

Part IV--Preparing Your Database for the New 4-H Year

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- A. **Before you start doing year-end enrollment tasks, you need to think about the order in which things are done...**
 - ✓ Re-enrollment forms for current records or will only print for **New and Returned** Members and Leaders.
 - ✓ Any Member or Leader who did not enroll last year at all is still **Inactive** at this point.
 - ✓ Members or Leaders who participated for part of the year and then moved or dropped out should be marked as **Terminated** at this point. Terminated is NOT a designation for individuals who never returned for the current year.
 - ✓ **When you do year-end processing, all Members and Leaders become Inactive and Group Records are erased.**
- B. **What tasks should be done after the year-end data and ES237 Report have been submitted?**
 - ✓ Print any reports that are maintained in the county office files, reflecting the year's members, projects, etc.
 - ✓ Delete Inactive and Terminated members (this is optional).
 - ✓ Print Re-enrollment forms for current (New and Returned) Members and Leaders.
 - ✓ Update your Master Project file to reflect new 4-H year additions/deletions.
 - ✓ Start a new year, with a new start date (01-01-2010), and all members/leaders ready to be re-enrolled.

So, in order, here's what you should do:

Make sure you have a backup. You're going to be really sad if you need to go back to the end of the year data, and you don't have it. Most of the changes you are about to make cannot be undone. This will also be your '08-'09 4-H file, for when you need to retrieve data for reports from last year. Name it clearly, e.g., 4HData2009.

2. **Print any year-end reports that you maintain in your office.** If you are new, check the files or ask someone who's been there awhile. At least keep an office copy of your final ES-237.
3. **Delete Inactive and Terminated Records.** These options are all found under the Utility/File Utilities/Utilities menu. If you are hesitant to delete Inactives and Terminateds, these records can be left in your database (in case these inactive individuals return at a later date)—it will just increase the size of your overall database, adding to the total number of Inactives.
4. **Remove Duplicate Projects.** Again, go to Utility/File Utilities/Utilities. This will eliminate any identical projects on a single record, which cause reporting problems as well as complicate the Year-End Processing function.
5. **Print Re-enrollment forms.** Go to Special/Enrollment Forms. See specific instructions in Part III.
6. **Do Year-end Processing Command.** This command turns all records in your database to Inactive. It also increases the 4-H Age, Grade, and Year in 4-H by one (1) year. If this process takes more than ten minutes, something bad is going on, and you are going to be relieved you have the backup (above). Choose options that are appropriate for your county. If you get an error in the middle of this procedure, write down the error message with the details and give me a call. The most common "hangup" occurs if you didn't Remove Duplicate Projects as described above in step B.4. **Don't redo the year-end processing command if you think it didn't "take" – call me first!**

For more information and screen shots of this task, see the BR manual, Section 7-2 (on your BR CD under the Documentation folder).

There is no advantage in doing Year-End Processing before you are ready to enter data for the new year.

- C. **Go to File/County Information and change the "4-H Age Calculation Date" to 01-01-2010.** You must enter a four-digit year.

D. Make changes in the Project Master File (File/Project Codes) for the new 4-H year. The following are changes to make in WA State 4-H Projects; additionally, you may have county project additions or deletions.

Add projects:

DCA Wind Energy, ES237 project code = DC

CCC Reading/Finance Literacy, ES237 project code = CC

EA Health Rocks, ES237 project code = EA

E. Go to Utility/Preferences to double check preferences for efficient data entry. Preference settings for 'Default Member Entry,' 'Default Project Entry,' and 'Integration Status' will reduce data entry time and minimize errors. Automatic numbering for both Member and Parent screens is highly recommended. You must click on 'OK' before leaving these screens to save your changes.

F. Begin entering enrollments as they come in.

G. If you need to re-print a re-enrollment form for a previous member, you will have to mark the record as 'Return' first (re-enrollment forms don't print for Inactives).