

## 4HPlus – Read Me First! February 2008

### Important First Steps!

**Read this document - "4HPlus – Read Me First!"**

It is very important to thoroughly read this document before moving ahead with any of the steps outlined below. Follow the steps in the prescribed order to assure a clean transfer of data from Blue Ribbon Youth Enrollment to 4HPlus. The documents referenced in each step are posted on the 4-H Youth Development 4HPlus/Blue Ribbon web page:

<http://www.uwex.edu/ces/4h/resources/mgt/blueribbon.cfm>. You will need your CE Netid and Password to access this web page.

**Perform Update**

Refer to Update Instructions document for step-by-step instructions.

### Instructions for Importing Data

**Set Up Clubs**

1. **Print Club Code File from Blue Ribbon Youth Enrollment**

Go to: Report | Print Data Files | Data File Listing | Club Code File Numeric

2. **Follow the Steps outlined in the Set Up Clubs document**

This step must be done before importing data so the club information transfers correctly for the members and leaders.

**Data Import**

Refer to the Data Import document for step-by-step instructions.

### Optional Set Up Steps Before Cleaning Up Records and Entering New Leader and Member Enrollments

**Set Up Local Fields**

Fields that can be named at the county level to record any type of data that needs to be tracked during the course of the year. There are 10 member local fields and 10 leader local fields. They can be named the same or different for members and leaders. *Local fields can be named or renamed at any time.* Fields will accept text and numerical data. These fields can be searched for labels and reports.

For members, year-long uses might include MAQA attendance, code of conduct forms, individuals serving on a board or committee, or dues payments. Shorter-term uses might include summer camp or trip forms and payments, or workshop registration information.

For leaders, year-long uses might include individuals serving on an executive board or special committee. Shorter-term uses might include workshop registration, forms or payments.

Refer to the Set Up Local Fields document for step-by-step instructions.

**Set Up Additional Achievements**

*Note: 4HPlus uses the term "Achievements" for experiences previously known as activities.*

1. **Print the list of State Achievements posted on the 4HPlus/Blue Ribbon web page:**

<http://www.uwex.edu/ces/4h/resources/mgt/blueribbon.cfm>.

The Achievements listed on the State Achievement listing are already included in the 4HPlus program.

2. **If your county would like to add additional achievements, refer to the Set Up Additional Achievements document**

Additional Achievements can be added now, or at any time in the future.

## Instructions for Cleaning Up Leader and Member Records After Importing Data

### Leader Clean Up

1. **Print Leader Certification from Blue Ribbon Youth Enrollment (*used in completing Screening section of 4HPlus*)**

Go to: Report | Leader Certification |  
Report Type: Status  
Style: Alpha  
Status Report/Mail Labels: All Leaders  
Preview | Print

2. **Print Projects 100-110 from Blue Ribbon Youth Enrollment (*used in identifying appropriate Adult Leader Type in 4HPlus*)**

Go to: Report | Project/Activity/Awards | Standard Reports  
Project/Activity/Awards Listing  
Category: General, Project, Activity, Resource  
Report Type: Complete  
Record Status: New or Returned  
Report Style: Break by Codes  
Report Format: One line  
Record Type: Projects  
Select Specific Codes  
Preview  
Select Projects: 100 – 110  
OK

3. **Print Activities from Blue Ribbon Youth Enrollment (*used in identifying appropriate Achievements in 4HPlus*)**

Go to: Report | Project/Activity/Awards | Standard Reports  
Project/Activity/Awards Listing  
Category: General, Project, Activity, Resource  
Report Type: Complete  
Record Status: New or Returned  
Report Style: Break by Codes  
Report Format: One line  
Record Type: Activities  
Preview

Beginning Activity Year	2008
Ending Activity Year	2008
Beginning Activity Code	A1000
Ending Activity Code	Z9999

Note: If the activity took place this past fall and the year in the activity screen is 2007, then select the specific activity code and run the report for 2007.

4. **Refer to Leader Clean Up document for step-by-step instructions on cleaning up the individual leader records**

**Member Clean Up**

1. **Print Parent Information File from Blue Ribbon Youth Enrollment (*used to complete parent screen in 4HPlus*)**

Go to: Report | Parent Lists | Parent File Listing  
Report Style: Family Report  
Report Type: Print all Parents  
Report Order: Alpha  
Grouping: Complete  
Preview | Print

2. **Print Activities from Blue Ribbon Youth Enrollment (*used in identifying appropriate Achievements in 4HPlus*)**

Go to: Report | Project/Activity/Awards | Standard Reports  
Project/Activity/Awards Listing  
Category: Member, Cloverbud  
Report Type: Complete  
Record Status: New or Returned  
Report Style: Break by Codes  
Report Format: One line  
Record Type: Activities  
Preview

Beginning Activity Year	2008
Ending Activity Year	2008
Beginning Activity Code	A1000
Ending Activity Code	Z9999

Note: If the activity took place this past fall and the year in the activity screen is 2007, then select the specific activity code and run the report for 2007.

3. **Refer to the Member Clean Up document for step-by-step instructions on cleaning up individual member records**

## **Instructions for Entering New Leader and Member Enrollments**

**Entering New Leader Enrollments**

Refer to the Entering New Leader Enrollments document for step-by-step instructions.

**Entering New Member Enrollments**

Refer to the Entering New Member Enrollments document for step-by-step instructions.