interpret data from volunteer sign-in sheets to fill out S-2 forms.

Correctly enter sing-in data in S-2 form.

Activity 6: Enter volunteer data from S-2 forms to Blue Ribbon

Leader preparation:

Remove volunteer enrollment data from previous training (replace Data folder).

Learner activities:

Interpret data from S-2 forms to enter data in Blue Ribbon.

Identify and define duplicated volunteer records.

Recognize the importance of good record-keeping habits in managing volunteer enrollment data.

Activity 7: Enter leadership training data into Blue Ribbon

Leader preparation:

Remove leadership training data from previous training (replace Data folder).

Learner activities:

- Correctly enter group numbers into S-4 forms.
- Interpret data from S-4 forms to enter data in Blue Ribbon.
- Correctly enter leadership training data into Blue Ribbon.

Prepare Statistical Reports: Activity 8: Print verification forms to locate missing data

Leader preparation:

Make sure that some records have missing/insufficient data (replace Data folder).

Learner activities:

- Print verification report.
- Proofread the verification report to locate missing data.
- Use Member records to add in missing data.
- Recognize the importance of complete and accurate statistical data.

Activity 9: Preview statistical reports

Leader preparation:

None.

Learner activities:

- Print/Preview statistical reports.
- Compare current year data with previous year data.
- Recognize inconsistencies in statistical numbers, and use problem solving skills to correct those.
- Recognize importance of complete and accurate statistical data.

Activity 10: Print final statistical reports

Leader preparation:

None.

Learner activities:

- Print/Preview final statistical reports.
- List the components of a complete statistical packet submitted to the state office.

Advanced Reports Activity Packet

Editing Reports: Activity 1: Edit a Blue Ribbon report in Microsoft Word

Leader preparation:

Microsoft Word must be loaded on machines.

Learner activities:

- Create a project report, and save as a text file.
- Edit a Microsoft Word document (using Find & Replace)
- Convert tabbed text to table format in Microsoft Word.

Importing Data: Activity 2: Exporting Blue Ribbon data to FileMaker Pro

Leader preparation:

- FileMaker 3 must be loaded on machines.
- 3 FileMaker databases: Member, Parent, and MPLink must be created & loaded on machines.

Learner activities:

- Export tables from Blue Ribbon.
- Understand the contents of Youth Enrollment tables, and the linking structure.
- Import data into FileMaker documents, using relationships and linked fields.

Report Writer: Activity 3: Creating a report using Report Wizard

Leader preparation:

None

Learner activities:

- Create a report using the Report Wizard.
- Make minor formatting changes to a report in Layout view.

Activity 4: Saving a report as .qr2, .qrp, and .txt

Leader preparation:

None

Learner activities:

- Save a Report writer document in three formats.
- Differentiate between the options available in each format.
- Identify the correct screen from which to save in each of the three formats.

Activity 5: Editing a report, using a query

Leader preparation:

None.

Learner activities:

- Identify main dataset for a report.
- Use SQL Wizard to define a query (filter) for a report.
- Change dataset link definitions for data fields in a report.

Activity 6: Creating a report using linked fields from multiple tables

Leader preparation:

Make sure Awardlist.qr2 is available for participants to copy if desired.

Learner activities:

- Add datasets to a report, and define linking relationships between the datasets.
- Add data fields to a report that was created in Report Wizard.
- Define data fields which belong to different datasets.

Adult and Youth Involvement



Appendix C

Appendix C

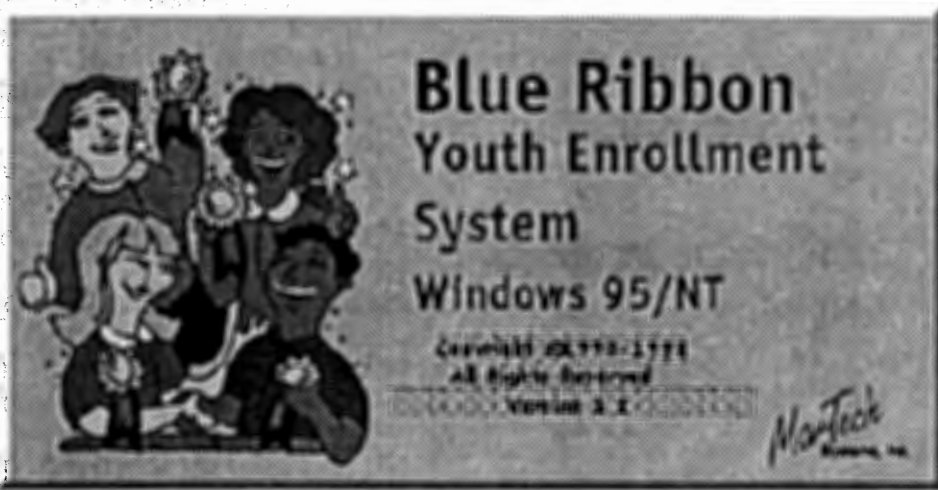
Appendix C

Appendix C

Appendix C

Appendix C

Blue Ribbon Youth Enrollment



Training Manual

Area Training February - March 1999

© *Becky Nibe, Systems Support Specialist*
Iowa State University Extension
State 4-H Office

DOWNLOADING & INSTALLING UPDATES	1
PROGRAM UPDATES	1
DATA FILE UPDATES	1
CUSTOMIZING BLUE RIBBON	3
CUSTOMIZING THE TOOLBAR	3
PREFERENCES	3
UTILITIES	4
BACKUPS, DISK COPIES	4
RESTORING FILES	5
RECREATING INDEXES	5
ENTERING DATA	6
ADDING/MODIFYING DATA FILES	6
ENTERING/RE-ENROLLING MEMBERS & LEADERS	7
PRODUCING REPORTS, ENROLLMENT FORMS, AND MAILING LABELS	10
PRINT DATA FILES	10
MEMBER/LEADER LISTS	10
PARENT LISTS	11
MEMBER/LEADER BY CLUB	11
PROJECT/ACTIVITY/AWARDS	11
LITERATURE REPORTS	12
STATISTICAL REPORTS	13
CERTIFICATION	14
ENROLLMENT FORMS	14
MAILING LABELS	15
STATISTICAL REPORTING	17
WHAT IS DATA USED FOR AT THE STATE LEVEL?	17
HOW CAN WE MAKE SURE DATA IS ACCURATE AND CONSISTENT?	18
HOW TO COMPILE YEAR-END STATISTICALS FOR SUBMISSION TO THE STATE OFFICE	20
MEMBER QUERY	21
FILTERING RECORDS	21
SELECTING RECORDS	21
APPLYING ACTIONS TO SELECTED RECORDS	22
ADVANCED REPORT OPTIONS	23
EDITING REPORTS IN MICROSOFT WORD	23
EXPORTING DATA TO OTHER APPLICATIONS	23
REPORT WRITER	24

DOWNLOADING & INSTALLING UPDATES

PROGRAM UPDATES

All updates are located on the State 4H website: http://www.exnet.iastate.edu/Pages/y4h/BR_yth/br98.html

Program updates change the way the program runs, fixes bugs, adds new features to the program. It does not change either the county data (members, parents, etc.) or the state data (literature, projects, etc.)

Read the information on the website or in Blue Ribbon e-mails marked "IMPT Update Info" to determine what changes there are in the newest update.

Updating is a two-step process:

Make sure that all users have exited from the Youth Enrollment program.

Download (save) the file from the web to a local disk—either the C:\Program Files\Youth Enrollment directory or to a floppy disk in the A: drive. The files have been compressed so that they will fit on one floppy disk. If you use Blue Ribbon on a network (your data files are on your G:\ drive), you should save the download on a floppy disk. If you only use the program on one machine, save the download to the C:\Program Files\Youth Enrollment directory.

After saving the file, it still needs to be installed. The files must be expanded and installed into the program. Double-click on the WYUpd(date).exe icon, and expand the files into the C:\Program Files\Youth Enrollment directory. Click Yes to all when asked to overwrite. This will change some of the program files, but will not change any data.

You will need to install (expand) the program update on every machine that is using Blue Ribbon if you are using the network setup with the Data stored on the G:\ drive. Failing to update every machine will cause unnecessary problems.

DATA FILE UPDATES

These are also located on the State 4H website: http://www.exnet.iastate.edu/Pages/y4h/BR_yth/br98.html

These are only data updates that reflect changes in the literature, projects, activities, and initiatives files. These changes may include new projects & activities, new literature for specific projects, new lit prices, and deleting/renaming projects and activities.

If you routinely make significant changes to the literature or activity files (marking literature as required, adding county-level activity codes), you may not wish to download those state data file updates. They will overwrite all your county-entered data, and you will need to go in and make those changes again.

If you do not download, you will still need to make changes to your data files so that they match what is being used by the rest of the state.

Consideration Sheet #1: The Learner

What is the learner supposed to learn?	Considering the knowledge that was mandatory for each user led to the development of a list of tasks that are completed by each user of the Blue Ribbon™ program.
What will learners need to learn this task?	Access to a resource person (the state support person) Written documentation for the tasks A computer on which to practice the various tasks under the supervision of the teacher.
How can learners motivate themselves and stay motivated?	The fiscal year had progressed since the introduction of the program, necessitating more and more use of the program. Users were finding themselves not prepared to use the program for many of the tasks associated with it. There was no existing knowledge base among other county office employees from which networking and problem-solving could be developed.
What obstacles or problems hinder learners from learning?	Computer phobia, general computer "illiteracy" Unfamiliarity with the purposes of the Blue Ribbon™ program. Negative perception of the program, due to the problems associated with the early versions and the numerous upgrades to fix serious problems: No foundation of trust or confidence in the new state support person's ability.
How should learners approach this task to effectively learn the content, maintain motivation, and overcome obstacles?	A positive attitude and open mind Reassurance that the training was valuable, accurate, and designed to accommodate their needs.

download the state data files:

Make sure that all users have exited the program.

You can choose to **download (save)** any of the four data files separately, or all four at once. Choose the option that is right for you, and click to download. Save the file to your DATA folder. (On an individual machine, the path is C:\Program Files\Youth Enrollment\Data. For a network user, the path may be G:\WinYouth\Data, or it may be G:\Data. Check your G: drive to see where your Data folder is stored.

After you have saved the download, you still must **install** it into the Data folder. Find the icon that is named "project.exe" or "literature.exe" or "Wyth.exe" and double-click on it. These are named something logical so that you can easily find them. You will be prompted to enter a path for the expansion. Enter the path for your Data folder.

Click Unzip. You should receive a message telling you how many files were unzipped successfully. Close out of the dialog box.

When you download and install new data files, it is probably a good idea to recreate indexes for those files. From within the Blue Ribbon program, choose Utility|File Utilities, highlight the files that need new indexes (Youth2c.db, Youth2g.db, Youth2j.db, and Youth2y.db) and choose File|Recreate indexes.

These updates do not change the way the program works. They do not come from Martech. They change what literature, etc. is listed in that data file. They are compiled at the State office.

If you do not choose to download the state files, you still must make your data files match the state version. See the section on "Modifying Data Files".

It is important to remember that if you want to ADD a project, activity, or additional link from literature to project, you must either use the ADD button, or the DUPLICATE button. If you simply make changes to one screen, then SAVE, you've only replaced the old information with new information. You have not added anything.

CUSTOMIZING BLUE RIBBON

CUSTOMIZING THE TOOLBAR

Perhaps there are buttons on the Blue Ribbon toolbar that you do not wish to have there, or there are others that you think would be useful. To change those buttons:

Either click on the "Tool" button on the Toolbar, or go to Utility|Speed Bar Setup.

Now your toolbar is in active edit mode, which means that you can add buttons from the list that appears, delete buttons by dragging them off the toolbar, or move and reorder buttons by clicking and dragging. For instance, I moved the EXIT button to the right side so that it was more like the old version.

You can change the location of your toolbar by clicking in an unused gray space, and dragging to the right edge of the screen. Then your toolbar is vertical along the right side. It can be located on any one of the four sides. Be aware that the right & left sides are shorter than the top & bottom, so if you have many buttons on your toolbar, they may not all show up when the toolbar is vertical.

PREFERENCES

Preferences can be used to save some time when entering members, re-enrollments, etc.

Go to Utility|Preferences and you should see a screen with several tabs at the top. The first screen is useful for setting default entries for member/leader entry. Use as many or as few as are useful to you. All choices can be changed on the regular screen, and preferences can be changed whenever you want. See **Enrolling/Re-enrolling Members & Leaders** for more information.

The second tab is useful for the group enrollment process. If you know that the majority of your groups will be non-integrated group, mixed community, set that here. Remember again that you can change these on the regular input screen, and that you can change preferences whenever you want without changing the data that has already been input.

The Backup tab defines the directory path for the backup utility program, usually C:\Program Files\Accessories\Backup.exe. If you do not have the Windows Backup utility installed on your machine, it will need to be installed in order for this to work. See **Backups, disk copies** below, and call Becky with questions.

The Notification tab allows you to change how often your computer "reminds" you about backups. Set it to something you can live with, and get in the GOOD habit of making frequent backups. The more recent your backup, the less re-entering will be necessary if problems occur.

The final tab is to allow you to make changes in the way the Blue Ribbon screens look on your computer. You can change the color scheme to cardinal & gold, to green, or to blue if you so desire. However, there are some users who will think that makes you certifiably insane. Or ready to take on my job. Maybe that's the same thing.

UTILITIES

BACKUPS, DISK COPIES

Backups are as important as ever. No program runs trouble-free forever, and no computer is guaranteed against crashes. Stuff happens. It's your responsibility to make sure that stuff doesn't cost you and your county office any more than minimal annoyance, at least in relation to Blue Ribbon.

To make a backup by choosing Utility|Backup data files:

Windows Backup actually exits you out of the Blue Ribbon program temporarily, and launches Windows Backup, which is a part of Windows 95/98. If you do not have Windows Backup installed on your computer, check the FAQ website for help with installing that.

Select the Data folder, and place a check in front of it. This will back up every data file and index. You should also check the BRWYNet.naf file and "uncheck" it. If you don't, you'll get an error message, but your backup will still work.

Be sure you put the backup somewhere you can find it, and somewhere it will be secure. You should have a backup on floppy disk stored off-site somewhere, and that should be updated whenever you think you don't want to have to re-enter everything again. I also keep a backup on the G: drive for a quick on-site Restore if my data should become corrupted.

Name the backup something logical that includes the date. For safety's sake, use no more than eight letters, just like the old DOS naming conventions. I name mine something like "BR1208.qic". The .qic is added automatically by the backup program. Remember that—it may make it easier to find the backup if you forget where you stored it when you are already hot & bothered because your data is bad and you are afraid you've lost all your members. You are not going to be happy about searching high and low for that backup file. You are going to be especially unhappy if you realize that the date on your backup file is 3 months ago. You're going to be downright sick if you don't get around to making a backup. We'll be looking at some serious overtime.

make a backup by copying the Data folder:

If Microsoft Backup just will not work on your machine, you still have to have some way of guaranteeing that you won't have to key in all that data again. The next-best scenario is just to copy your entire Data folder onto a floppy disk. Open windows on your computer until you see the Data folder. Insert a floppy disk in Drive A: and open that window. Now drag the entire Data folder from your computer's C: or G: drive to the A: drive window. You will see the familiar Windows "flying papers" graphic. Label the disk with the date the copy was made, and store it in a safe place.

If you need to restore, you can then overwrite the Data folder in the Youth Enrollment folder with the one on the floppy disk.

Operating without a backup is like typing a book without ever saving, driving cross-country without a spare tire, and bungee jumping without an extra cord attached. It may work fine for a while, but the consequences are pretty darn nasty if it doesn't work. And sooner or later, it won't work. Back up your data!

RESTORING FILES

There are going to be times that, through no fault of anyone's, your data files will become corrupted. There's a possibility of this happening if you have a power problem while you have Blue Ribbon open and running, or if your computer freezes up while the program is open. Sometimes there's no good reason that normal human beings can figure out—things just happen. There's also a possibility of hardware damage—the CEED dropped your computer on the sale ring floor, the hard drive crashed, the building burned down. If you've backed up your files, you're going to be up and running in no time. You can always re-install the program—we have extra CD's at the state office if yours is damaged. The data files are the key issue. Having the program re-installed, but all members, leaders, parents, groups, clubs, etc. gone is going to be a big problem—lots of overtime and lots of headaches.

If you use the Backup utility to create backups of your data, you'll start restoring data with the Utilities|Backup/Restore data files command. The same introductory "warning" screens will appear here as they did when you used Backup. When you've got the split "Microsoft Backup" screen, click on the Restore tab. If your backup is stored on a floppy disk, be sure the disk is in your A: drive and highlight the A: drive icon in the left screen. Highlight the backup file name in the right screen, and go on to the next step. The next screen is not very straight-forward, as it appears that you would be backing up from a C: or G: drive, but if you keep opening files in the left window, you will soon find a Data folder. Place a check mark in the empty box beside Data. All data files will appear in the right window. When you Start Restore, the program will automatically restore all files to their original location, without you specifying that.

If you make copies of your Data folder, you will copy the Data folder that is on the floppy disk to either the C:\Program Files\Youth Enrollment folder, or to the G:\WinYouth folder. Open two viewing windows—one for the A: drive, and one for the drive where your data is (was) located. Click and drag the Data folder from the A: drive window to the new location. "Yes to all" for overwriting any existing files.

➤Both of these operations will re-set your data files to whatever information they contained when you did that last backup. Do backups as often as you think you wouldn't want to re-enter everything you've just done. This might be every day during busy times like enrollment, and once a month during less active times.

RECREATING INDEXES

Recreating indexes is somewhat similar to the old rebuilding process. It can solve some problems with indexes.

Try this first if you are having some quirky problems related to data, or getting index errors.

Go to Utility|File Utilities. Highlight the data file(s) that seem to be the problem, or choose Select|Select All. See the list of File ID's to identify the various files. Choose File|Recreate indexes. You will get a message stating how many indexes were recreated.

ENTERING DATA

ADDING/MODIFYING DATA FILES

Modifying project, activity, & literature data files

The project, activity, literature and initiative files are created at the state level to reflect projects and activities that will be tracked for the ES-237, the literature available for those projects, and the Federal and State initiative codes that are related to each project and activity. However, some counties make changes to these files. The most common changes are to require specific literature for some projects, and to add additional activity codes for county-level activities that do not fit under one of the state defined activities.

At the beginning of each 4H year, new data files are available from the state office to download that reflect projects and activities that have been added or dropped, literature that is new or no longer available, price changes on literature, and new Federal initiative codes. Counties **must** make changes to their files to reflect these changes, and may choose to do so in either of two ways: download the state data files (see section on **Downloads**), or make changes to their own data files. Even counties who download may find themselves needing to change data files at some point during the 4H year.

The first thing to do when you are changing your files to match the state files is to compare the two, and look for differences. Go to http://www.exnet.iastate.edu/Pages/y4h/BR_yth/br98.html and select a data file to View on Screen. Print out this data file, and mark it "State" if you think you'll become confused about which is which. Now go into Blue Ribbon and choose Report|Print data files. Select the same data file that you just printed out from the web. Print it out, and mark it "County".

Go through the two lists and find discrepancies between the two, and mark on the "County" copy exactly what needs changed.

In Blue Ribbon, choose File|Project Codes (for instance). Click Find to find the project that needs changed. In order to use the Find capability, you must type in the literature code exactly, with the hyphen in the right place, etc. Capital/small letters are not important, however. Make any changes to the project, and click Save. If you are adding a project instead of altering, you would click on Add, then enter the correct information and click Save. If a project has been dropped, click Delete.

The literature file requires a little more thought, because some pieces of literature are linked to more than one project. Each "link" is a separate record, not each piece of literature. So for a piece of literature that is required for all three levels of both breeding and market beef, there are 6 records, each one showing the literature code, name, cost, and "required", but each one linked to a different project code. Each one of those 6 records would have to be changed if the price of the literature was changed, or your literature bills are not going to balance.

It is important to know that if you merely change the project code for a piece of literature, the previous project code is now gone (unlinked) and you have just replaced it with the new one. If you want to link a specific piece of literature to an additional project, you must either choose Duplicate, make changes and Save; or choose Add, enter information and Save.

You have total control over whether a piece of literature is ordered for a specific member enrolled in a specific project. By going to the screen that links the literature to the project, you can mark it as either required or not. So, you could make it required for Breeding Beef Level 1, but not for Level 2 or 3.

Downloads from the state office will show no literature required. Literature orders would be generated from the Member/Project screen, by checking LitNeed.

Adding Award codes

Award codes are not generated at the state level; each county is free to name and code any awards that are a part of their programming. Award codes may be any combination of letters and numbers, but it would be good to decide on a standard convention when beginning. I would suggest using the leading letters M and L to differentiate between Member awards and Leader awards. However, you could also use J,I,S, and L for Junior, Intermediate, Senior, and Leader. As you look at the awards that are presented in your county, you should be able to group them into some classification system. You can then add your award codes by choosing File|Award Codes, clicking Add, and entering information.

Why would you go to the trouble of adding award codes if they're not required for state processing? It could make the program more valuable in tracking members' careers, and in designating leader awards (5-year, 10-year, etc.) If you can go to a leader's record, click on the awards tab, and see that he/she received the 5-year award in 1994, it's pretty easy to see that they're due for the 10-year award in 1999. Of course, that's assuming they're not wearing those pretty white jackets with L-O-N-G sleeves in the lovely rooms with soft squishy walls. Same scenario for members—has Johnny won the Beef award yet? Look it up—if you enter this data, it'll be right there.

A slightly different use for the Award codes function would be to set a code for specific training—my thought is PQA3 for swine project members. As they meet that certification, enter it into their member record, Award tab. Then you have a quick way to check on the status of any member. You can also use Member Query to find all those members with the certification, since they would have this award code in common. Information "in common" is the basis for all Member Query activities.

Adding clubs

Click on the Clubs button if it is on your toolbar. If it is not, go to File|Club Codes. The leaders listed on each Club screen are the ones who will receive the mailings that are generated as "one per club". At the present time, there is no way to specify two individuals to receive the mailings for one club.

You can modify club information by simply clicking in the field to be changed and typing in new information. Click save when all changes have been made.

Click Add to add a new club. The club number must be a unique 3-digit number. The information that you enter for the organizational leader of the club will be used if you print "Club Mailing Labels". At the present time, you can only enter one primary contact for each club.

Be sure to select a delivery mode for each club. If none of the listed delivery modes fits the club, select "Not a youth group unit". Those will not be counted in the ES-237 statistical reports. These would include your County Extension Council, or the local FFA club, for instance.

If the club is located in an ethnically or racially mixed community, or if the primary community that the club serves is mixed, enter a check for Yes. If the membership of the club itself is integrated, enter a check mark for Yes. The Date Organized field is optional.

When you are finished adding/editing information, click Save.

ENTERING/RE-ENROLLING MEMBERS & LEADERS

Setting preferences

Preferences can be used to help speed the data entry process. By setting your own "defaults" here, you can avoid having to key every field in. Any preferences that are set can always be typed over and changed in the normal entry screen. Choose Utility|Preferences. The first tab is "Default Member Entry". When you begin to re-enroll your members, or enter new members, you can come to this screen to define which fields you would like to have "automatically" fill in. Remember, this is not permanent. You can always overwrite your preferences settings on the member entry screen, and you can always come back here and change the preferences.

you have a stack of enrollments in front of you, and they are for Club 121 "Lucky Lassies" from Podunk, you would come to the Preferences screen and set the following preferences: County, Club, City, State, Zip, Participation Codes, Category, Residence, Ethnic, Status, School and Gender. These fields may not be correct for every member you enter, but they should be for the majority of them. The others can be changed as you enter them. This can save you a significant amount of typing.

By planning ahead as you begin the enrollment process, you may be able to "group" your enrollments to take advantage of the time saving features of the Default Member Entry screen.

Take a look at the Member Code—Automatic Entry option. Many of you have gotten in the habit of beginning the 5-digit member code with the three digits that represent that member's primary club code. That may have been a good thing in the old program, and may even have been necessary for some purposes. However, in the new program it is not only unnecessary, but also may cost you more time and effort than it is worth.

Think of that Member Code as similar to your social security number. If the government changed your social security number every time you changed your address, things would be even more of a mess. But then again, we probably wouldn't have to worry about the social security fund running out of money, because nobody would be letting any!

The member code does not have to match the parent code (in fact, if there are two children, one of them is not going to be able to match), the club code, a sibling's code, etc. etc. All it has to be is a unique five digit number. The program just reads this number as an identification code that allows it to link up that code number with others—projects, parents, etc. I would strongly encourage you to start using a random numbering system. To do that, check in the Automatic entry box, and set the beginning number to a number higher than you are currently using in your numbering system.

If you are going to stay with your numbering system that links member number to club code, you need to be aware that changing a member code is not as simple as typing in a new 5-digit number. When you change the member number, all the information about that member "goes away". There are no longer any links to parents, clubs, projects, awards, activities, etc. You have to start all over, just like he was a new member. This is pretty time-consuming, especially for an older member, and may result in inaccuracies.

Entering/Editing members & leaders

All of a member or leader's information can be accessed by choosing File|Member/Leader Files, or by clicking on the "Member" button. At the bottom of the screen, you will see a tab-defined information area. The tabs are Member/Parent, Clubs, Projects, Activities, Awards, and Certification.

Adding/linking parents

Adding and linking parents is a pretty straight-forward activity if you remember that you always start from the Member screen of the member to whom you wish to link parents. You cannot just enter the Parent File from any Member screen and directly edit any parent in there. Well, you can, but you'll end up with them linked to the wrong kid.

So, starting on the Member screen of the member who needs linked to a parent, click on the Parent File button. If the parent already has a record, you would now click Find (you may have to click Cancel first). Enter identifying information to find the parent record, and when you have it on screen, make any changes that you need to address, phone, etc. Click Save, then Link. The parent is now linked back to the member whose screen you started on. If there are no changes needed to the parent file, you won't have the option to Save, just click Link.

If this is a new parent, you would click Get. This brings over the address information from the member's record. Add the rest of the information about the parent, then click Save, then Link. On the Parent File screen, all children who are associated with that parent are listed. Likewise, on the Member screen, Parent/Family tab, all parent units associated with that particular member are listed.

Unlinking/deleting parents

First, you must understand that deleting a member does not delete the parent file. We wouldn't want it to, in case other members are linked to that same parent. However, if this is the only child of this set of parents, and the child is deleted, there is no need to keep those parents in the file. They can also be deleted from the Parent File screen, or all unlinked parents can be deleted at one time by using the Utility|File Utilities|Utility|Delete unlinked parents menu options.

If you want to unlink a parent record from a member record, start at the Member screen, Parent/Family tab. Click once on the parent to be unlinked, then click on the Remove Parent button at the bottom of the screen. You cannot unlink parents from the Parent File, only from the Member screen.

Adding clubs to a member record

From the Member/Leader screen, click on the Clubs tab. At the bottom of that screen are the Add Club and Remove Club buttons. Use the Add Club button to access a list of your county clubs. Choose the one you want to add, and decide whether to add it as a Primary Club, or just Add Club for a secondary or additional club. If you choose Primary Club, the Club number portion of the member's ID number will change to reflect that club. A member can only have one Primary Club identification, so each one will overwrite whatever was designated previously as the primary club.

Adding/deleting projects on a member record

From the Member/Leader screen, click on the Projects tab. To add a project, click in the cell in the column labeled "Project" and a list of all available project codes should pop up (or down). Scroll down to the one you want, or type in the numbers. The description field will automatically fill if you have entered a valid project number. If the member will need literature for this project, and the literature is Not Required in the lit file, double-click on the LitNeed box. Required literature and LitNeed work together in the following ways:

- ◆ If literature is marked "required", the member will get literature whether you click LitNeed or not.
- ◆ If literature is marked "not required", the member will ONLY get the literature if you click LitNeed.

There are two ways to add a second project when you're finished with the first one: for "mouse" users, use your RIGHT mouse button and click on any area of the project already entered. Choose Add Project from the menu that pops up, and you will get a new blank line to enter project data. "Keyboard" users can use the "down arrow" button on the keyboard to get a new blank line.

Deleting a project is easiest done with the RIGHT mouse click—when the cursor is over the project to be deleted. Choose Delete Project from the pop-up menu.

Adding activities & awards to a member record

Adding activities is done the same way as projects, but there is not so much information that needs entered—no literature, etc. You simply choose the activity from the pop-up menu, and the year in which the activity occurred. Use the year in which the statisticals will be filed—the second year of the two-year naming convention. For the program year which began in 1998 and ended in 1999, you would enter 1999.

Awards are exactly the same as activities, except that there are no Award Codes in the program unless they are entered at the county level. These are not compiled, suggested, or anything else at a state level. So before you can add awards to a member record, you must first enter Award Codes. See *Adding/Modifying Data Files* for more information on how to do that.

PRODUCING REPORTS, ENROLLMENT FORMS, AND MAILING LABELS

Throughout the year, you may be asked to produce various types of reports. There are reports which give valuable information to the CEED, YFS, 4-H Program Assistant, county council, state office, and EDC. The Blue Ribbon program gives you a great deal of control and flexibility with regards to the format of your report, and the members included in the report. Below is a brief description of each report that can be generated, in roughly the same order that the options appear on the Report menu:

PRINT DATA FILES

This option is used primarily for checking your projects, activities, initiatives, awards, and literature codes to make sure that they are accurate. It is extremely important that your initiatives, projects, and activities match the state codes, because otherwise the statisticals at the end of the year will not compile correctly. If your literature file does not match the state version, you may order discontinued literature, or may have incorrect prices. It's a good idea to have a print version of these data files in your Blue Ribbon handbook for easy reference.

MEMBER/LEADER LISTS

This is probably the option that will be used the most often. Your options for customizing information on this output screen are many:

Category, Record Status: You may check as many categories as you wish in these columns. You could use Member, Inactive to get a quick list of members who have not re-enrolled to use as a double-check to make sure you have not overlooked anyone.

Report Type: The "Complete" option will print information for all the records which match the Category and Record Status criteria that you defined. Other options in this pull-down menu allow you to further define criteria for inclusion in the report. You can print for specific grades, ages, school, year in 4-H, gender, ethnic, zip code (a sneaky way to print only one town), county (not applicable at the county level), and club.

Report Style: These options define how the report will look when printed—what information about each member will be included.

- ◆ One Line: Name, Member ID, Primary Club membership
- ◆ Telephone list: Name, Member ID, Phone number (both if two are listed)
- ◆ Name/Address: Name, Address, Member ID, Category, Age, Yr. in 4-H, Grade, Primary Club, Phone(s)
- ◆ Parent Info Line: All the information from Name/Address, and Parent 1 Name.
- ◆ Complete Report: All information about the member, including projects. Social security number is not included, due to privacy concerns in some states. At the present time, the parent name prints with an unnecessary comma—Becky, Nibe—but that is on the "fix list".
- ◆ Complete Individual: Is designed to print a Complete Report for one kid only. Do not use this with any Report Type except "Complete".
- ◆ Attendance Report: This prints blank attendance forms for the members specified. Used with "Report Type = Club Code", will print attendance records for all members of a club, which could be useful for the club leader or secretary for record-keeping.

Sort Order: You can choose to have your members listed in order alphabetically or in order by Member ID.

Grouping: "Break in Subgroups" is only valid if you have chosen a Report Type other than Complete. If you have chosen Grade, for instance, and indicated grades 9-12, the report will print with 9th graders grouped, followed by 10th graders, etc. Each subgroup will be ordered by Sort Order chosen. "Print for Range" prints all members selected, again in Sort Order chosen, with no subgroups identified.

Additional Options: At the bottom of the screen, you can choose to print your complete (Report Style, not Report Type) reports one per page, which would be a useful report to give to club leaders. Each of their members would have a separate page, listing all information, projects, etc. If you chose the "Break in Subgroups" option, you can print each subgroup on a separate page by checking the second option here. In the example above, 9th graders would print on page 1, 10th on page 2, etc. "Print Ethnic Statistics" will include a one-line summary at the bottom of each report, tallying the members printed by ethnic code.

PARENT LISTS

You have somewhat limited options here, but you can still print the most commonly used types of parent reports.

Report Style:

- ◆ One Line Report: Prints Parent Name, Phone(s), Parent Type
- ◆ Name/Address: Name, Address, Phone(s), Rec. Mail, Parent Type, Guardian
- ◆ Family: Same info as Name/Address; also lists all members linked to parent record.

Sort Order: You can again choose to have the records sorted alphabetically or by ID.

Grouping: Complete—all parents in your database. Club Range—select parents for particular club(s) only. County Range—not used at the county level.

Page Break Club Report: Used with Grouping—Club Range only. Prints reports for each club on a separate sheet of paper.

MEMBER/LEADER BY CLUB

At first glance, this would seem to be the same as Member/Leader. However, this option automatically sorts and groups the members you request by Club ID, then allows you to make a further selection in Report Type. Each time you print a report in this mode, you will be prompted for beginning and ending club code, and then for the range of the criteria that you selected in Report Type.

The Report Parameters screen is identical to the one you saw when printing Member/Leader Reports. The outcomes are slightly different, however.

Report Type: Complete—prints a list of all members of the club(s) you specify. They will be grouped by club membership, sorted alphabetically or by ID within those clubs.

Grade, etc.—prints a list of all members who fit those criteria (for example, grades 9-12), sorted and separated by club membership, then alphabetically or numerically within the clubs.

Grouping: If you choose Break by Subgroups, each club is listed separately, and within that club, criteria are sorted. So, clubs 200-300, grades 9-12, would yield a report that listed all members of Club 200 separately by grade level, followed by Club 201 separated by grade level, etc. Print for Range would result in the clubs being listed separately, but all 9-12th graders listed together, either alphabetically or numerically sorted.

PROJECT/ACTIVITY/AWARDS

This is the option to choose if you need a list of all members enrolled in a specific project or activity, or who have received a specific award. The Report Parameters options are similar to ones on other screens.

Category: Again, you can select as many options here as you wish.

Report Type: This allows for a secondary sort within each project, activity, or award code. It is a similar situation to the Member/Leader by Club option. Members are going to be sorted by project first, then can be further identified by the criteria listed under Report Type. For instance, you could generate a report of all 9th graders enrolled in Market Beef, Level 3.

Report Style: The options here are slightly different than on other report screens.

- ◆ **Break by Codes**—Members will be summarized and listed by the project code(s) you define, then by the Report Type criteria.
- ◆ **Break by Club**—Members will be summarized and listed by Club code(s), then by Project(s), then further by Report Type criteria.
- ◆ **Range/Print Once**—Members are printed alphabetically (or numerically), identified and grouped by the criteria selected in Report Type. This can yield pretty unexpected results, and probably should only be chosen with Report Type = Complete.
- ◆ **Condensed/Codes**—This option overrides and eliminates selections of Report Format. Members are again printed alphabetically (or numerically), identified and separated by Report Type criteria. Information included in the report is Member ID, Name, Address, Phone(s), Parent 1 Name, Age, Yr 4H, Birthdate, Gender, Grade, Category, Project Code(s) & Description(s). This can also produce some unexpected results, and should probably also be used with Report Type = Complete.

LITERATURE REPORTS

This option is used to order materials from EDC, and to check your bills at the end of the program year. EDC needs specific forms to be able to fill your orders, and they need to be in a format that allows them to do this in the most efficient means. The first thing to remember is that the only literature that is going to be ordered is literature that is marked as "LitNeed" on a Member/Leader screen, or literature that is marked as "Required" in the project Literature data file. The next thing you need to keep in mind is that after you have either printed OR reviewed a lit report, all literature is changed to "LitOrd", which means it will not show up on any subsequent reports. This means that if you preview, then cancel, you still have all your literature marked as having been ordered. The options on the Report Parameters screen are few, but important, depending on what you are printing or submission:

Report Type: These are the four options for reports or tasks that can be carried out through this process.

- ◆ **Primary Club:** This is the report that you will print out for submission to EDC. ****Note: It MUST be sorted by Literature Code in the box at the right.** It will print in two separate parts: "Literature Needs—Primary Club", and "Literature Summary". The first one, "Literature Needs—Primary Club" is sent (one copy only) to the EDC, with a mailing label for the leader of that specific club. THREE or FOUR copies of the "Literature Summary" are also included in that mailing to the EDC. One is for the leader, one for the EDC, one for Sue Bogue, and one returned to the county. You probably want to keep one copy of each at your county office also.
- ◆ **Reflag Primary Club:** If you have printed OR previewed a club's literature needs, then need to reprint, you must reflag the club first. Otherwise, you will get an error message: "No data with those parameters" which is a fancy computer-ese way to say "Nobody in that club is marked as LitNeed". *The problem with reflagging comes when you submit partial orders for a club. If you have a successful order for some of the members, then new ones come in, and that order is not successful, reflagging on this screen will reflag everyone—ones who have received literature and the new ones who haven't. In this case, the only way to fix this is to manually go into the Member record of each one of the new ones, and mark them as LitNeed.*
- ◆ **Club Literature Summary:** This option prints ONLY the second section of the Primary Club option—"Literature Summary". The difference, however, is that it prints out the literature that either is needed or has already been ordered. In other words, it makes no difference if it is reflagged or not. Both "LitOrd" and "LitNeed" are summarized on this report.

- ◆ **County Literature Summary:** This report lists all the literature that has been ordered for your county throughout the year. *It is printed in May, and mailed to Sue Bogue.* If you have specific changes that need to be made to this summary, you will write them in by hand (typically, you will have discussed these with Sue—materials no longer available, incorrect prices, etc.) After Sue receives this, she will make changes based on back orders that did not ever arrive, then will forward information about your account, and your available literature credits, to EDC. They will then forward to the business office a credit and a bill. You will pay only the amount of your literature orders that exceed the literature credit allotment for your county.

➤If you have questions or difficulties with the literature ordering process, please call either Sue Bogue (515-294-1533) or me (800-689-6589) and we will be happy to help you work through this. We know it is sometimes confusing, at least in the beginning.

STATISTICAL REPORTS

These are summary reports of the kind of information that you may wish to have for statistical purposes. Individual member data is not printed, only compiled numbers within specific categories. Knowing how to set your Report Parameters will allow you to print a report with the information that you need.

Record Type is your first choice, and defines which members will be tallied with in the categories that you select below. Each of the different types brings up different options in the bottom part of the screen.

Member/Leader is the default choice, and will print statistics for all members entered in your database. The options that you have beyond that are:

- ◆ **Category**—select as many as you wish in this column.
- ◆ **Sort Order**—the first one listed will be categories listed along the left side of the screen. Within those categories, each line will be divided by the second category listed. For example, the top one, "Residence/Gender" yields a 5-line report with a line for Farm, split by M/F, then a line for Rural, split by M/F, etc. There is a M/F breakdown on each line for Members, Adult Leaders, and Special. If you do not check Leaders or Special in the Category column, those will just show zeroes.

➤An easy way to think of this Sort Order is to think that the first category defines the ROWS of the report, and the second category defines the COLUMNS of the report.

Member/Leader Projects allows you to print statistical information for members, leaders etc. enrolled in specific projects. The Category options remain the same, and you can choose as many as you wish.

- ◆ **Sort Order**—The project numbers will automatically become the "first" sort, defining the rows of the report, and the one that you select in this column will become the "second" sort, defining the columns that are reported in each row. "Status %" is a little obtuse, but could provide interesting information. What it does is break the numbers down by "new" and "return" and report what percent of enrolled members are "returns". That might be an interesting way to see if you are attracting new members to this project, or whether you are keeping members enrolled as they return.

Member/Leader Activities is the same sort of report as the Projects, but it summarizes participants by activity codes, rather than by project codes.

➤The only thing that seems a little "clunky" at this point is that the range of projects and activities that you choose has to be consecutive. You can't print a report with projects 1011, 1051, 1071, and 1411 (Level 1 livestock projects), for example. It has to be from 1011 to 1411 and includes all projects in between.

Member/Leader Club is again the same sort of report, with the same sort of options. The "# Family Units" at the bottom of the Sort Order column does not work at the present time (at least, it doesn't for me!)

Youth Group brings up a whole new set of options.

- ◆ **Type**—You can choose to print statistical information for only Youth Groups (group enrollment data) or for Group/Member Combined (group enrollment data, and traditional member data).
- ◆ **Sort Order**—This is the primary sort, which defines the rows of data. You can choose Project Code, Activity Code, or Club Code. Again, you will be prompted to enter a range of consecutive codes.
- ◆ **Report Type**—These are the secondary sorts, defining the columns included in each row. If "Gender" is selected, the M/F will be further broken down by Delivery Mode (organized club, special interest, etc.) "Ethnic" is further broken down into Dupes/Non-dupes. "Residence" and "Grade" have no further sub-divisions on each line.
- ◆ **Style**—Detail Report lists each Project, Activity, or Club on a separate line. Summary Report lists only the total numbers for all the projects, activities, or clubs within the range you specified on one line.

CERTIFICATION

These reports are a way for you to quickly list and print mailing labels for leaders who have/have not been trained and certified. If you click Category=Trained, and Status=Yes, you will get a list of all trained leaders. Category=Certified and Status=No, generates a list of all leaders who have not been entered as certified in your records. Some counties do not use Blue Ribbon to track certification data, and it is not required on statistical processing. However, if you do, this is an easy way to double-check certifications, and print mailing labels to send out to specific categories of leaders.

ENROLLMENT FORMS

The key thing to remember about enrollment forms is that they will be printed for New, Return, and Inactive members, but will "Print with Projects" only for Projects that are currently marked "Active" on the Member's screen.

If you complete Year-end Processing before you print enrollment forms, you will not be able to "Print with Projects", since all projects will have been set back to Inactive. At that point, you will either have to print the enrollment forms without the projects listed, or Restore from your last data backup from before you did Year-end Processing, then print enrollment forms, then do your Year-end Processing over again.

Sort Order:

- ◆ **Complete/Alpha**—Prints enrollment forms for all members from your county, in alphabetical order.
- ◆ **Primary Club Code**—Select the club code(s) for the clubs whose enrollment forms you wish to print. Sorts alphabetically within club codes.
- ◆ **All Club Codes**—Also prints enrollment forms for members of a club, even if it is not their primary club. Same sort as Primary Club Code. Does not print duplicates. If you ask for a range of clubs from 200-210, and Johnny's primary club is 200, but he also belongs to 205, only one enrollment form will print for him.
- ◆ **Individual**—Print an enrollment form for only one specific member.
- ◆ **Blank Forms**—Prints blank enrollment forms for new members to fill out. Includes a second page for county office use, listing Parent data.
- ◆ **Alt. 1 Page Blank**—Prints only the first page of a blank enrollment form (no parent data page).

MAILING LABELS

Under the Special menu, you have two choices for mailing labels: Club Mailing Labels, and Mailing Labels.

Club Mailing Labels is a quick way to print labels for your general/organizational leaders. You can print for all identified clubs, all youth club types ("Not a Youth Group Unit" will not print), and only those clubs that are identified as Not a Youth Group Unit. Your other options are type of label used, and whether or not to print bar codes. Clicking on the "Setup" button allows you to change font, size, and margins. Be careful changing margins, and always preview or print on plain paper before using the real labels!

Mailing Labels gives you a great deal of flexibility over which members/families will have mailing labels printed. You can select a specific group of members by correctly choosing from the multitude of options available on the Report Parameters screen:

Category: Choose as many as you wish on this list.

Group By: You can only choose one option in this list. This is a place to make an additional "sort" on your data.

- ◆ **Complete**—all members which fit the criteria defined in Category, Record Status, Record Type, and Range.
- ◆ **Grade/Age/Year in 4-H**—Before printing, you will be asked for a range of grades, ages, years. Labels will be printed in the order defined in Sort By, not by the criteria here.
- ◆ **Ethnic Code**—A prompt screen will ask you to select only one ethnic code for printing.
- ◆ **Proj/Act by Year**—Designed to be used with Activities & Projects options under Record Type, can identify only first-year project members, or your 8th-9th year project members. This will only work if you have kept that data current in the member records.
- ◆ **Zip Code**—Prints mailing labels for only specific zip codes, which is way to print labels for members who live in one community.

Record Status: Choose as many as you wish on this list.

Sort By: Your labels can be printed either in order by zip code, or alphabetically by the member's name. For large mailings, zip code is going to be best for bundling mailings to take to the post office.

Record Type: You can only choose one option in this list. This is another place to make an additional "sort" on your data.

- ◆ **Member/Leader**—prints labels for all members identified in Category, Group By, Record Status, and Range.
- ◆ **Project Range/Select Projects**—Project Range allows you to enter projects on a "from...to" basis, including all projects in between. Select Projects is a pretty cool option (that should be included on other reports) that allows you to select as many project numbers as you want, and that can be non-consecutive. On the left side of the Select screen that opens, simply double-click on whichever project number(s) you want, and they will move to the right side, which lists the projects that have been selected to print. To remove one from the selected list, double click on it, and it will "go away".
- ◆ **Activities Range/Select Activities**—Works the same as the Projects, but allows you to choose activity codes.
- ◆ **Award Range/Select Award**—Same process. However, since there are no state-wide award codes, you will have to have entered award codes for your county before this one will work.

Range: You can choose to print all records already defined, or further sort by club code. County code would not be used at a county level, since presumably all members would have the same county code.

Label Style: Choose the one that matches your printer setup. Laser/Inkjet is pre-defined for Avery 5160 (30 per sheet) labels.

Additional Options: You can choose as many of these as you wish.

- ◆ **Labels-One Per Family**—sorts through the members identified above, and prints only one label for each family unit. So if 3 brothers were all identified, only one label would print if they were all linked to the same parent unit.
- ◆ **Print Ethnic Statistics**—provides a summary of labels printed for each ethnic category.
- ◆ **Print County Code**—prints the county code on the top line of a 4-line address label.
- ◆ **Public Mailing List**—is designed to print labels for only those members who have checked Yes in the Public Mailing List field on their member screen.
- ◆ **Print Bar Code**—adds the mailing bar code to the label. It has been quirky, but is supposed to be fixed at the present time. Preview before printing. Check with your post office to see whether 5-digit zips are to be bar-coded—there is some disagreement about this.
- ◆ **All Capital Letters**—again, there is disagreement about whether mailing labels for bulk mailings are to be all caps or upper/lower. Check with your post office about their understanding of the rules. If you choose One Per Family, Print County Code, Print Bar Code, and All Caps, your mailing labels are going to be pretty darn crowded. Be sure to preview before you print.

Setup: The setup button can be your friend, especially if you are trying to print a great deal of information on each label. You may have to change font or size in order for those labels to print. Also, if your post office says "all caps", they may also have regulations that the font must be "sans-serif"—that means Arial, Helvetica, Chicago, as opposed to Times. Sans-serif fonts don't have the little "feet" at the bottom of the letters. Always preview before you print when you change settings on this screen!

There is a new way to select specific members for mailing labels—through Member Query. This is not covered in the Martech manual, since it was added after the program was distributed. See the section of this handbook on Member Query for more information.

STATISTICAL REPORTING

WHAT IS DATA USED FOR AT THE STATE LEVEL?

State-wide youth enrollment data is used for a variety of things. The first is the annual ES-237 report that is filed at the federal level by Nov. 1 each year. This report includes numbers of members enrolled by delivery mode, grade, ethnic category, gender, place of residence, and by ES-237 curriculum codes. Iowa 4-H receives 17% of its budget from the USDA through federal level funding, so we must be accountable for how those funds are spent, and the ES-237 is one way we do that.

But there are also very practical uses of the compiled county data. Each member who may exhibit swine at the state fair needs contacted about the regulation changes with PQA, derby, etc. The only way to reach those potential exhibitors is to send a mailing to all members who have enrolled in swine projects. That data comes from the county offices. There are mailings to dairy and horse project members that are similar to the swine mailing. The 4-H Foundation sent a fund-raising update to all club leaders in the state.

➔This is a place where accuracy is critical. Members who do not receive a mailing because they were not enrolled in the right project, and are then denied the option of exhibiting at the state fair because of rules they were not aware of, are going to be understandably upset. The member who did not receive his livestock check because the wrong address was listed in the database was upset. The 4-H Foundation has spent a great deal of postage trying to correct leaders' addresses after letters were returned to Ames because of address problems.

There are numerous questions that come to our office in relation to our programming: How many K-3 kids are involved in 4-H? What percent of 4-H members are minorities? How do the numbers for school enrichment compare with traditional club membership numbers? Are those numbers significantly different in the urban counties? How many organized 4-H clubs are there in Iowa? How has the rural:urban ratio changed over the past ten years? What is the male:female ratio for members and leaders? None of these questions can be answered without the data that is recorded in the Blue Ribbon program, forwarded to the state office, and compiled.

Statistical numbers are one way to measure the impact that 4-H has on the youth of Iowa—not a measure of quality, to be sure, but still an important measure. When Joe Kurth can go to Stan Johnson and say that 22% of the K-12 students in Iowa have had a connection to 4-H in the past year, that's an impressive statement of our impact.

One the most important uses of the statistical numbers is to monitor trends—increasing and decreasing populations and enrollments, and plan programs to be consistent with those trends. If we can see that over the past 10 years, an activity or project has consistently declined out of proportion to others, we may need to adjust the amount of support that is allocated to that program. That support should instead go to programs which are showing growth.

At a county level, your statistical numbers are the basis for your billing for Blue Ribbon support funds, and for your literature allocation money. The Blue Ribbon support funding formula is 45¢ per organized club member. The literature allocation is somewhat more complicated, but it basically adds your organized club members to a percentage of the other numbers, then figures your percentage of the total money available state-wide.

HOW CAN WE MAKE SURE DATA IS ACCURATE AND CONSISTENT?

order for the numbers that are received at the state office to be meaningful and useful, all counties must do their best to enter their data accurately, and use some consistent definitions and conventions state-wide. Many definitions are covered in the Blue Ribbon manual, but there are some common trouble areas that I'd like to address.

Duplicates and non-dupes:

This may be easier to understand if think of the difference between "contacts" and "people". "Total including duplicates" indicates how many individual contacts were made by 4-H staff during the year.

If you gave a presentation 5 times in the same 2nd grade classroom of 20 kids, that is 100 contacts made. However, there were only 20 students involved, and so 20 is the non-duplicated number. There were 80 duplicates in this scenario. Eighty of the contacts made were to students who had already been involved in a 4-H program.

If you made a presentation to a 5th grade classroom in which 12 of the 27 students are 4-H members, you have 27 contacts; 12 duplicates, and 15 non-duplicates.

If you make an educational presentation to a local 4-H club, they are all duplicates, because they are already members.

The two ways that a person could be a duplicate are: if they are a 4-H club member attending another type of activity (school enrichment, etc.), or if they are not a 4-H club member, but have attended more than one activity.

Every county that does programming beyond just traditional community clubs should have some duplicates to report. If you do not make an effort to identify duplicates, you may find yourself in the position of reporting that you reached more than 100% of the available K-12 population in your county. That's going to be a tough sell at the state level.

Delivery Modes:

Category 1 is "Organized 4-H Club"—your traditional community clubs. Kids who belong to more than one club will automatically be sorted into duplicates/non-duplicates by the Blue Ribbon program. Most of the program activities that occur in your county beyond the community clubs will be either #2—Special Interest, or #4 School Enrichment. These would be the delivery mode categories used most often for group enrollments.

The difference between these two categories involves the "school" component. If the program is delivered *during school hours and to support school curriculum*, then it is #4—School Enrichment. The program can be taught by Extension personnel, teachers, or trained volunteers. If, however, the program is *not a part of the school curriculum*, then it would be #2—Special Interest. Nearly all of those programs will be conducted outside of regular school hours. They can still be taught by Extension personnel, teachers, or trained volunteers.

Overnight camping participants should not be reported at the county level if they are going to be counted and reported by the staff at the 4-H Center. Overnight camping experiences that are not conducted at the Center should be reported. Iowa typically does not support programs 5, 6, and 7.

At the end of this packet, I have included samples of some of the forms that should be filled out for school enrichment and special interest activities, so that the data can be accurately entered.

Over/Less than 6 Hours Programming:

How do you decide if an activity involves more or less than 6 hours? This can be a kind of gray area. If an activity is a one-time, full-day activity, then obviously it's six hours or more. But what about those multiple 1-hour school enrichment topics that are conducted? Basically, to be counted as more than 6 hours for the ES-237, there should be more than 6 hours of programming with the same group (or kid). Babysitting clinics that are handled as three 2-hour sessions would qualify, because it's 6 hours all on the same topic. But so would an after-school program that met once a week for 6 weeks for an hour after school, and investigated various different E-SET activities. Though the topics were not the same each time, it was an on-going program with roughly the same group of kids. However 12 half-hour "Handwashing" sessions conducted in the 12 kindergarten classrooms in the county would not be 6 hours, since different kids were contacted each time. Think about it from the standpoint of time spent with the kids. Do your best, and make those judgment calls deliberately and thoughtfully, and everything will turn out fine.

Remember that these contacts are to be educational—no all-day ski trips, basketball tournaments, or other primarily recreational activities. Although those are tons of fun and can help build our program, they are not reported on the statisticals—educational programming only.

HOW TO COMPILE YEAR-END STATISTICALS FOR SUBMISSION TO THE STATE OFFICE

Office Preparation: Before you can send your statistical documents to the state office, you must make sure that the data is accurate and complete. Follow these steps:

- ◆ Compile the "Less than 6 Hours" Programming. Enter the summary data on form S-7, "County Summary of Youth Reached with Less than 6 Hours". Make a copy and set aside to be mailed to the state office. If you have difficulty, see the Blue Ribbon Basics Activities Packet, Activity 16.
- ◆ Find all copies of form S-2, "Volunteer Enrollment" and enter them into the Blue Ribbon program by using the ES237|Volunteer Group Enrollment menu option. Notice the tabs for Adult volunteer and Youth volunteer. Other than that, the computer screen closely matches your S-2 form.
- ◆ Find all unentered copies of form S-3, "Youth Group Enrollment" and enter those into Blue Ribbon by using the ES237|Group Youth Enrollment menu option. If you have difficulty with this, refer to the Blue Ribbon Basics Activities Packet, Activity 17.

Computer Preparation: These are the steps to preparing your statistical data to be copied to disk and reports intended to be sent to the state office:

- ◆ Go to ES237|ES237 Verification, and select all categories, with the exception of "Special" and "Other". Preview or Print.
- ◆ Check the report, and look for "holes" in the data. What are "holes"? A member's ethnic code may be missing, or the residence, or gender, etc. Locate all those pieces of data that are missing, then go to the appropriate member's screen and correct those omissions.
- ◆ Go to ES237|ES-237 Statistical Report. Begin by choosing Complete File, Complete Combined Report, and Test-Member/Leader File Data. Print or Preview and proof-read your data carefully. Take out a copy of last year's statistical and compare the two. Does it show that you have 525 community club members and no school enrichment this year, when last year you only had 230 community club members and lots of school enrichment? Maybe you'll have to go back and make some corrections at this point. Make sure when you're done that this is something you want God and everybody to see. These are the numbers that will be posted on the web, distributed to area directors, presented to Stan Johnson, and used to set your Blue Ribbon support fees & literature allotments.
- ◆ When you're convinced that you've been as accurate as you can be, these are the right numbers, and the "holes" are mended, go to ES237|ES-237 Statistical Report, and choose Combined Processing-Final Report at the bottom. Notice that the other options are no longer available. Preview or print.
- ◆ Make copies of your data files on a floppy disk (we're hoping Martech will provide guidance on how to do this before Sept. 1) and label the floppy with your county name, county number, and Blue Ribbon contact person. This may change if we find the data can be attached to an e-mail message.

Submit to the state office (by Sept. 1): Send the following items to Becky Nibe, 32 Curtiss Hall, ISU.

- ◆ A copy of the S-7 form.
- ◆ A copy of the combined ES-237 report.
- ◆ The disk with your data files. This may change, if they can be attached to e-mail messages.

Prepare for the next year's enrollment:

- ◆ If you wish to print re-enrollment forms with the previous members' names and projects printed on them, do it now.
- ◆ Choose Utility|Process Year-End Files. This will increment the member's age, grade, year in 4H, and set all projects to Inactive. If you print re-enrollment forms now, no projects will print.
- ◆ Print some blank enrollment forms for new members.
- ◆ Utility|File Utilities|Utilities|Delete Terminated Members, and Delete Unlinked Parents to clean up your files.

MEMBER QUERY

Member Query is a powerful tool that, when used correctly, can save you a great deal of time. However, if you aren't careful as you are making changes by using the Query, you can also cost yourself a lot of time in "undoing" some unexpected results.

In order to use Member Query, the group of records that you want to work with must all have something in common that sets them apart from the entire file. If the records are just "random", you won't be able to effectively use the Query feature. They can have any defining member characteristic in common—Member ID, Club ID, Category (member, leader, etc.), Status (new, return, etc.), Name, City, School, Gender, JrLead, 4H Yr., Grade, Age, Ethnic, Residence, or Delivery Mode (org. club, school enrichment, etc.). Some of these are not going to be too practical, but others may be ideal. Notice that projects and activities are not a part of the data that can be filtered here. "Name" is surprisingly useful. I know you're all asking, how many kids would have the same name? That's exactly the point. If you want to print a mailing label for just one specific kid, here's the place to do it.

Once you've chosen the File|Member Query option, you have many tasks that can be performed. We'll take a look at the menu choices, in approximately the order that you would choose them if you were working with Query.

FILTERING RECORDS

File|Filter: When you first enter Member Query, all records are displayed, sorted by whatever is selected in the pull-down "Index" box at the upper right of the screen. In order to select only a specific group of the members, you must "filter" out the ones you want. On the File|Filter screen, you have a list on the left of all the defining fields that can be used for the filter. The "All" tab at the bottom is gray (active). When you select a field, you will go to the right side of the field and type in the information that you want to be included. The tabs at the bottom let you select whether you want only one specific piece of information (By Value) or a range of information (By Range).

You can also choose whether the information must be an exact match, a partial match at the beginning of the field, or a partial match anywhere in the field, and whether the case (Upper/lower) should be considered in the match. If you enter Member ID as the field, and 402 as the Field Value, and check "Partial match at beginning", you will see a list of all members from 40200 to 40299. If you check "Partial match anywhere", you will also see 14023, and 15402, etc.

SELECTING RECORDS

Select Menu: After you have the results of your filter choices, you MUST highlight those records that you want to change/print mailing labels for, etc. If no members are highlighted, no changes will be made. You can choose Select|Select All, or you can individually highlight. Shift-click to highlight a range of members (*from* the first clicked *to* the last clicked, and all in between), or Ctrl-click to highlight non-consecutive members. If all but a few listed members are to be highlighted, it might be easiest to Select|Select all, then Ctrl-click on the ones you *don't* want highlighted.

Search Menu: In addition to filtering, you can also choose to find only specified members within the list. If you choose Search|Find, you will get a little screen that asks you to define search criteria, similar to the Filter screen. You can choose which field to search and match with the pull-down "Fields" box at the bottom of the screen.

Once you have clicked on "First" or "Next", you will return to the Member Query screen, and the appropriate member's record will be identified. You can choose to highlight it at that point.

APPLYING ACTIONS TO SELECTED RECORDS

Action: This is where you can actually begin to make changes to a group of records.

- ◆ **Mailing Labels**—You can print mailing labels for the members whose records you have highlighted. You don't, however, have the "one per family" option that you do on the Special|Mailing Labels menu option. So, if you only want one label per household, be sure you haven't highlighted two kids from the same family.
- ◆ **Change Primary Club**—If a club has disbanded, and all members have switched to a different club, you can change them all quickly here.
- ◆ **Change Status**—You could select all the kids who have a grade = 12 (at the end of the year, before year-end processing) or higher (after year-end) and mark them all as "Alumni" or "Terminated", depending on how you want to track your graduates. At the beginning of the year (re-enrollment time), you could pull up a list of all kids in a specific club, highlight the returnees, and quickly change them from Inactive to Return.
- ◆ **Delete Members**—This may be the quickest way to get members out of your database, but be careful choosing this that you have highlighted only the members that you truly no longer want records for. This will not delete their parent record. You will have to choose Utility|File Utilities|Utilities|Delete Unlinked Parents for that task.

Add: Use this menu to quickly add a project, activity, award, or club to a group of selected members.

Delete: Use this menu to quickly delete a project, activity, award, or club from a group of selected members. If a club disbands, you would want to delete it from the members' records before you deleted the club from your Club Codes file.

»Changes that are made to records on the Member Query screen are reflected on the member/leader screen. For instance, I chose at one point to set to proper case, which for some reason "uncapitalized" all of the Ave. & St. notations, and changed IA to Ia. I used "filter" to pull them up, then did copy & paste operations to change them back. It was quicker than going through all the member screens one by one—but still time-consuming, and unnecessary...if I had just thought that through a little better, I wouldn't have had to spend all that time!

ADVANCED REPORT OPTIONS

EDITING REPORTS IN MICROSOFT WORD

One of the easiest ways to customize a report in Blue Ribbon is to save the report document as a text file (.txt). You can then open the document in Microsoft Word, and make any editing or formatting changes that you desire. This is useful if:

1. Because there is no “common element” precisely defining your target group, you have to include more members in your list than you really want
2. You would like to include/delete information in a pre-formatted report, and don't mind typing in whatever information you would like added.
3. You would like to change the font, size, or other appearance issues of a report.
4. You wish to change the order in which a report prints, and you don't mind doing a little cut and paste to accomplish that.

In order to save your report to a text format, you must first go through all the steps to create the report (getting it as close as possible to what you want your finished product to look like), then Preview the report. On the top of the Preview screen is a button with a floppy disk icon on it. When you position your cursor over that button, you can see that it is a “Save” button. On the Save As... screen, at the bottom, you will see the Save as type: pull-down box. If you save as QuickReport file, you will only be able to open this document in Blue Ribbon. Pull that box down to the option of Text file.

Opening a text file in Microsoft Word must be done from the File|Open menu command inside Microsoft Word. If you simply double-click the icon that represents the document, it will open in WordPad or NotePad. It can be edited there, but it's ugly and not very powerful.

If you save your report as QuickReport format, it is opened in Blue Ribbon by using the Report|View Saved Report menu option. It is not “edit-able” at that point—no report parameters can be changed, etc.

➤Saving a report as either QuickReport or Text does not change the fact that this report will not update. The next time you open it, the same information will be there, even if you have updated and changed member records in the meantime. The information is static, not linked to the database.

EXPORTING DATA TO OTHER APPLICATIONS

Data from Blue Ribbon can be exported into two types of formats: dBase and ASCII. A “dBase” file is what some people have become familiar with as “tab-delimited”. It will import directly and cleanly into FileMaker Pro, or will open cleanly in Microsoft Excel. It opens “ugly” in Microsoft Word.

ASCII files are also called “flat files”, which means that there is no delimiting character. They will open in Microsoft Word, “really ugly” in Microsoft Excel, and “this really isn't what you wanted to do” import into FileMaker Pro. In FileMaker, each entire record will be saved in one field—name, address, grade, age, etc... will all be contained in one field. This is a very bad thing. Don't open an ASCII file in Excel unless you are an experienced user. In fact, don't do it at all, since you have the option of using dBase, which works.

Exporting data from Blue Ribbon into a dBase file, and then importing into a FileMaker database is not difficult as long as all the information you want is contained in one table (Youth2a.db, for example). It gets trickier when you want information about a member, his/her parents, and his/her projects all exported to FileMaker. In the “Advanced Report Options” Activity Packet, you will find a way to accomplish this. The databases I created are available for you to make copies and take home if you think they will be useful. The whole process is based on linking information in one table to information in another table, similar to the way the tables have been linked by Blue Ribbon.

REPORT WRITER

Terminology

Before you can begin with Report Writer, it's going to be important to understand some of the terminology that you will be using.

- ◆ **Table**—the closest “plain words” definition is that it is like a single, stand-alone (no look-ups, relationships) database. Each of the .db files in your Data folder is a table—Youth2a.db, etc.
- ◆ **Query**—a “filter” operation which allows you to select specific records, based on criteria which you define. For instance, “ClubID—is equal to—100” is a query statement which would return only those records for members whose primary club is #100. In Report Writer, they use a specific query format called SQL—Structured Query Language, which sounds pretty intimidating. It's not at all difficult, and actually is very similar to the Member Query File|Filter menu option.
- ◆ **Database**—a collection of tables and queries that are intended to be used together, usually with a defining relationship.
- ◆ **Dataset**—a collective term used to mean tables and queries.

Report Wizard

Before a report can be produced, you must have defined (at a minimum) a database or directory (WinYouth, in our circumstances), a table (Youth2a, for instance), a sort order, and the fields which will be printed (Name, Address, etc.). Using the Report Wizard gives you a structured means for entering that information. It is limited, in that you can only use one table as you are building the report, but it does give you a solid foundation for expanding your report.

Using one table means that you cannot directly produce a report with the Report Wizard which would list both information about a member and information about his/her parents, since that information is stored in two separate files: Youth2a.db and Youth2b.db.

To access the Report Wizard, you simply choose Utility|Run Custom Report Writer from Blue Ribbon, then choose File|New and any report type EXCEPT “New blank report”.

The screens that follow will ask you to:

1. Define your dataset as either a table or query and identify the database in which the table or query is located (and define the query if selected).
2. Select the sort order for your report (alphabetical, club numerical, etc.)
3. Select the fields which you wish to have printed on your report. These are fields that are contained within the table that you earlier selected.
4. Choose whether or not to print headers, titles, summaries, and footers.
5. Give the report a title, select the number of columns, and choose tall or wide page orientation.
6. Select fonts and sizes, and add separator lines (horizontal or vertical).

After progressing through all the Report Wizard screens, you will be able to Preview your report, and then will Finish. All editing, adding fields from other tables, changing title header text, etc. will be done at that point, and outside the Wizard.

Report Wizard—long lost third cousin of FileMaker Pro??

Once you have created some simple reports with the Wizard, then have learned to add additional elements and fields on your own, you should start to see some similarities in this process to building a layout in FileMaker Pro. Indeed, the people that are the most experienced in FileMaker Pro layouts (especially adding summaries, sub-summaries, etc.) will be the ones who will adapt to the Report Writer the most easily. Understanding the concept of relationships between databases is also a key element to producing reports that include information from more than one of the Youth Enrollment tables.

Appendix D: Additional Financials

Appendix D.1

1. The table below shows the results of the regression analysis. The dependent variable is the return on assets (ROA) and the independent variables are the control variables.

Variable	Coefficient	Standard Error	t-statistic	p-value
Constant	0.025	0.005	5.00	0.000
Size	0.010	0.002	5.00	0.000
Profitability	0.005	0.001	5.00	0.000
Liquidity	0.002	0.001	2.00	0.047
Debt to Equity Ratio	0.001	0.001	1.00	0.318

Appendix D.2

2. The table below shows the results of the regression analysis. The dependent variable is the return on assets (ROA) and the independent variables are the control variables.

Variable	Coefficient	Standard Error	t-statistic	p-value
Constant	0.025	0.005	5.00	0.000
Size	0.010	0.002	5.00	0.000
Profitability	0.005	0.001	5.00	0.000
Liquidity	0.002	0.001	2.00	0.047
Debt to Equity Ratio	0.001	0.001	1.00	0.318

Appendix D

Appendix D.3

Table 1

Table 2

Table 3

Blue Ribbon Training Evaluation

Pre-Training

Please rank your knowledge of the following Blue Ribbon functions:

1 = Little or no knowledge, ... 5 = Experienced

A. Installing data and program updates	1	2	3	4	5
B. Maintaining data files (project, activity, lit)	1	2	3	4	5
C. Entering member data	1	2	3	4	5
D. Using Member Query to update records	1	2	3	4	5
E. Entering Group Enrollment data	1	2	3	4	5

Post-Training

Please rank your knowledge of the following Blue Ribbon functions:

1 = Little or no knowledge, ... 5 = Experienced

A. Installing data and program updates	1	2	3	4	5
B. Maintaining data files (project, activity, lit)	1	2	3	4	5
C. Entering member data	1	2	3	4	5
D. Using Member Query to update records	1	2	3	4	5
E. Entering Group Enrollment data	1	2	3	4	5

The best thing I learned today was...

I liked....

I wish we had...

Next time, I would change...