Expanded Food
and Nutrition
Education Program

EFNEP

EVALUATION/REPORTING SYSTEM

USER'S GUIDE

Volume 1: Software User's Manual

Version 4.0

Expanded Food and Nutrition Education Program

CSREES

United States Department of Agriculture

Washington, DC

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The software system described by this manual was developed for the United States Department of Agriculture (USDA) under Contract Number 53-3159-4-1 by Systems Support Alternatives, Inc.

The software described in this manual was written in Microsoft Access® 2.0, a registered product of Microsoft Cooperation. The backup functions included with this software use the *DynaZip™ Data Compression Toolkit for Microsoft Windows,* a product of Inner Media, Inc. The on-line help was developed under WinHelp Office by Blue Sky Software. WinHelp's screen capture program was used to prepare the screen images displayed in this manual. This manual was prepared with Microsoft Word for Windows 95 (Word 7). Adobe Acrobat ® was used to prepare the CD-ROM rendition of Volumes 1, 2 and 3 of this User Guide.

Earl O. Merrill
February 1998

ACKNOWLEDGMENTS FOR ERS VERSION 4

The EFNEP Evaluation/Reporting System, version 4 (ERS4) was developed over the course of nearly four years, and required the assistance and cooperation of many individuals throughout the Cooperative Extension System, at all levels of the organization. Thanks to all who gave input, tested components, reviewed products and provided support for the project during this process. This acknowledgment will highlight some of the key contributors, but many others added in significant ways to the total effort.

ERS4 was built on the foundation of the original system, released in 1993. Please read the acknowledgments for that release, which immediately follow this section, in order to see how the system evolved, and the significant work that went into creating this evaluation software.

After the release of the EFNEP Evaluation/Reporting System (ERS) in 1993, we immediately began looking toward the future. The ES/WIC Nutrition Education Initiative was just starting, and the project directors felt that the ERS could serve as a useful tool for measuring the impacts of that new effort. We also heard from states and territories, who said, "The system is great, but it would be even better if ..." All these new ideas, enhancements, and the occasional "bug" were recorded, and as funds permitted, updates were prepared. The most significant upgrade was released as version 3.3 in October, 1997, which included a greatly expanded and modified foods database, a revised 10 question behavior checklist, and several new reports and enhancements.

During this same time, computer technology advanced rapidly, with the release of Windows-based operating systems and greatly enhanced computing capabilities. So we began to look at a major overhaul of the system, adding in many new features while still maintaining the basic principles of flexibility and ease of use.

Perinatal Module

The project directors for the ES/WIC Nutrition Education Initiative identified various components of pregnancy, birth outcome and infant feeding practices that ultimately formed the cornerstone of the Perinatal module. These new components will greatly strengthen the impact data collected for these vulnerable audiences.

One Day Food Recall

The Western Region EFNEP Coordinators were impressed with a simplified diagnostic report created by Bret Luick, AK. After much discussion, Joda Derrickson, HI led the group in the design of a visually graphic summary that combined Bret's ideas with other key measures. Proposed formats were put on the Alaska EFNEP Web page for viewing by all states, and with the assistance of Karen Wilken, Colorado, a final version was created that is now included as an optional report.

The New Foods Database

The database incorporated in version 4.0 and 3.3 contains about 160 new foods (bringing the total to 1540 foods) and incorporated hundreds of changes to existing foods. This activity required much patience and dedication on the part of many people, some of whom I would like to recognize here. Alicia Hogbin, working with Ruby Cox, Virginia EFNEP Coordinator, calculated

nutrient values for many of the recipes included in ERIB-3, added other new foods requested by states, corrected errors in the calculation of "other" servings, changed names of products to add consistency and aid in finding the correct food item and corrected nutrient values and weights for many foods. Georgia Lauritzen, Utah EFNEP Coordinator, spent a summer sabbatical in our offices, making further additions and revisions to the foods database, including adding more cuts of chicken and pork, checking out "problem areas" and updating nutrient values and food weights using new USDA data. Sylvia Montgomery helped with the data entry and verification of changes. Many others, including Linda Cook, Florida EFNEP Coordinator carefully reviewed the database, and pointed out potential errors, that were then investigated. The care, attention to detail, and perseverance of many helped to create a greatly improved database that will be used in both version 3.3 and version 4.0. Thanks to all who supported this effort.

Behavior Checklist

Several states were dissatisfied with one or more questions on the Behavior Checklist. A work group was formed to reexamine the domains relevant for EFNEP education, and to propose alternative questions. As a result of this effort, the 15 question checklist was revised to a 10 question checklist. The work group consisted of:

Jean Ann Anliker, MD

Linda Drake, CT

Kathy Daly-Koziel, KY

Jane Voichick and Larry Jones, WI

Muriel Brink and Margaret Day, NY

Judy Heald, Elizabeth Specht and Julie Haines, PA

Ruby Cox and Michael Lambur, VA

Joda Derrickson, HI

Karen Wilken, CO and

Ellen Schuster, MN.

Master Question Database

One outcome of the Behavior Checklist Work Group's activities was the creation of a Master Question Database that would capture all additional questions that States may want to use. The system was designed to allow States to create multiple question sets specifically targeted to the needs of selected target audiences or specific program goals. The following individuals supplied questions for inclusion in the master database:

Kim Greder, IA

Suzanne Murphy, CA

Julie Haines, Judy Heald, PA

Larry Jones, WI

Karil Bialostosky, National Center for Health Statistics, DHHS, and

Diane Linder, LA.

Georgia Lauritzen, UT compiled the Master Question database, and worked with those submitting questions to assure that all information was provided in the correct format and that the scoring was properly calculated. She also initiated the process for getting the documentation about the additional questions for use by future users of the database.

Pilot Test

In the summer and fall of 1996, a dozen states received copies of the ERS 4 system to pilot test. These tests were critical for identifying modifications to the software, operation, manuals and supporting documents. It also became clear that additional training support would be needed to ease the transition and implementation of the system. I want to thank the following for their help during this critical phase of the development:

Elvira Conde and Muriel Brink, NY

BeVerly Sims, AR

Georgia Lauritzen, UT

Larry Jones, WI

Pam Ventris, OK

Jodie Boulton and Sara Wehmas, MN

Robin Orr, IL

Joda Derrickson, HI

and a special thanks to Linda Cook and Nancy Johnson and their counties in Florida for the detailed comments and intensive testing, and to Chris Hanson, Linda Garcia, Marilyn Townsend and the counties in California for the added pilot testing they did as the project neared the end of the development phase.

Training

To provide the essential training support, many alternatives were considered, and ultimately the decision was made to utilize distance education strategies. The number of ERS 4 users is projected to be far greater than for ERS 3, and the train-the-trainer models would be too time-consuming to be effective. Linda Cook and Nancy Johnson, FL developed the training videos and implementation guide, and worked with the programmer to create the sample data set that is used in training sessions.

CD-ROM

At the end of the project, as we were ready to duplicate the software and manuals, we were faced with budget cut-backs. This lead to more creative problem solving — how to distribute the system and documentation at the lowest possible cost to the greatest number of users. The use of CD-ROM technology was explored and with the assistance of the contractor, Earl Merrill and Families, 4-H and Nutrition staff Denise Otto, Sylvia Montgomery and Faye Thompson, we were able to convert all the various documents into a form that could go on the CD-ROM.

Other

Carol Ely helped in defining the early "wish list" and components to be incorporated into the system, and tested the first products developed . Sylvia Montgomery provided support to states,

reviewed products, prepared documents and provided invaluable support to the project. Linda Fischer, Contract Officer, helped in negotiating the contract, and developing alternative strategies to keep the project on track. Faye Thompson typed major portions of the volume 3 documents. Karen Konzelmann provided moral support and helpful advice as I solved each of the challenges that arose during the design and development of this software.

And finally, I was very pleased that Earl Merrill was able to stay on this project. He is excellent at translating my "wish list" into reality, often in ways that improve upon the initial idea or request. His creativity, perseverance, and appreciation of the goals of this project have made it a pleasure to work with him.

Wells Willis

National Program Leader, EFNEP

February, 1998

ACKNOWLEDGMENTS FOR ORIGINAL RELEASE, 1993

This new EFNEP Evaluation/Reporting System could not have come about without the hard work and dedication of the National EFNEP Evaluation and Reporting Committee and many others who have served important supporting roles. They devoted many long hours over the past three years to bring this product to completion. All of the members participated in meetings and teleconferences while they carefully deliberated the pros and cons, benefits and burdens of each component part of the program. The aim was to provide the greatest opportunity for enhanced management of EFNEP operations and capture the strengths and successes of EFNEP, while providing flexibility and minimizing reporting burden. This was a heavy responsibility, but I hope you will agree that they did a superb job.

In addition to the design and implementation issues, they also pilot tested the various versions of the software, reviewed and modified the User's Manual, developed supporting documentation and designed sample data collection forms. As a final step, they designed and conducted the regional training sessions, and provided the resources that can aid the training and implementation in the individual States.

For on-going support during design, testing, documentation review, and data collection:

Jean Ann Anliker
Betty Cameron
Linda Cook
Ruby Cox
Joda Derrickson
Virginia Goebel
Micki Horst
Carlene Jordan
Marilyn Townsend.

For development of the dietary analysis portion, including the Foods database and dietary methodology:

Ruby Cox and Joda Derrickson, Team Leaders
Virginia Goebel
Carlene Jordan
Jean Ann Anliker.

For development of the youth component:

Betty Cameron and Marilyn Townsend, Team Leaders
Jean Ann Anliker
Joda Derrickson.

For development of the behavior checklist component:

Micki Horst and Jean Ann Anliker, Team Leaders

Linda Cook

Joda Derrickson

Nancy Hurley (Johnson).

Carlene Jordan provided the County perspective; Virginia Goebel worked on the volunteer portion; and Betty Cameron was the lead for the Interagency Collaboration. Linda Cook, along with Nancy Hurley who became an ex-officio member of the committee, provided many recommendations about the operation of the program, reports to be generated, identification of problems and recommendations for improvement. Jean Ann Anliker and Nancy Hurley worked closely with the programmer during a critical phase of the redesign effort.

As the project progressed, it became clear that we also needed more input from the administrative and policy perspective. Carol Anderson, Ruth Conone and Martha Johnson graciously agreed to join the committee and help address issues, such as sampling and how the data will be used to support the future of EFNEP from the State Leader perspective.

Bart Hewitt, ES, was involved in the early stages of this project, coordinating the initial survey of States and helping summarize the committee's decisions in the initial design phase. Carol Ely, ES, has played a key role in the final stages, following up on many details that need attention, coordinating the revision of the User's Manual and supporting documents. Sylvia Minor (Montgomery) provided support to the committee, arranging conferences, communicating with the committee members, creating the Foods Database using a computer program supplied by the Human Nutrition Information Service, and helping to test the software.

The Behavior Checklist expert panel consisted of:

Michael Lambur, Extension Specialist, Evaluation, Virginia

Steve Carlson, USDA, Food and Nutrition Service

Nancy Ellen Kiernan, Program Evaluation Specialist, Pennsylvania

Mike Young, USDA, Office of Budget and Program Analysis

Connie McKenna, USDA, Extension Service

Jon Weimer, USDA, Economic Research Service

Sid Clemens, USDA, Office of Budget and Program Analysis

Laura Sims, Professor, Human Nutrition and Food Systems, University of Maryland

Juanita Bowens, Graduate Assistant in Virginia EFNEP.

Michael Lambur and Micki Horst set up the procedures for the focus groups. People who conducted or arranged the focus groups included:

Jean Ann Anliker

Linda Cook

Ruby Cox

Marilyn Townsend

Ellen Schuster, University of Minnesota.

Michael Lambur also provided assistance with focus group data and pilot test data analysis along with Ruby Cox. Those who pilot tested the revised EFNEP Behavior Checklist in their States included:

Carol Anderson

Betty Cameron

Ruth Conone

Ruby Cox

Joda Derrickson

Micki Horst

Marilyn Townsend.

Brian Fitzpatrick, System Analyst/Programmer from the University of Kentucky Cooperative Extension Service, conducted beta testing of the State and Federal level systems and the revised Unit level system. He received frequent updates and provided immediate feedback to the programmer, thus helping the project to remain on time and to meet expectations.

Earl Merrill worked tirelessly for many long hours creating a system that brought all the ideas and concepts to a wonderful conclusion. We are indebted to him for his dedication and recognition of the value that this program will have in helping to strengthen the effectiveness of EFNEP.

Finally, I want to thank all of the EFNEP Coordinators and State Leaders who have participated in this effort by taking the time to respond to our surveys and react to the various documents outlining the decisions regarding the dietary analysis, behavior checklist, youth and other components. You helped us identify what was essential, and kept us aware of the need for flexibility. We valued your input and made many adjustments to accommodate the concerns raised. We also valued the work that had gone on previously, and built from the framework of previously existing systems, particularly the Cornell Enhanced EFNEP Reporting System, and the work of the team for the Nutrition Diet and Health Impact Indicators.

And most especially, I want to thank the State Directors for their support of the committee members. You have given them the time and the financial resources and the support to be a part of this effort.

Wells Willis

National Program Leader

EFNEP, USDA-ES

April, 1993

Revised November, 1993

EFNEP Evaluation and Reporting System Committee Members

Dr. Carol Anderson, Associate Director, CES, Cornell University

Dr. Jean Ann Anliker, Nutrition Specialist, CES, University of Maryland

Ms. Betty Cameron, State EFNEP Coordinator, CES Iowa State University

Ms. Linda Cook, EFNEP Coordinator, CES, University of Florida

Dr. Ruth Conone, Assistant Director CES and Associate Dean, Ohio State University

Dr. Ruby Cox, State EFNEP Coordinator, CES, VPI & State University

Ms. Joda Derrickson, State EFNEP Coordinator, CES, University of Hawaii

Ms. Virginia Goebel, EFNEP Program Specialist, CES, Auburn University

Ms. Micki Horst, Program Leader, CES, Michigan State University

Ms. Nancy Hurley, Senior Computer Support Specialist, EFNEP, CES, University of Florida

Dr. Martha R. Johnson, Assistant Director, CES, Auburn University

Ms. Carlene Jordan, Home Economist, EFNEP, CES, Pittsburg County, Oklahoma

Ms. Marilyn Townsend, Nutrition Education Specialist, CES, University of California

Ms. Wells Willis, National Program Leader, EFNEP, USDA, Extension Service

CONTENTS

FIGURES

TABLES

CHAPTER 1 - INTRODUCTION

About EFNEP

The USDA's Cooperative State Research, Education, and Extension Service's Expanded Food and Nutrition Education Program (EFNEP) is a unique program designed to reach limited resource audiences -- especially youth and families with young children. EFNEP operates in all 50 states and in American Samoa, Guam, Micronesia, Northern Marianas, Puerto Rico, and the Virgin Islands. Extension professionals train and supervise paraprofessionals and volunteers who teach food and nutrition information and skills to limited resources families and youth.

The objectives of EFNEP are to assist limited resources families and youth in acquiring the knowledge, skills, attitudes, and changed behaviors necessary for nutritionally sound diets, and to contribute to their personal development and the improvement of the total family diet and nutritional well being.

About the EFNEP Evaluation/Reporting System

This computer system, the EFNEP Evaluation/Reporting System, was developed to capture the positive impacts of the EFNEP. The system provides a variety of reports that are useful for management purposes, provides diagnostic assessments of participant needs, and exports summary data for State and National assessment of the program's impact. The specifications for this system were developed by a committee made up of representatives from across the United States.

The MS-DOS version of this computer system was introduced in the Fall of 1993 and is in use in approximately 1,000 locations covering every state and the U.S. territories. This document describes the Microsoft Windows version of that system. In addition to upgrading from DOS to Windows, a number of new features and capabilities have been added. They are summarized on page 5 (What Changes Have Occurred Since the Previous Version).

Levels of Interaction

The EFNEP Evaluation/Reporting System consists of separate software sub-systems for the Unit, State, and Federal levels. They are denoted as follows:

ERS	Unit (County) level subsystem
SRS	State level subsystem
FRS	Federal level subsystem

Each ERS accumulates data about individuals and exports summary data to the SRS. The SRS accumulates the ERS data from the units, prepares State summary reports and exports the summary data to FRS. The FRS, in turn, prepares nationwide reports. Also, there is a flow of data from FRS to SRS, and from SRS to ERS. Figure 1-1 shows the flow of data between these three systems.

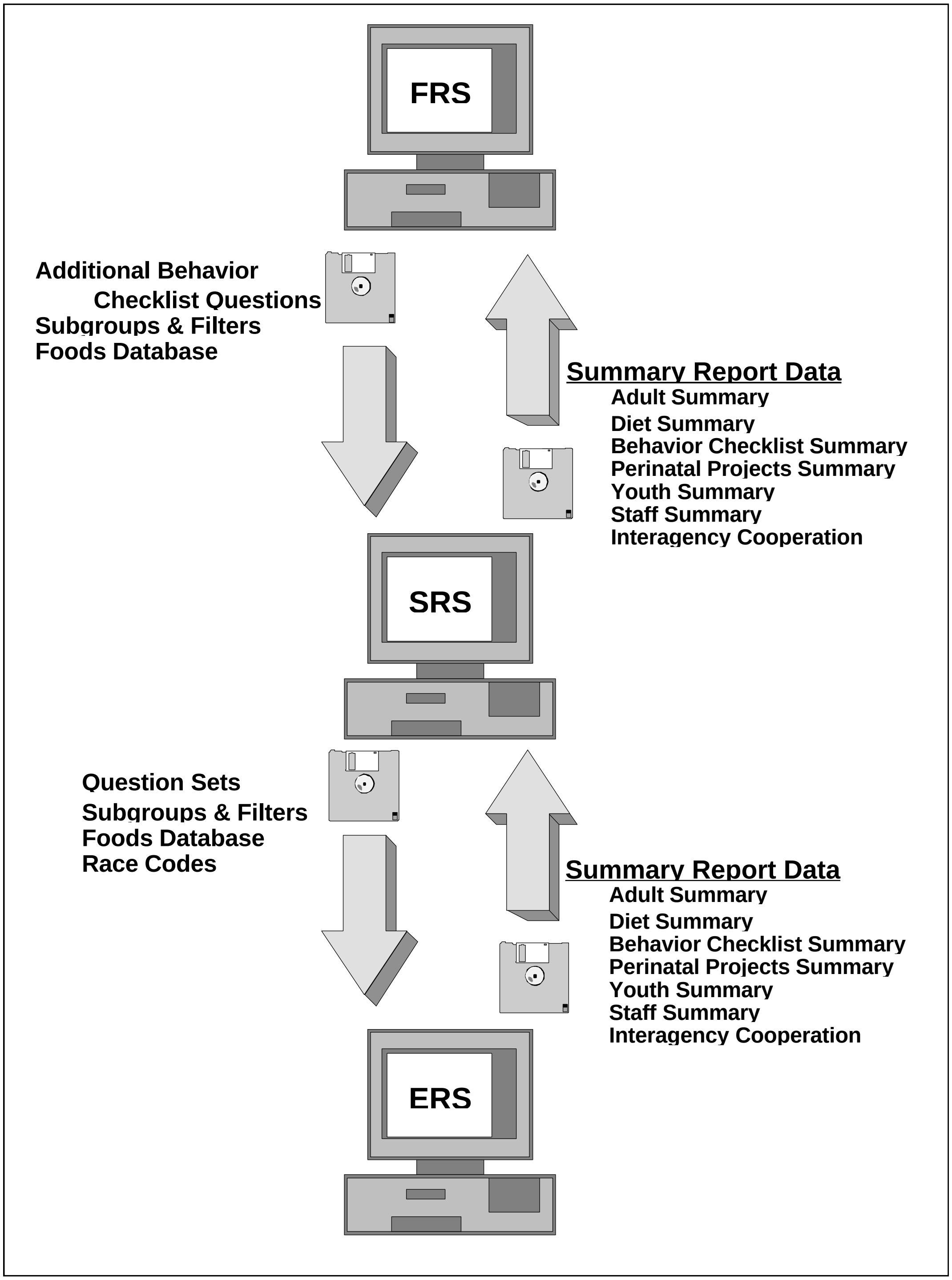


Figure 1-1. Data Flow between Federal, State, and Unit Systems

How to Use This Manual

This manual describes Version 4 of the Unit Level EFNEP Evaluation/Reporting System. Included is information on the use of the system and the system's capabilities. The system makes extensive use of on-screen hints to assist the user. Additionally, on-line, context sensitive help is available to assist the user. This manual, the on-screen hints, and the help system are designed to complement each other.

User documentation of this system is in three separate volumes. This volume, **Volume 1**, guides the operator through installation and use of the software. **Volume 2** contains samples of the reports that may be prepared with this system. **Volume 3** provides background documentation and describes the policies and procedures formulated by USDA headquarters and your State for clarity and consistency in input and analysis.

Although this manual concentrates on the operation and use of the software, some information about the strategies that may be used to correctly prepare data for the system is included. The terms ERS and system are used interchangeably.

! *Sample screens and related instructions are for Windows 3.1 and Windows for Workgroups 3.11. The appearance of screens will be slightly different with Windows 95, primarily the system controls on the title bar.*

This volume is organized into 17 chapters. This initial chapter provides a basic overview of the system and its features, and highlights differences from preceding versions.

Chapter 2 shows you how to run the system. Included is the suggested sequence of initial data entry for a new database. It also provides a description of the types of screens used by the system, some symbols used, some basic Windows terms, and some keyboard and mouse tips.

Chapters 3 through 15 describe the components and functions performed by the system, including the ERS Tools application which is described in Chapter 15. Installation of the system is described in Chapter 16 The final chapter, Chapter 17, provides the lookup tables and codes used by the system.

What Equipment is Needed

The system requires an IBM 386 or compatible desktop, tower model, or laptop personal computer (PC) running Windows, Windows for Workgroups, or Windows 95. All of these operating systems will be referred to as Windows.

<u>Personal Computer Hardware</u>

Like most Windows-based programs, ERS runs more quickly on a faster machine. Microsoft recommends as a minimum a 386SX-based PC with at least 6MB of RAM. Such a PC may operate very slowly, however.

Although ERS will run on almost any computer that runs Windows 3.1 or Windows 95, good and better hardware configurations are presented in Table 1-1. It is best to avoid using computers with less capability than what is listed in the good column.

Table 1-1. Good and Better Computer Configurations

Feature	Good	Better
CPU	Pentium 75 MHz	Pentium 200 MHz
RAM	12 MB	48 MB
Hard Drive (*)	30 MB available	60 MB Available
Windows Version	3.1 or 3.11	95
Laser Printer - speed	6 pages per minute	12 pages per minute

*- If buying a new PC, get at least a 2 GB hard drive

Printing

Most printers supported by Windows may be used. A laser printer is recommended; an ink jet is acceptable but will be slow; dot matrix printers should be avoided.

All reports are designed for printing on 8½ x 11 inch paper. Most reports have portrait orientation; a few have landscape orientation.

All reports are directed to the Windows default printer. Provision is made to select a new default Windows printer from within the system.

What are the Key System Features

The EFNEP reporting system (ERS) is a database that stores information in the form of records about the program participants, their family structure and their dietary preferences. The system is structured to collect data about adult participants, about youth and youth group members, and about staff assignments, and hours. The information can be added to and modified throughout the report period. The major components and features are summarized in Table 1-2.

Table 1-2. ERS Component Features

Component or Feature	Highlights
ADULTS	Maintain and report sex, age, income, residence, aid from public assistance programs and other information about the adult participants.
NUTRITION	Information on the actual nutrient content of the diets and how well the diets meet national dietary recommendations.
BEHAVIOR CHECKLISTS	Evaluates the impact of EFNEP on participants during enrollment. Assesses improvement in the areas of food resource management, nutrition practices and food handling and safety.
STAFF	Maintains the data about the professionals, paraprofessionals, and volunteers who deliver the program.
YOUTH	Maintains information and provides reports on the youth groups, with options to keep records on the individual youth enrolled in a group.
INTERAGENCY COOPERATION	Records data addressing interagency cooperation with two major food assistance programs, coalitions and agreements, and captures data on source and amount of outside funds.
SUBGROUPS	Selects participants meeting specific criteria such as age, sex, public assistance, and subgroup membership.
PERINATAL PROJECTS	Records birth data and infant feeding for pregnant and nursing females.
TABLES	Maintains the racial categories, recommended dietary allowances, minimum recommended servings, and poverty level tables used by the system.
SYSTEM ADMINISTRATION	Maintains DataDB and TableDB, identifies system and reporting period; and manages security.
DATA INTERCHANGE	Exports summary information, usually to diskette, for transmittal to the State. These exports include information about adults, youth, staff, diet, behavior checklist, perinatal projects and interagency cooperation. Imports information from the state for use at the unit level. These imports include behavior checklist question sets, subgroups filters, foods database, and race codes.
NOTEBOOK FEATURE	Provides for simultaneous updating to a database and a copy of the database, with the subsequent merger of changes made to the copy back into the original database.

What Changes Have Occurred Since the Previous Version

- The system has been redesigned to operate under Microsoft Windows. A point and click method using the mouse serves to activate various command buttons appearing on the screen. Additionally, the system's data may be accessed over a Local Area Network (LAN). This allows two or more users to operate with the same database at the same time.
- A professional category has been added to the Staff Component.
- All of the import and export features have been regrouped and activated by one top-level switchboard. You can choose to export all of the data sets or select from the Adult Summary, Diet Summary, Behavior Checklist Summary, Perinatal Projects Summary, Youth Summary, Interagency Cooperation.

- A Notebook feature has been added to permit installing a copy of the database on another computer. Updates may be made to the copy with the changes merged back into the original (master) database at a later date.
- The repair, compact, and backup operations have been consolidated into an auxiliary program accessible through the ERS Tools icon.
- The Perinatal Projects component records information about prenatal care, births, and breastfeeding choices.
- Printing of reports has been streamlined for use with laser printers and a preview option has been built in. The presentation of reports has been designed for easy readability and identification.
- Support for Avery laser labels has been added for convenience in selecting and formatting mailing labels.
- A new report, the One Day Food Recall Summary has been added to provide a composite statistical and graphical review of a participant's food recall data.
- The Subgroups feature allows the forming of subsets of the database by developing filters to select a cross-section of adults who meet these filter criteria.
- The Additional Questions feature expands the information collected about nutritional practices and food handling, by allowing another predetermined set of questions to be used in addition to the base behavior checklist questions.

CHAPTER 2 - GETTING STARTED

This chapter is designed to get you up and running quickly. It shows you how to start the system, and how to take care of and protect the data you enter into the database. It also contains some definitions and helpful information for moving around within the system.

! *This manual assumes you have the general understanding of basic Windowsä procedures, including how to move between applications and program groups, use the File Manager, and work with a mouse and keyboard. If you require assistance in these areas, please consult the Getting Started with Microsoft Windows manual that came with your Windows package.*

Installation of the software is described in Chapter 16. If Version 4 of ERS is not yet installed on your computer, turn to Chapter 16.

How to Start ERS

<u>Windows 3.1</u>
To start ERS, first locate the ERS Program Group. It should appear something like the one shown in Figure 2-1. Then double click on the ERS icon.

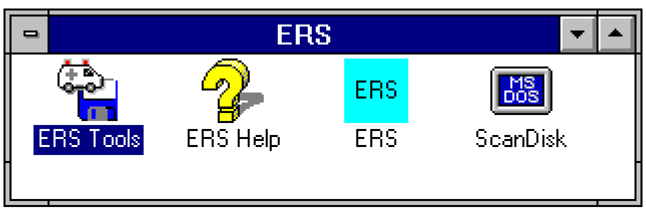


Figure 2-1. ERS Program Group

The ERS icon starts the ERS system. When you double click on it, you will be prompted to enter your user ID and password. See **User IDs and Passwords** later in this chapter. Once you are logged on, the ERS Main Switchboard, Figure 2-7, will appear.

The ERS Tools icon starts the ERS Tools application, which provides database repair/compact, backup/restore and software update functions. The ERS Tools functions are described in Chapter 15.

The ERS Help icon provides direct access to the on-line help without actually running the system. When in ERS, press the F1 key to bring up ERS Help. The ERS Help supplements the information in this manual.

The DOS ScanDisk icon provides convenient access to ScanDisk. Run ScanDisk immediately after a crash to correct any problems with the hard drive. Note that when you run ScanDisk under Windows, it will not be able to correct any problems. If ScanDisk reports errors, you will need to Exit Windows and run ScanDisk again directly from DOS.

! *If ScanDisk is not available on your computer (DOS versions earlier than 6.20) then you will need to shut down Windows and run CHKDSK /F from the DOS prompt.*

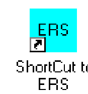
Windows 95

There are two ways to run ERS under Windows 95.

One way is to click Start→Programs, select the ERS program group, then the item to run.

Figure 2-2. Using Start→Programs to Run ERS

The other way is to use the short cut placed on your desktop by Setup. Double clicking it opens the ERS program group shown in Figure 2-3.



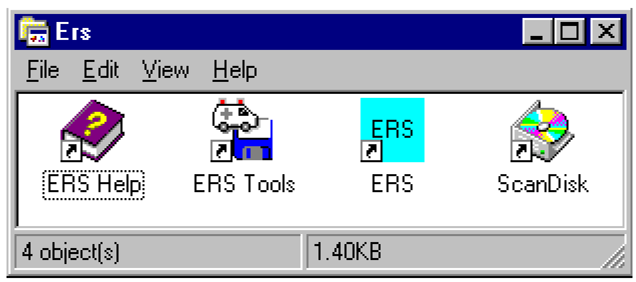


Figure 2-3. Program Group via ShortCut

All the icons in Figure 2-3 function as described above for Windows 3.1, except ScanDisk, which is fully functional under Windows 95.

Database Locked Error

If you get the following error after entering your ID and password, you have probably started a second copy of ERS. This can happen if you minimize ERS and then start it again. Sometimes, triple clicking the ERS icon will be interpreted by Windows as two double clicks which causes ERS to start a second time.

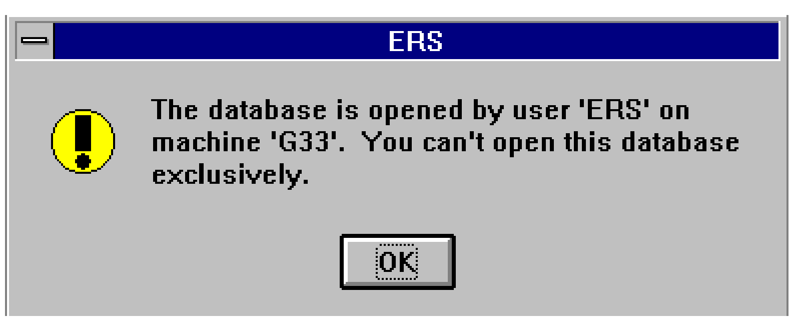


Figure 2-4. Database Locked at Startup

If this happens, click OK to close the startup. Then, hold down the Alt key and press Tab until the following appears:

Figure 2-5. Alt-Tab to Active ERS

The name of the current ERS screen is shown in the square brackets.

If this does not solve the problem, close Windows, re-boot the computer and try again.

User IDs and Passwords

Logging on to ERS requires a User ID (Name) and password. The Logon screen is shown in Figure 2-6. Use the Security Functions described in Chapter 12 to assign new IDs, remove users, and change passwords.

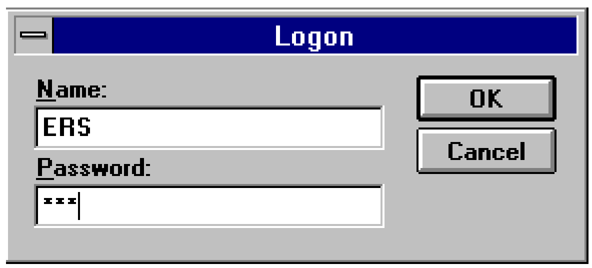


Figure 2-6. Logon Screen

After typing the logon name (user ID), press the tab key to move to the password field. After entering the password, you can press the Enter key or click the OK button.

! *When the system is first installed, you must log on using ERS as both your user ID and password. Remember, passwords are case sensitive, the initial password, **ERS**, must be entered in all caps.*

The security features help protect the privacy of the individuals whose information is stored in the database. Additionally, they provide a safeguard against unauthorized modification of the data. See Volume 3 for additional guidance on use of user IDs and passwords.

The ERS Main Switchboard

The ERS Main Switchboard, Figure 2-7, is the main menu for the system. Use the ERS Main Switchboard to access the various components and functions of the system, and to close the system and return to Windows. The Main Switchboard also displays the unit ID, the names and locations of the DataDB and TableDB, today's date, reporting period, and user ID. The functions of the buttons on this switchboard are described in chapters 3 through 14. Use the Tools button to close ERS and open ERS Tools. Once in Tools, you will need to exit to Windows to reenter ERS.

Always, verify that you are using the correct DataDB and TableDB by reviewing the large information box on the Main switchboard. If not, click the System Administration button to attach the correct ones. It's also a good idea to check the date to make sure the computer clock is correct.

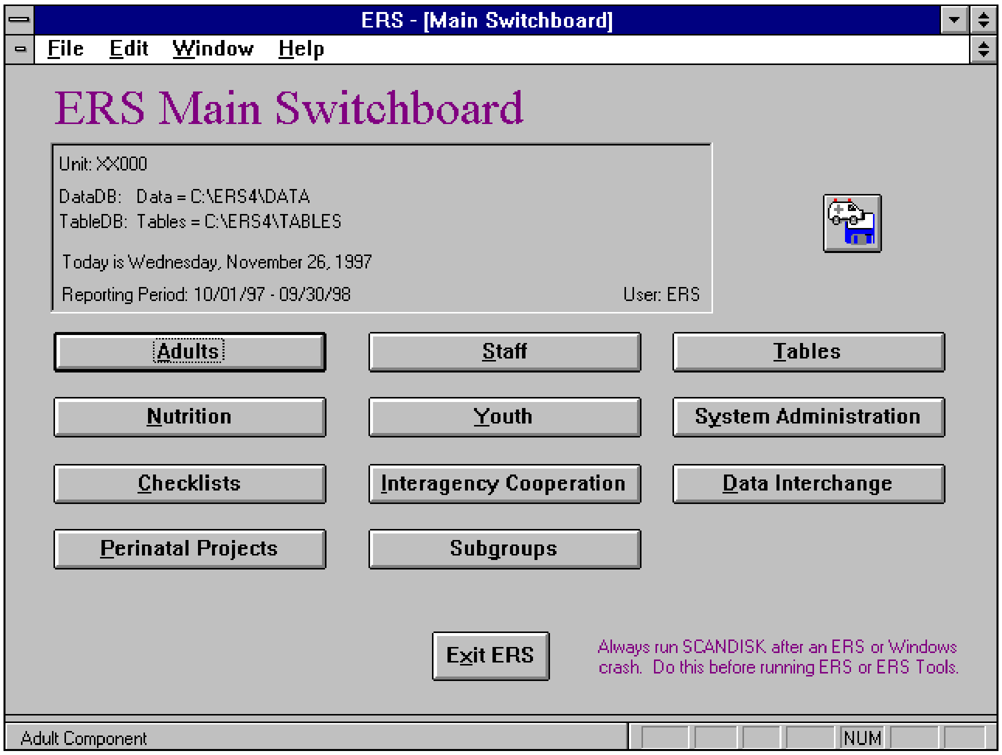


Figure 2-7. ERS Main Switchboard

The DataDB and TableDB

The system keeps the data in two databases called DataDB and TableDB. The DataDB contains information entered for adults, youth, staff, etc. The TableDB contains the Foods Database, Race Codes, the RDA table, the Minimum Servings table, and the Poverty Guidelines table. Usually you will have one DataDB and one TableDB directory for each fiscal year. If your computer holds data for more than one unit, the data for each unit will be in a separate DataDB. They can share the same TableDB. In fact, for each reporting period, the contents of the TableDB will be the same throughout your State.

The DataDBs and TableDBs are named. The initial ones will be named DATA and TABLES, respectively. Assuming you installed the system in the default directory, DATA will be located at C:\ERS4\DATA, and TABLES will be located at C:\ERS4\TABLES

The initial DataDB will be empty. You may enter data as described in the next section, or import the data from ERS Version 3. See Chapter 13 for information on importing the Version 3 data.

Initial Data Entry Sequence

If you are starting with a new, empty database, enter the data in the following progression:

System Configuration
Enter the Unit ID, name, and the reporting period.

The System Configuration information is described in Chapter 12.

Staff
Add the Adult and Youth professionals and paraprofessionals.

Youth volunteers must be added before the Youth Group with which they work can be created. Volunteers who only work with Adult homemakers can be added at any time prior to entry of their adults.

The Staff functions are described in Chapter 7.

Adults
Use the Adult switchboard to add adults. Food Recall, Behavior Checklist, or Perinatal Projects data can only be entered for those homemakers who are in the system.

If you are using State level subgroups, you will need to import your State's subgroups before you can add adults for that subgroup. If you are using Additional Checklist Questions, you will need to import your State's question sets before you enter responses to the additional questions.

See the following chapters:

Adults - Chapter 3
Recalls - Chapter 4
Behavior Checklist - Chapter 5
Perinatal Projects - Chapter 6
Subgroups - Chapter 10
Importing - Chapter 13.

Youth
Youth groups must be added using the Youth switchboard before any member's Individual Enrollment data can be entered. If youth are participating through Individual Learning, Mentoring, or Family Learning (Delivery Mode E), create a place-holding group called "No Group" with group ID = 1. All youth who fall under Delivery Mode E should be assigned to this ID to maintain an accurate total number of groups in the unit.

The youth functions are described in Chapter 8.

Imports from State
Your state may provide you with some or all of the following imports:

Race Codes (RACES.DBF)

Question Sets (CKQSET40.MDB)

Subgroups and Filters (SUBGRP40.MDB)

Imports are described in Chapter 13.

Screen Styles

The system uses four styles of screens: Switchboard, Browse, Form, and Dialog Box. Switchboards are used to switch to a different part of the system. Browse screens are used to select the item of data to use, and Form screens are used to view, add or edit the selected data. Dialog boxes are popup screens containing a request for important information or to display an error message.

! *The term screen is used interchangeably with the term window. Switchboards, browse screens, forms screens, and dialog boxes are all windows in the Microsoft parlance.*

Switchboards

Switchboards are screens of command buttons. Click one of the buttons to perform the operation indicated by the button. Switchboards are like menus. The term switchboard is used instead of menu to distinguish from the Menu Bar that is in the upper left corner of the screen. The ERS Main Switchboard, Figure 2-7, is an example of a switchboard.

For buttons with an underlined letter in their caption, pressing the Alt key and the underlined letter has the same effect as a mouse click. Also, tabbing to a button and pressing the Enter key or the Space Bar will activate the button.

Browse Screens

Browse screens present a list of information in a table. They provide a quick way to review the contents of the table and to position to the desired entry. Figure 2-8 shows a sample browse screen.

The current row is indicated by the small triangle shaped arrow at the left edge of the row. Also, the lower left area of the screen shows the current record number and the total number of records in the table.

There are a number of ways to move about the rows in a browse screen. Here are the more popular ones:

- Use Page Up and Page Down to move a screen at a time.
- Use the vertical scroll bar along the right edge of the screen.
- On screens with a Locator box, enter a value and press Enter to position to the record nearest the value entered. The Locator searches the leftmost data column on the browse screen.

See help topic Navigation Keys in the on-line help for other hints on moving about screens.

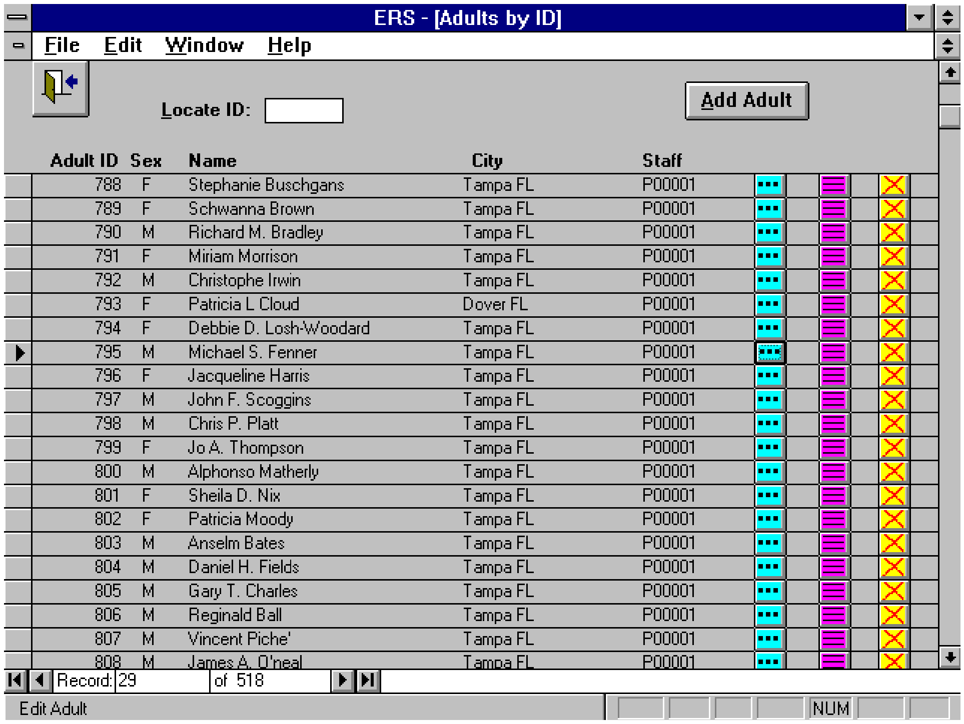


Figure 2-8. Sample Browse Screen

<u>Form Screens</u>

Form screens are used to view or enter data. Figure 2-9 shows a sample form screen.

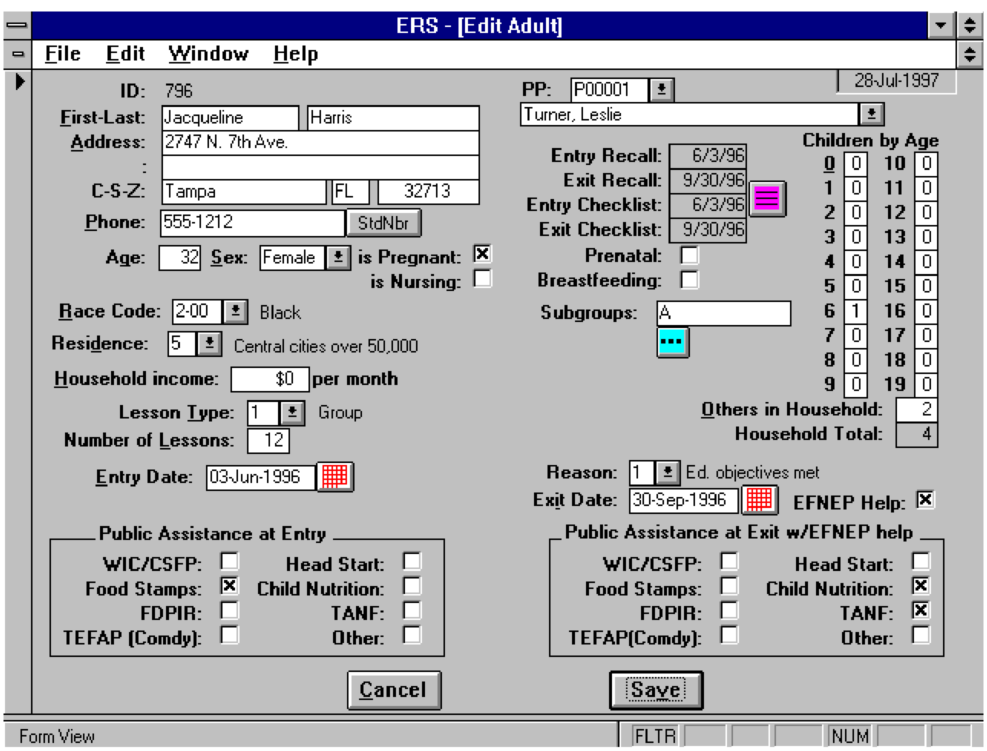
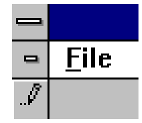


Figure 2-9. Sample Form Screen



When you enter a change, a pencil symbol will appear in the record selector area, which is along the left of the screen. The pencil indicates a change has not yet been saved. To undo the change, press Esc. All changes are automatically saved when the screen is closed, unless the screen was closed with a Cancel button. Using File→Close or the Windows 95 X button to close a screen may or may not save the changes, so use those methods to close screens with unsaved changes with caution. See **Record Selector Symbols** later in this chapter for a description of the symbols that may appear in the record selector area.

Dialogs and Message Boxes

Dialogs and Message Boxes are popup screens. They may prompt you for a decision, ask you to confirm an action, or notify you that a process has completed. Error messages are in the form of dialog boxes. The dialog must be answered before any other action is permitted. Figure 2-10 is a dialog box requesting you to point to the location of a file named CKQSET40.MDB.

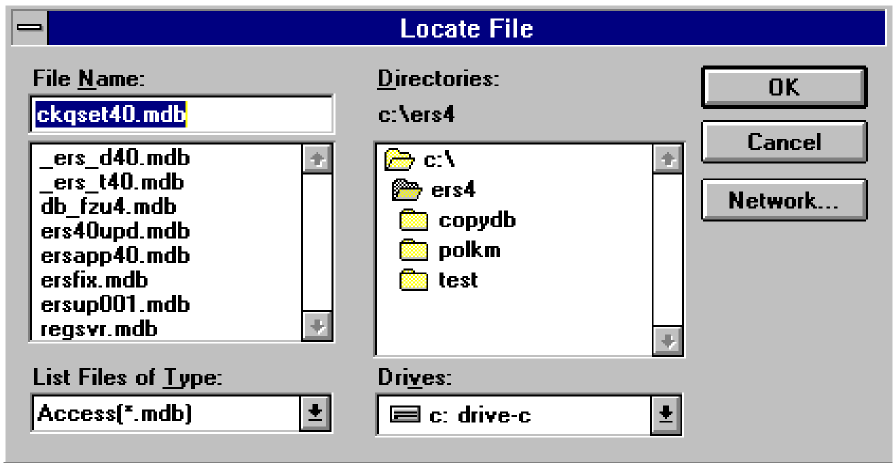


Figure 2-10. Sample Dialog Box

Record Selector Symbols

Microsoft Access places symbols in the record selector area to convey information about the status of the form or its underlying data record. The record selector is displayed along the left side of the screen. The symbols and their meanings are shown in Figure 2-11.

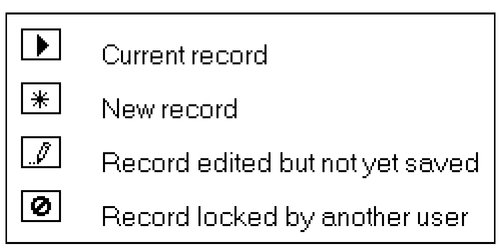


Figure 2-11. Record Selector Symbols

On Browse screens, the Current Record symbol indicates which row is current. The New Record symbol will not appear due to the controlled way the system adds new records. The pencil symbol indicates a change has not yet been saved. Clicking the Save or Close button will automatically save the change. Clicking the Cancel button, if present, will undo the change and close the screen. The Record Locked symbol indicates the current record is locked by another user. This happens when the other user is saving changes.

Printers and Paper

The system works best with laser printers. Most Ink Jet printers are OK, but slower. You may incur problems with dot matrix printers.

All reports are designed for printing on 8½ x 11 inch paper. Most reports have portrait orientation; some have landscape orientation.

All reports are directed to the Windows default printer. You may select a new default printer with the Default Printer menu item under File on the Menu Bar (ALT-F,D).

If you are using Windows 3.1 or Windows for Workgroups, you will need to use Print Manager to resolve out of paper, printer not ready conditions and other printer problems. With Windows 95, use the Printers folder under My Computer to resolve printer problems.

Mailing Labels

The system can print mailing labels for adults, staff, youth groups and youth. The labels may be printed, previewed, or exported to a dBase file. If exporting to dBase, the file name will be ERSLABEL.DBF. Many Windows word processors can prepare form letters from the dBase file

! *Only Avery laser mailing labels (or generic substitutes) are supported. Printing labels on a dot matrix printer is not supported. If you need to print to a dot matrix printer or use a label that is not in the list, use the Export to dBase function. Then use your word processor or other label printing software to print the labels*.

Three font sizes are available: 8, 10 and 12. Be aware that larger font sizes may not work well with small labels. The labels may be sorted by last name or by ZIP code. Figure 2-12 shows the options available for printing labels.

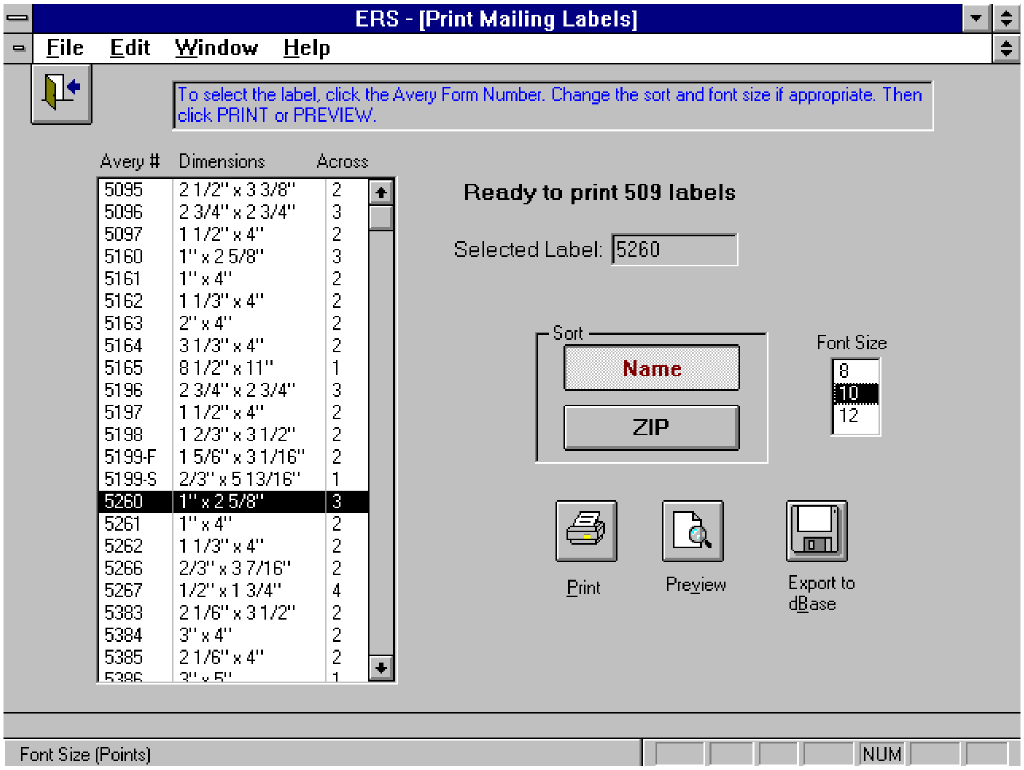


Figure 2-12. Sample Print Mailing Label Screen

The Windows Environment

The system is designed to work with Windows 3.1, Windows for Workgroups 3.11, and Windows 95. While hints for each operating system may be provided, the document focus is for Windows 3.1.

Some Windows navigation keys are listed in Table 2-1. They apply to all windows applications. The remainder of this chapter presents some important Windows information and describes some terminology used by this system.

Table 2-1. Windows System Keys

Press	To
F1	Display the Help contents. If the Help window is already open, pressing F1 displays the contents for How To Use Help.
CTRL+ESC	Switch to the Task list.
ALT+ESC	Switch to the next application, whether it is running in a window or running as an icon.
ATL+TAB	Switch to the application you last used. Or switch to the next application, by pressing and holding down ALT while repeatedly pressing TAB. To return to your original application, keep holding down the ALT key, and press ESC.
SHIFT+ALT+TAB	Switch to previous applications by pressing and holding down ALT+SHIFT while repeatedly pressing TAB. To return to your original application, keep holding down the ALT key, and press ESC.
PRINT SCREEN	Copy an image of the screen onto the Clipboard.
ALT+F4	Quit an application or close a window.
CTRL+F4	Close the active group window or document window

Controls

Controls are graphical objects placed on screens to display or accept information. The standard controls are described below. Windows will highlight the current control so you can tell which one is selected. To select a different control, tab to it, or click its label.

Labels

Labels are text used as a label or description of another control.

Text Boxes

Text boxes display and accept text or numeric data. If the text box has a white background, you may enter data into it. If it has a gray background, it is locked and you may not type in it.

Option Group

A group of options, represented by option buttons or check boxes, is enclosed in a border. Only one option at a time may be selected.

Check Boxes and Toggle Buttons

Check boxes and toggle buttons represent Yes/No, True/False, or On/Off values. Clicking the label of the check box or toggle button will select the opposite value. Also, pressing the space bar while the check box or toggle button is selected will toggle its value.

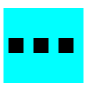
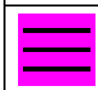
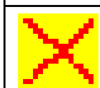
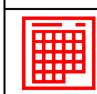
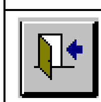
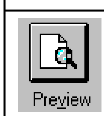
Combo Box (Drop-Down List)
A combo box is a combination text box and list box. You may enter data directly or pick from the drop down list.

List Box
A list box displays a list of items for you to select. It does not allow for user input. Use the mouse to click the item to be selected.

Subform
A subform is simply a form embedded on a main form.

Command Button
Command buttons perform some action when clicked. Command buttons may have a text caption such as “Close”, or have a graphical representation such as . Table 2-2 describes the graphical command buttons used by the system. Command buttons with a red caption may be activated by pressing the Esc key.

Table 2-2. Graphical Command Buttons

Button	**Name**	**Action**
	Explode	Shows an exploded view of the data on the row. Usually this opens a view/edit form screen.
	Jump	Accesses the recall, behavior checklist data, and perinatal projects data for the individual selected.
	Delete	Deletes the record from the database.
	Printer	Print or preview a report for the current record.
	Calendar	Use the calendar popup to select the date for the date field to the immediate left of the button.
	Exit (Exit Door)	Close the current screen and return to the previous one. On most screens, pressing the Esc key will activate the Exit Door button.
	Print Preview	Displays the report on the screen. Press F1 while previewing a report for the zoom and navigation keys available to move about the report.
	Print	Prints the requested report on the default printer.

Menu Bars

The Windows environment organizes commands in categories that are displayed in a horizontal bar, the menu bar, at the top of the screen. The ERS system provides four menus: File, Edit, Windows, and Help. Clicking on the menu will pull down a list of commands associated with that menu. Available commands are shown in black text. If the command cannot be used at this time it will be grayed out. The menu also indicates keyboard entries which correspond to the available commands.

The Control Menu

The control menu, Figure 2-13, is an expansion of the gray button at the left of the menu bar. It controls the size and position of the screen.

Figure 2-13. Control Menu

The File Menu

The File menu allows you to print the screen you are working with. This menu allows selection of a different printer as the default printer for printing reports. Use the Emergency Close if the normal exit button does not work. Figure 2-14 shows the File menu.

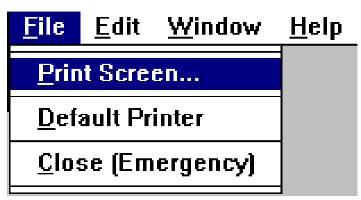


Figure 2-14. ERS File Menu

The Edit Menu

The Edit menu, shown in Figure 2-15, allows you to copy or cut highlighted data from a text box to the Windows clipboard. Paste copies the contents of the clipboard to the current control - which also should be a text box.

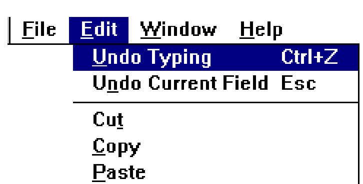


Figure 2-15. ERS Edit Menu

The Window Menu

The Window menu, Figure 2-16, identifies the active window, and controls the arrangement and size of the open screens.

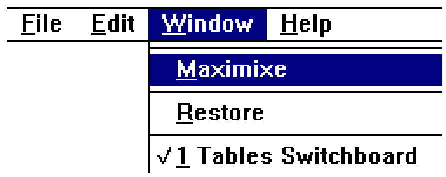


Figure 2-16. ERS Window Menu

The Help Menu

The Help menu provides context-sensitive help to aid in selecting what action to take, or the proper code or data to enter. The Help system contains both a top-level table of contents and individual topics which may be searched alphabetically. The Help system can also be activated by pressing the *F1* function key. The Help on Help choice will bring up the Windows Help on Help system. Figure 2-17 shows the help menu and Figure 2-18 shows the Help About Dialog Box.

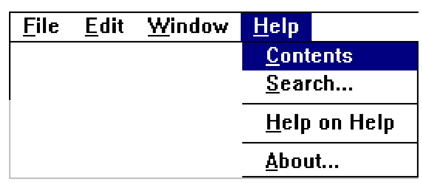


Figure 2-17. ERS Help Menu

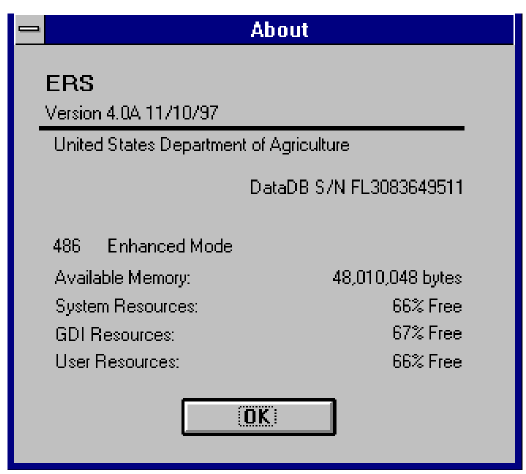


Figure 2-18. Help About

Title Bar

The Title Bar is a colored text banner appearing along the top of the screen. The caption in the title bar is the “name” of the screen.

Status Bar

The Status Bar is a text box at the bottom of the screen which often contains information about the current control or the status of the current activity. For prolonged operations, the status bar may contain a Status Meter which is a gauge of the activity's percent of completion. In some cases, there is no specific additional information and the status bar contains the Microsoft Access default of "Form View."

Some Keyboard and Mouse Tips

There are a number of short cuts you can use to minimize the number of mouse clicks and keystrokes. In many cases, you can use the mouse or the keyboard to accomplish the same thing. Which you use will depend on your preferences and where your hands are. If you have the mouse in hand, you will probably want to continue using the mouse until you need to release it to type some information. While your hands are on the keyboard, you may want to use keyboard short cuts to avoid reaching for the mouse.

1. When a button is selected (highlighted), pressing the space bar or the Enter key is like clicking the button.
2. When the caption for a button has an underlined letter or number, holding down the Alt key and pressing the letter or number is like clicking the button.
3. When the label of a text box contains an underlined letter or number, holding down the Alt key and pressing the letter or number has the same effect as tabbing to the text box.
4. With many text boxes (data entry fields), clicking on the label will select the text box.
5. When characters in a text box are highlighted, pressing a character key will delete the highlighted text and replace it with the new typing.
6. Dragging the mouse from right to left across a text box is a quick way to highlight the text in the text box.

For more information, visit the following topics in the on-line help:

- Editing Keys
- Navigation Keys
- Shorthand Keys for Data Entry

CHAPTER 3 - THE ADULT SWITCHBOARD

About the Adult Switchboard

The Adult switchboard, Figure 3-1, is used to enter and update adult data and to prepare reports of the data entered.

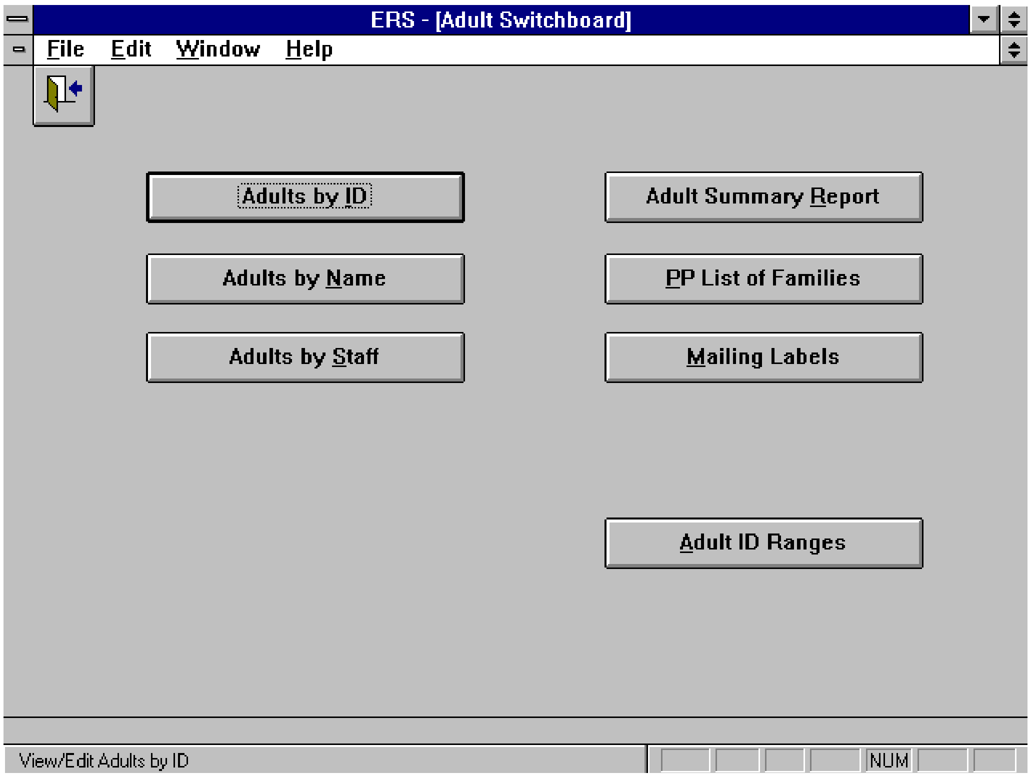


Figure 3-1. Adult Switchboard

! *The terms adult, homemaker, and participant are used interchangeably to refer to the adults stored in the database.*

Following is a description of the command buttons on the Adult Switchboard.

Adults by ID
This button provides access to the adults by their ID.

Adults by Name
This button provides access to the adults by their name.

Adults by Staff
This button provides access to adults by their assigned staff member. Once the staff member is selected, the assigned adults may be accessed by ID or by name.

Adult Summary Report
This function is used to prepare the Adult Summary report. An option screen allows you to define the report period, the subgroup filter, and other selection criteria, such as staff and Zip code.

PP List of Families
This function prepares the Paraprofessional List of Families. An option screen allows you to define the report period, the subgroup filter, other selection criteria, and the report sort and format.

The report sort, for formats A and B, may be by ID or by name. Format C is available in ID sort only. The three report formats are as follows:

Format A allows for information to be presented on a one-line per person basis.

Format B allows for information to be presented, in landscape format, on a one-line per person basis .

Format C allows for information to be presented on a one-line/three-pages per person basis. This report contains all the data entry fields of the adult record.

Mailing Labels
This function prepares participant mailing labels. An option screen allows you to define the report period, the subgroup filter, other selection criteria, and the sort. Also, the names and addresses may be exported to a dBase file.

Adult ID Ranges
The Adult ID Range function provides a way to assign blocks of IDs to a staff member or to a class of adults. When you add a new range you provide a name for the range and the low and high values for the range. When adding adults, select the appropriate range to assure that all new adults will have an ID within the range.

The default range, **<ALL>**, may be used if you do not wish to use ID ranges.

You may add and delete ranges at anytime. The ranges may overlap.

Adding a New Adult to the Database

New adults are added by clicking the Add Adult button on the Adults by ID or Adults by Name browse screens. The screen shown in Figure 3-2 will appear. Before clicking the Next button, assign a staff member to this new adult (it can be changed later) and the enter the new adult's ID (or use the one suggested by the system).

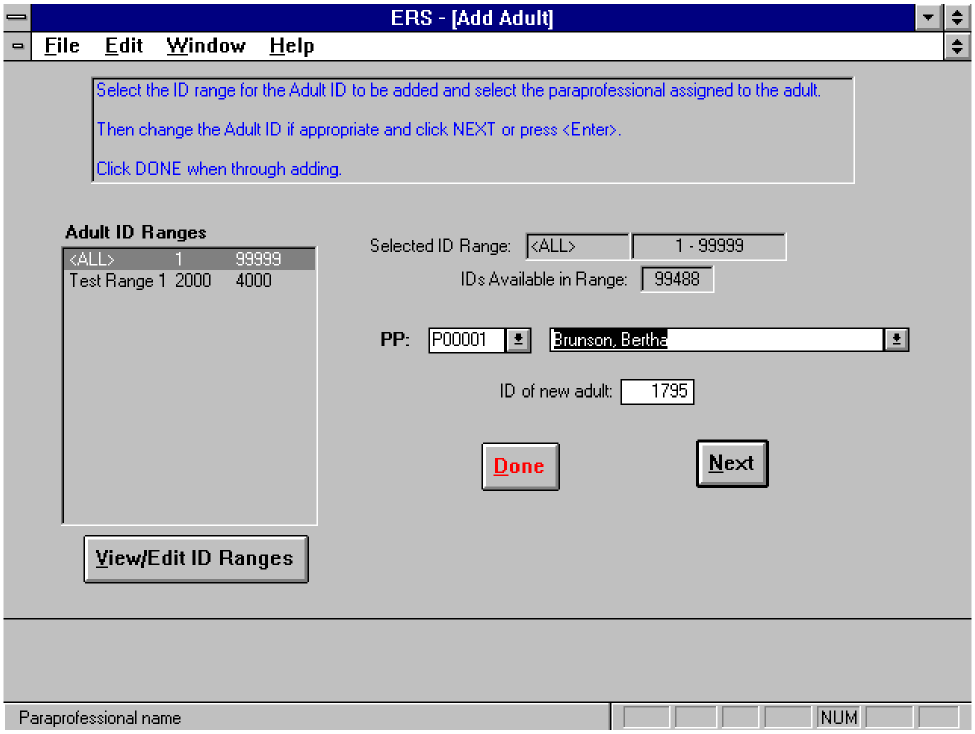


Figure 3-2. Entering a New Adult

Note that you can click the View/Edit ID Ranges button to enter a new ID range at this point.

When you click Next the form screen for the New Adult screen, Figure 3-3, will appear. After you save (or cancel) the new adult record, the above Add Adult screen will reappear. Continue adding other adults until all have been added, then click Done.

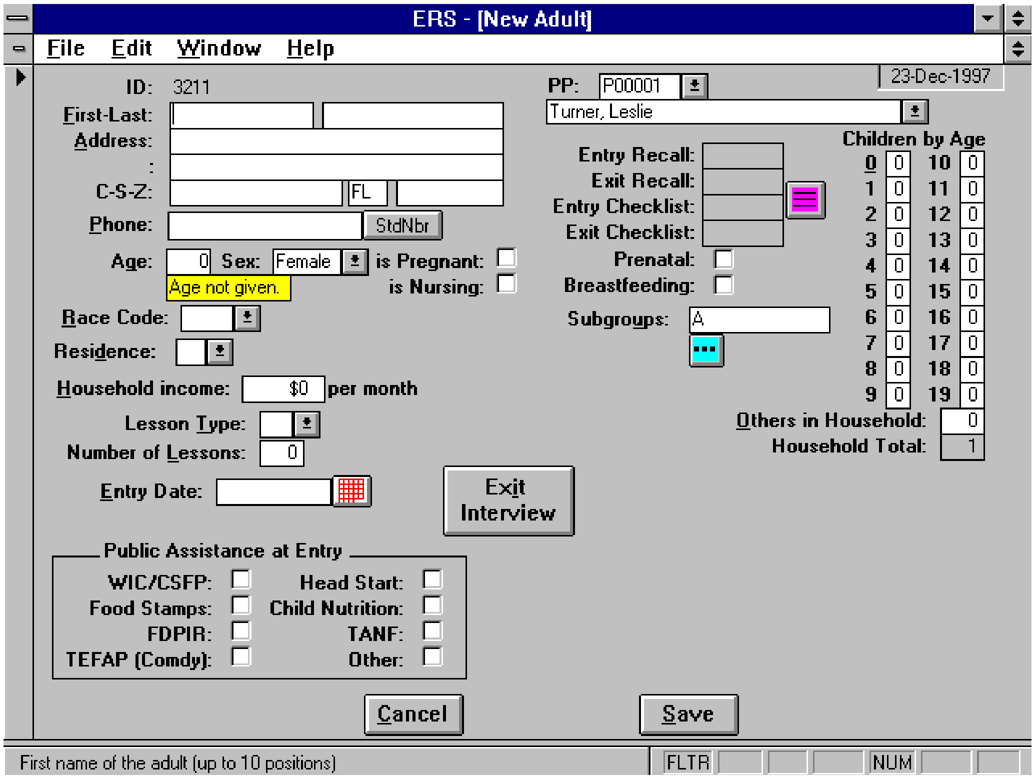


Figure 3-3. New Adult Screen

Updating Recall, Checklist or Perinatal Projects Data using the Jump Button

The Jump button will bring up the dialog box shown in Figure 3-1. It provides a convenient way to access the nutritional, behavior checklist, and perinatal projects data for the adult.

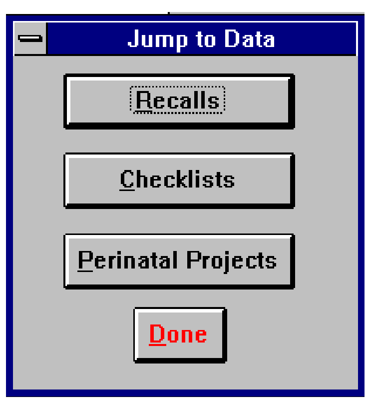


Figure 3-4. Jump Dialog Box

Entering Subgroup Codes

Subgroup codes may be entered directly in the Subgroups text box or by checking off from a popup screen of available subgroups. See Chapter 10 for information about subgroups.

To enter directly, type the appropriate letters in the text box. To enter from the popup screen, click the explode button below the text box. The subgroup selection popup screen is shown in Figure 3-5

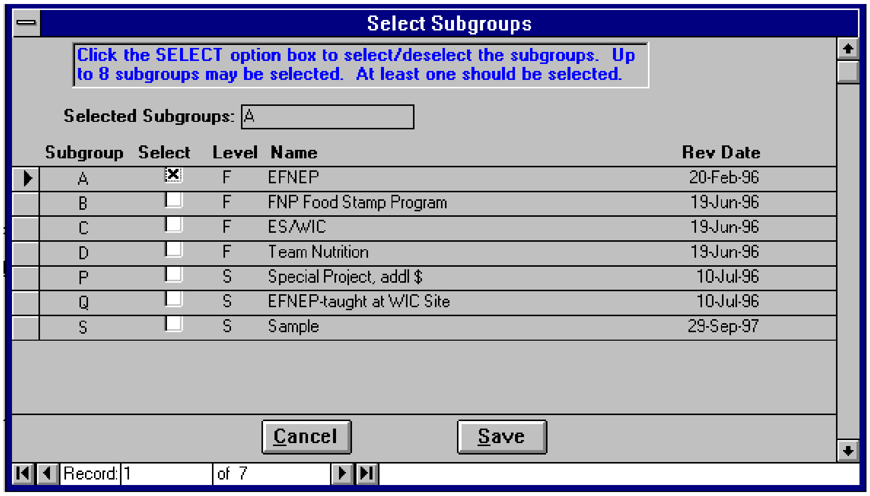


Figure 3-5. Selection of Subgroup Codes

<u>Required Adult Data</u>

The New Adult screen is used to enter the initial information for each adult participant. The following information is required:

Adult ID
Staff ID
Race code
Residence code
Lesson type
Entry date

Drop down lists are provided for entering sex, race code, residence code, and lesson type. An explanation of the codes in given in Chapter 17.

<u>Default Adult Data</u>

Some fields on the new adult screen will contain default values. That value will be used unless you change the entry.

The default values are:

Age = 0 (Age not given)
Sex = Female
Pregnant = no
Nursing = no
Size of household = 1
Subgroups = A

Additional information is entered as available. Thus, the adult's data may be modified as necessary throughout the program. A summary of the data fields is given in Table 3-1.

Table 3-1. Data Fields on the Adult Edit Screen

First-Last	Enter the adult's first and last name.
Address	Two address lines of 28 positions each are available.
C-S-Z	Enter the city, State and ZIP code.
Phone	This is usually the adult's home telephone number. A command button has been added to standardize the number format so you may just type in the digits.
Age	Enter the participant's age at time of entry into the program.
Sex	Use F for Female and M for Male. Type or select from the drop down list.
Pregnant	Check box if participant was pregnant at any time during enrollment in the program.
Nursing	Check box if participant was breastfeeding at any time during enrollment in the program.
Race Code	Enter the race code or select from the drop down list.
Residence	Enter the place of residence code or select from the drop down list.
Household income	Enter the monthly income for the household.
Children by Age	Enter the number of children in the household from 0 (infant) to 19 years of age in the appropriate field.
Others in Household	Enter the number of other members of the household.
Household Total	The Household Total is computed by the system. It is the number of Children by Age, plus the number of Others in Household, plus one for the participant.
Lesson Type	Enter the lesson type code.
#Lessons	Enter the number of lessons the participant has received.
Entry Date	Enter the date the participant entered the program.
Assistance received at entry	For each of the programs, check the box if the participant was receiving the assistance at time of entry.
Subgroups	Enter the subgroup codes for the adult. At least one subgroup code must be entered.

Updating Adults

To update an existing adult, use the Adults by ID, Adults by Name, or Adults by Staff button on the Adult Switchboard to position to the adult. Then click the explode button to bring up the edit screen for that adult. Figure 3-6 shows the Edit Adult screen.

! *Remember to **update the number of lessons** on a regular basis. This is especially important at the Exit Interview.*

<u>Exit Interview</u>

When an adult exits the program, click the Exit Interview button on the Edit Adult screen. This will reveal the controls for recording the exit information.

Enter the code for the exit reason or pick from the drop down list. To revert to not exited, enter 0 as the exit reason.

The exit date determines the reporting period for inclusion of the adult in the Adult Summary report. This is a good time to verify the adult has entry and exit recalls and checklists and the perinatal projects data is current. Use the Jump button to jump to the data for the adult.

If the adult was receiving public assistance as a result of a referral or suggestion from EFNEP personal, toggle on the EFNEP Help check box, and enter a check for the public assistance programs the participant is receiving *as a result of referral or suggestion of EFNEP personnel*.

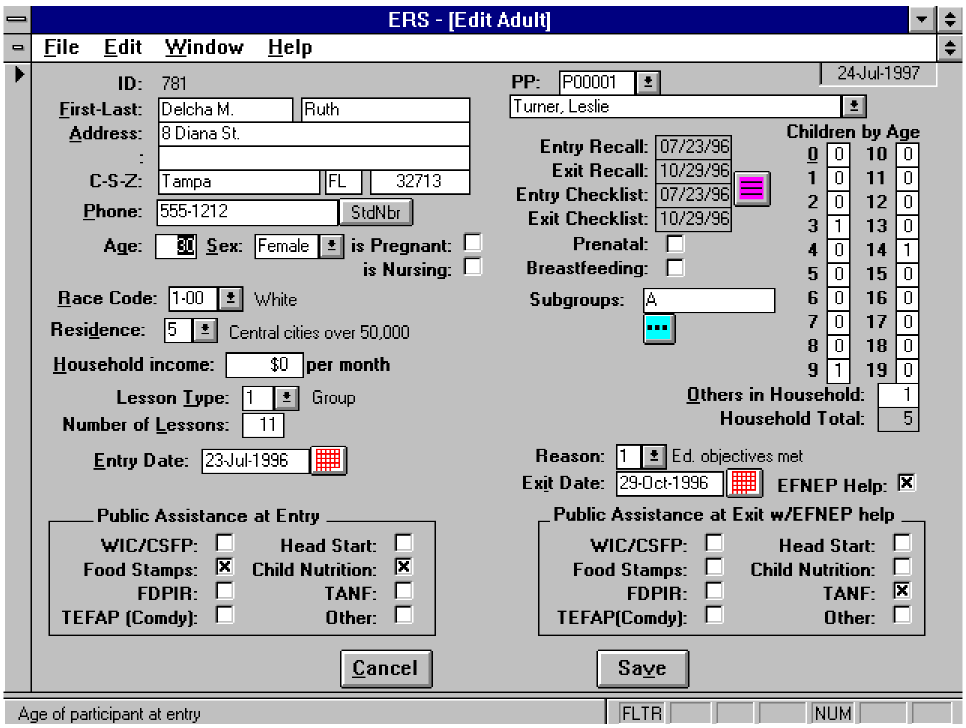


Figure 3-6. Edit Screen for Exited Adult

Deleting Adults

As a rule, adult records are retained for end of year reporting. The Start New Reporting Period function described in Chapter 12 will automatically delete exited adults from the new period’s data. Manual deletion of adults, other than those entered by mistake, should be avoided as it may distort your end of year reports.

CHAPTER 4 - THE NUTRITION SWITCHBOARD

About the Nutrition Switchboard

The Nutrition Switchboard, Figure 4-1, is used to enter recalls, prepare diagnostic reports for participants, prepare the Diet Summary Report, and view/edit the Foods database

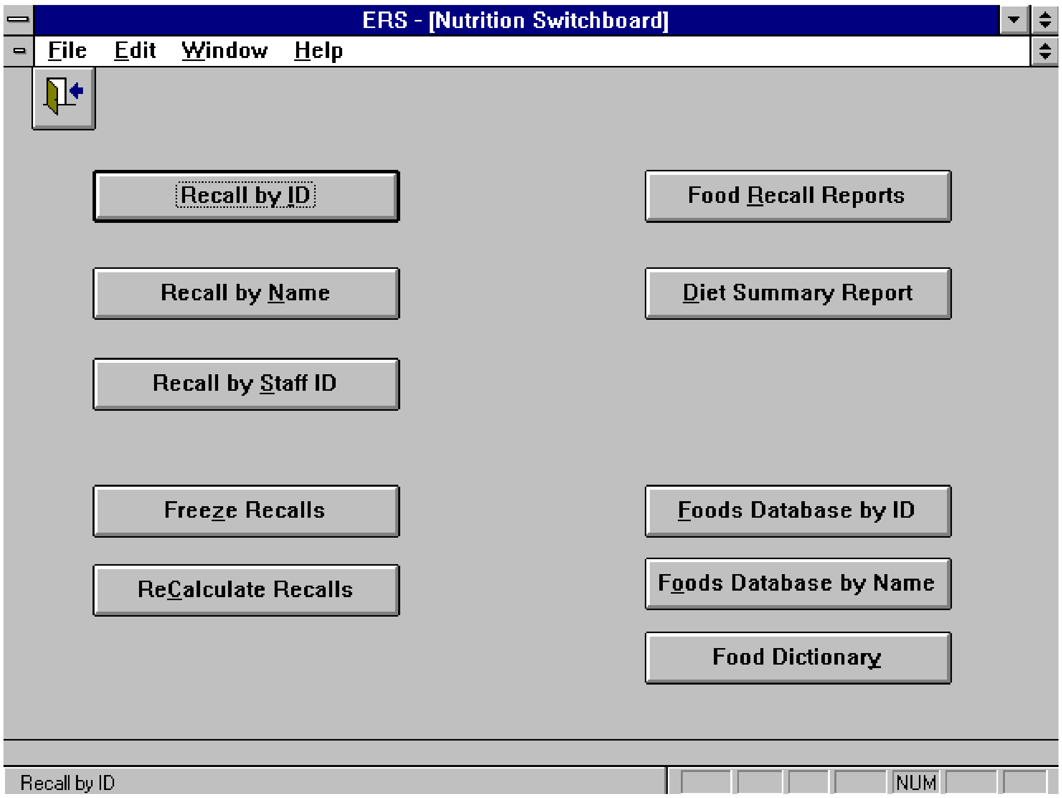


Figure 4-1. Nutrition Switchboard

Following is brief description of each command button on the Nutrition Switchboard.

Recall by ID
This function is used to access recalls by adult ID.

Recall by Name
This function is used to access recalls by adult name.

Recall by Staff ID
This button provides access to adults by their assigned staff member. Once the staff member is selected, the recalls for the assigned adults may be accessed by ID or by name.

Freeze Recalls
This function prevents further changes to a recall. Also, the meal items associated with the recall are deleted to free up some disk space.

ReCalculate Recalls
Perform this function after changing the Foods database so the recall data will reflect the values from the new Foods database.

Food Recall Reports
This function is used for volume printing of the three recall reports.

Diet Summary Report
This function is used to prepare the Diet Summary report. An option screen allows you to define the report period, the subgroup filter, other selection criteria, such as staff and Zip code.

! *Note that adults must have exited the program (with or without objectives met) and have both an Entry and an Exit recall to be included in this report.*

Foods Database by ID
This function is used to access the Foods database by Food ID.

! *The Foods database can be updated only while the Allow Update of Foods DB is on. See Chapter 12.*

Foods Database by Name
This function is used to access the Foods database by Food Name.

Food Dictionary
This function is used to prepare a listing of the Foods database. The listing may be sorted by Food ID or Food Name. Optionally, the report may be sent to your word processor for revision and annotation. Annotated copies of the Food Dictionary may aid in locating food items in the Foods database.

The Recalls Screen

After selecting the adult from one of the “Recall by” buttons on the Nutrition Switchboard, the Recalls screen shown in Figure 4-2 will appear. This screen lists the recalls for the adult.

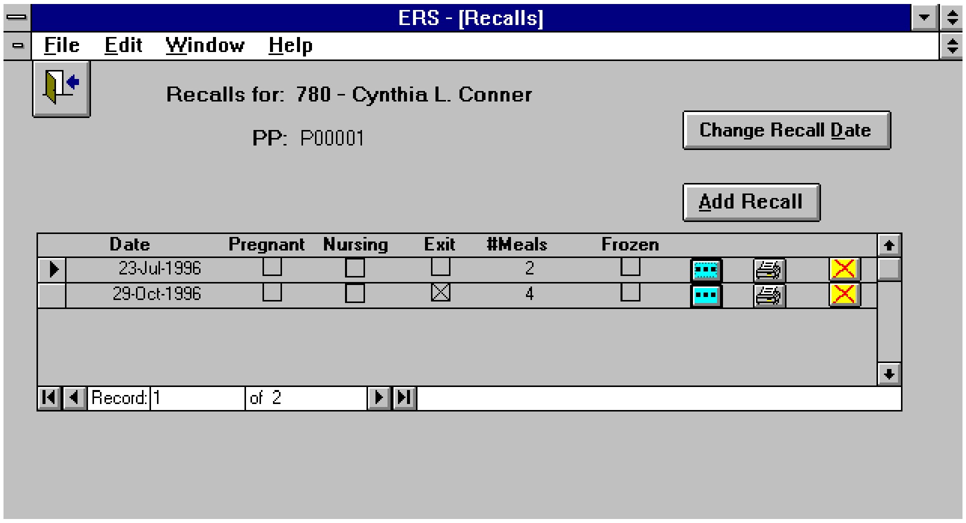


Figure 4-2. Participant's Recall Screen

Nutritional Method

When you are adding the first recall for an adult, the screen shown in Figure 4-3 will prompt you for the nutritional method to be used. All subsequent recalls for that individual must use the same method.

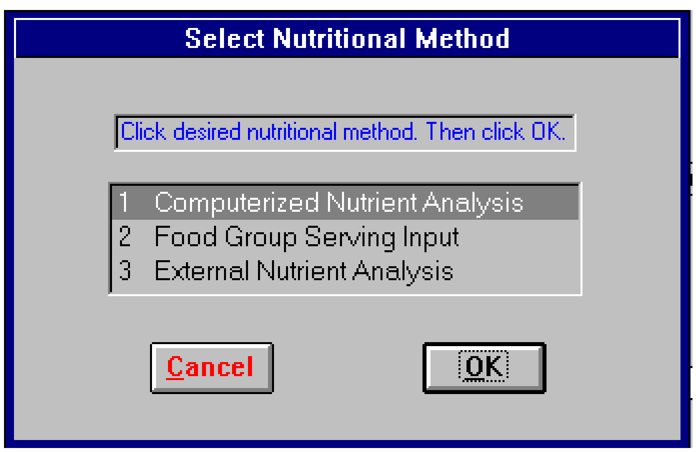


Figure 4-3. Select Nutritional Method Dialog Box

Edit Recall Screen

The format of the Edit Recall screen depends on the nutritional method. For each recall, provide the recall date, the amount spent on food last month, and indicate if the participant is pregnant, nursing, or taking nutritional supplements, and whether this is the exit interview.

! *In the adult record (See* Figure 3-3 *and* Table 3-1*), enter pregnant or nursing if she is pregnant or nursing at any time during enrollment in the program. For recalls, enter pregnant or nursing only if she is pregnant or nursing at the time of the recall.*

Edit Recall for Nutritional Method 1 - Computerized Nutrient Analysis

For nutritional method 1, enter the meal items for the recall. The system will compute the nutrient values.

Figure 4-4 shows an Edit Recall screen for nutritional method 1. Click the Enter Meal Items button for the Meal Items screen (Figure 4-5). From the Meal Items Screen use the Explode Button to edit an existing item or the Add Meal Item to add a new entry.

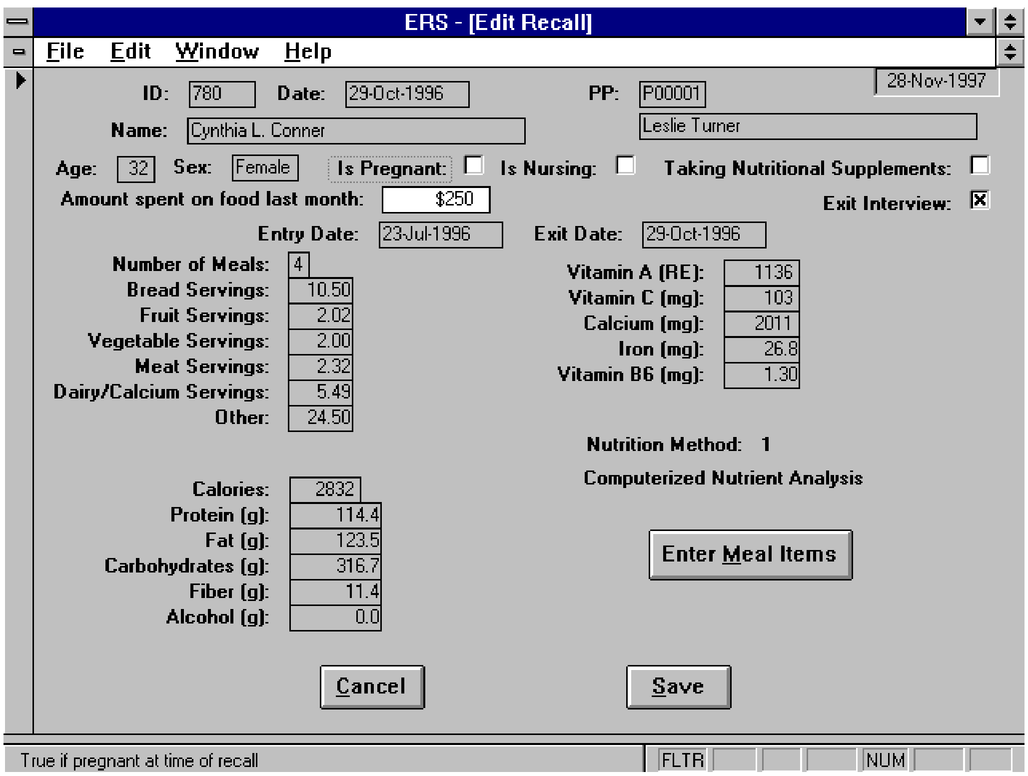


Figure 4-4. Edit Recall for Nutritional Method 1

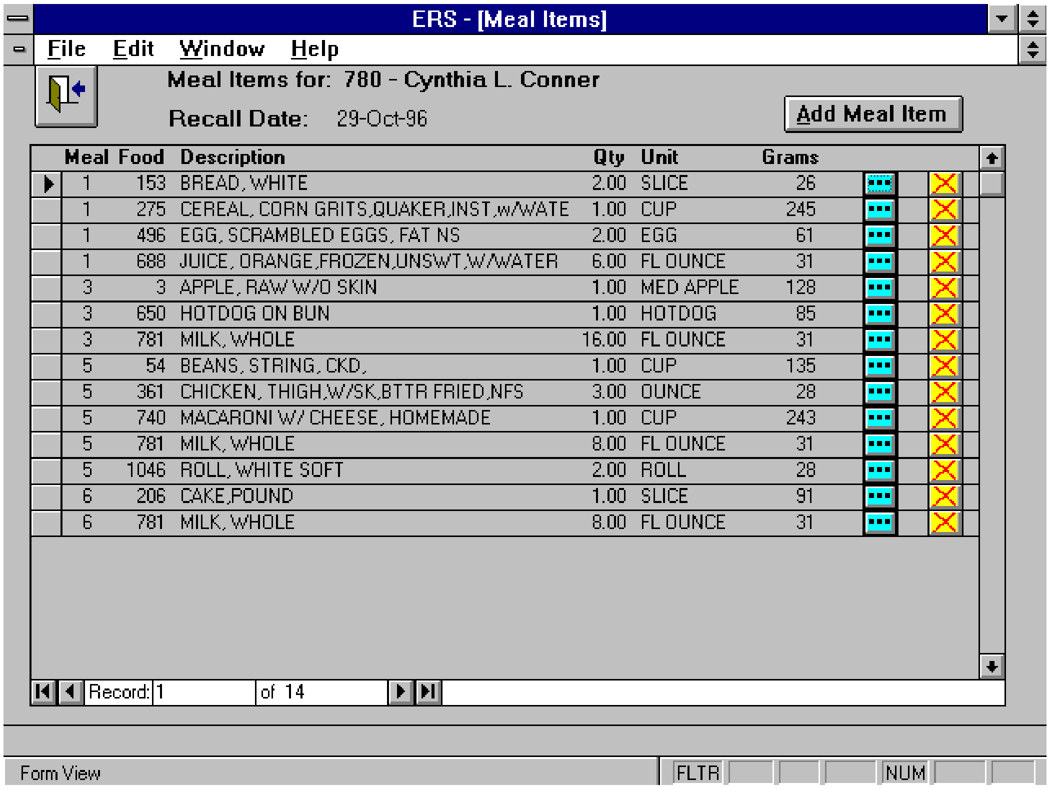


Figure 4-5. Meal Items Browse Screen

<u>Entering Meal Items</u>

Entry of a meal item consists of entering the *Meal Type Code*, the *ID or Name of the Food Item*, and the *Quantity Consumed* on the Edit Meal Item screen, Figure 4-6.

<u>Meal Type Codes</u>

Meal codes identify the time of day the participant ate. They are presented in a drop down list corresponding to Table 4-1.

Table 4-1. Meal Type Codes

1	Morning meal or snack
2	Midmorning meal or snack
3	Noontime meal or snack
4	Afternoon meal or snack
5	Evening meal or snack

<u>Food ID</u>

The Foods Database contains the food items. You may supply the Food ID or the Name of the food item The Food ID lists items in the foods database, numerically, in the chronological order in which they were entered. For an alphabetical listing, use the food name. You may type in the name or use the drop down list. If you are still not sure, use the browse button to see the items related to your choice.

Quantity Consumed

For quantity consumed, use the grams/unit, the name of the unit, and the serving size to determine the 'size' of the food item, and therefore the appropriate quantity.

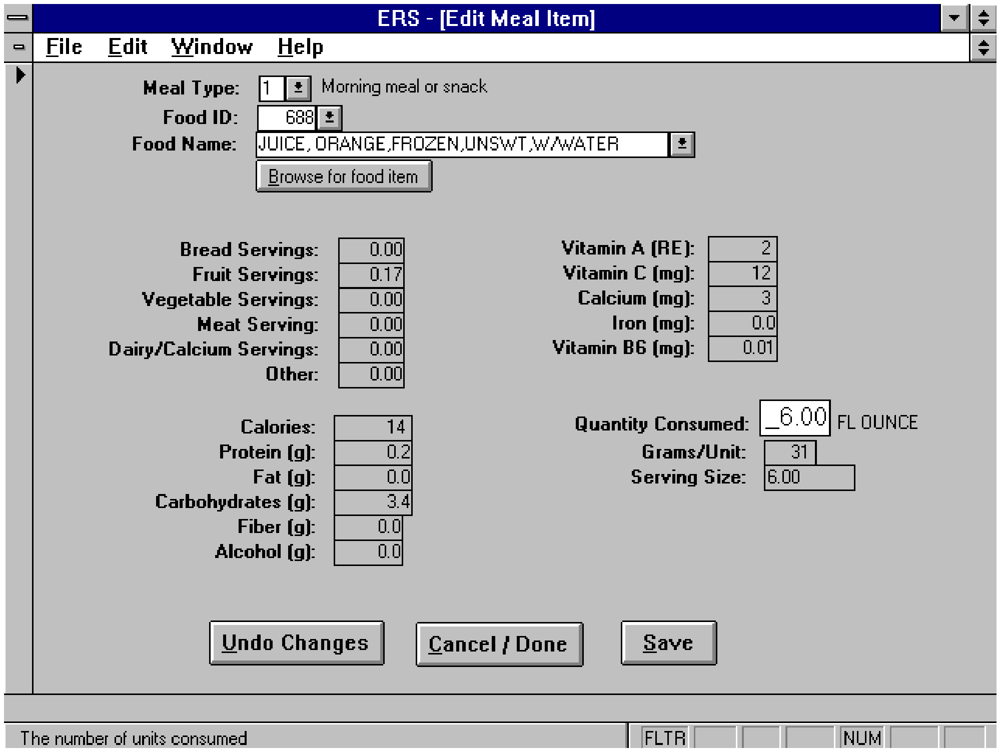


Figure 4-6. Edit Meal Item Screen

Edit Recall for Nutritional Method 2 - Food Group Serving Input

Figure 4-7 shows the Edit Recall for nutritional method 2. Note that only the number of meals and the number of servings for each food group is captured, based on tabulations done externally.

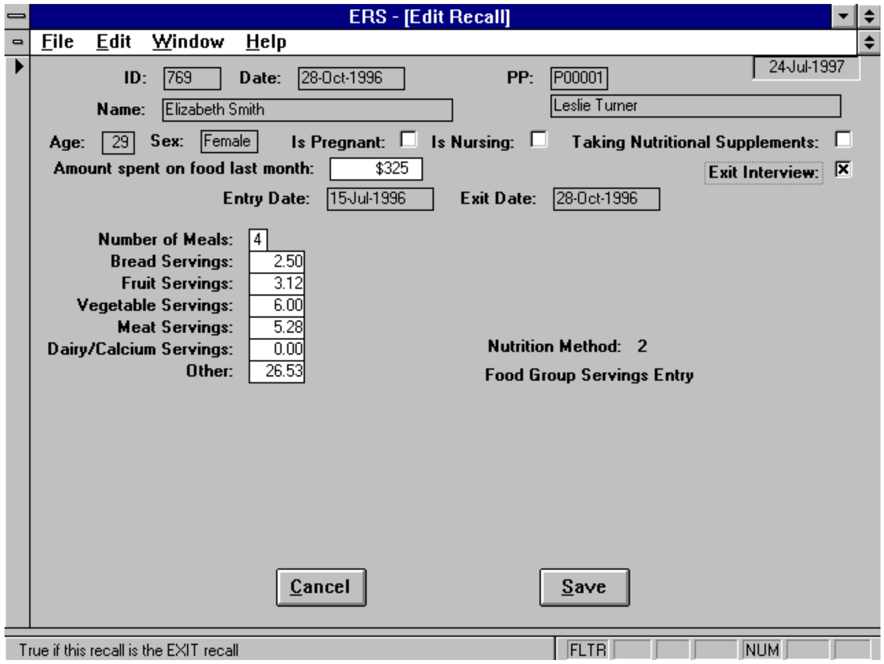


Figure 4-7. Edit Recall for Nutritional Method 2

Edit Recall for Nutritional Method 3 - External Nutrient Analysis

Figure 4-8 shows the Edit Recall for nutritional method 3. Note that all nutrient values are entered manually, based on tabulations done externally.

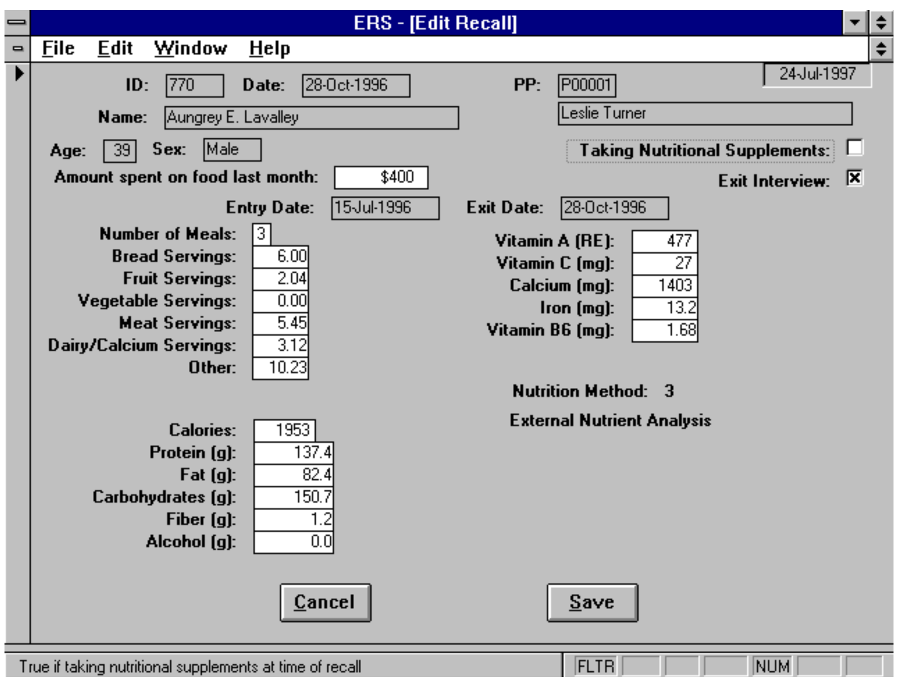


Figure 4-8. Edit Recall for Nutritional Method 3

Food Recall Reports

The Food Recall Reports function is used to print a number of recall reports at once. Figure 4-9 shows the Food Recall Reports Screen.

Use the Report Type option buttons to select which of the three report formats is to be used. Use the Output Mode option buttons to select Print or Preview. Note that Preview is not available for batch printing. If Preview is selected for batch printing, it will be ignored.

The Select by ID, Select by Name, and Select by Staff buttons provide single printing of the report by individual participant. The Batch Print buttons provide selecting a number of reports to be printed as a batch. Use Batch Print by ID, by Name and by Staff to select the participants whose data is to be printed. Then click the Print Selected Reports button on the browse screen to commence printing. The Batch Print Changes button is used to print the selected report type for all participants with modifications to the adult record or the recall record since a selected date, expressed as days prior to today.

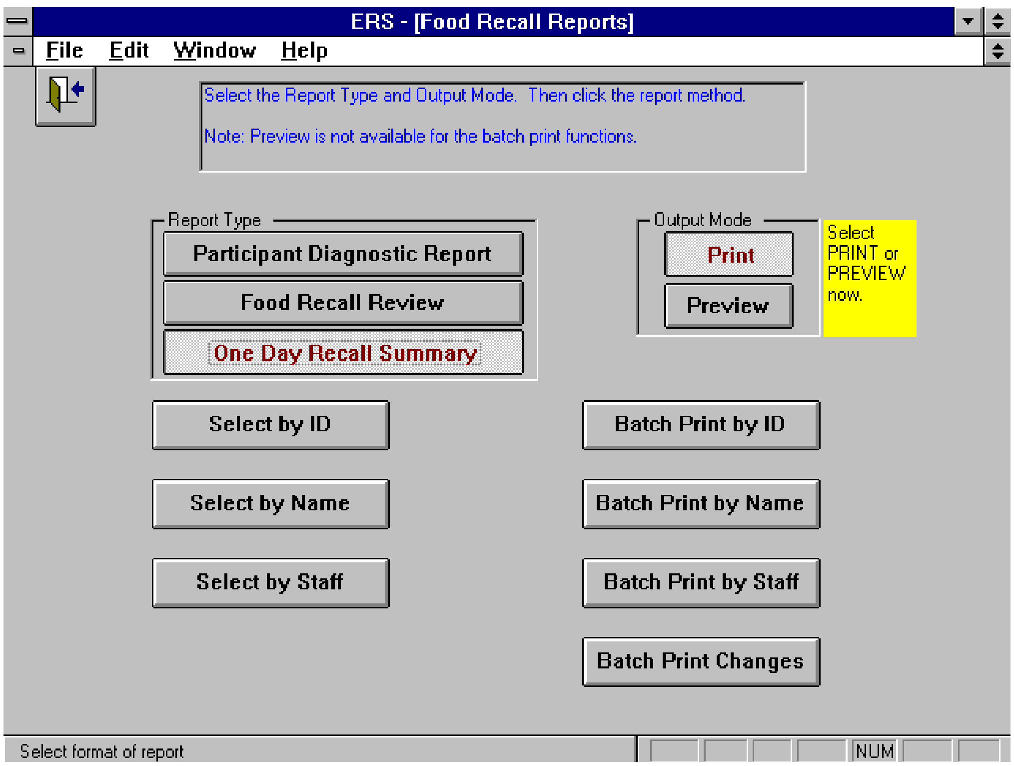


Figure 4-9. Food Recall Reports Screen

The food recall reports are available in three formats:

<u>Participant Diagnostic Report</u> - This is a four to five page report which can be printed out for each recall entered. This report is most useful if computerized nutrient analysis (Nutritional Method #1) is being used, although it will print out a limited report if the other nutritional dietary analysis options are chosen. The report consists of four parts: Analysis of Food Recall, Daily Food Guide, Nutrient Analysis, and Good Sources of Nutrients when Nutritional Method 1 is used. For Nutritional Method 2, the number of servings of the food groups is listed as well as the results of the entry recall. For

Nutritional Method 3, the number of servings of the food groups and the nutrient values are listed as well as the results of the entry recall.

Other information on the report includes homemaker demographics (from the family record); nutrient values; % RDA's; % of calories from protein, fat, carbohydrates and alcohol; foods eaten; how foods fit into the food groups; and good sources of nutrients. The total number of servings eaten from each of the food groups is compared to the total servings from the previous record and to the Food Guidance chart.

<u>Food Recall Review</u> - This report lists the food items consumed for each meal. Its purpose is to list the food items for data entry validation. This report applies only to Nutritional Method 1.

<u>One Day Recall Summary</u> - This report shows a pictorial summary of the participant's intake of the five basic food groups compared to the recommended servings. A food pyramid allows a visual representation of the servings. Nutrients are summarized by actual grams ingested and percent of recommended dietary allowances. This is also graphically represented. The percent of calories from fat, protein, and carbohydrates are compared against recommended proportions.

This report applies only to Nutritional Methods 1 and 3.

Diet Summary Reports

This function provides reports and graphs on dietary improvement of participants for designated report periods. You may select the entire database or by staff member or by ZIP code. You may also choose a subgroup filter.

In order to be included on the report, adults must have exited the program (with or without objectives met) and have completed both an entry and exit recall. The exit date must fall within the report period.

Figure 4-10 shows the Diet Summary Report screen where selection of the adults to be included in the report is made.

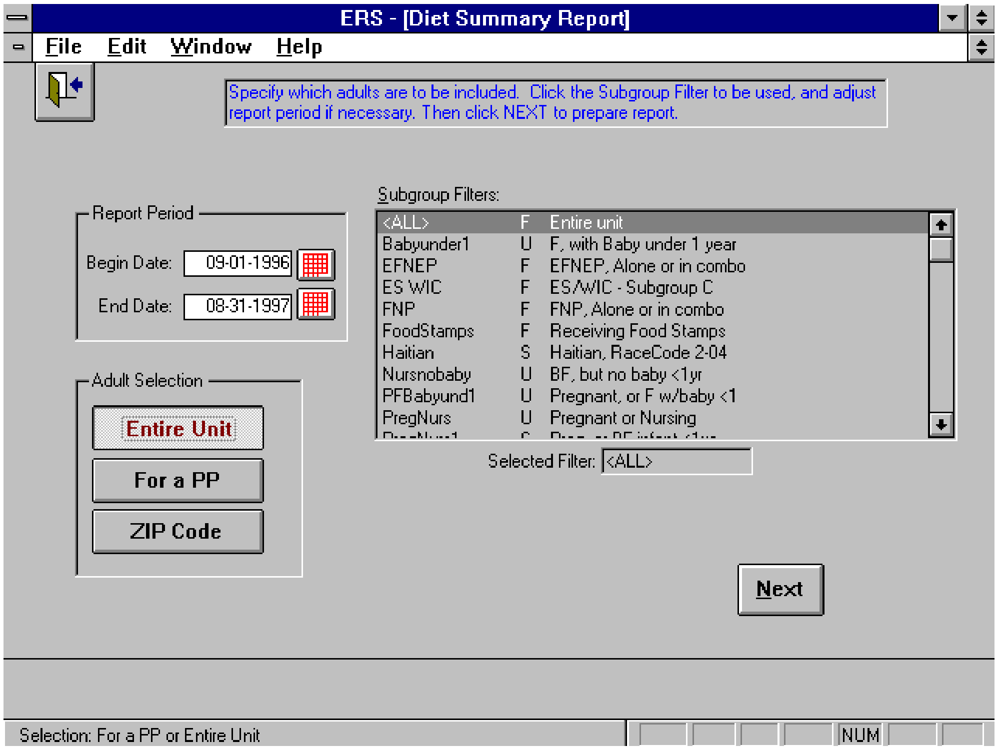


Figure 4-10. Selecting the Adults for the Diet Summary Report

About the Foods Database

The Foods database is the database containing the nutrient values and servings of food groups for each food. The food dictionary, an alphabetical printout of all the foods currently in the database (by food name), is included in Volume 3. The Foods database is designed to be a "generic", reliable, concise database for use by all EFNEP States and territories. Nutrient values of most foods were taken from the USDA Handbook #8 series or the database from the Agriculture Research Service that was used to analyze the Nationwide Food Consumption Survey. Additional recipes, manufacturers' and ethnic food data were entered to make the database as complete as possible. Enter additional foods commonly eaten in the community to the database.

When the Foods database is to be updated or edited, the source of the information should be documented and a printout or listing of the information and who entered the data should be kept. To maintain the integrity of the system, it is highly recommended that the database be edited only at the State office (copies can then be distributed to County offices). If certain foods are not needed in your area, you may delete them from the database.

Foods were entered in standard amounts. Units included those for items (apple, sandwich, slice, etc.) and those for measures (teaspoon, tablespoon, ounce, cup). Standard Units for meat = 1 ounce, beverages = 1 fluid ounce, and mixed dishes = cup. Since only one database portion can be used (and the portion size cannot be manipulated like other dietary analysis programs), use standard portions or utilize the conversion table in Volume 3. The Foods database is organized or indexed by food name. The food names for many types of foods are listed by category, such as bread, juices, chicken, fish, beef, turkey, cereal, candy, soup, sandwiches and sauces. These foods are all listed with the category name first, then a comma, and then a more precise description (such as chicken, thigh, batter/fried). When adding new foods, be sure to consistently organize food names in a similar manner to ensure foods are displayed in correct alphabetical order. Food ID numbers were originally organized in alphabetical order by food name (1=alfalfa sprouts). Although added foods will be assigned the next ID number, they may be accessed alphabetically by food name.

From time to time, a new foods database may be supplied by EFNEP headquarters or the State. This will probably be a complete replacement; however any local changes may be retained through a comparison feature. Refer to Chapter 13 for details on importing a new foods database.

Updating the Foods Database

When new food items are added, the dialog box shown in Figure 4-11 will prompt you for the ID of the new food item. Use IDs starting at 90000 to avoid duplicating IDs that may be used at the national level.

The Foods database may be updated only when the Allow Update of Foods DB switch in the System Configuration record (see Chapter 12) is *on*. Keep that switch *off* except when changes to the Foods database are necessary. This avoids accidental and undocumented changes to the Foods database.

Figure 4-11. Identification of New Food Item

The Edit Food Item screen, Figure 4-12, is used to enter the new values. Table 4-2 identifies the specific information to be completed in this edit screen.

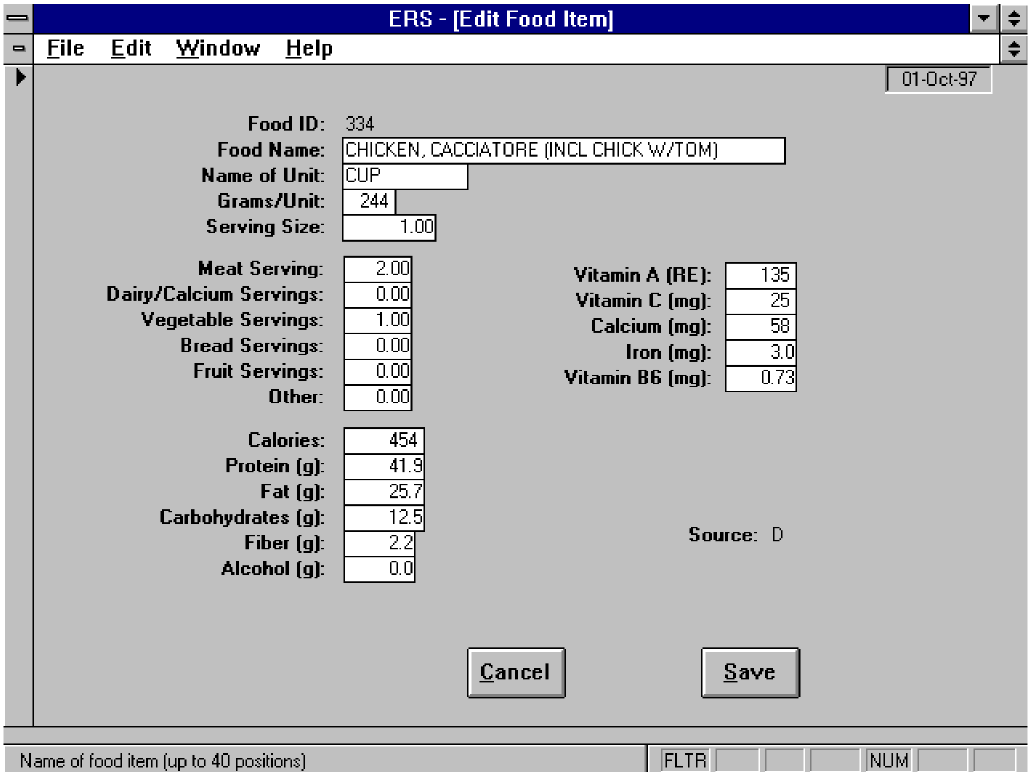


Figure 4-12. Foods Database Edit Screen

Table 4-2. Data Fields in the Foods Database

ID	When new food items are added by a unit, the assignment of the ID number must be coordinated, so it does not duplicate a number being assigned to another food item by headquarters. Units should use the 90000 to 99999 range of ID numbers for locally generated items.
Food Name	The food name may have up to 40 characters.
Name of Unit	Enter a descriptive name for the size of the food item. Examples include **ounce**, **slice** and **cup**. Name of unit can be up to 10 characters.
Grams/Unit	Enter the weight in grams of the unit of food. (1 ounce is approximately 28 grams).
Serving Size	Enter the quantity of the food item needed to make a standard serving. Be sure to distinguish between serving sizes of cups and ounces.
Bread/Cereal Servings	Enter the number of bread servings provided by this unit of food.
Fruit Servings	Enter the number of fruit servings provided by this unit of food.
Vegetable Servings	Enter the number of vegetable servings provided by this unit of food.
Meat and Alternate Servings	Enter the number of meat/alternate servings provided by this unit of food.
Dairy/Calcium Servings	Enter the number of dairy/calcium servings provided by this unit of food.
Other	Enter the number of other (added fat and sugar) servings provided by this unit of food. Each serving of an "other" is equivalent to approximately 35 calories (1 tsp. fat or 2 tsp. sugar).
Calories	Enter the number of calories provided by this unit of food.
Protein (g)	Enter the grams of protein provided by this unit of food.
Fat (g)	Enter the grams of fat provided by this unit of food.
Carbohydrates (g)	Enter the grams of carbohydrates provided by this unit of food.
Fiber (g)	Enter the grams of fiber provided by this unit of food.
Alcohol (g)	Enter the grams of alcohol provided by this unit of food.
Vitamin A (RE)	Enter the number of Retinol Equivalents of vitamin A provided by this unit of food.
Vitamin C (mg)	Enter the milligrams of vitamin C provided by this unit of food.
Calcium (mg)	Enter the milligrams of calcium provided by this unit of food.
Iron (mg)	Enter the milligrams of iron provided by this unit of food.
Vitamin B6 (mg)	Enter the milligrams of vitamin B6 provided by this unit of food.

Source Codes

The source code indicates which source of nutrient composition information was used. All records added or modified by the unit will have a source code of U. Table 4-3 identifies the source codes.

Table 4-3. Foods Database Source Codes

A	ARS (was HNIS) database
B	USDA Handbook 8 series
C	Manufacturers data
D	Reliable local data or recipe
S	State system (SRS)
U	Unit system (ERS)

CHAPTER 5 - THE BEHAVIOR CHECKLIST SWITCHBOARD

About the Behavior Checklist Component

The Behavior Checklist component provides an assessment of EFNEP's impact on participants' food practices during enrollment. Data will be collected from the EFNEP Survey given to participants, and then entered into the system. Two surveys are required: One at entry and one at exit.

The improvement of participants is summarized in three different areas which illustrates the number of practices improved in Food Resource Management, Nutrition Practices, and Food Handling and Safety.

Use of the checklist component is optional. However, if data is entered, all fields and responses to questions must be supplied. In addition to the base questions, States may elect to incorporate additional questions from a master database of questions.

Behavior Checklist Switchboard

The Behavior Checklist Switchboard, Figure 5-1, is used to access the functions of the Behavior Checklist component.

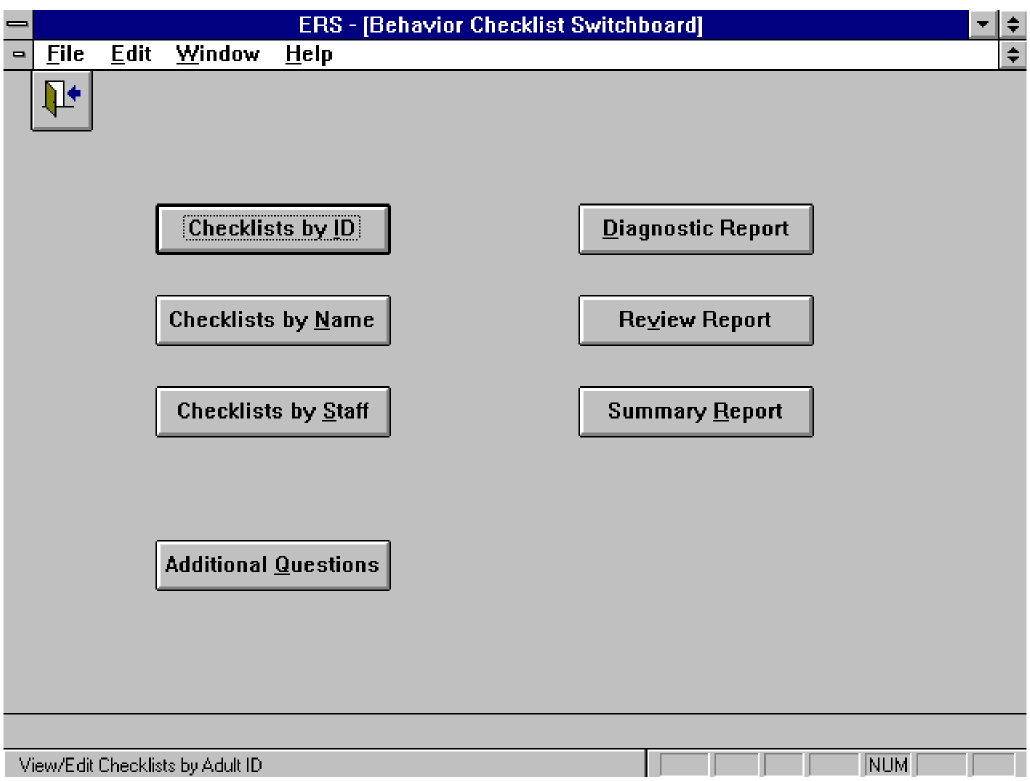


Figure 5-1. Behavior Checklist Switchboard

Following is brief description of each command button on the Behavior Checklist Switchboard.

Checklists by ID
This function is used to access checklists by adult ID.

Checklists by Name
This function is used to access checklists by adult name.

Checklists by Staff
This button provides access to adults by their assigned staff member. Once the staff member is selected, the checklists for the assigned adults may be accessed by ID or by name.

Additional Questions
This button opens the Additional Behavior Checklist Questions Switchboard.

Diagnostic Report
This function is used for printing Behavior Checklist Diagnostic reports individually or by batch.

This report uses the messages associated with the behavior checklist questions to give the participant feedback for his or her food behavior practices. The first section describes positive habits which have been adopted as a result of the program. The second section offers suggestions for areas of improvement.

Review Report
This function is used to print the Checklist Review Report. The Checklist Review allows staff to review the results of the survey by comparing entry and exit responses of each participant.

Summary Report
This function is used to prepare the Behavior Checklist Summary report. An option screen allows you to define the report period, the subgroup filter, other selection criteria, such as staff and Zip code.

! *Note that adults must have exited the program (with or without objectives met) and have both an Entry and an Exit survey to be included in this report.*

The Checklist Screen

After selecting the adult from one of the "Checklists by" buttons on the Behavior Checklist Switchboard, the Checklist browse screen shown in Figure 4-2 will appear. This screen lists the surveys for the adult.

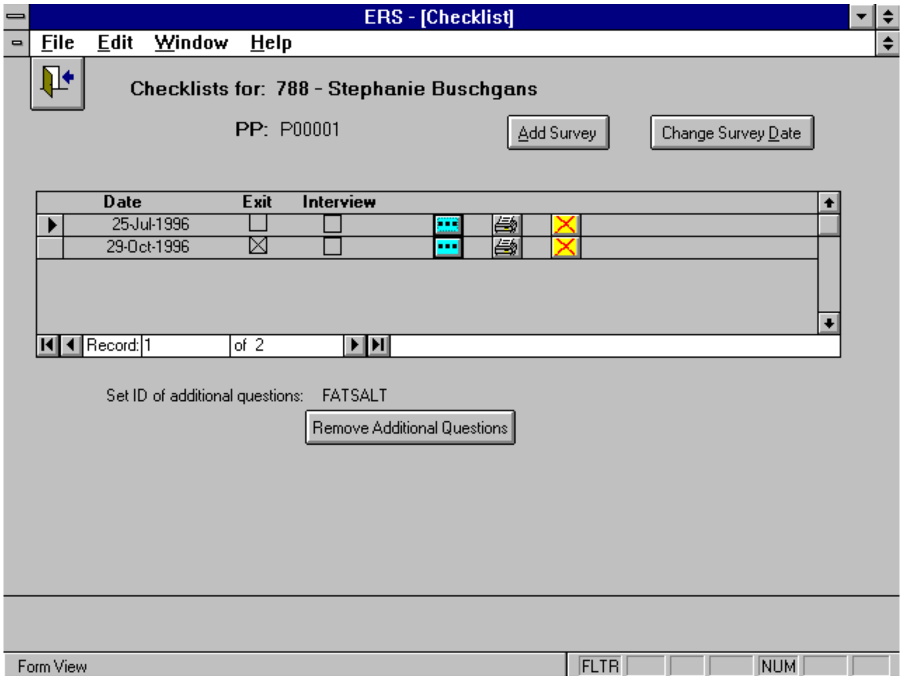


Figure 5-2. The Checklist Browse Screen

Base Behavior Checklist Questions

The base Behavior Checklist Questions are the 10 questions that apply to all adults who participate in the Behavior Checklist component. Figure 5-3 shows the screen for entry of responses to the base questions.

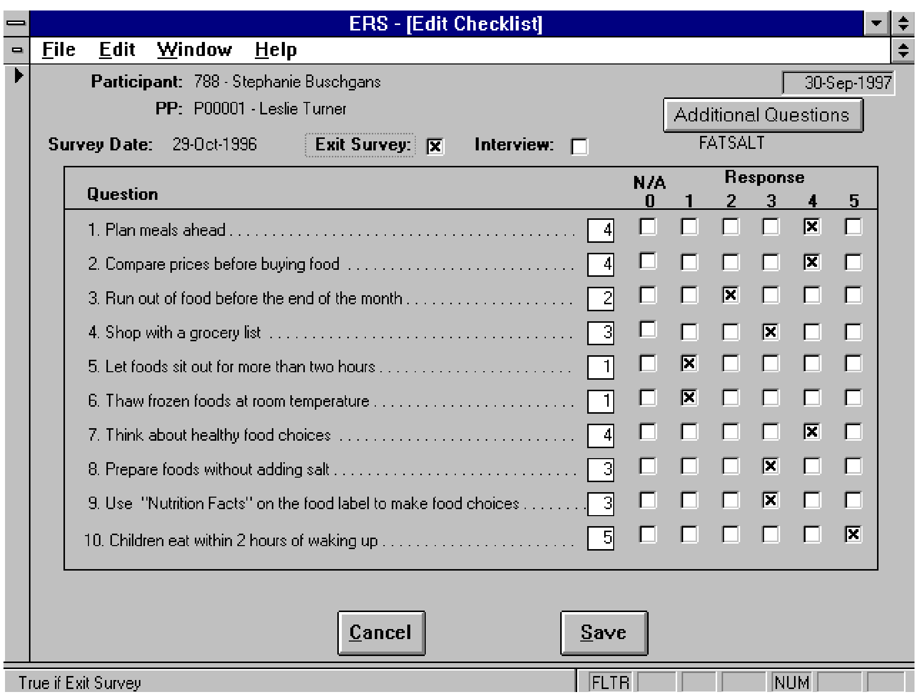


Figure 5-3. Edit Checklist Screen for Base Questions

Responses to the base questions are coded on a 1 to 5 scale, plus 0 for not applicable, as shown in Table 5-1. The response to each question may be entered by keying the numeric code or by clicking on the checkbox in the appropriate column.

! ***Not applicable*** *should be avoided when possible, as it may distort the results.*

Use the Additional Questions button to open the Additional Questions edit screen. This screen is shown in Figure 5-4

Table 5-1. Behavior Checklist Questions Responses

0	No Response or Not Applicable
1	Do Not Do
2	Seldom
3	Sometimes
4	Most of the Time
5	Almost Always

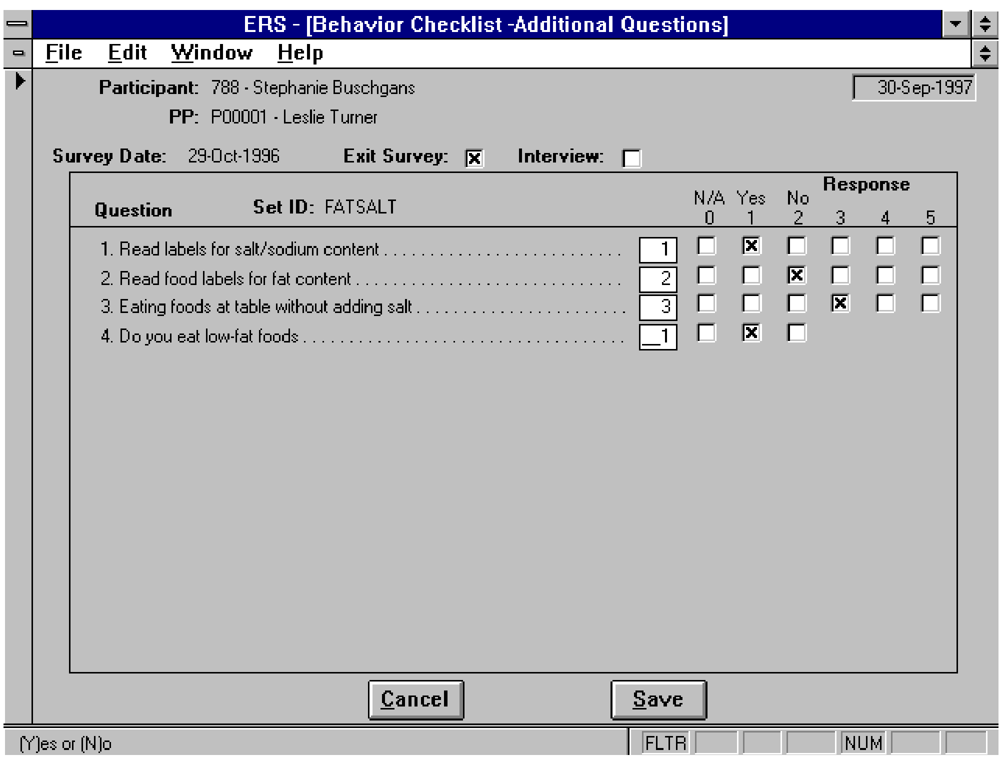


Figure 5-4. Edit Screen for Additional Questions

About the Additional Behavior Checklist Questions

The Additional Behavior Checklist Questions are questions that may be asked of participants in addition to the Base Behavior Checklist Questions.

The additional questions are prepared at the Federal level using questions submitted by the States. This Question Master File is then exported to the State system where they are grouped into one or more Question Sets. The State system then exports the questions and question sets to its Unit level systems where they are used to collect entry and exit responses from participating adults. The Behavior Checklist Summary Report includes the results of the responses to the base and additional questions.

Table 5-2 lists the types of additional questions that may be used. For all questions, except numeric, a response of 0 means not applicable. For numeric questions a question mark (?) is used to code not applicable.

! ***Not applicable*** *should be avoided when possible, as it may distort the results*

Table 5-2. Types of Additional Questions

Code	Type	Description
4	4-Choice	Responses are coded on a 1 to 4 scale.
5	5-Choice	Responses are coded on a 1 to 5 scale.
L	Logical	Responses are 1 for yes and 2 for no.
N	Numeric	A numeric value is used. Each question has its own range of high and low values

Additional Behavior Checklist Question Switchboard

The Additional Behavior Checklist Questions Switchboard, Figure 5-5, provides functions for viewing and printing both the additional questions and the sets of additional questions. It also provides for importing new question sets.

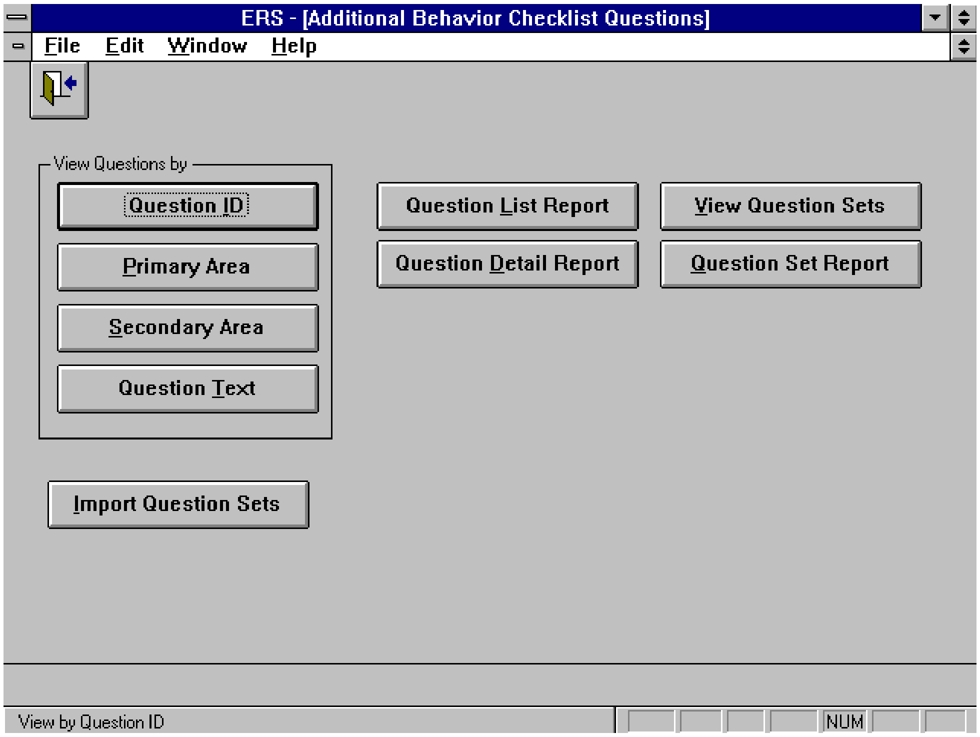


Figure 5-5. Additional Behavior Checklist Questions Switchboard

Following is a brief description of the command buttons on the Additional Behavior Checklist Questions switchboard.

Question ID
This function is used to access questions by ID number. For questions submitted by states, the state abbreviation appears as the first two letters of the ID.

Primary Area
This function is used to access questions by Primary Area addressed, such as Food Resource Management, Nutrition Practices, or Food Safety. See Volume 3 for a list of codes for primary and secondary areas.

Secondary Area
This function is used to access questions by Secondary Area addressed. Some questions may relate to more than one area, for example, Nutrition Practices and Food Resource Management.

Question Text
This function is used to access questions based on the text of the question. This may aid in identifying similar questions.

Question List Report
This function provides a single line per question of all questions in the database. The list may be sorted by Question ID, Primary Area, Secondary Area, or Question Text.

Question Detail Report
This report provides the detailed information about each question. The report is formatted so two questions fit on a page. To print the detail information for a specific question, use the print icon on one of the **View Questions by** buttons.

View Question Sets
This function provides access to the question sets available for use. Use the explode button for a set to see it's questions.

Question Set Report
This function provides a list of the question sets and the specific questions in each set.

Import Question Sets
The Import Question Sets command is described in Chapter 13.

Behavior Checklist Summary Report

The Behavior Checklist Summary report illustrates the survey results using tables and graphs. This report includes both base and additional questions. Figure 5-6 shows the screen for selecting the adults to be included in the Behavior Checklist Summary report.

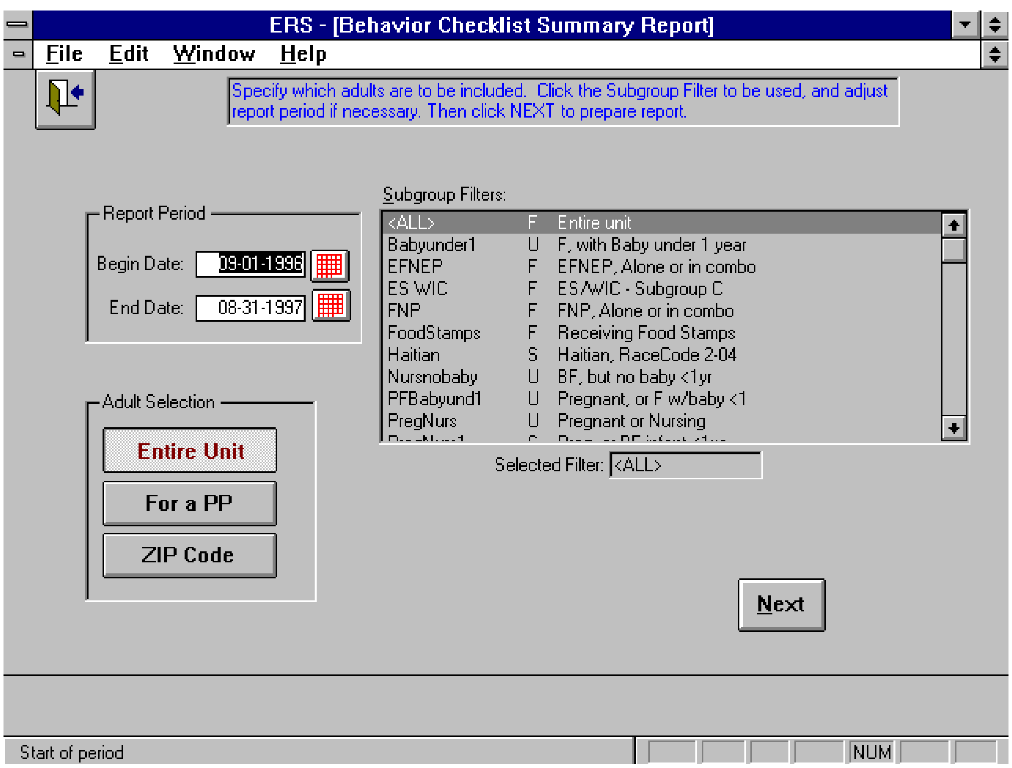


Figure 5-6. Selection of Adults for the Behavior Checklist Summary Report

CHAPTER 6 - THE PERINATAL PROJECTS SWITCHBOARD

About the Perinatal Projects Component

The Perinatal Projects component provides an assessment of the prenatal care of pregnant females and the breastfeeding preferences of nursing females. For each mother there are three choices of the data to be collected:

- Prenatal Only
- Breastfeeding Only
- Both Prenatal and Breastfeeding

Once the perinatal projects record has been created for the mother, it will be updated a number of times during the prenatal or breastfeeding period. Completion of the prenatal care information is indicated by the entry of the birth data. Completion of the breastfeeding portion is indicated by the entry of an “end record” date. Once marked complete, the information will be included in the Perinatal Projects Summary Report. The birth date will be used to determine if the prenatal information falls within the report period; and the “end record” date will be used to determine if the breastfeeding information falls within the report period. It is possible for a mother’s record to span two periods, with the prenatal in one and the breastfeeding in the next.

The system will handle multiple births by creating a separate record for each baby. The baby’s first name or some other designation such as “A”, “B” may be entered for identification. Separate breastfeeding information will be maintained for each baby. For the breastfeeding portion, percents in reports will be based on the number of live births where the child was put to breast at least once. The system will allow for multiple pregnancies in a year. This will provide for the possibility of a prenatal record for a second pregnancy while collecting breastfeeding information on a prior birth. Also, since separate breastfeeding records are maintained for each live birth, simultaneous collection of breastfeeding information from two pregnancies is possible.

Table 6-1 shows the data collected for the prenatal and breastfeeding segments.

Table 6-1. Perinatal Data Collected

Information Collected	Number of data records	Prenatal	Breastfeeding
Prenatal	1 per mother	◊	
Delivery	1 per mother	◊	◊
Birth	1 per baby	◊	◊
Breastfeeding	1 per baby		◊

Perinatal Projects Switchboard

The Perinatal Projects switchboard, Figure 6-1, is used to access features of the Perinatal Projects component.

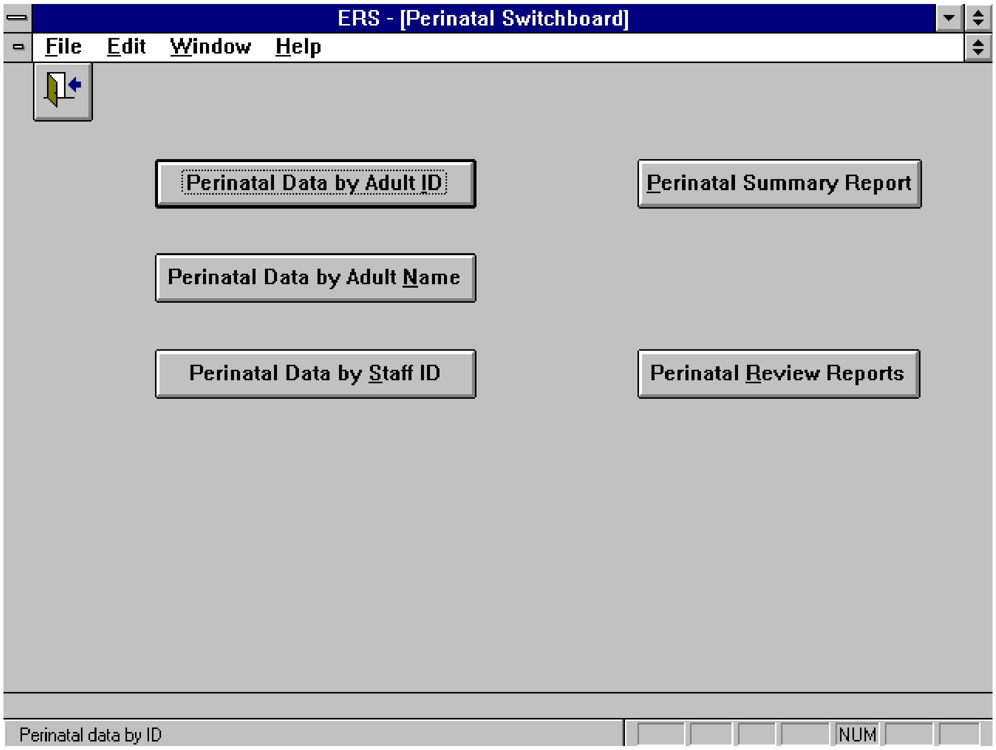


Figure 6-1. Perinatal Projects Switchboard

Following is brief description of the command buttons on the Perinatal Projects Switchboard.

<u>Perinatal Data by Adult ID</u>
This function is used to access the perinatal data by adult ID.

<u>Perinatal Data by Adult Name</u>
This function is used to access the perinatal data by adult name.

<u>Perinatal Data by Staff ID</u>
This button provides access to adults by their assigned staff member. Once the staff member is selected, the perinatal data for the assigned adults may be accessed by ID or by name.

<u>Perinatal Summary Report</u>
This function is used to prepare the Perinatal Projects Summary report. An option screen allows you to define the report period, the subgroup filter, other selection criteria, such as staff and Zip code.

Perinatal Review Reports

The Perinatal Review report is used to review or validate the data entered. The report may be prepared for the entire unit or for a staff member. Separate reports are prepared for the prenatal and breastfeeding portions, and the breastfeeding report is in two parts.

The Perinatal Data Browse Screen

The Perinatal Data browse screen, Figure 6-2, shows the Perinatal Projects data being maintained for the mother. The bottom portion of the screen shows the criteria used to determine if the data is to be included in the Perinatal Projects Summary report.

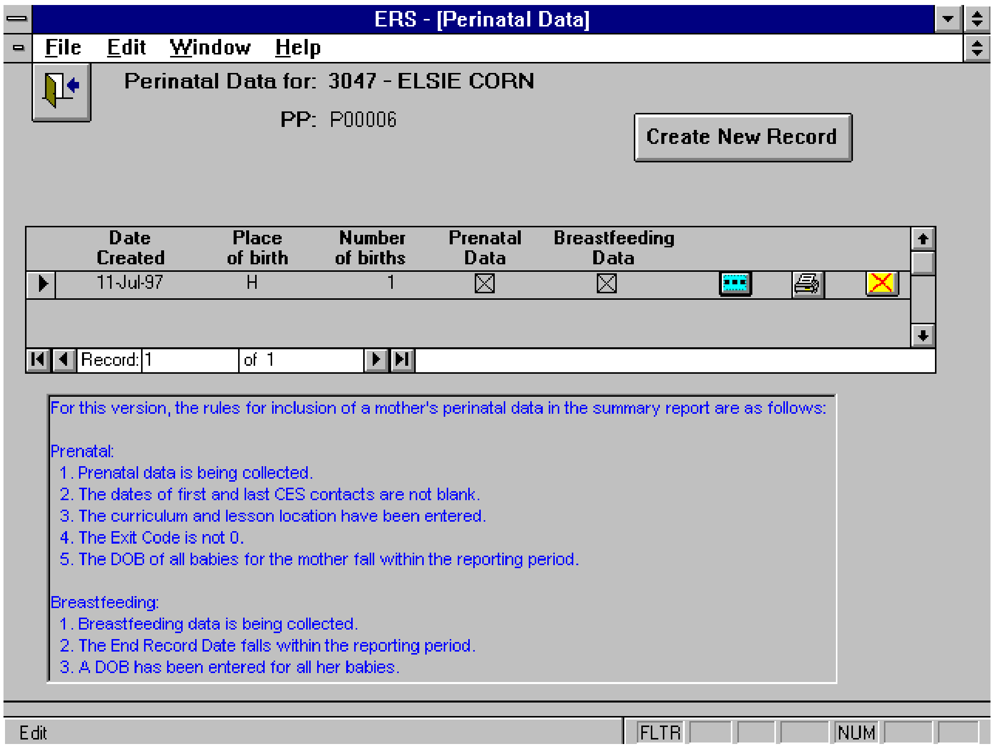


Figure 6-2. The Perinatal Data Browse Screen

Creating a New Perinatal Record

Selection of prenatal data, breastfeeding data or both is made at the time the perinatal record is created for the mother. If the mother starts out in prenatal only and is later enrolled in a breastfeeding program, you can create a new breastfeeding-only record for the mother. You will then need to enter the Delivery and Birth information twice - once for the prenatal record and once for the breastfeeding record. The baby will not be counted twice, as separate totals are prepared for prenatal and breastfeeding. If the mother enrolls in both, but later does not participate in breastfeeding, simply do not enter any breastfeeding information.

The Create Perinatal Information screen, Figure 6-3, is used to specify the data to be maintained for the new perinatal record.

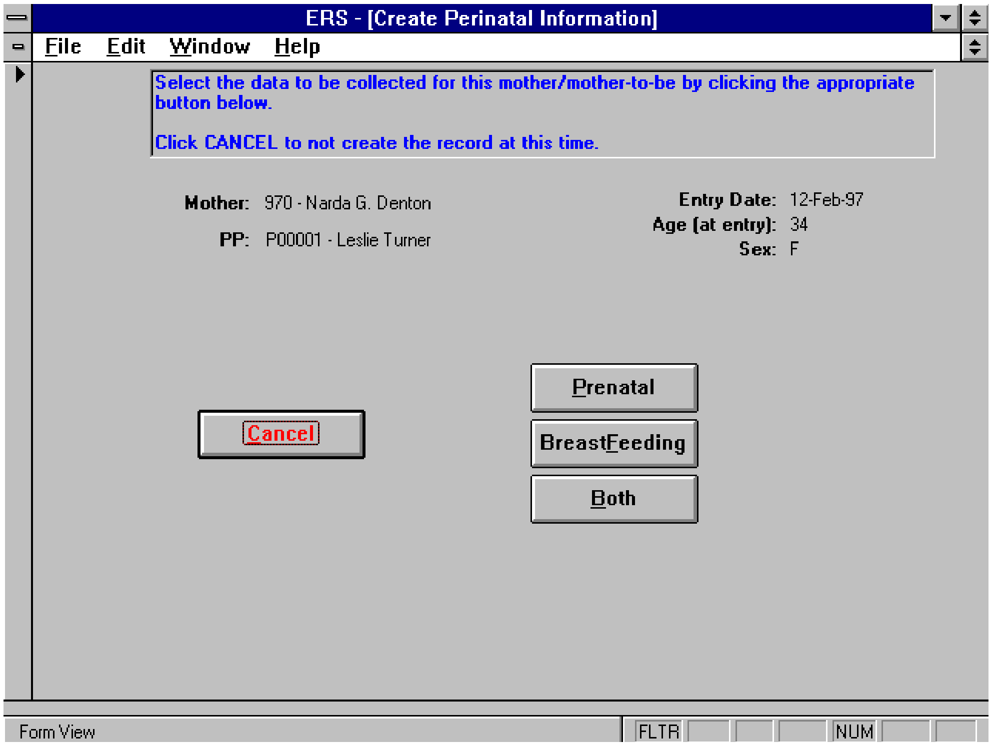


Figure 6-3. Create Perinatal Record Screen

Updating the Perinatal Data

The Perinatal screen is used to access the four data components. The screen has one of three combinations of the components depending on the data being collected for the mother. The three formats are shown by Figure 6-4, Figure 6-5, and Figure 6-6, respectively.

Prenatal Information records the prenatal medical care, CES and WIC lesson contacts, mother's knowledge and use of smoking, alcohol, and street drugs.

Delivery Information records the mother's delivery location and number of births.

Birth Information records information such as sex and birth weight for each baby.

Breastfeeding Information records the breastfeeding experience plus the use of formula and other foods.

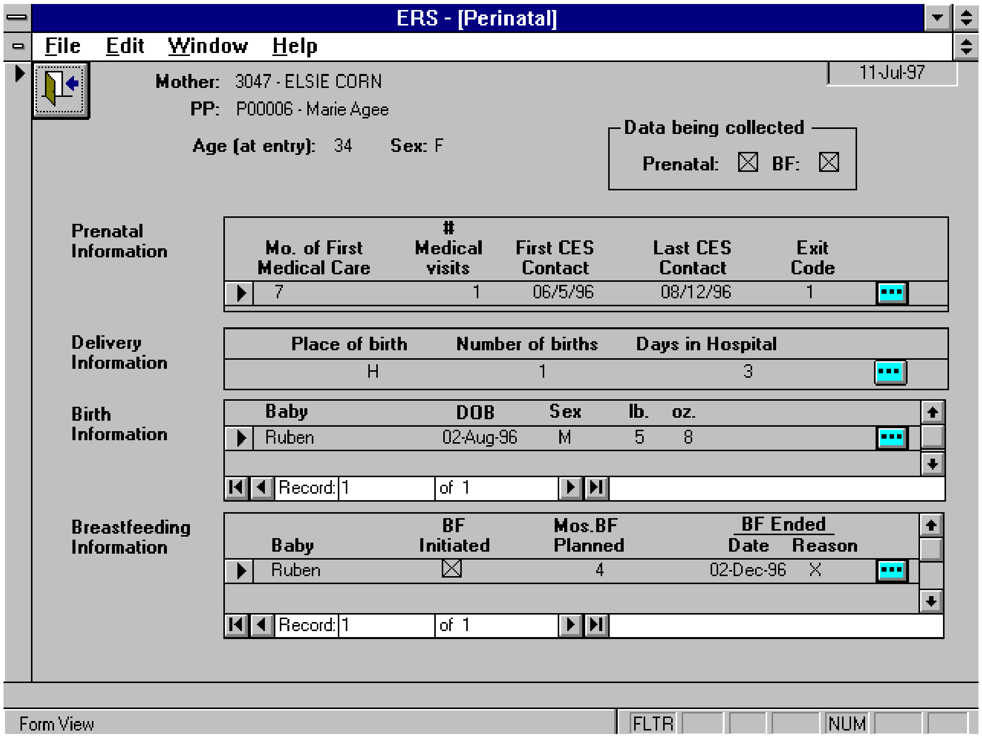


Figure 6-4. Perinatal Access Screen for both Prenatal and Breastfeeding Data

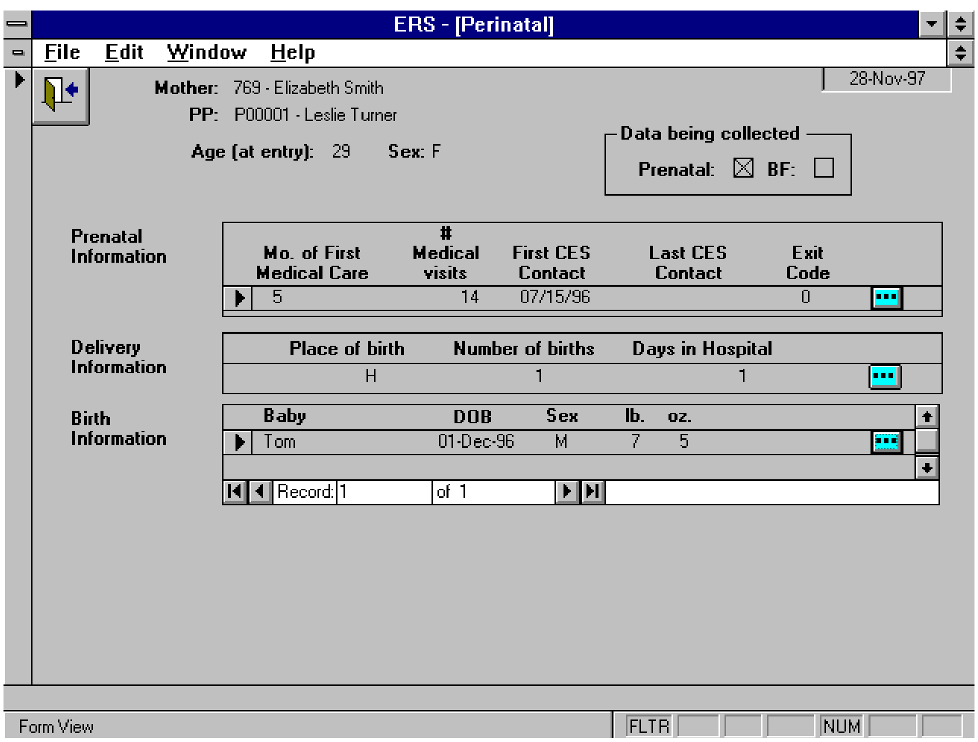


Figure 6-5. Perinatal Access Screen for Prenatal Data

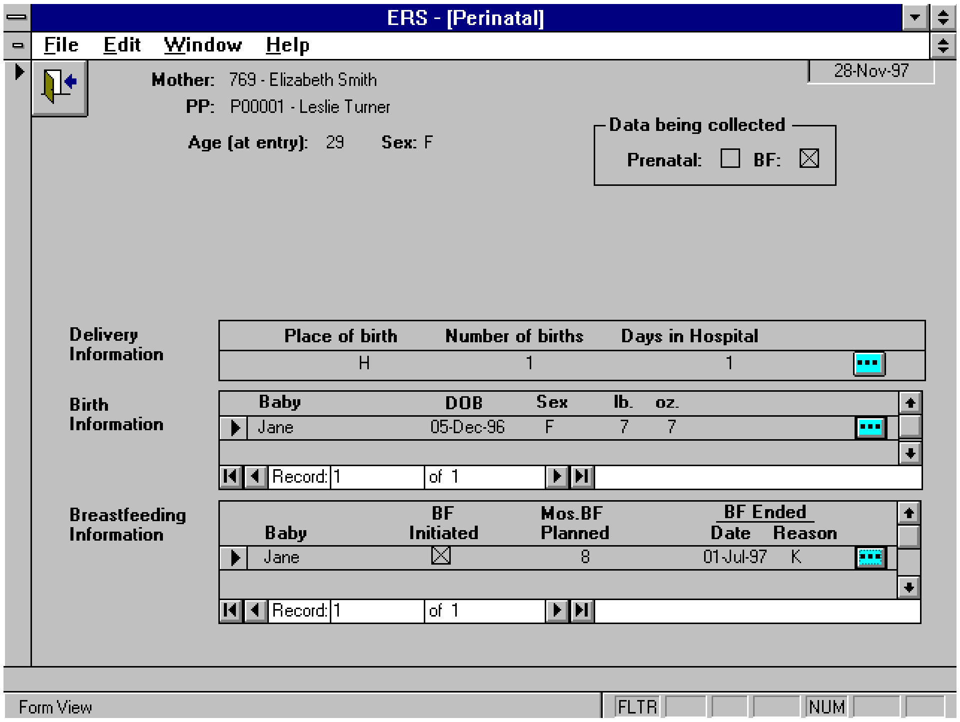


Figure 6-6. Perinatal Access Screen for Breastfeeding Data

Each data component has its own edit screen:

<u>Prenatal Information</u>

The Prenatal Information edit screen is shown in Figure 6-7. The following data is required for the information to be included in the Perinatal Projects Summary report:

- Date of first CES contact
- Date of last CES contact
- Curriculum
- Location of lessons
- Exit Code (other than 0)

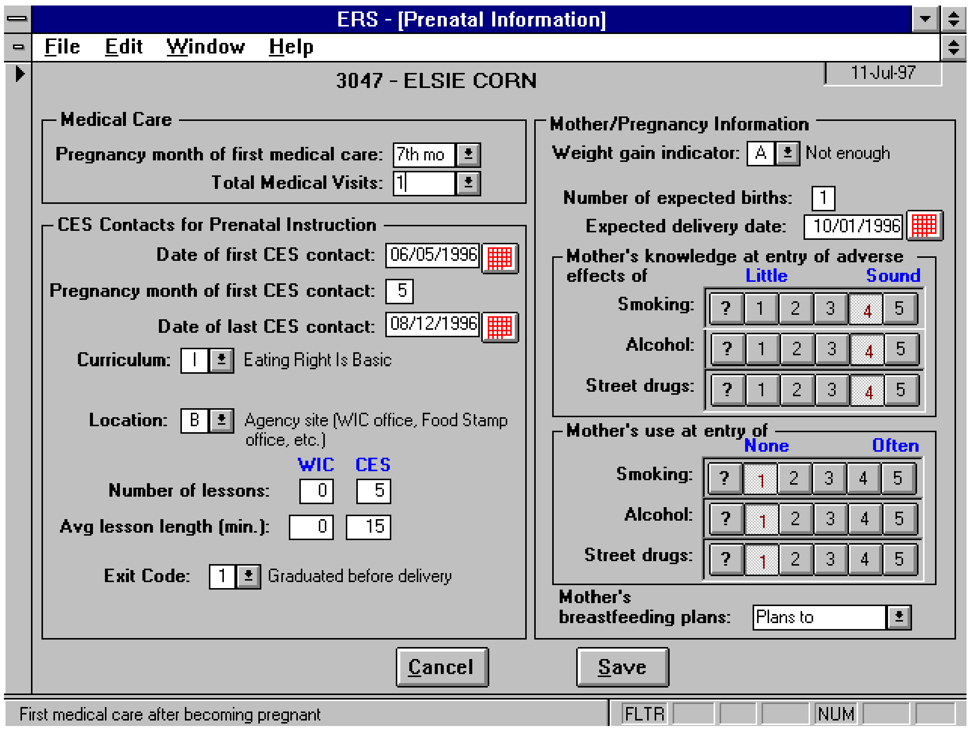


Figure 6-7. Prenatal Edit Screen

<u>Delivery Information</u>

The Delivery Information edit screen is shown in Figure 6-8. Use this screen to record birth location, the number of days the mother is in the hospital, and the number of births.

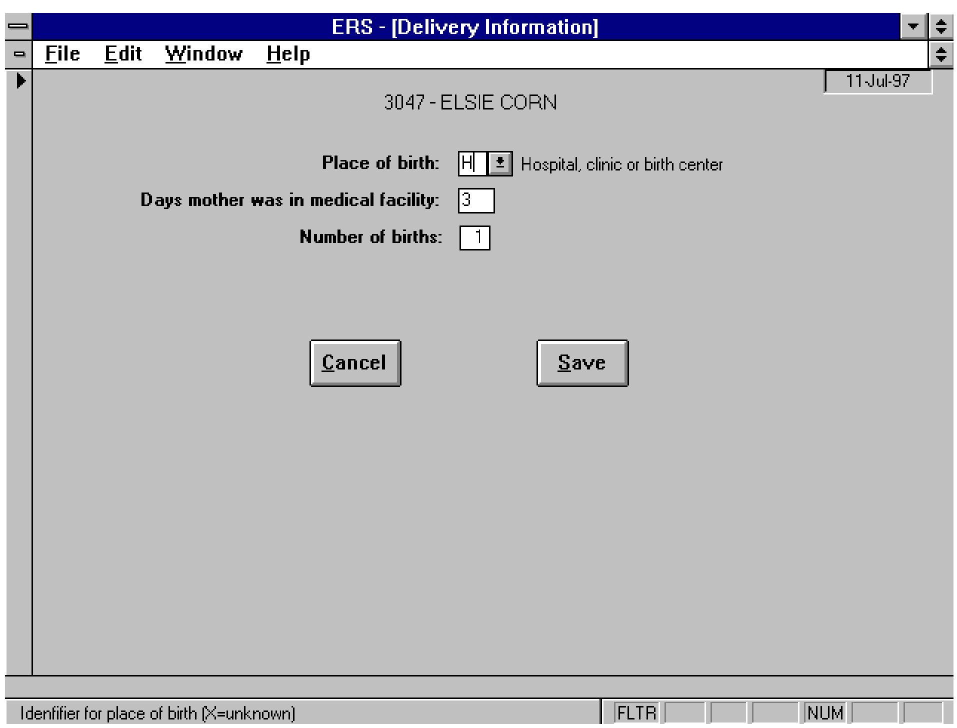


Figure 6-8. Delivery Information Edit Screen

Birth Information

The Birth Information edit screen is shown in Figure 6-9. A separate record is maintained for each baby. For Baby Name, enter the first name of the baby or use A, B, C, etc.

If the Birth Outcome is Premature, you will be prompted to enter the weeks of gestation completed. For a miscarriage, the system still needs a "Date of Birth" to associate the record with a report period. If you know the (approximate) date of the miscarriage, use it as the DOB. Otherwise, use the date of Last CES Contact as the DOB.

For prenatal data, this record provides low/normal birth weight. Also, the DOB is used to determine the report period for this birth.

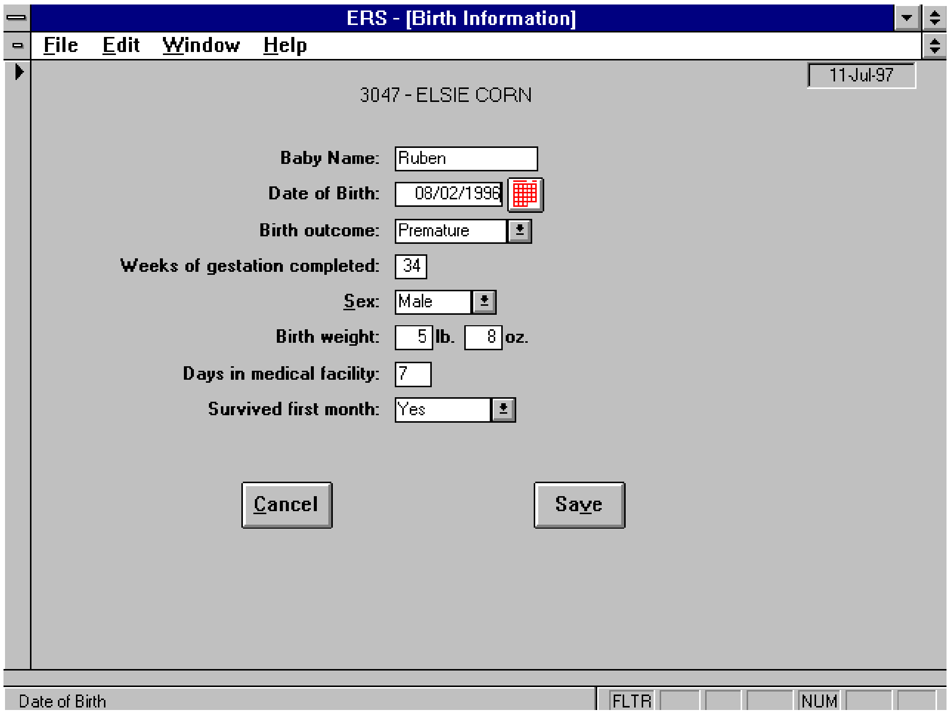


Figure 6-9. Birth Information Edit Screen

Breastfeeding Information

The Breastfeeding Information edit screen is shown in Figure 6-10. Breastfeeding Initiated means the child was put to breast at least once. Only records where breastfeeding was initiated will be included in the Perinatal Projects Summary report. Also, the End Record date is the indicator that all available information has been entered. That date must fall within the period of the summary report.

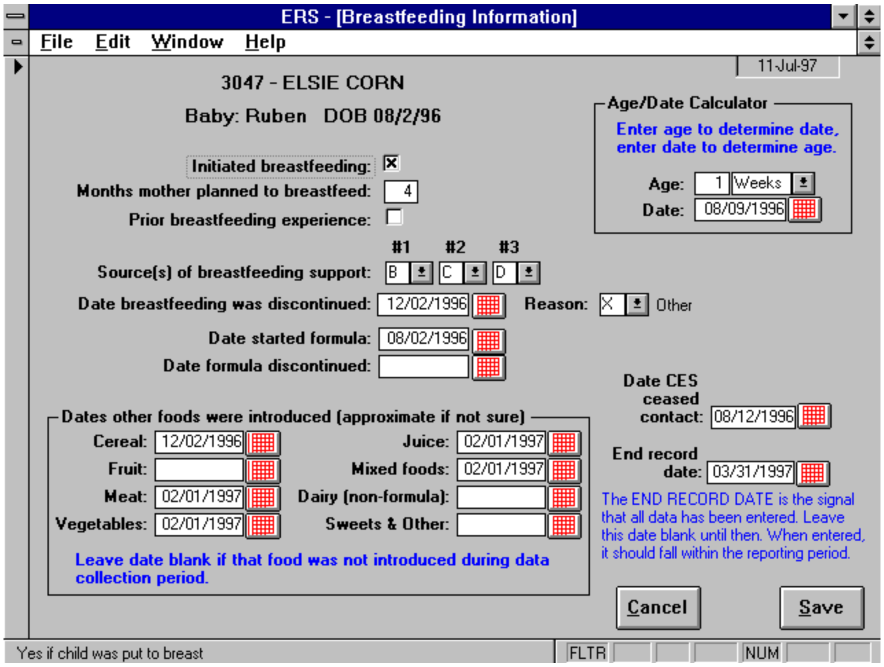


Figure 6-10. Breastfeeding Edit Screen

Perinatal Projects Summary Report

The Perinatal Projects Summary Report provides summary information for the prenatal and breastfeeding data. Separate reports are prepared for the prenatal and breastfeeding portions. The screen to select the mothers to be included in the report is shown in Figure 6-11. See also the criteria itemized on Figure 6-2.

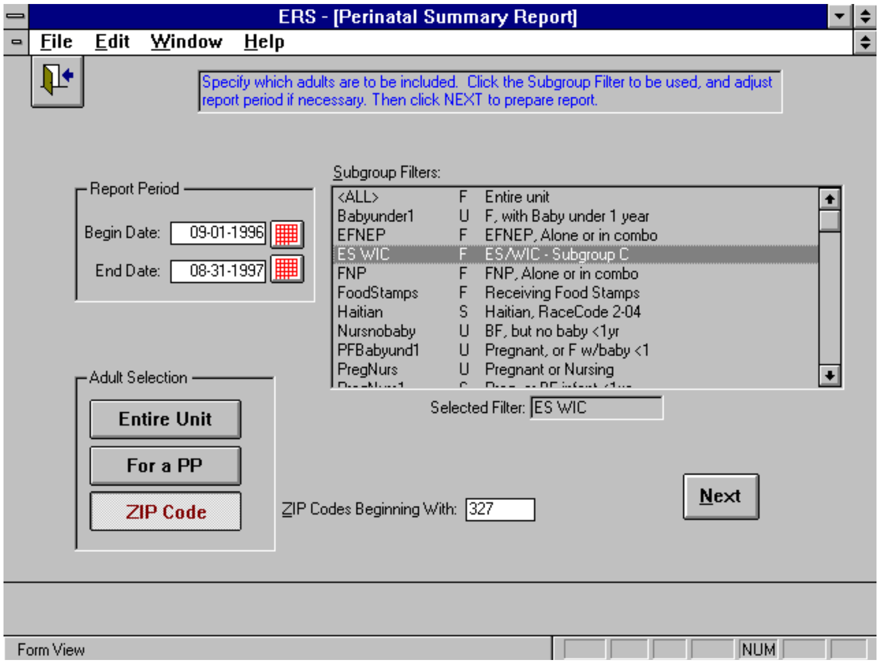


Figure 6-11. Selection of Adults for the Perinatal Projects Summary Report

Perinatal Projects Review Report

The Perinatal Review report is used to review or validate the data entered. The report may be prepared for the entire unit or for a staff member. Separate reports are prepared for the prenatal and breastfeeding portions, and the breastfeeding report is in two parts. The report may be sorted by Adult ID or Name.

CHAPTER 7 - THE STAFF SWITCHBOARD

About the Staff Component

There are three classifications of staff members: Professional, Paraprofessional, and Volunteer. In most cases, the system permits any staff member to be used where a staff member is to be supplied. When that is not the case, the drop down list or browse screen of choices will be limited to valid choices.

Entry of adult records requires designation of the assigned staff member and entry of youth groups requires identification of the group's leaders. Thus, entry of the staff members should be one of the first tasks with a new database.

<u>Staff IDs</u>

Staff ID numbers begin with a prefix which identifies the staff classification:

Professionals	A00000 through A99999
Paraprofessionals	P00000 through P99999 (P00000 is a special case)
Volunteers	V00000 through V99999

<u>Paraprofessional ID P00000</u>

ID P00000 has a special use. It is a place holder for a staff member who performs a professional or paraprofessional role, but is not to be counted in summary reports. Its purpose is to provide a dummy paraprofessional to assign to volunteers who are NOT assigned to a professional or paraprofessional. Any other use of P00000 should be avoided.

IDs A00000 and V00000 are normal IDs and are counted on their respective summary report.

Staff Switchboard

The Staff switchboard, Figure 7-1, is used to perform operations on the Staff component. Separate functions are used to maintain the professionals, paraprofessionals, and volunteers, even though essentially the same information is maintained for each. Each may be assessed by ID or by name. Also, volunteers may be assessed via their assigned staff member.

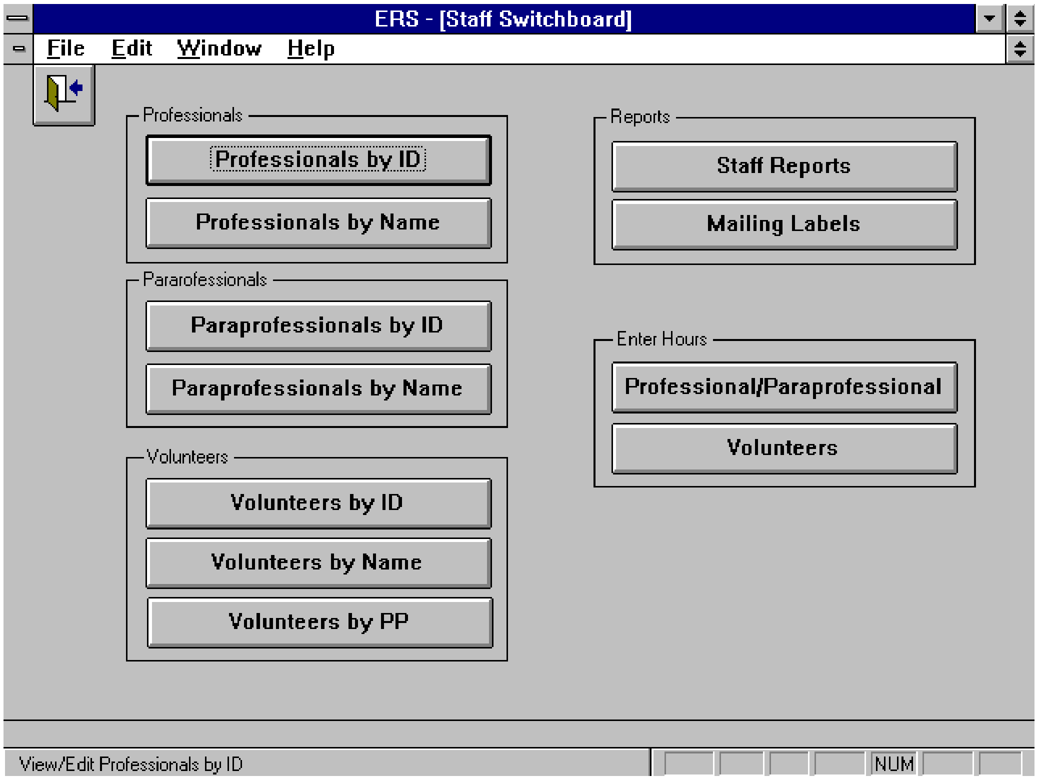


Figure 7-1. Staff Switchboard

Staff Reports

Three reports are available for each staff classification: Profile Summary, List by ID, and List by Name. The Staff Reports Switchboard, Figure 7-2, is used to prepare the reports. Due to the number of options for the Volunteer List a separate screen is used specify the report setup.

The Volunteer Summary report is in three parts:

Part 1 - All Volunteers
Part 2 - Volunteers who work with Youth
Part 3 - Volunteers who work with Adults

Hours worked with Youth must be one (1) or more for the volunteer to be included in Part 2. Likewise, hours worked with adults must be one (1) or more for the volunteer to be included in Part 3.

The Volunteer Summary report also includes a summary of volunteer roles.

The Staff Status Report provides the number of adults who entered or exited the program by their assigned staff member.

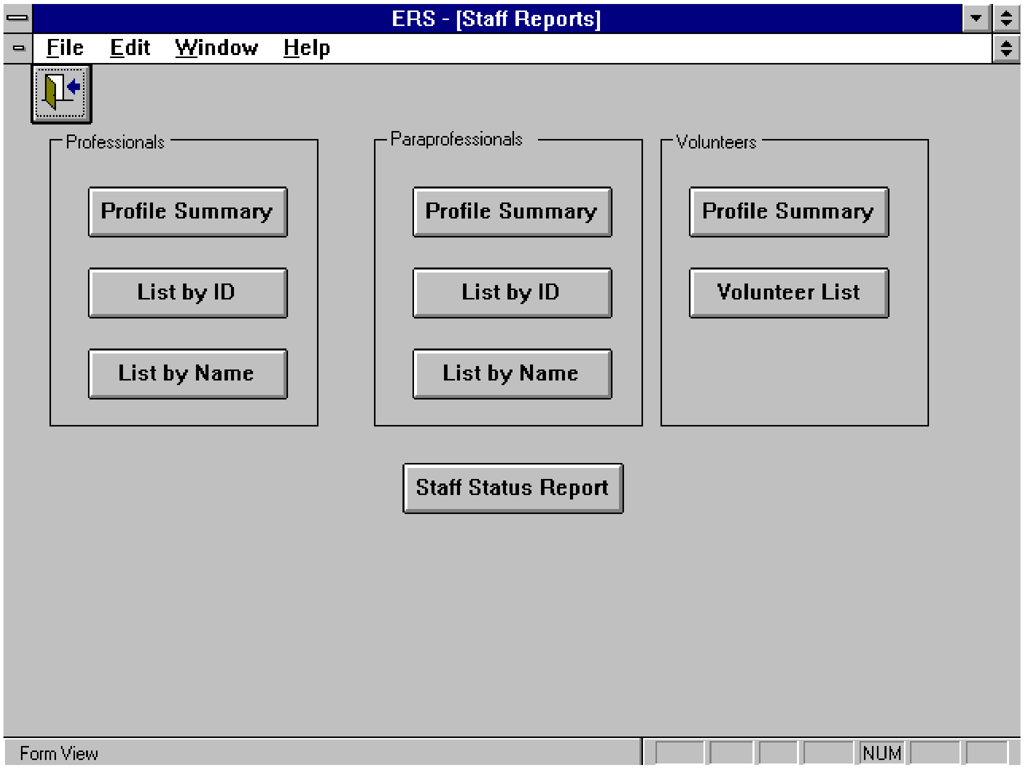


Figure 7-2. Staff Reports Switchboard

Staff Mailing Labels

Mailing labels may be prepared for any combination of the three staff classifications. For example, you may prepare labels for professionals, or for professionals and paraprofessionals combined.

Updating the Staff Database

The records for each staff classification may be accessed by ID or by name. Additionally, volunteers may be accessed by their assigned professional or paraprofessional. When adding a staff member the system will offer the next available ID and allow you to enter another. Figure 7-3 is an example of the popup screen for entering the ID of a new staff member.

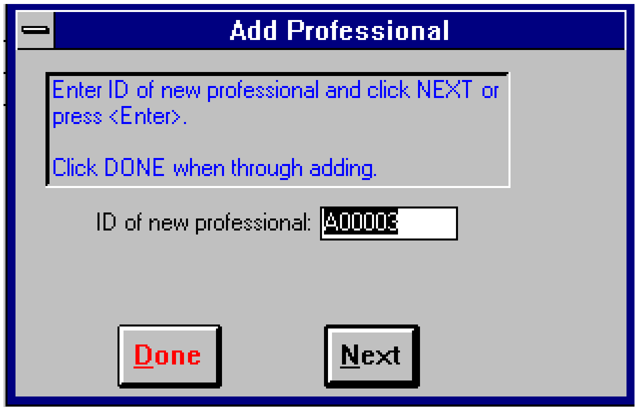


Figure 7-3. Assigning Staff ID Number

Updating Professionals and Paraprofessionals

The edit screens for professionals and paraprofessionals have the same format. Figure 7-4 shows the paraprofessional edit screen. The data fields are described at Table 7-1.

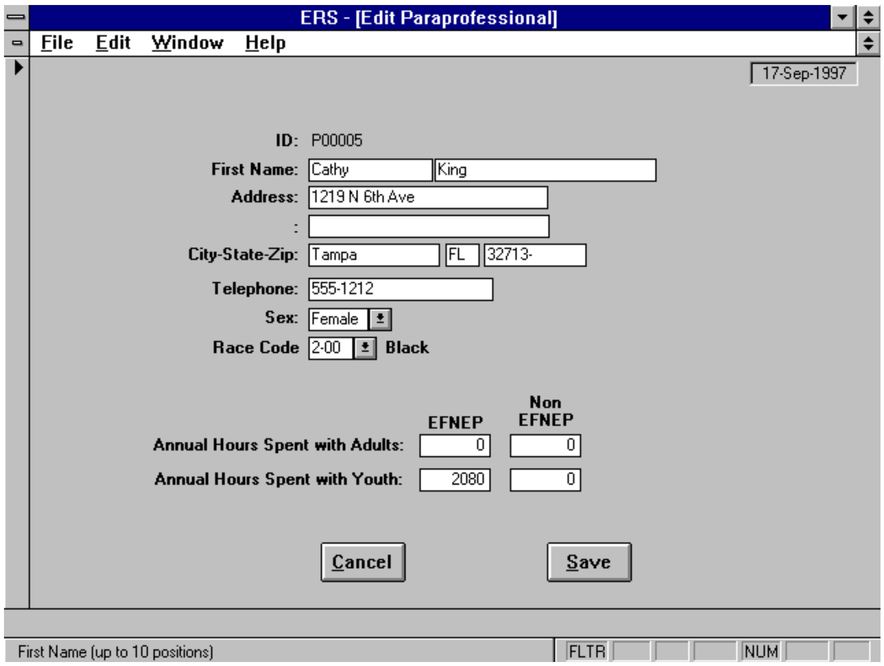


Figure 7-4. Paraprofessional Edit Screen

Updating Volunteers

The volunteer edit screen is shown in Figure 7-5. The data fields are described at Table 7-1. See Chapter 17 for a description of the volunteer roles.

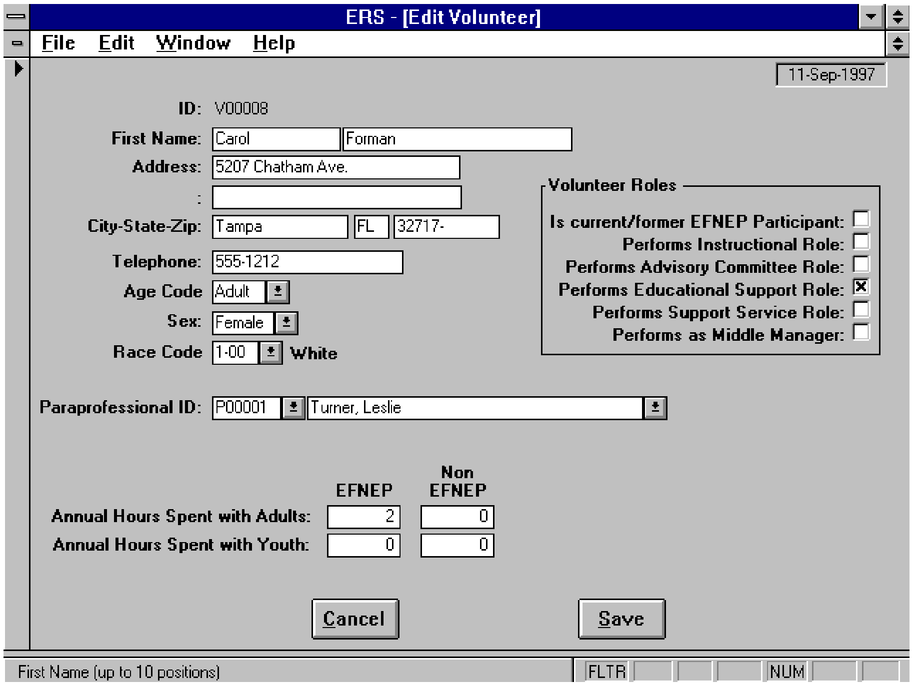


Figure 7-5. Volunteer Edit Screen

Table 7-1. Staff Member Data Fields

ID	Professional IDs begin with the letter A; Paraprofessional IDs begin with the letter P; Volunteer IDs begin with the letter V.
Name(First-Last)	Enter the first and last names of the staff member.
Address	The address consists of two lines of up to 28 positions each.
City-State-ZIP	The default state is supplied by the system. The ZIP code may be in the 5-digit format or in the ZIP-plus-four format.
Telephone	This is usually the home telephone number of the staff person.
Sex	Type Female or Male or select from the drop down list. The screen will default to Female
Race Code	Type in the race code or select from the drop down list.
Annual Hours Spent with Adults	Enter the number of hours spent with adults during the reporting year.
Annual Hours Spent with Youth	Enter the number of hours spent with youth during the reporting year.
Age Code	Applies to Volunteers Only. Enter Adult for volunteers 18 and older. Enter Youth for volunteers under 18.
Volunteer Roles	Applies to Volunteers Only. Captures the functions performed by the volunteer. See Chapter 17 for a description of the roles.

Staff Hours

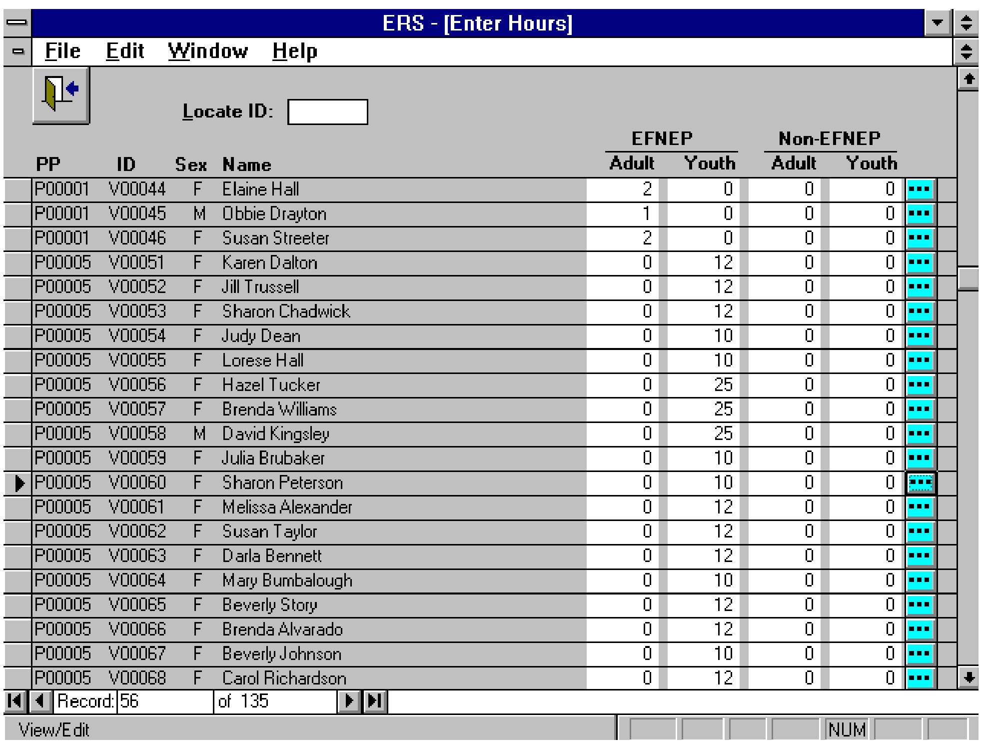
Annual hours are usually entered at the end of the reporting period just before preparation of the final reports. Estimated hours may be entered earlier for use on interim reports. If no hours are reported when a volunteer is initially entered, then enter one (1) dummy hour in the youth or adults category to indicate whether the volunteer is working with youth or adults.

Staff hours are recorded in four categories:

Annual Hours	EFNEP Hours	Non-EFNEP Hours
With Adults	<hrs>	<hrs>
With Youth	<hrs>	<hrs>

These hours are used to calculate the total Full Time equivalent (FTE) commitment to the program. Accuracy and completeness are essential. Leave, training and other paid time should be pro-rated to the appropriate category to assure a true FTE count. Hours should be reviewed prior to performing the Export Summary Reports at the end of the year.

Hours may be entered in the professional, paraprofessional, and volunteer edit screens or with the special Enter Hours screens on the Staff Switchboard.



PP	ID	Sex	Name	EFNEP Adult	EFNEP Youth	Non-EFNEP Adult	Non-EFNEP Youth
P00001	V00044	F	Elaine Hall	2	0	0	0
P00001	V00045	M	Obbie Drayton	1	0	0	0
P00001	V00046	F	Susan Streeter	2	0	0	0
P00005	V00051	F	Karen Dalton	0	12	0	0
P00005	V00052	F	Jill Trussell	0	12	0	0
P00005	V00053	F	Sharon Chadwick	0	12	0	0
P00005	V00054	F	Judy Dean	0	10	0	0
P00005	V00055	F	Lorese Hall	0	10	0	0
P00005	V00056	F	Hazel Tucker	0	25	0	0
P00005	V00057	F	Brenda Williams	0	25	0	0
P00005	V00058	M	David Kingsley	0	25	0	0
P00005	V00059	F	Julia Brubaker	0	10	0	0
P00005	V00060	F	Sharon Peterson	0	10	0	0
P00005	V00061	F	Melissa Alexander	0	12	0	0
P00005	V00062	F	Susan Taylor	0	12	0	0
P00005	V00063	F	Darla Bennett	0	12	0	0
P00005	V00064	F	Mary Bumbalough	0	10	0	0
P00005	V00065	F	Beverly Story	0	12	0	0
P00005	V00066	F	Brenda Alvarado	0	12	0	0
P00005	V00067	F	Beverly Johnson	0	10	0	0
P00005	V00068	F	Carol Richardson	0	12	0	0

Figure 7-6. Entering Volunteer Hours

CHAPTER 8 - THE YOUTH SWITCHBOARD

About the Youth Component

The youth component maintains information on youth groups and the individual members of the groups.

Youth Groups may have INDIVIDUAL or GROUP enrollment.

Individual Enrollment
Individual enrollment involves the entry of each youth in the group into the database. The system then summarizes the demographic information about the individuals into the Youth Group database. (The group must be created before the individuals in the group can be entered.)

Group Enrollment
Information about the youth is maintained in summary form, and this summary information is entered into the Youth Group database. (Group enrollment is usually used for groups of limited duration or when detailed data on participants are not available.)

Youth Group IDs
Each group is assigned an ID between 1 and 99999. When a new group is being added the system suggests the next number after the last one in the database. This may be changed before advancing to the edit screen.

! *You should use one group for all the youth involved in delivery method E (Individual learning, mentoring, or family learning). Incorrect counts of the number of groups in the unit may result if there is more than one group with delivery method E. Use of Group ID 1 is suggested.*

Youth IDs
Each youth is assigned an ID from 1 to 99999. When a new youth is added the system suggests the next number after the last ID in the database. This may be changed before advancing to the edit screen.

Youth Impact Indicators
Four Impact Indicators, as described in Table 8-1, are maintained for each youth group. Depending on the group, an indicator may or may not apply. For those that apply, enter the percent of youth in the group who met the criteria of the indicator.

Table 8-1. Youth Group Impact Indicators

Brief Name	**Description**
Eat Variety	Program youth eat a variety of foods
Knowledge	Program youth increased knowledge of the essentials of human nutrition
Select Food	Program youth select low-cost, nutritious foods
Practices	Program youth improved practices in food preparation and safety

Youth Switchboard

The Youth Switchboard is shown in Figure 8-1.

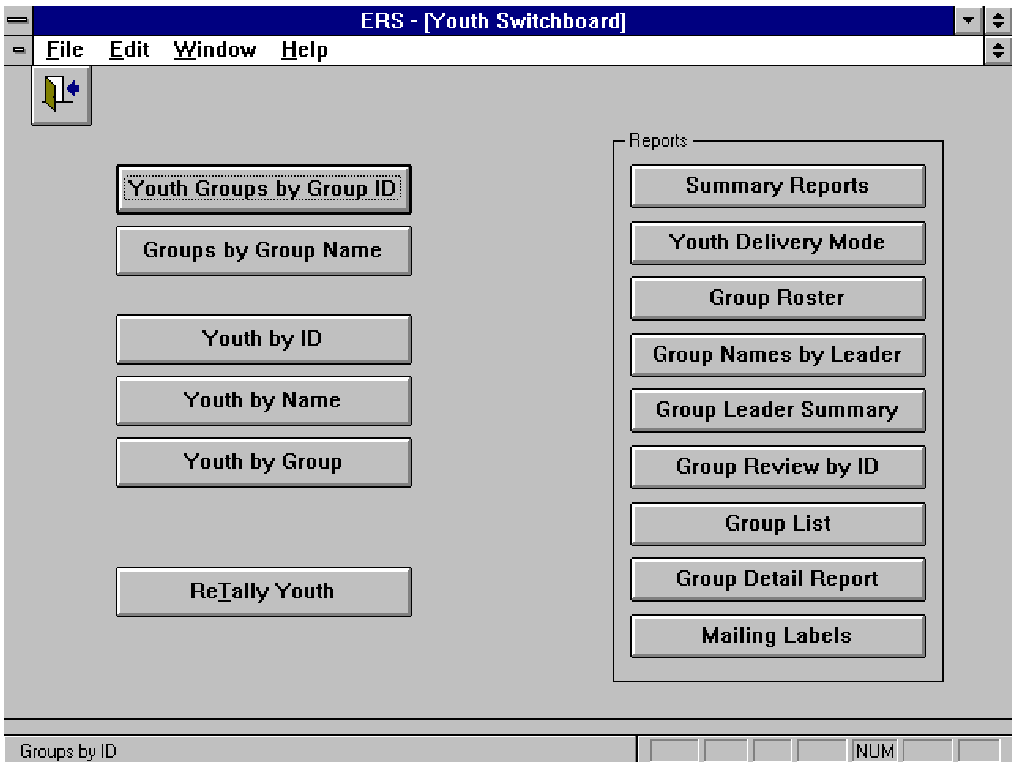


Figure 8-1. Youth Switchboard

Following is a brief description of the command buttons on the Youth Switchboard:

Youth Groups by Group ID
This function provides access to the youth groups from a browse screen sorted by group ID.

Groups by Group Name
This function provides access to the youth groups from a browse screen sorted by group name.

Youth by ID
This function provides access to the individual youth records from a browse screen sorted by youth ID.

Youth by Name
This function provides access to the individual youth records from a browse screen sorted by the youth's last name.

Youth by Group
This function provides access to the individual youth records from a browse screen sorted by Group ID.

Re-Tally Youth
When changes are made to the youth records, the system automatically re-calculates the counts by sex, race, age, and residence for each group. The system also checks Group Enrolled groups to verify that the counts match. If errors are encountered, the group ID is displayed. You should note the groups with errors and correct the problem.

This function is run automatically when changes to the individual youth records are made. You may wish to run it at other times to make sure the counts are correct.

Summary Reports
Two versions of the report may be prepared: *Group Profile Summary*, which is a summary based on the group records, and *Participant Profile Summary*, which is a summary based on only the individually enrolled youth.

Youth Delivery Mode
This report prints the Youth Delivery Mode (YDM) information.

Group Roster
Roster reports are a listing of the individual youth members of a group.

Group Names by Leader
The Group Leader report provides a list of the groups for which the paraprofessional or volunteer is a leader. Separate lists are prepared for primary (leader #1) and support (leader #2, #3, or #4) leader roles.

Group Leader Summary
The Group Leader Summary Report provides summary information about the groups where the selected staff member is a primary or support leader. The summary information includes number of youth, number of meetings, contact hours, and delivery mode.

Group Review by ID
The Group Review by ID Report provides summary information about the groups. You may find this report helpful for finding data entry errors.

The summary information includes number of youth, number of meetings, contact hours, and delivery mode.

Group List
The Youth Group List provides a list of the groups. Name, address, and leaders are shown.

Group Detail Report

This report is a detail listing of the contents of the youth group record.

Mailing Labels

Mailing labels may be prepared for the youth in a group, for the youth groups, and for the youth leaders.

Updating the Youth Groups

The format of the edit screen for youth groups depends on the type of enrollment. Figure 8-2 shows the edit screen when the group has group enrollment. Figure 8-3 shows the edit screen when the group has individual enrollment.

On the group enrolled edit screen, click the Enter Youth by Race and Sex button for a browse screen for entry of the females and males by race code.

On the edit screen for individually enrolled youth, click the View/Edit Youth in Group button to access the individuals in the group.

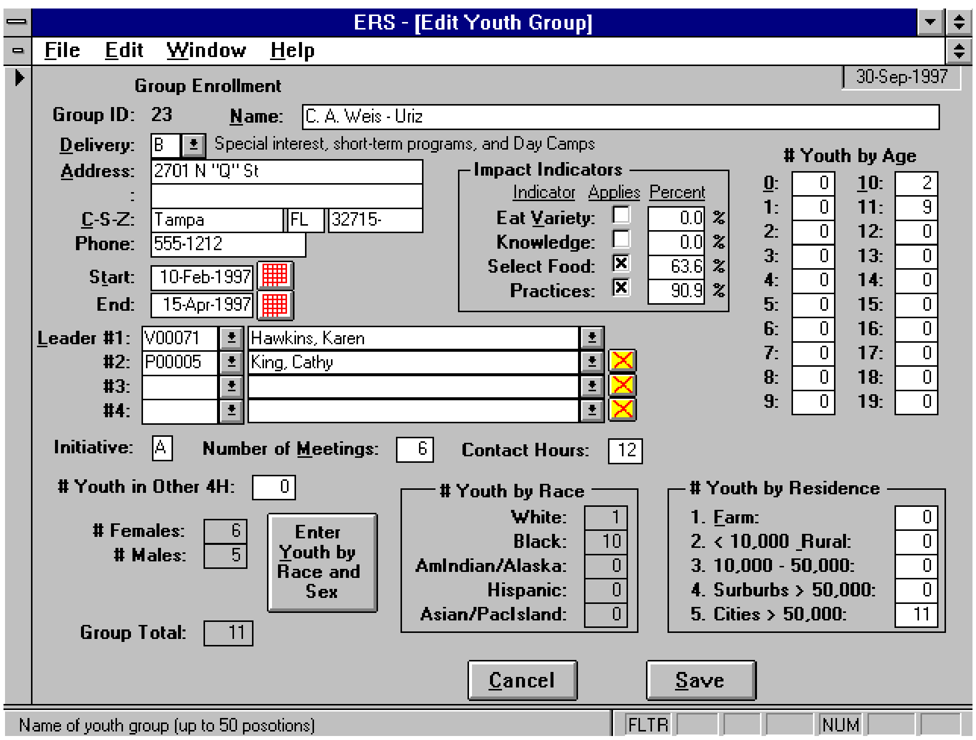


Figure 8-2. Edit Youth Group - Group Enrollment

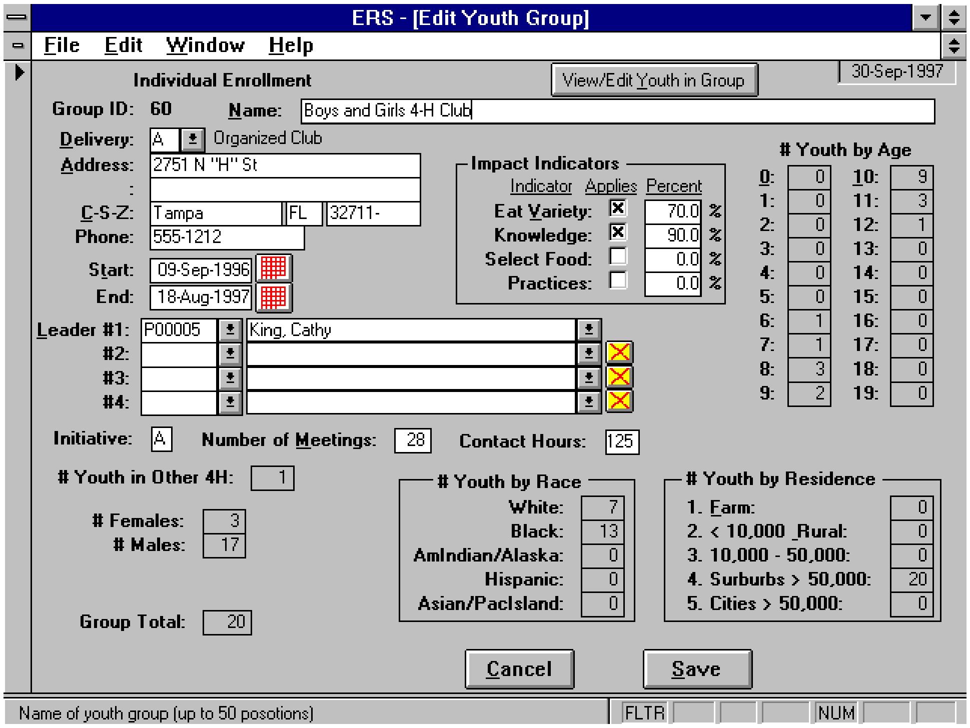


Figure 8-3. Edit Youth Group - Individual Enrollment

The youth group data fields are described in Table 8-2. Note that some fields can be entered only if the group has group enrollment.

Table 8-2. Youth Group Data Fields

Group ID	The Group ID identifies the group.
Name	The name of the youth group may be up to 50 positions.
Delivery	The delivery mode codes are defined in Chapter 17. Use one group for all the youth involved with delivery method E (Individual learning, mentoring, or family learning). Incorrect counts of the number of groups in the unit may result if there is more than one group with delivery method E. Use of Group ID 1 is suggested.
Address	The address may be up to two lines of 28 positions each. If mailing labels are to be used, be sure that the first address line is the name of the group meeting place.
C-S-Z	The city, state and ZIP code of the group meeting location should be entered if mailing labels will be printed.
Phone	The group's telephone number.
Start and End dates	The group start and end dates are used in a number of reports to determine if the group, or the youth in the group, are to be included. If the end date is not yet known, use the end of the reporting period.
Leaders	Each group must have at least one leader and may have up to 4 leaders. Leaders may be paraprofessionals or volunteers. The #1 leader is considered primary and the other leaders are considered support.
Initiative	The default initiative code for EFNEP is A. The system permits any letter to be used. The initiative codes are listed in Chapter 17.
Number of Meetings	This is the number of times the group meets.
Contact Hours	This is the number of hours of EFNEP instruction.
#Youth in Other 4-H	Enter the number of youth who are participating in other 4-H activities, now or at any time during the reporting year.
#Youth by Age	Enter the number of youth at each age from 0 (infant) to 19 years. For most groups, ages will be 6 or older. The system allows all ages from infant to 19. Code youth over 19 as 19.
# Youth by Residence	Enter the number of youth by each type of residence category.
Race and Sex	For group enrollments, the number of youth by race and by sex are entered via the Enter Youth by Race and Sex button. For individual enrollments, the number of youth by race and sex are derived from the individual youth records.

Updating Youth

For individually-enrolled youth groups, it is necessary to enter the information for each youth in the group. The youth edit screen is shown in Figure 8-4.

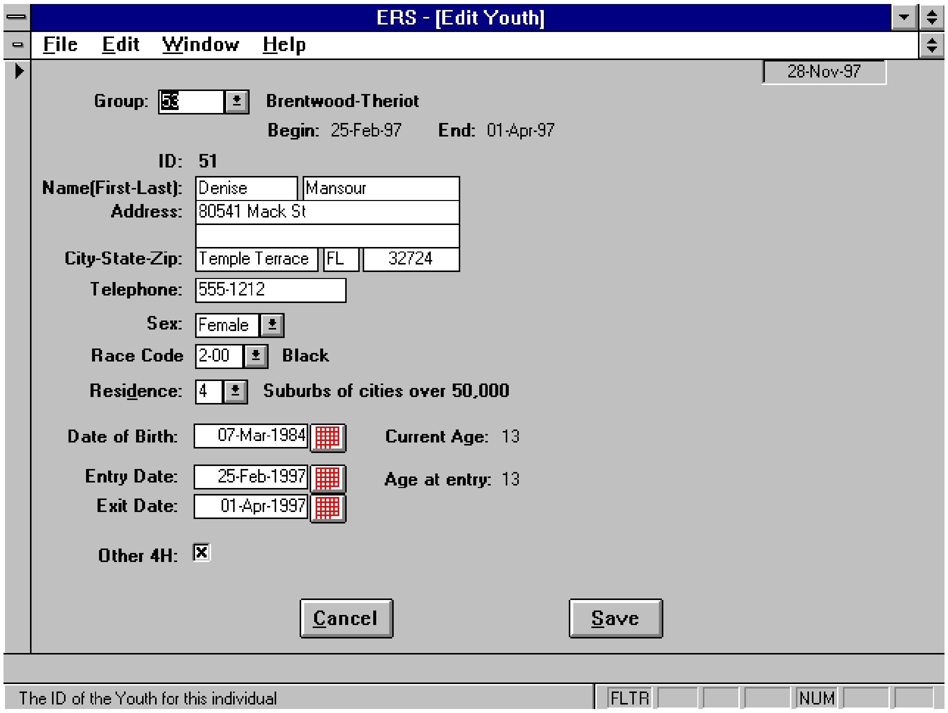


Figure 8-4. Youth Edit Screen

The youth data fields are described in Table 8-3.

Table 8-3. Youth Data Fields

Group	The Group ID identifies the group to which the individual belongs.
Name (First-Last)	The first and last name of the youth.
Address	The address may be up to two lines of 28 positions each.
C-S-Z	Enter the city, state and ZIP code.
Telephone	The youth’s home telephone is usually entered.
Sex	Enter Male or Female.
Race Code	Enter the race code or select from the drop down list.
Residence	Enter the residence code or select from the drop down list.
Date-of-Birth	Enter the date of birth. The system will determine the youth’s current age.
Entry date	Enter the entry date. The system will determine the youth’s age at entry.
Exit Date	Enter the date the youth has or will exit the group.
Other 4H	Check this box if the youth is in other 4H activities.

CHAPTER 9 - THE INTERAGENCY COOPERATION DATA

About the Interagency Cooperation Data

The Interagency Cooperation Browse Screen, Figure 9-1, is organized by fiscal year. This screen shows a brief recap of the data for each fiscal year. (Due to the limited functions available for this component, a switchboard screen is not used.) Figure 9-2 shows the edit screen for the Interagency Cooperation data. The data fields are described in Table 9-1.

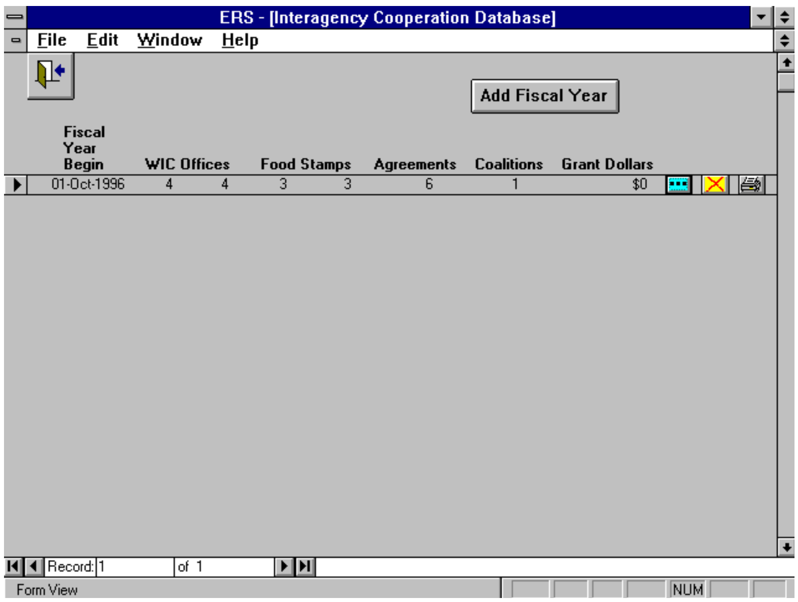


Figure 9-1. Interagency Cooperation Browse Screen

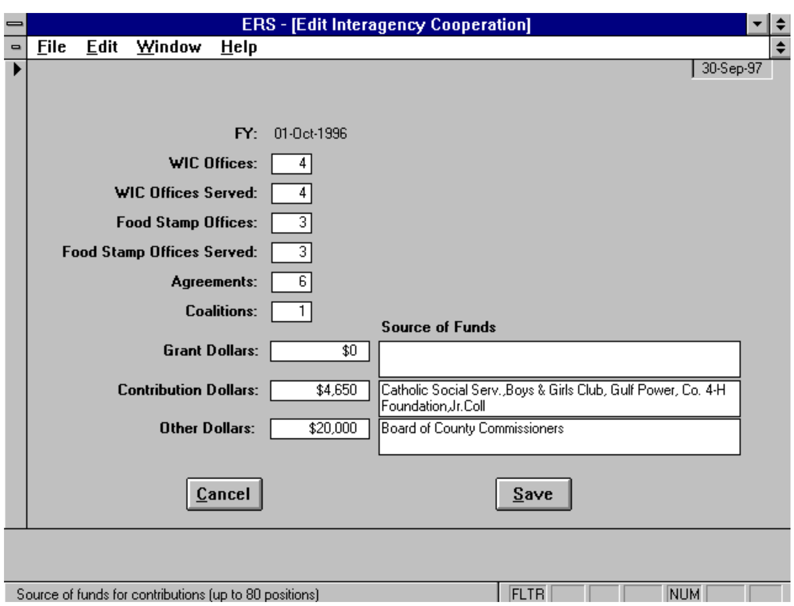


Figure 9-2. Interagency Cooperation Edit Screen

Table 9-1. Interagency Cooperation Data Fields

FY	The first day of the fiscal year for this entry.
WIC Offices	The total number of WIC offices or clinic sites which **exist** within the geographic areas served by EFNEP. (Do not count separate satellite sites which are only open one to two times per month unless it is reasonable to work with them.)
WIC Offices Served	The total number of WIC offices actually **served** by EFNEP. "Served" means some active working relationship, either a cross-referral system, on site classes, or some other specific involvement. This number *cannot* be higher than the number of WIC offices present.
Food Stamp Offices	The total number of Food Stamp offices which **exist** within the geographic areas served by EFNEP.
Food Stamp Offices Served	The total number of Food Stamp offices actually **served** by EFNEP. "Served" means some active working relationship, either a cross-referral system or some other specific involvement. This number *cannot* be higher than the number of Food Stamp offices present.
Agreements	Enter the number of formal, but not necessarily written, agreements entered into by unit. A formal agreement refers to an agreement between EFNEP and a specific local agency that also serves the EFNEP audience for the purpose of obtaining referrals to EFNEP, recruiting, or teaching the EFNEP curriculum at the agency. As part of such agreements, EFNEP may refer homemakers or members of recruitment audiences to local agencies by means of a brochure identifying services that may meet their needs and for which they are likely to be eligible.
Coalitions	Enter the number of coalitions entered into by the unit. A coalition refers to several agencies or organizations joining together for a common purpose, and may involve sharing resources, expertise, or training. An example would be representatives from WIC, Food Stamps, EFNEP and other agencies serving on a task force with the common goal of reducing hunger or promoting good nutrition.
Grant Dollars	Enter the actual dollars received by the unit in grants.
Contribution Dollars	Enter the total of the actual dollars plus estimated dollar value of in-kind contributions (i.e. goods and services) by groups outside CES.
Other Dollars	Enter the **actual dollars** received (<u>not</u> in-kind) by the unit from other sources, including County and State.
Source of Funds	Describe the sources of the grant, contribution and other funds.

CHAPTER 10 - THE SUBGROUPS SWITCHBOARD

About the Subgroups Feature

The Subgroups feature permits storing adults involved in a variety of programs, initiatives, or projects in the same database. They are identified by a Subgroup Code . Each adult must be assigned to at least one subgroup and may be assigned to as many as 8 subgroups.

The term “subgroup” is used to denote some class of adult participants in the database. The system will allow for up to 26 subgroups, designated A through Z.

Subgroup Filters are prepared to select (filter) the adults who meet the filter criteria. Almost all adult-based reports, including the Adult Summary, the Diet Summary, the Behavior Checklist Summary, and the Perinatal Projects Summary reports may be prepared from the adults who meet a filter’s criteria. Each level of the system, Federal, State, and Unit, may have its own subgroup codes and filters.

For control purposes, the following blocks of letters are reserved for each administrative level: A-L = Federal, M-V = State, W-Z = Unit.

Subgroups Switchboard

The subgroups switchboard is shown in Figure 10-1.

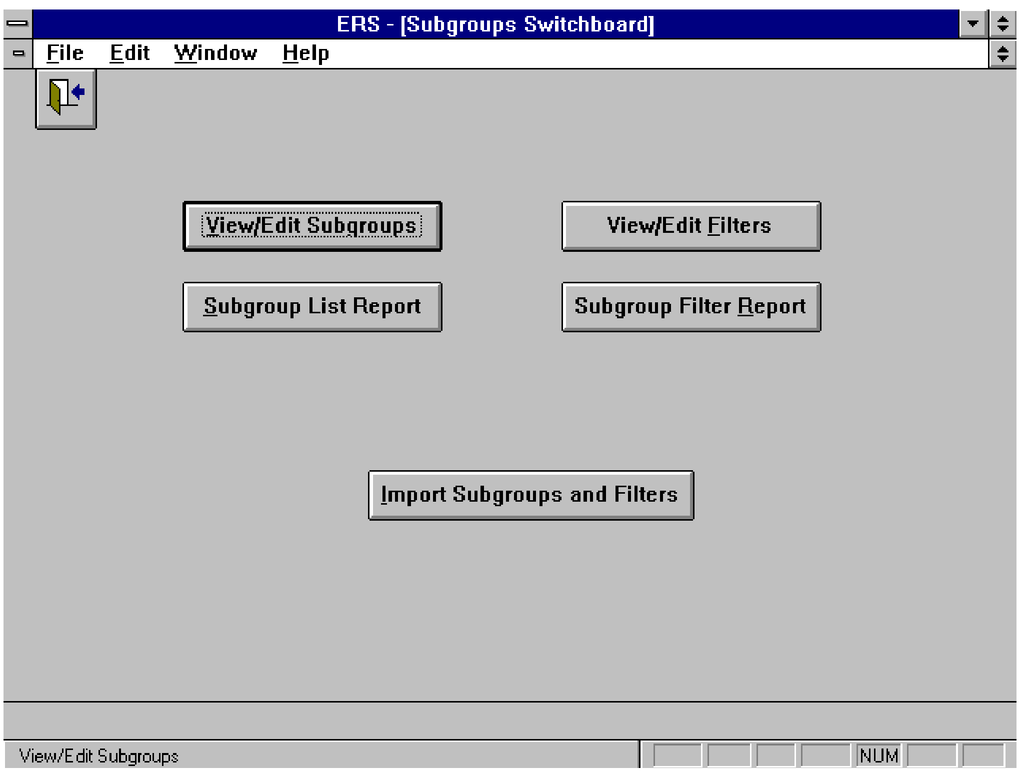


Figure 10-1. Subgroups Switchboard

Following is brief description of each command button on the Subgroups Switchboard.

View/Edit Subgroups
Federal and State subgroups may be viewed. Unit level subgroups may be edited. You may change the name of a Unit Level subgroup at any time, and you may add and delete them at any time. The system does not check that a deleted subgroup is in use.

Subgroup List Report
This report is a list of the subgroup codes and their names.

View/Edit Filters
Federal and State filters may be viewed. Unit level filters may be edited.

Subgroup Filter Report
This report provides the detail information about each filter.

Import Subgroups and Filters
Use this function to import a new set of Federal/State subgroup codes and filters from your state. See Chapter 13 for information about this function.

Subgroup Codes

The browse screen shown in Figure 10-2 is used to view the Federal and State subgroup codes and to view/edit the Unit subgroup codes.

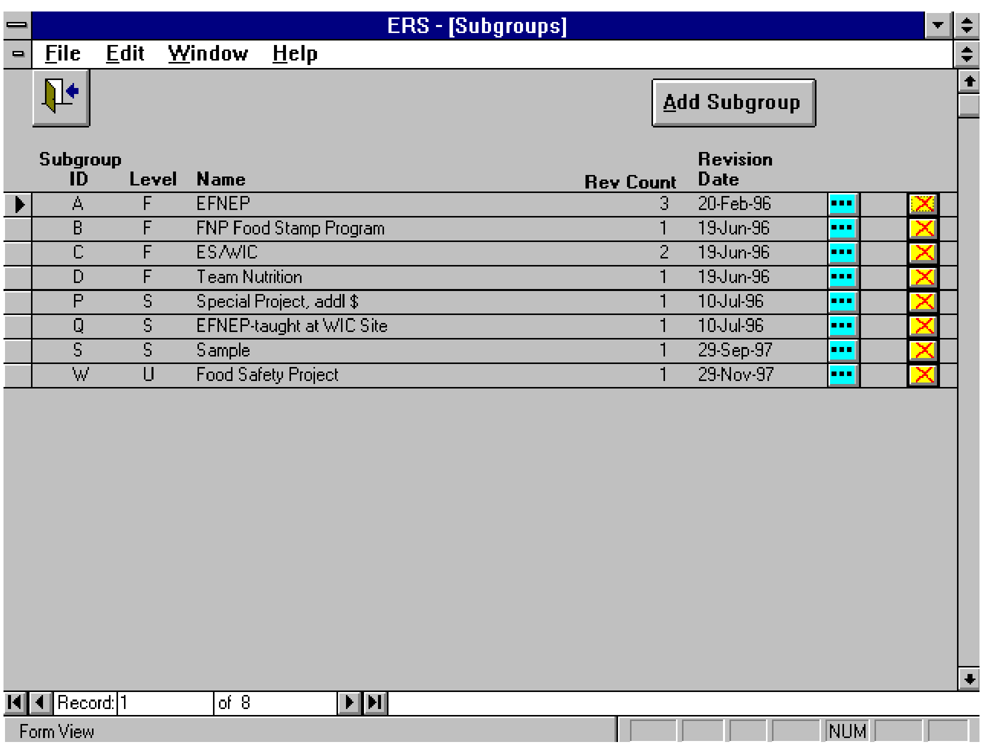


Figure 10-2. Subgroups Browse Screen

Note that if you delete a subgroup code, it still may be present in adult records and in subgroup expressions. Deletion of the subgroup code simply makes it unavailable for future use as a code in adult records and as an expression in new filters.

Subgroup Filters

The subgroup filter allows you to create subsets of the adult data using logical expressions. Only adults who meet the filter criteria are included in the report. The default filter **<ALL>** may be used to include all adults.

Subgroup filters are designated Federal, State, or Unit, depending on who prepared the filter. You cannot revise State and Federal filters. When you export summary data, the summary data for all State and Federal filters will be prepared. Local (Unit level) filters are not included in the export.

Figure 10-3 shows a sample subgroup filter expression. Separate command buttons are used to build the Participant Filter Expression (See Figure 10-4) and the Subgroup Filter Expression (See Figure 10-5). They are combined as the Full Filter Expression, also shown in Figure 10-3, which you can modify by clicking the Manual Revise button. See **Manual Subgroup Revision** later in this chapter for more information on using the Manual Revise button.

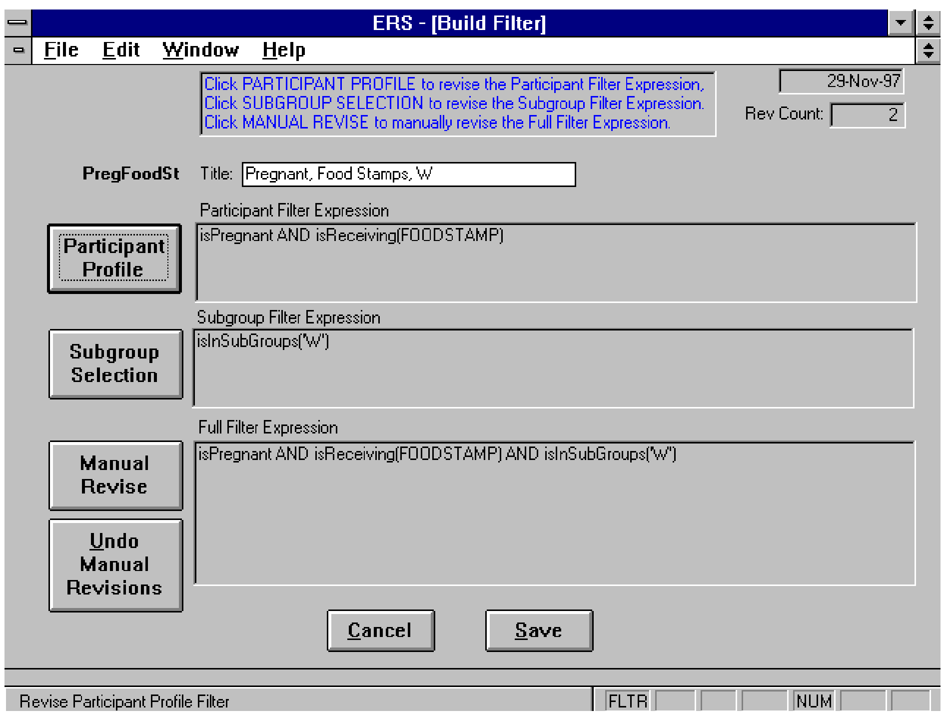


Figure 10-3. Build Subgroup Filter Screen

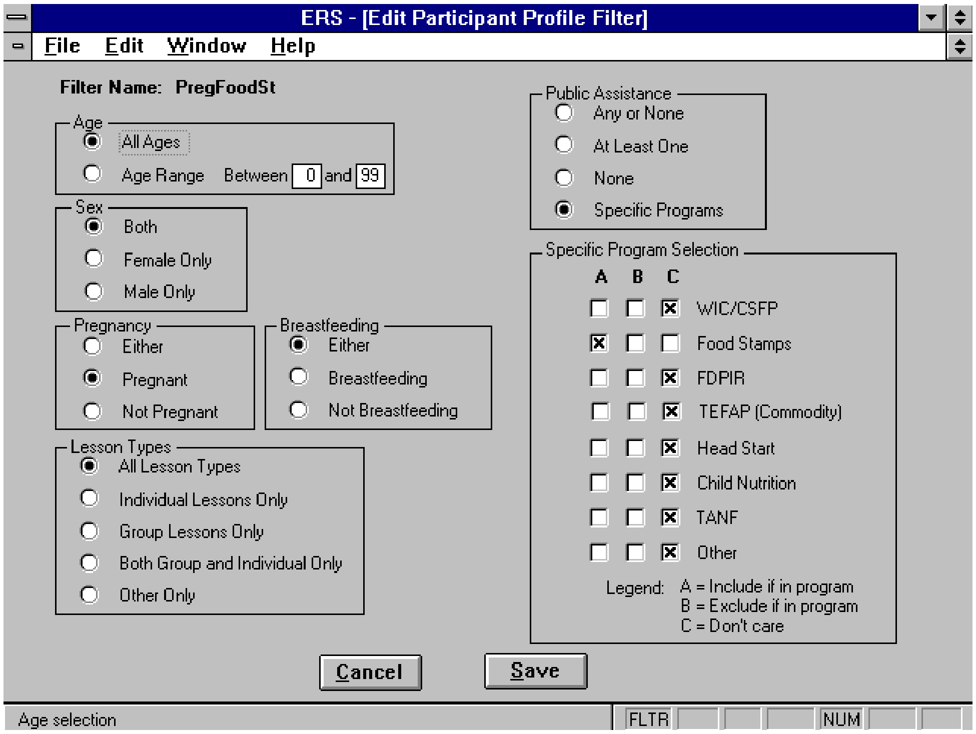


Figure 10-4. Edit Participant Profile Filter

You may make one choice from each box shown on the screen.

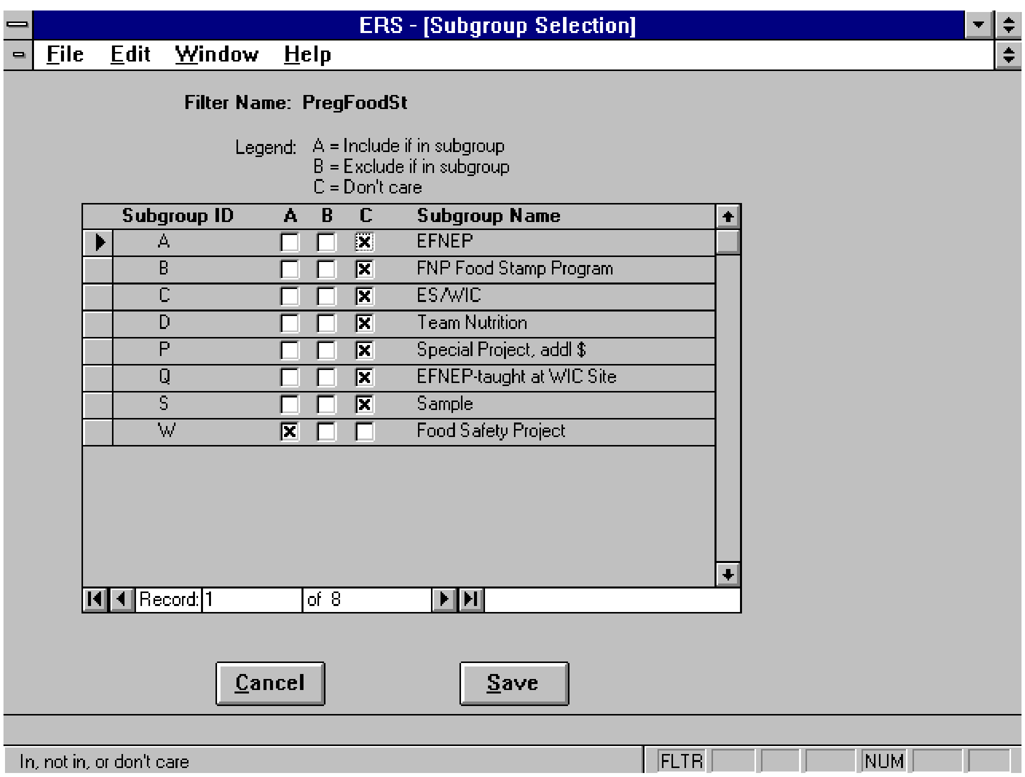


Figure 10-5. Subgroup Selection

Manual Subgroup Revision

A subgroup filter expression uses fields from the adult record. Expression operators AND, OR, and NOT may be used.

Each time you change the Participant Profile or Subgroup Selection parts of a filter, all manual revisions are undone.

! *Only experienced users should attempt manual revision. Be sure to balance parentheses and to leave a space between terms in the expression.*

One reason for manual revision would to change an expression such as **isInSubGroups("AB")** , which is true if the adult is in *either* of the subgroups, to **isInSubGroups("A") AND isInSubGroups("B")** , which is true if and only if the adult is in *both* of the subgroups.

Sometimes you need to base a filter on fields in the adult record not available in the normal expressions. The following four fields can be used in manual expressions:

Field	**Type**	**Description**
RaceCode	Character	The race code, e.g. "2-01"
Income	Number	Family monthly income.
TownSize	Character	Residence Code: "1" through "5".
LessonCount	Number	Number of lessons

Some sample expressions:

Expression	Comment
`RaceCode = "3-02"`	Specific race code
`RaceCode LIKE "4*"`	All race codes starting with 4
`Income >= 300`	Income greater than or equal to $300.
`Income BETWEEN 100 AND 400`	(Income >= 100) AND (Income <= 400)
`TownSize = "4"`	Suburbs of cities over 50,000
`LessonCount < 5`	Fewer than 5 lessons

The LIKE operator allows wild card (*) matches. The BETWEEN operator is used to select within a range. The comparative operators < (less than), > (greater than), and = (equals) may be used with both character and numeric fields.

CHAPTER 11 - THE TABLES SWITCHBOARD

About the Tables Switchboard

The Tables switchboard, Figure 11-1, is used to view and update the four tables needed by the system. A fifth table, the Foods database, is accessed via the Nutrition Switchboard (Chapter 4).

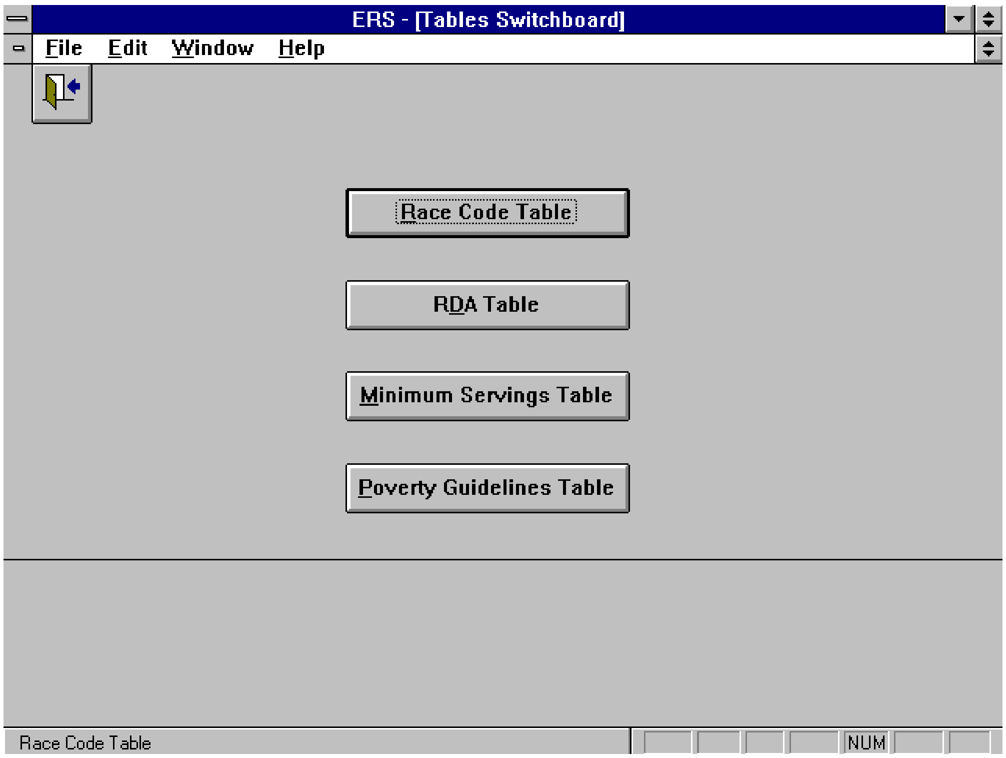


Figure 11-1. Tables Switchboard

Tables can be updated only when the Allow Update of Tables switch in the System Configuration screen is on. Keep this switch off except when you need to make changes. Be sure to turn it off again to prevent accidental changes to the tables.

Race Code Table

The Race Code table cannot be updated. Your State will supply a new Race Code table if changes are needed.

RDA Table

The RDA table provides the Recommended Dietary Allowances of nutrients recommended by the Food and Nutrition Board of the National Research Council, National Academy of Sciences. Only those nutrients of interest to the EFNEP nutrition system are included.

Use the Load Defaults button on the RDA browse screen to replace the current table with the system default table, which as of this writing is the RDA table as of February 1998.

The data fields in the RDA table are described in Table 11-1.

Table 11-1. RDA Table Data Fields

Description	A descriptive name for the entry, e.g. Male 11-14
Lower Age	The lower age of the age range.
Upper Age	The upper age of the age range.
Sex	Gender for this entry (male or female).
Pregnant	If this entry is for a pregnant female.
Nursing	If this entry is for a nursing female.
Calories	Minimum recommended calories.
Protein (g)	Recommended number of grams of protein.
Fiber (g)	Recommended number of grams of fiber.
Calcium (mg)	Recommended number of milligrams of calcium.
Iron (mg)	Recommended number of milligrams of iron.
Vitamin A (RE)	Recommended number of Res of vitamin A.
Vitamin C (mg)	Recommended number of milligrams of vitamin C.
Vitamin B6 (mg)	Recommended number of milligrams of vitamin B6.

Minimum Servings Table

The Minimum Servings table contains the minimum food group servings from the Food Guide Pyramid by age range, sex, and condition of pregnancy and nursing.

The table should contain an entry for each age range from 0 to 99 for all valid combinations of gender, pregnancy and nursing. It is better to include entries for extreme cases than to have the system use an estimate.

The data fields in the Minimum Servings Table are described in Table 11-2.

Table 11-2. Minimum Servings Table Data Fields

Description	A descriptive name given to this entry.
Lower Age	The lower age of the age range.
Upper Age	The upper age of the age range.
Sex	Gender for this entry (male or female).
Is Pregnant	If this entry is for a pregnant female.
Is Nursing	If this entry is for a nursing female.
Bread/Grain	Minimum recommended daily servings of bread, and grain products.
Fruit	Minimum recommended daily servings of fruit.
Vegetable	Minimum recommended daily servings of vegetables.
Meat	Minimum recommended daily servings of meat, or alternatives.
Dairy/Calcium	Minimum recommended daily servings of dairy/calcium products.

Poverty Guidelines Table

The Poverty Guidelines table provides the poverty level expressed in annual income for each family size. Entries for family sizes from 1 to 25 are provided.

The table supplied with the system represents the 48 contiguous States and the District of Columbia. Units in the States of Alaska and Hawaii will need to update the table for their respective State. Poverty level guidelines for outlying jurisdictions (Puerto Rico, the U.S. Marshall Islands, the Federated States of Micronesia, the Commonwealth of the Northern Marianas, and Palau) are not published and must be obtained through other channels.

The poverty level guidelines are usually updated annually. The Federal office will provide States with the new guidelines in printed form by June 1 of each year.

CHAPTER 12 - THE SYSTEM ADMINISTRATION SWITCHBOARD

About System Administration Switchboard

The System Administration Switchboard, Figure 12-1, is used to perform system administration and housekeeping functions.

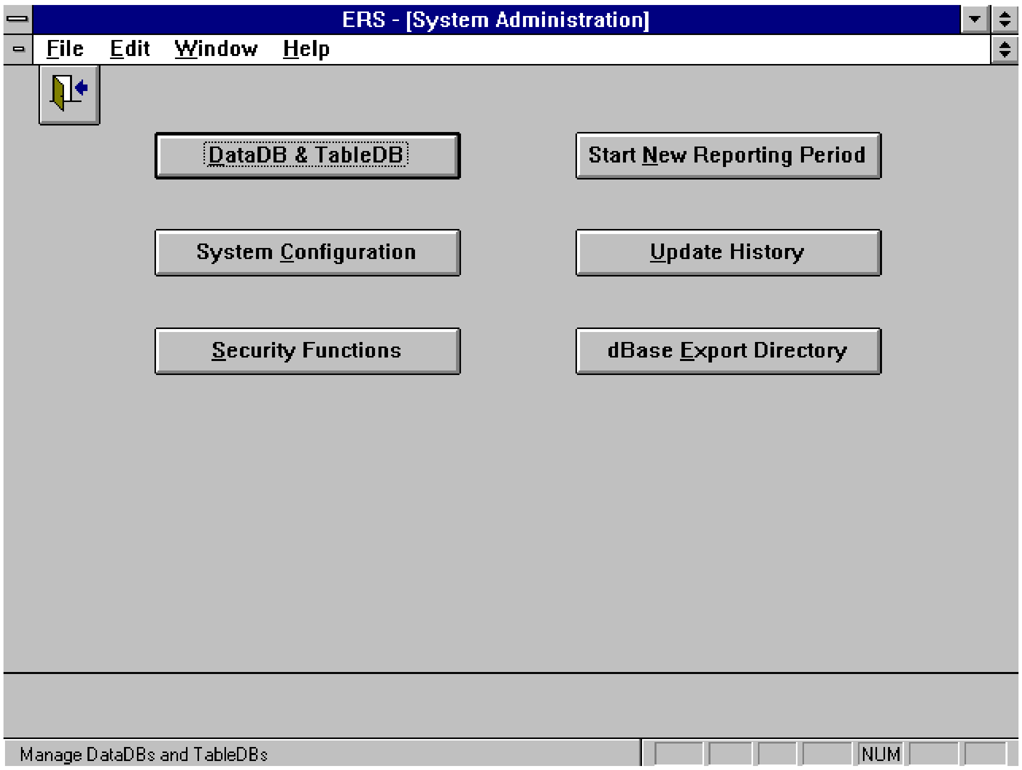


Figure 12-1. System Administration Switchboard

Following is a brief description of each command button.

<u>DataDB & TableDB</u>
This function is used to specify the location of the Data database (DataDB) and Tables database (TableDB). They may be in the same or different directories. If you have more than one set of data, use this function to switch to the one you want to use.

<u>System Configuration</u>
This function identifies the unit, establishes the report period, and sets some operational switches.

<u>Security Functions</u>
Use this function to add and remove users, and to change your password. See Volume 3 for policy guidance on security.

Start New Reporting Period
At the end of each reporting period (fiscal year) use this function to prepare a copy of the DataDB and TableDB for the new year.

Update History
Use this function to view the log of software updates.

dBase Export Directory
This function sets the default directory to contain exports to dBase.

DataDBs and TableDBs

About DataDBs and TableDBs
The system uses two databases to hold the data: a DataDB and a TableDB. Each has a name which may be up to 16 characters long. This name is a short cut name for the full path to the database. The initial names are DATA and TABLES.

The DOS file name of all DataDBs is ERSDAT40.MDB, and the DOS file name of all TableDBs is ERSTBL40.MDB. A DataDB and a TableDB may be in the same directory.

DataDBs and TableDBs may be located on your local drive or on a file server. When multiple DataDBs and TableDBs are maintained, some may be on your local drive and some may be on your network drive (server). In a network environment where more that one workstation is accessing the same DataDB, you may benefit from a network configuration as described in Chapter 16.

The setup program (Chapter 16) will create an empty DataDB and a default TableDB as follows:

Database	Name	Location (Path)
DataDB	Data	C:\ERS4\DATA
TableDB	Tables	C:\ERS4\TABLES

You should maintain separate DataDBs and TableDBs for each reporting period or fiscal year. See the **Start New Reporting Period** section later in this chapter. Sometimes you may need more than one DataDB for the same year, for example, if you are maintaining data for two different offices on the same computer. You may also want to create a separate DataDB for training.

The DataDB and TableDB are the only two files that need to be backed up on a regular basis. See the ERS Tools in Chapter 15.

Attaching a DataDB and a TableDB
Database attachment is a process of making the data it contains more rapidly accessible to the system. The way to switch from one DataDB to another is to *attach* the new one.

From the lists of available DBs on the Attach DataDB and TableDB screen, Figure 12-2, click the ones you want to attach. Then click the Attach button.

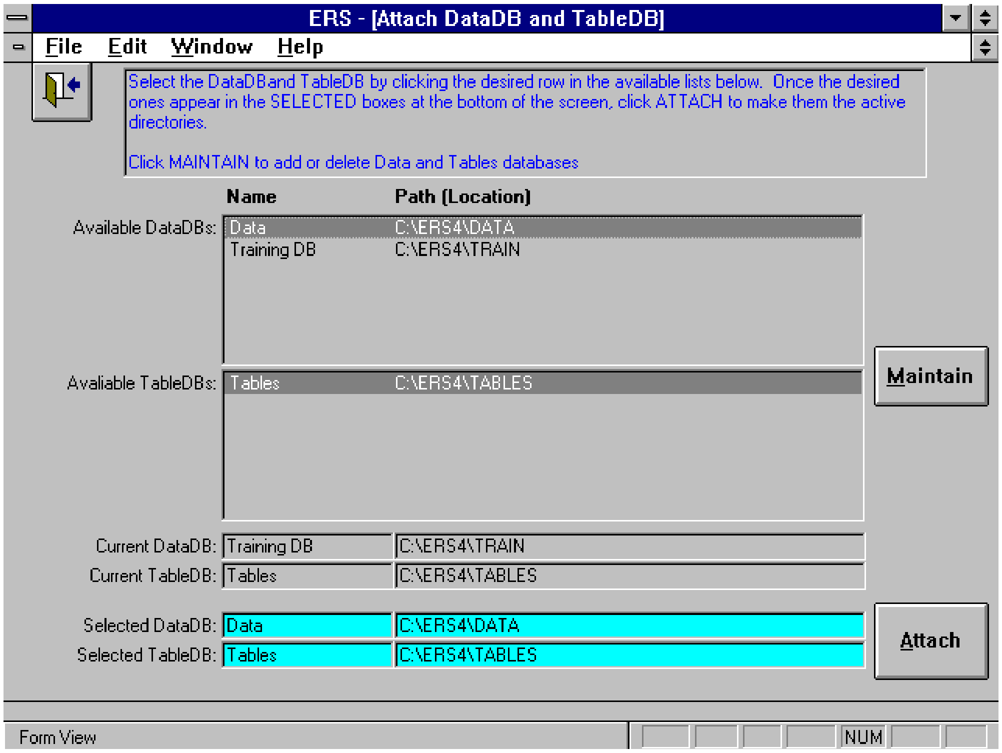


Figure 12-2. Attach DataDB and TableDB

<u>DataDB and TableDB Maintenance</u>

Maintenance functions are delete a DB, add a DB, and change the location of a DB. The Maintain DataDB and TableDB screen is shown in Figure 12-3.

Use the Windows File Manager to create directories to hold the new DataDB or TableDB and to explore your hard drive. An example is provided in Figure 12-6.

Use the Add DataDB and the Add TableDB buttons to create a new entry. This is a two step process:

1. Supply a name for the new DataDB or TableDB that you are adding. This is shown in Figure 12-4. Click Next after entering the name. This will open the Select Directory screen shown in Figure 12-5.
2. Select the directory to contain the new DataDB or TableDB by clicking the Browse button on the Select Directory screen. This will open the Specify Directory dialog box shown in Figure 12-7. Use it to position to the desired directory and click OK to copy that directory name into the Path field on the Select Directory screen. Click Save to add the new DataDB or TableDB to the list of ones that may be attached.

! *The first time you attach a new DataDB or TableDB, you will be notified that the database does not exist and asked if you want to create it. Usually, you will respond with Yes. If you think the database already exists, click No and use File Manager or some other tool to investigate. See* Figure 12-8.

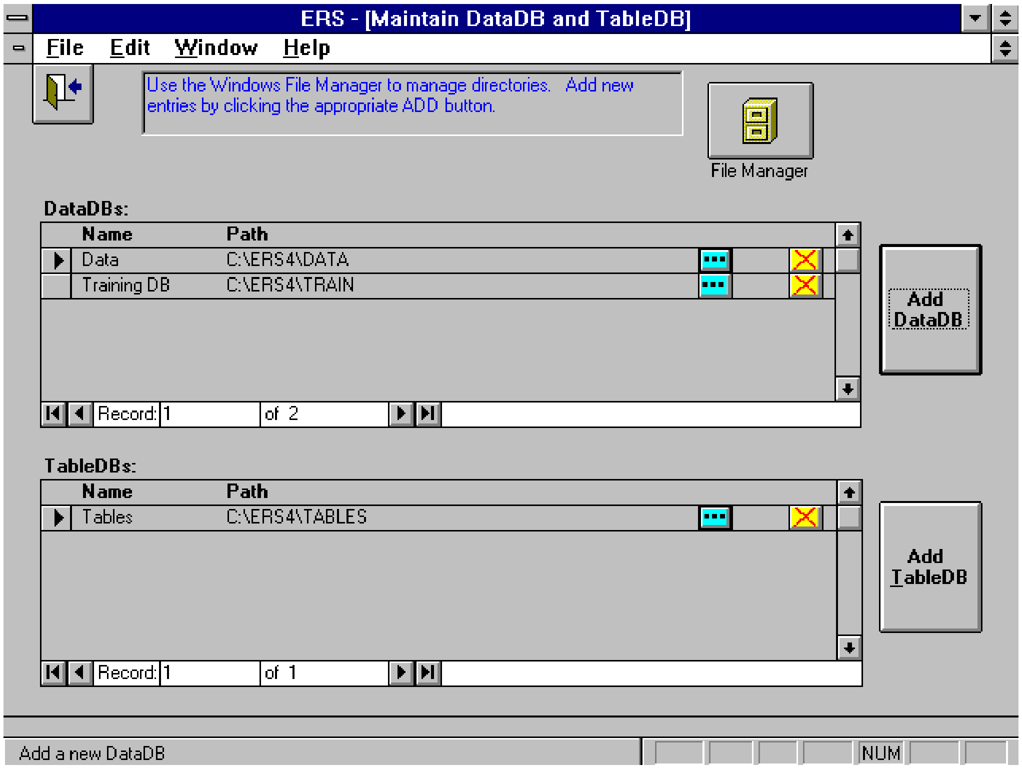


Figure 12-3. Maintain DataDB and TableDB

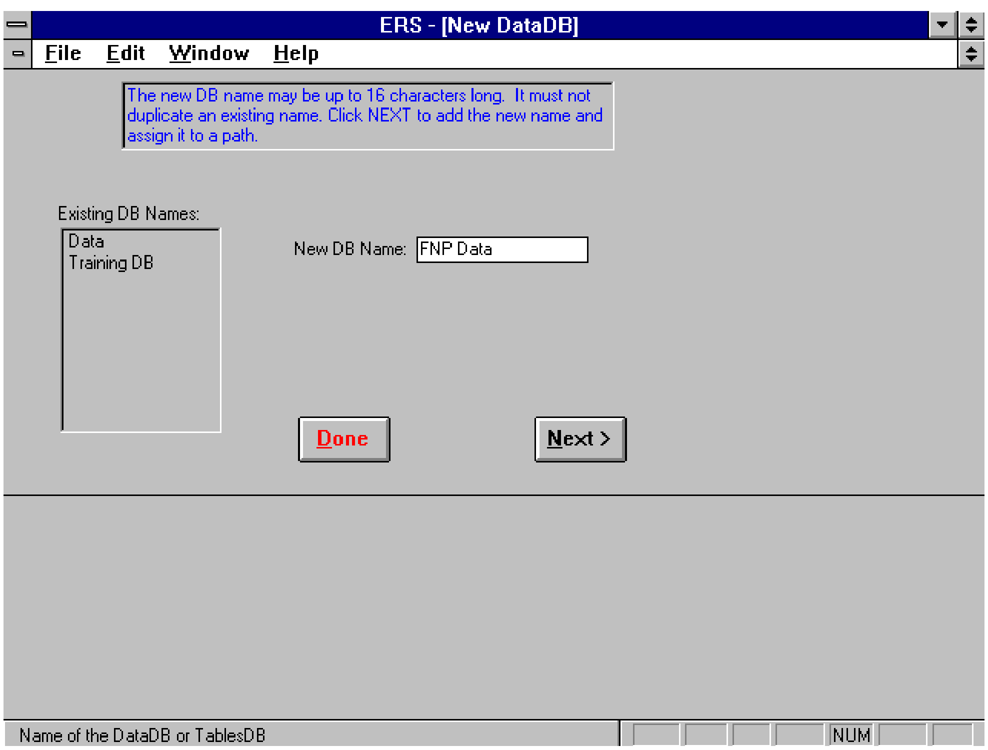


Figure 12-4. Naming a New DataDB

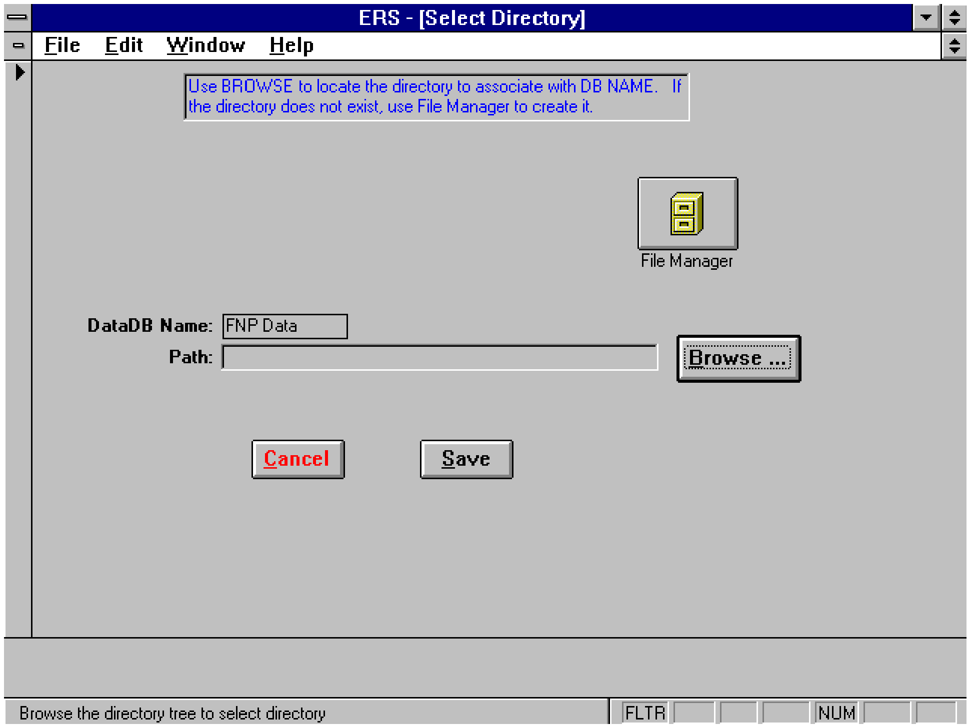


Figure 12-5. Selecting the Location for a New DataDB

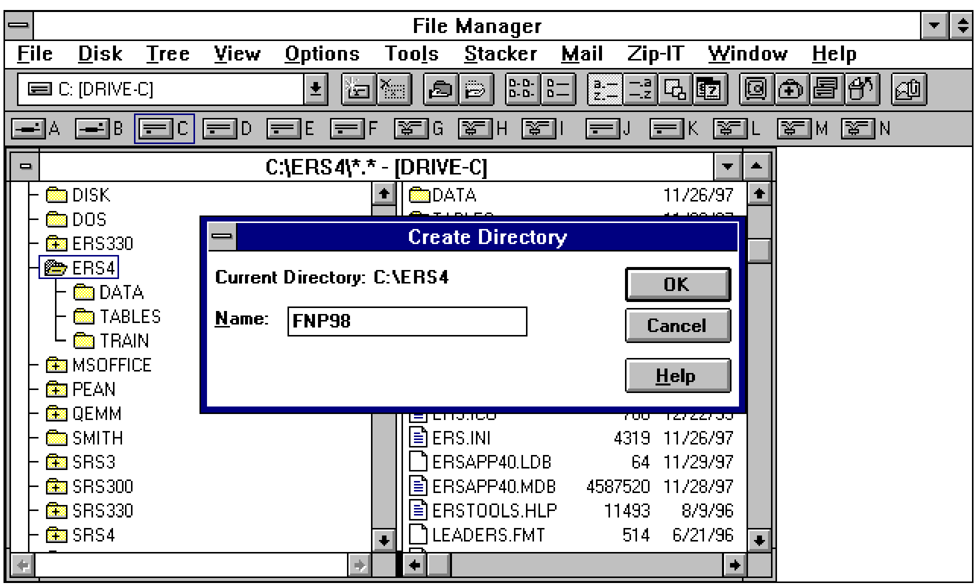


Figure 12-6. Using File Manager to Create a Directory

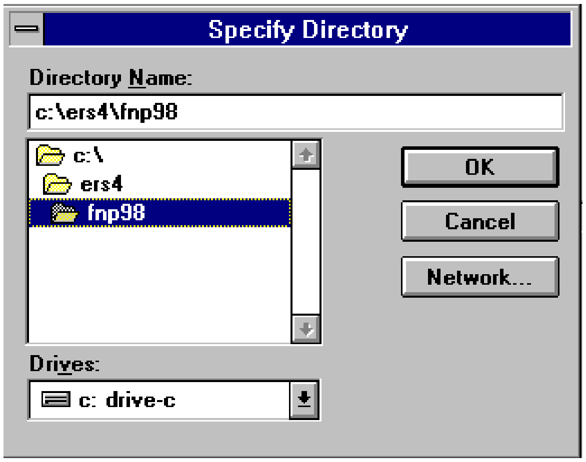


Figure 12-7. Using Browse to Identify Directory

The first time you attach to a new DataDB or TableDB, the system must create the MDB file. Before creating it, the system provides the notice shown in Figure 12-8. The only time you might respond with a Cancel is if you believe the DataDB or TableDB already exists. For example, it may be on a network drive and the network is down.

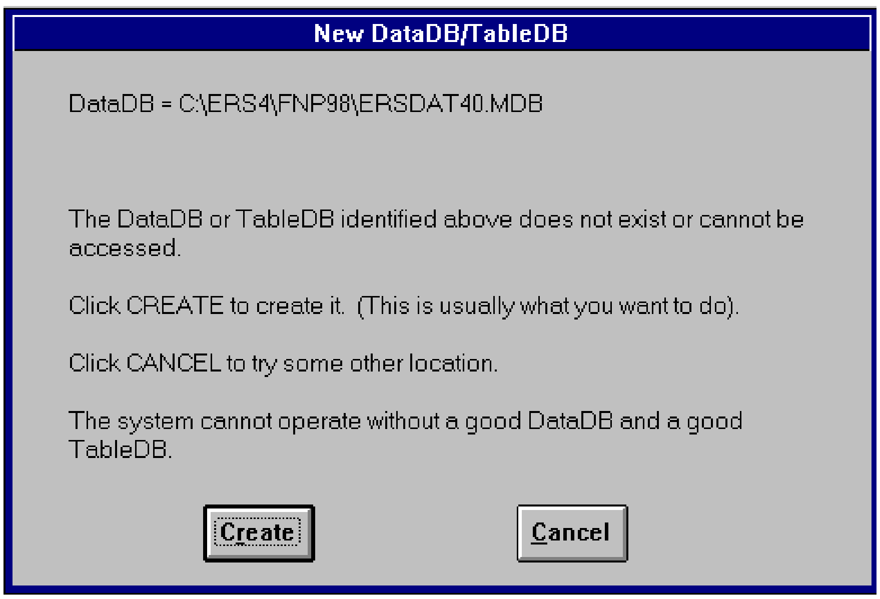


Figure 12-8. Create New DataDB/TableDB Notice

System Configuration

The system configuration information, Figure 12-9, provides identification of the unit, the reporting period, the default nutritional method, and update options. A description of the data fields is given in Table 12-1

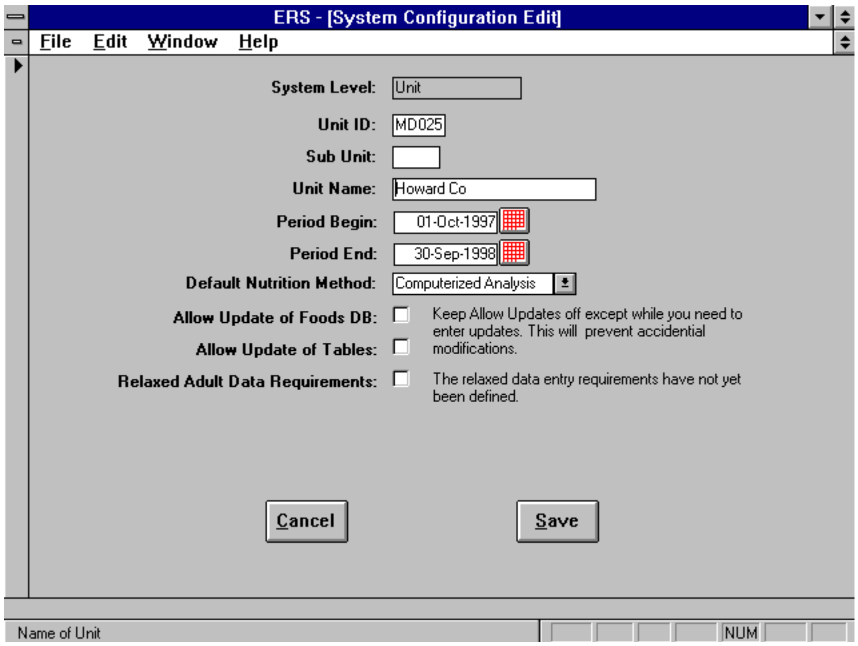


Figure 12-9. System Configuration Edit

Table 12-1. System Configuration Data Fields

Unit ID and Sub Unit	Unit ID and optional Sub-Unit ID identify the unit. The Unit ID consists of the two letter State abbreviation and the FIPS code. Use the Sub-unit code to distinguish between different computers or sites within the county.
Unit Name	Unit Name will appear on reports. Use the unit's City or County as the unit name.
Period Begin and Period End	The Report Period is used to specify the time period of the active data. These dates are sometimes used as a sanity check when other dates are entered. Usually the fiscal year is used as the report period. These dates become the default dates for report and export date ranges.
Default Nutritional Method	The default nutritional method is supplied here. When the first recall for an adult is entered, the system will prompt for the method to be used for that individual, with the one selected here as the default.
Allow Updates of Foods DB	Enable updates to the Foods database only while you are making required changes. This avoids accidental updating when someone is viewing the Foods database.
Allow Updates of Tables	Enable updates to the tables only while you are making required changes. This avoids accidental updates when someone views the table. Modification of the following tables are controlled by this switch: RDA Table Minimum Servings Table Poverty Guidelines Table
Reduced Adult Data Requirements	This may be implemented at a later date.

Security Functions

Use this function to add and remove users, and to change your password.

The system maintains two levels of permissions for users: Executive and Data Entry. The only difference between them at present is that Data Entry users cannot manage security, they can only change their own password.

! *Remember that passwords are case sensitive. PassWord and Password are not the same.*

New systems have user ID **ERS** and password **ERS**. Use user ERS to set up your specific users. Do not delete user ERS, and do not change its password, until you are confident you can add users and perform the other security functions. *Be sure there is always at least one Executive user!* See Volume 3 for additional guidance on security and passwords.

The dialog box, shown in Figure 12-10, is used to add users, delete users, clear their passwords, and set their permissions level.

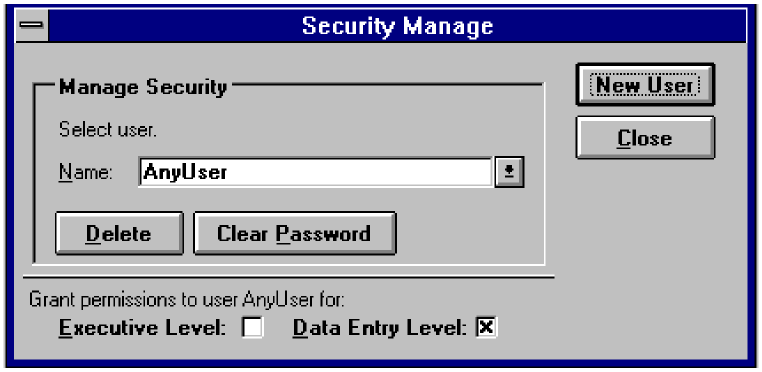


Figure 12-10. Manage Security

Start New Reporting Period

Use this function to create a new DataDB and a new TableDB for the new reporting period. Figure 12-11 shows the screen used to specify the reporting period and the new DataDB and TableDB locations. Once created, the system will make the new DataDB and Table DB current and delete all adults who exited before the new report period.

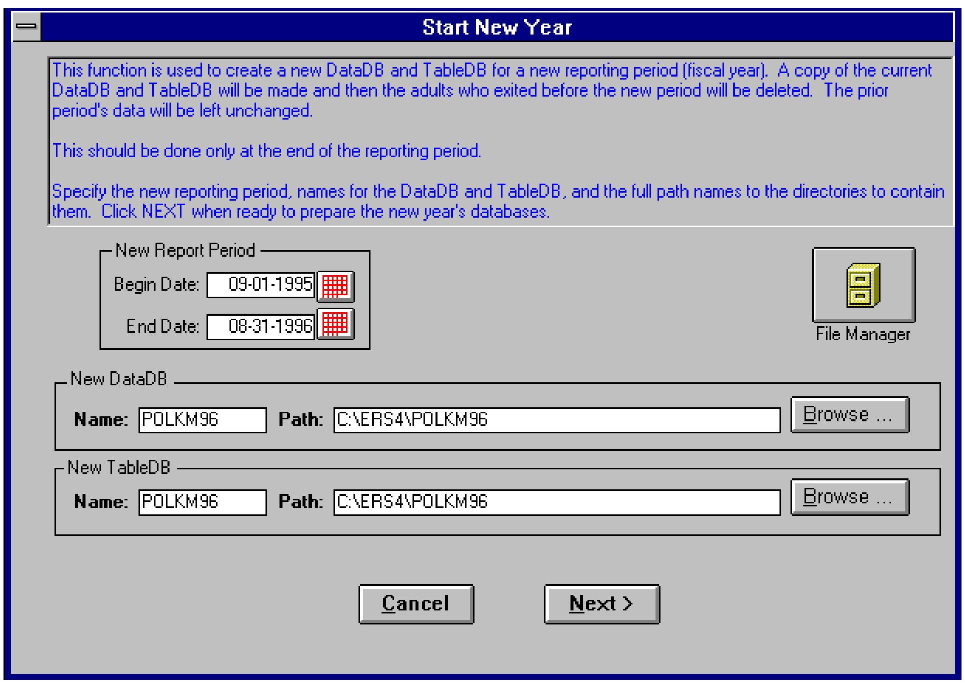


Figure 12-11. Start New Year

The DataDB and TableDB for the prior period are left unchanged. You may need to switch back to them from time to time to prepare end of year reports and export the summary data to your State.

Update History

This feature provides for a description of any software updates applied to the system. Updates are made from the ERS Tools application. Use Help→About to see your current version, as shown in Figure 2-18.

dBase Export Directory

Use this function to set the default directory for exports to dBase.

CHAPTER 13 - DATA INTERCHANGE SWITCHBOARD

About the Data Interchange Switchboard

The Data Interchange Switchboard, Figure 13-1, is used to import data from your State office and to export data for use by your State office.

! *If you are on a network, be sure no other users are using the ERS system while you are importing or exporting. Loss of data may result.*

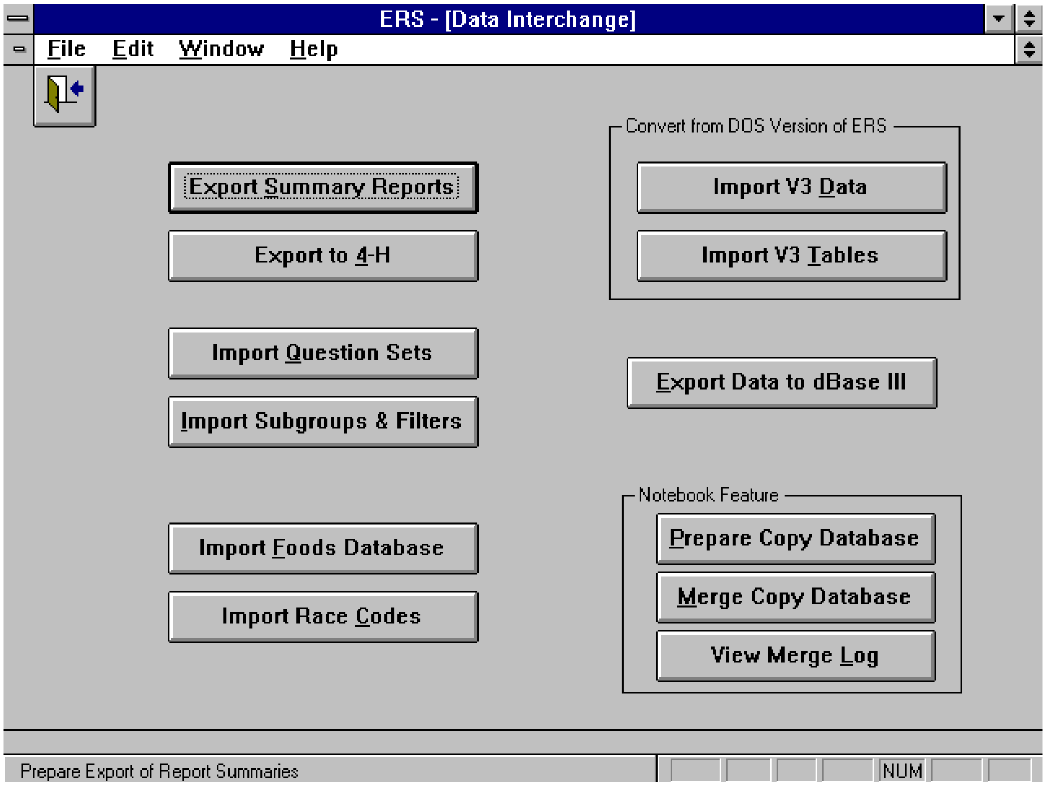


Figure 13-1. Data Interchange Switchboard

The three command buttons for the Notebook Feature are described in Chapter 14.

Export Summary Reports

This function prepares a export of the selected summary data. The State will consolidate this data with other units to prepare state-wide summary reports. Figure 13-2 shows the screen used to prepare the export.

For the Adult, Diet, Behavior Checklist and Perinatal Projects summaries, the system will prepare an export for each State and Federal level Subgroup Filter.

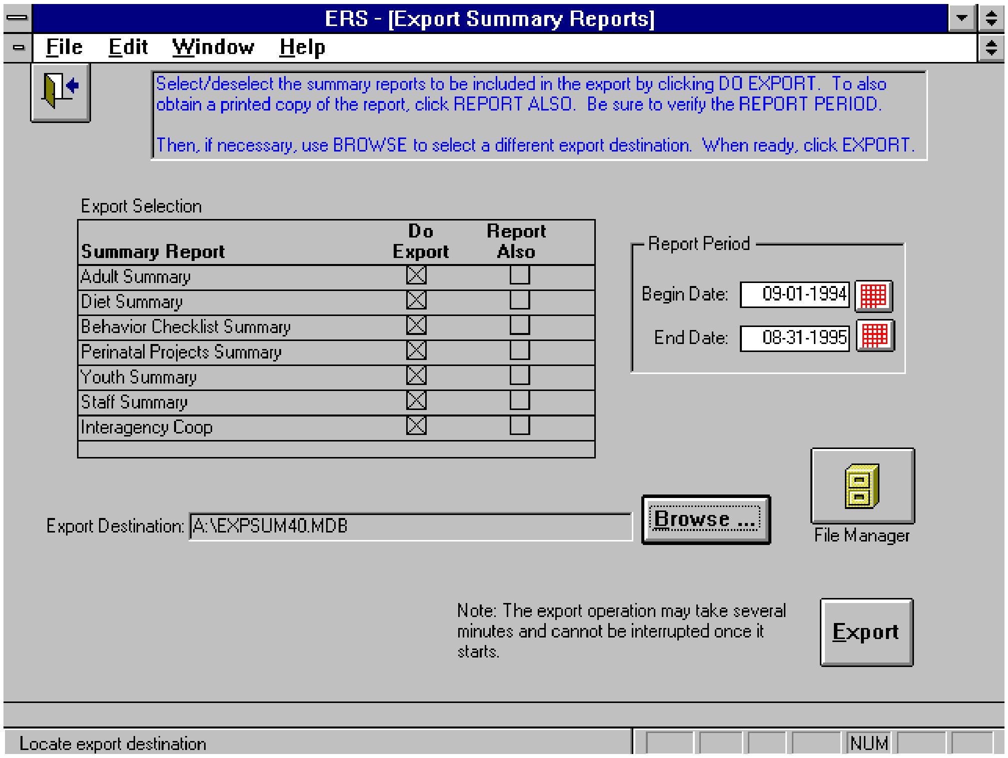


Figure 13-2. Export Summary Reports

In most cases you will want to export *all* summaries by leaving Do Export checked. Omit a summary only if instructed to do so by your State. The export should fit on a 1.44 MB diskette. You can use the Browse button to select the B: drive or a drive and directory on your hard drive. The export file name is EXPSUM.MDB.

The Report Also option is used to retain a hard copy report of the data being exported. Be aware that if you select this option, you will need a considerable amount of paper.

Export to 4-H

The Export to 4-H function, Figure 13-3, is used to export the youth data for use by 4-H.

This data will be imported by the new 4-H reporting system (ES-237). This feature provides for optimal management of resources and elimination of duplication. Units will only need to enter the data once to meet the reporting requirements of both program areas.

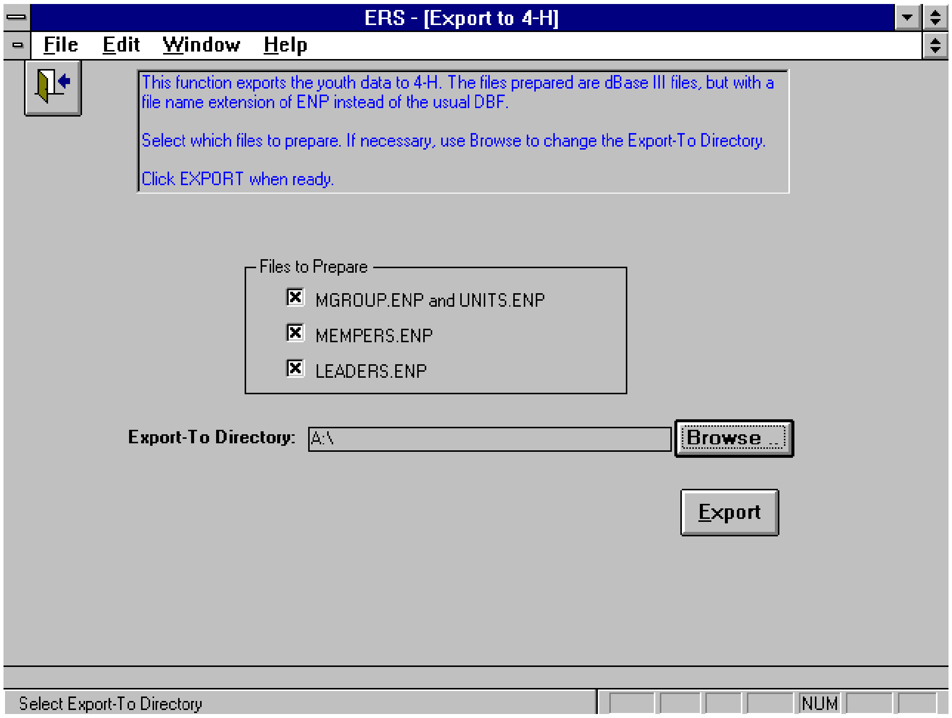


Figure 13-3. Export to 4-H

Import Question Sets

The Import Question Sets function, Figure 13-4, is used to import new sets of additional behavior checklist questions from your State. New question sets should be imported at the start of the reporting period, since changes imported later in the year could impact surveys already entered.

The name of the file to be imported is CKQSET40.MDB. If it is to be imported from other than the A: drive, use the Browse button to locate the file.

Once the import completes, the system will scan for existing Additional Questions and make adjustments to them if required. This operation may take several minutes.

! *The newly imported question sets will replace the existing question sets and may invalidate data compiled for individuals using the old questions.*

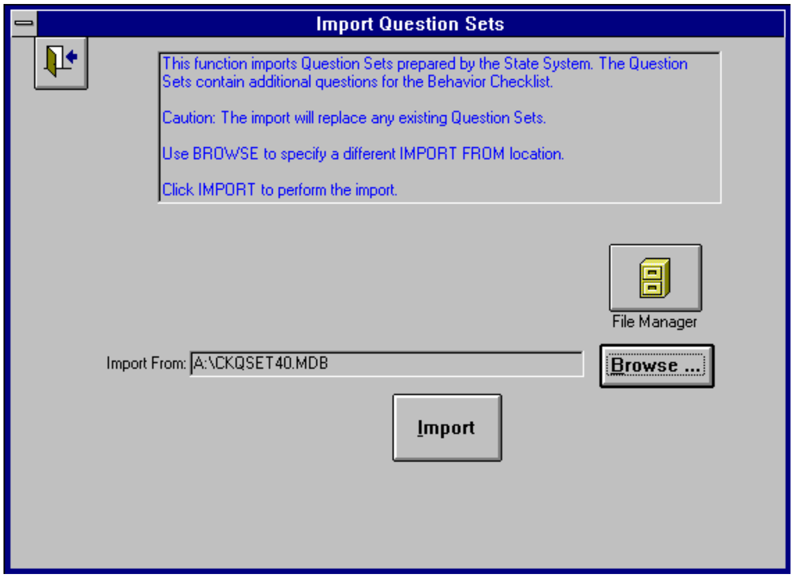


Figure 13-4. Import Question Sets

Import Subgroups

The Import Subgroups function, Figure 13-5, imports new subgroups and subgroup filters from your State.

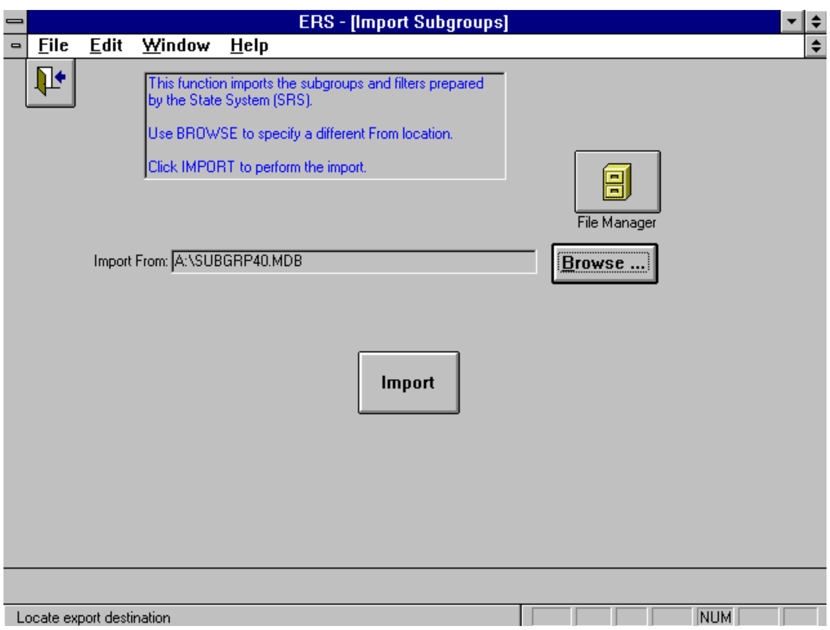


Figure 13-5. Import Subgroups

Import Foods Database

The Import Foods Database function, Figure 13-6, is used to import a new Foods Database supplied by your State office. The import file must be a dBase III file with a name of FOODS.DBF.

You may choose between two import strategies:

Complete Replacement: If you choose Complete Replacement, the existing Foods database will be deleted and replaced with the new one.

Retain Local Changes: If you choose Retain Local Changes, all food records with a source code of U, which is the source code assigned to any food items modified at the Unit level, are not deleted. Those with a source code other than U are deleted. The new Foods database is then merged with the food items with a U source code. If a food item from the import has the same ID as one with a U source code, both records will be displayed on the screen for you to select which one to keep.

Once the import completes, you should run the Re-Calculate Recalls to make sure the nutrient values for existing recalls reflect the new Foods database.

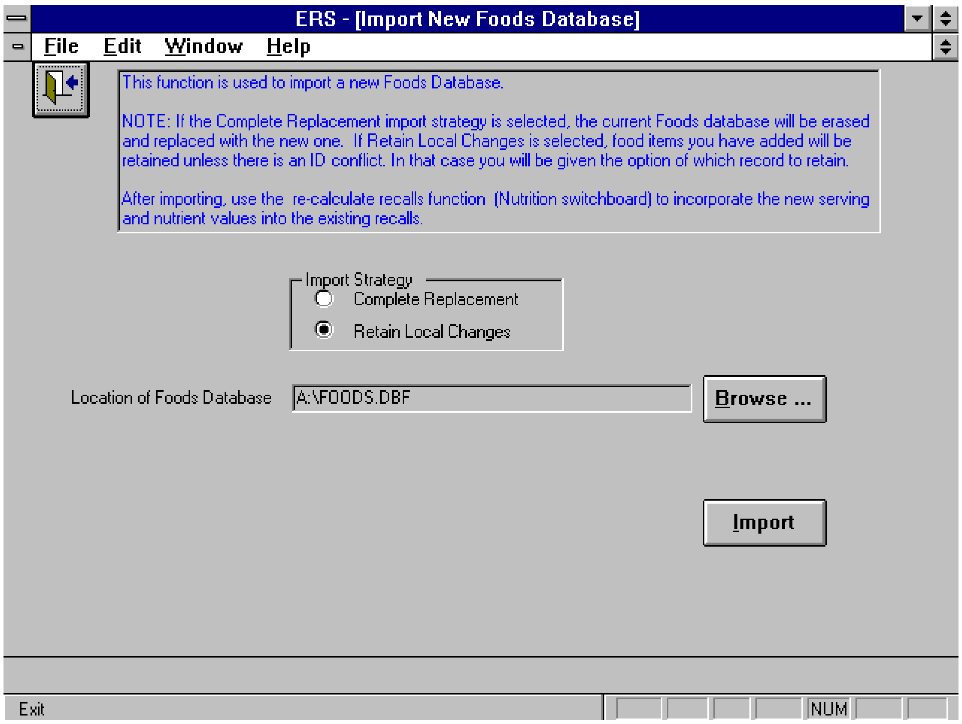


Figure 13-6. Import Foods Database

Import Race Codes

The Import Race Codes function, Figure 13-7, is used to import the Race Codes to be used within your State. The import file must be a dBase III file with a name of RACES.DBF.

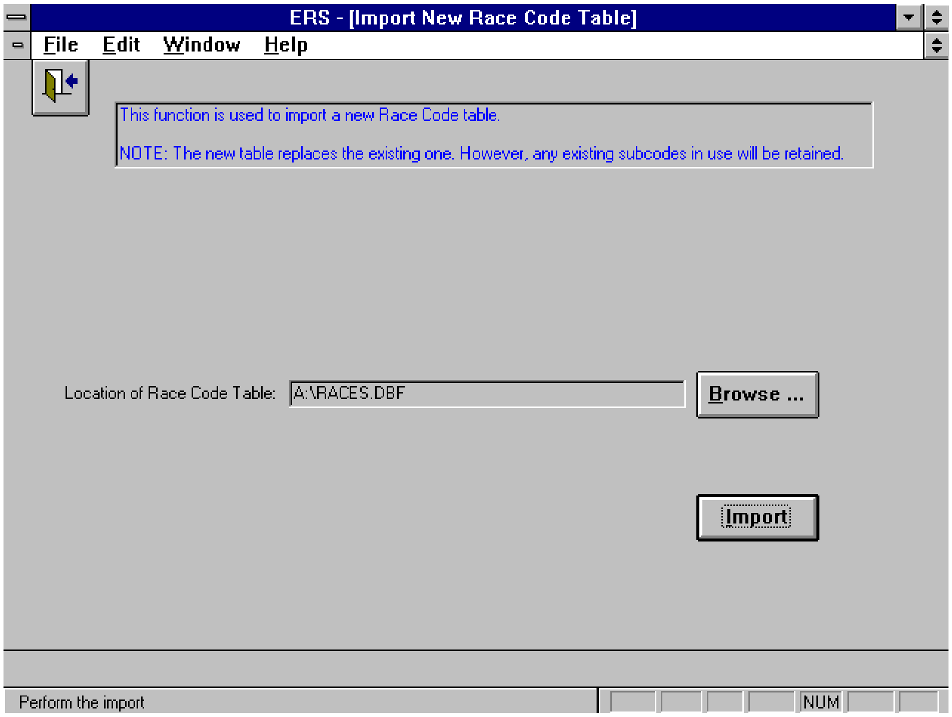


Figure 13-7. Import Race Codes

Import V3 Data

The Import V3 Data function is used to import data from the ERS Version 3.x system. Prior to importing, use the Version 3 system to pack all data.

! *If you need to import the Version 3 tables, you must do that before importing the data. In most cases importing the Version 3 tables will not be necessary. An example of why you would import the Version 3 tables is if you are using a non-standard RDA table.*

The import will erase any existing data, so in most cases you will want to use DataDB and TableDB Maintenance to prepare a new DataDB to hold the imported data.

The system can handle the old 15-question or the new 10-question checklists. It does a fair job of converting the 15-question responses to 10-question responses, but you may wish to review the results. Do not attempt to import data from versions earlier than 3.1. First, upgrade that system to ERS 3.1 or 3.3.

The first step is to use the Locate Files button to point to the Version 3 systems data directory. with the files to be imported. See Figure 13-8. Next click Import to commence the import.

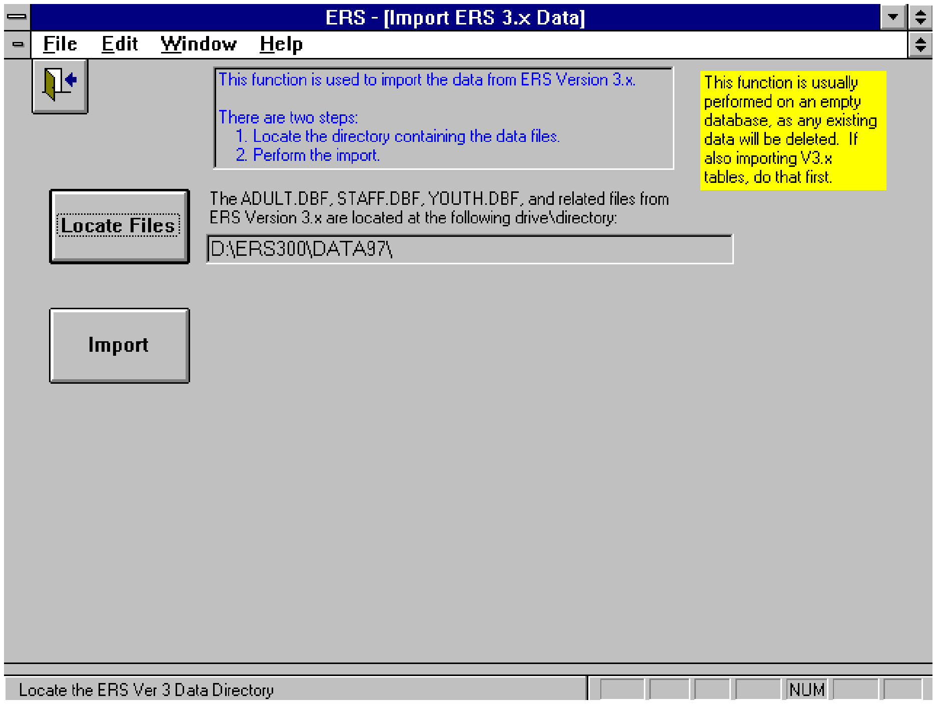


Figure 13-8. Import V3 Data

The status of the import will be displayed as shown in Figure 13-9.

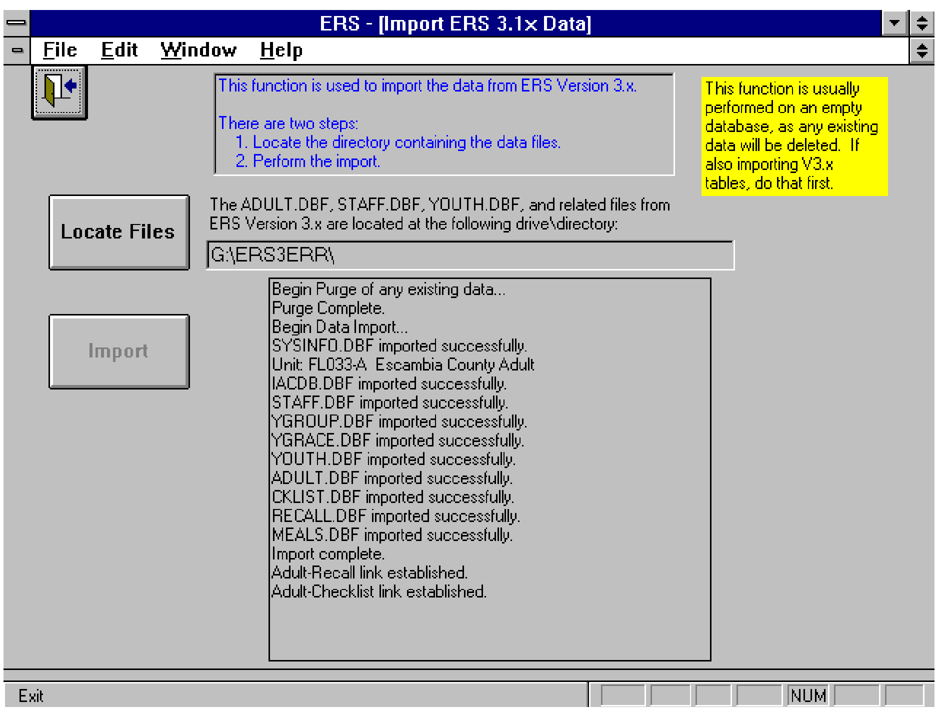


Figure 13-9. Import Progress

The data is verified during import. Most error records are skipped, but critical errors will abort the import. If error records are skipped, they will be displayed at the end of the import as shown in Figure 13-10. Examination and printing the problem list can only be done at this time. The information will be deleted once the import operation ends.

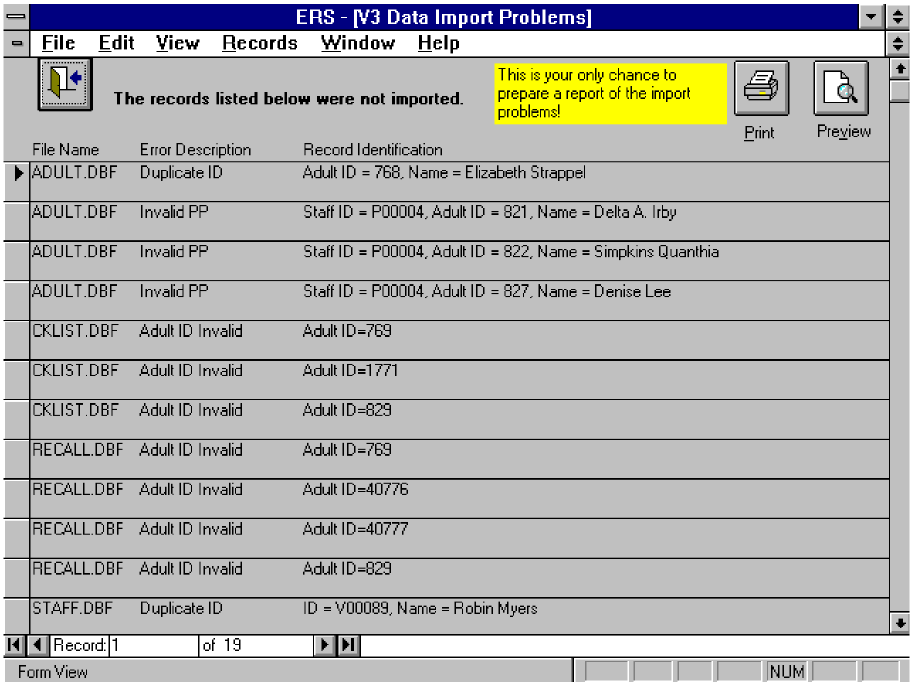


Figure 13-10. Import Problems

Import V3 Tables

The Import V3 Tables function, Figure 13-11, is used to import the tables from the ERS Version 3.x system. In most cases, this function will not be necessary.

Prior to importing, use the Version 3 system to pack all data. Then when performing the import, use the Browse button to point to the Version 3 systems tables directory.

! *This function deletes any data in the current DataDB and TableDB. Be sure to perform this import before you import the Version 3 data.*

The import will erase any existing data, so in most cases you will want to use DataDB and TableDB Maintenance to prepare new a DataDB and a new TableDB to hold the imported data.

The data is verified during import. If errors are encountered, the import is canceled. You will need to use the Version 3 system to correct the error and try again.

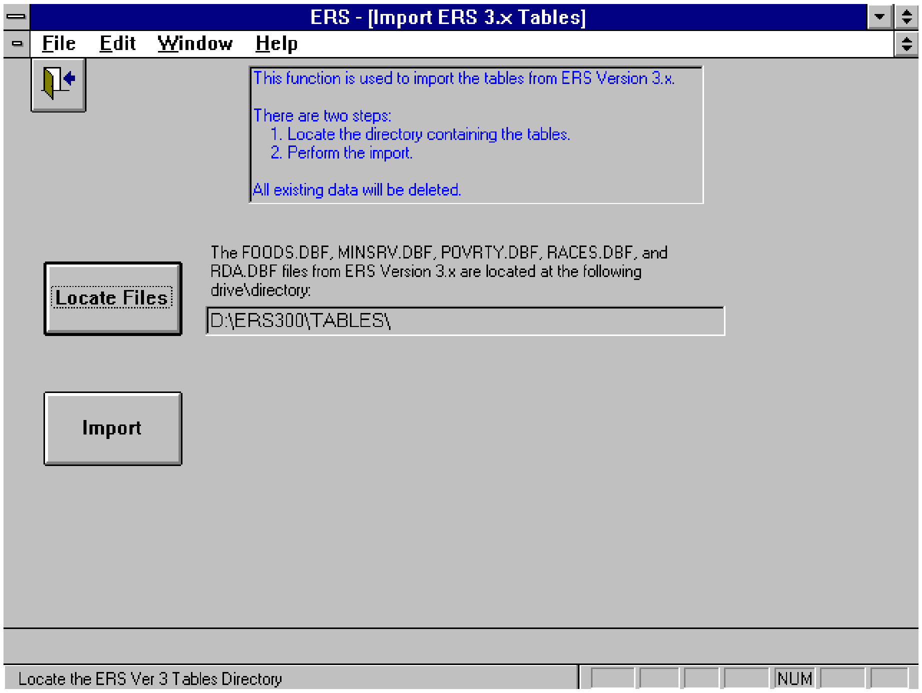


Figure 13-11. Import V3 Tables

Export Data to dBase III

The Export Data to dBase III function, Figure 13-12, is used to prepare dBase III DBF files of the data maintained by this system. You may elect to export all or selected tables of data.

The purpose of this export is to prepare a copy of the database for external analysis by software capable of reading DBF files.

The DBF files resemble, but are not the same as, the files used in Version 3.x of the ERS system. DO NOT attempt to read them with the DOS version of ERS.

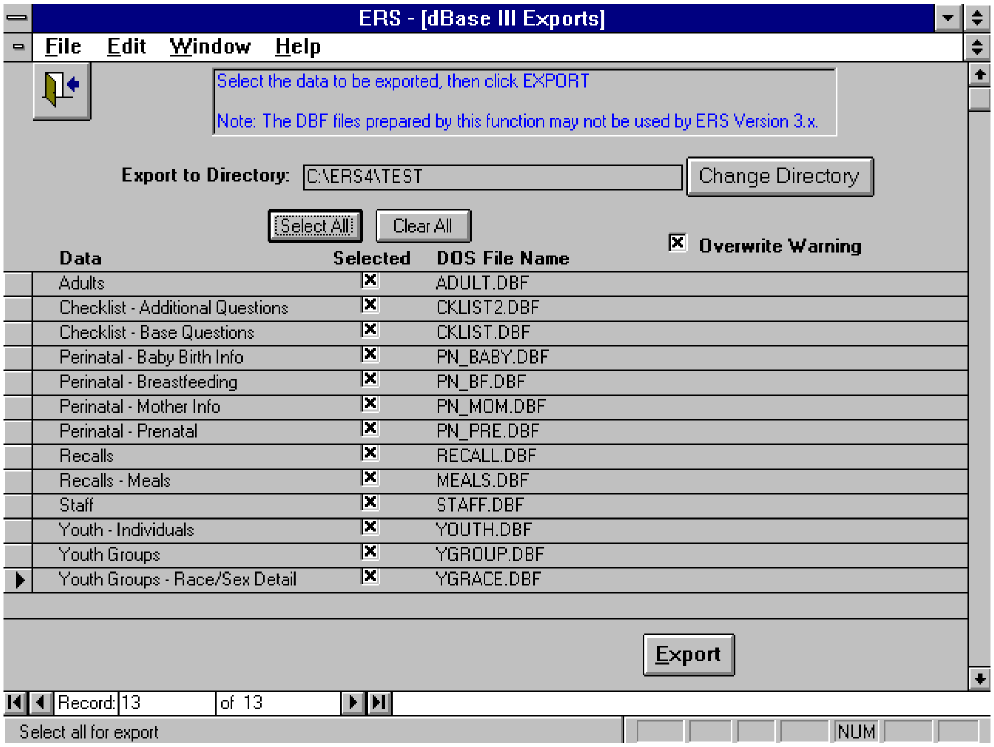


Figure 13-12. Export Data to dBase III

CHAPTER 14 - THE NOTEBOOK FEATURE

About the Notebook Feature

The Notebook feature provides for duplication of the database so that independent data entry can be performed on a second (notebook) computer and the results merged back into the database at a later date. The primary use of the notebook feature is expected to be in situations where the Copy Database is transferred to a laptop or notebook computer for data entry outside the office.

The Notebook feature fits between the two other ways to maintain data on more than one computer: (1) The use of sub units to maintain a county's data on two or more separate computers, and (2) a local area network where two or more computers update the same database.

The basic steps involved in using the Notebook feature are shown graphically in Figure 14-1. Once the CopyDB has been merged into the MasterDB, update the remote to match the master by preparing a new CopyDB for the remote.

! *Both the Master Database and the Copy Database have the same DOS file name: ERSDAT40.MDB. The term MasterDB is used to refer to the Master Database, and the term CopyDB is used to refer to the Copy Database. The CopyDB can perform all ERS system functions except spawn its own CopyDB.*

Three command buttons on the Data Interchange Switchboard are used for the Notebook feature. They are disabled for CopyDBs. The three buttons are

Prepare Copy Database
Create a CopyDB using all or selected data from the current (Master) database.

Merge Copy Database
Merge data from the CopyDB into the current (Master) database.

View Merge Log
View the log of previous merges of CopyDBs.

It is important that the Notebook Feature be used carefully. Updates made to the MasterDB and CopyDB should be coordinated to minimize conflicts. The CopyDB should be merged back into the MasterDB *within a month*. If you wait more than a month, there is a good chance that so many updates have been made that the resulting merge may be incorrect. Inspect the results. If they are not what is desired, restore from the backups and try again with a different merge strategy. Some experience and experimentation may be required for this to go smoothly. Do not use this feature as a substitute for a Local Area Network.

About the CopyDB
When creating a CopyDB, you specify how much adult and youth data to include. The choices are to include adult data only, youth data only, or both. Furthermore, the adult/youth data may be for all staff members or for one staff member. By limiting the data to one staff member, the CopyDB will require less disk space and the subsequent merge will go a little faster.

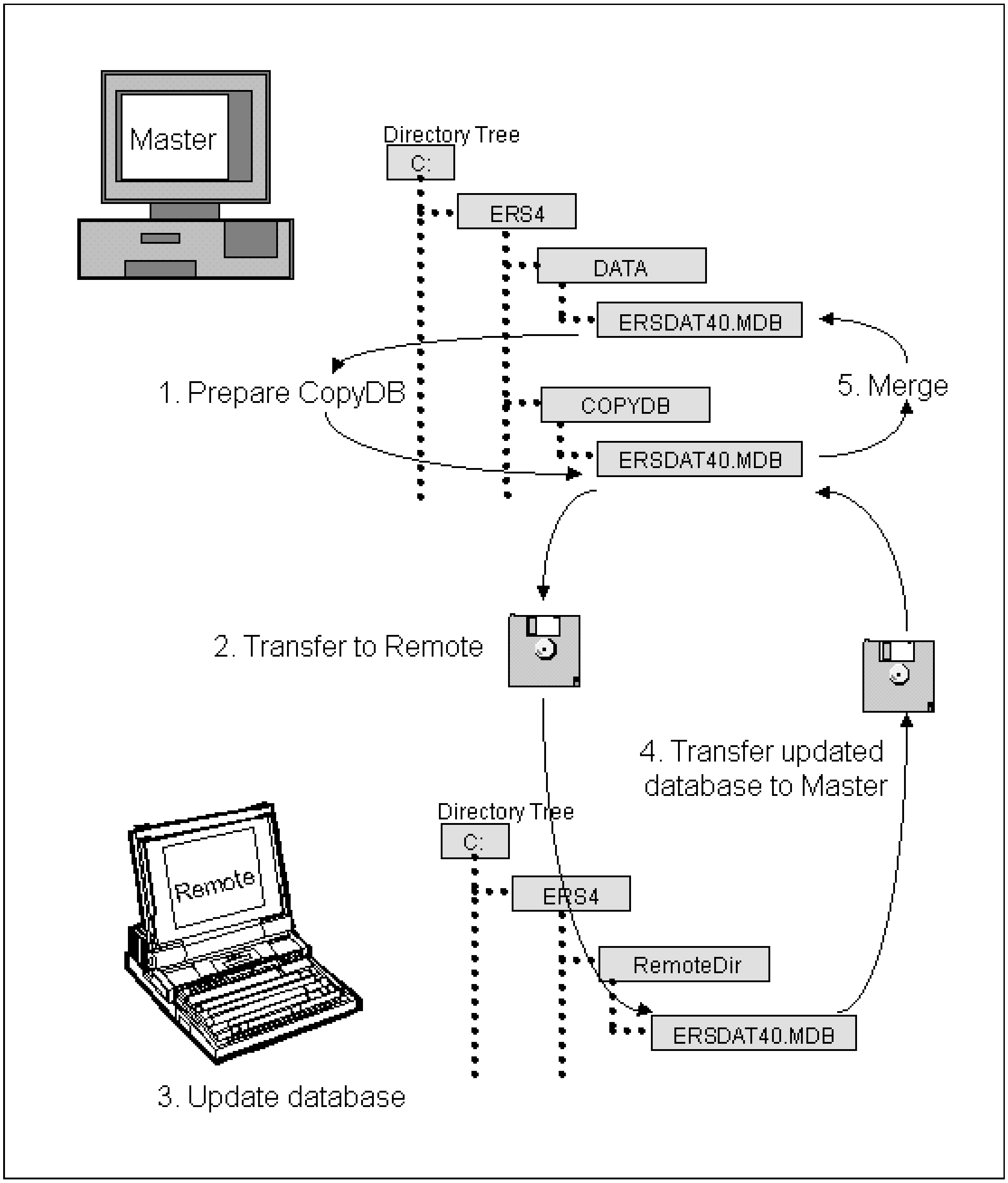


Figure 14-1. Steps in Using the Notebook Feature

You may make any number of CopyDBs. For example, one for each staff member. The CopyDBs may later be merged into the MasterDB, in any order.

It is important to note that the CopyDB works much like a MasterDB. Both may be on your computer - but in separate directories. You can use the DataDB & TableDB button on the System Administration Switchboard to establish a Data Directory for the CopyDB. In fact, you may wish to attach the CopyDB and examine it before performing the merge (See Figure 14-2). Once you have verified it has good data, switch back to the MasterDB and perform the merge.

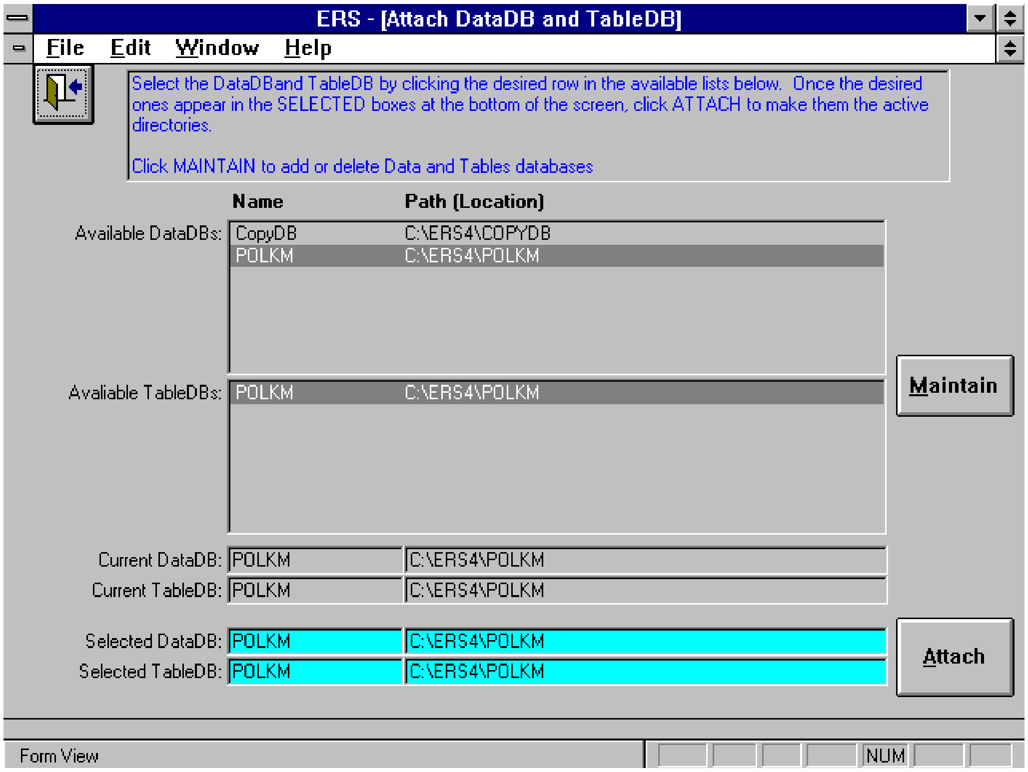


Figure 14-2. Attaching the CopyDB as a DataDB.

About the Merge

When merging, you can limit the merge to adult data only, youth data only, or both. Additionally, the merge may be limited to data for one staff member. For adults included in the merge (all, or those for a staff member), you may elect to include or exclude the recall, behavior checklist, and perinatal projects data. The merge will always include changes made to the volunteer data, either all or those assigned to the selected staff member, as the case may be.

! *Always backup the MasterDB and CopyDB before starting the merge*.

The merge operation only considers changes made to volunteers, adults, recalls, behavior checklists, perinatal projects and youth. Changes to the foods database, question sets, and subgroups are not considered. It is important that any such changes be made to both databases. For example, the system does not check that race codes in adult/youth records are still valid when the record is copied from the CopyDB to the MasterDB. If you let the race code tables in the two databases become different, you may not be able to do the merge until you make them the same. Similar problems will occur if you import new question sets into one but not both databases. The Notebook Feature was not designed to protect from such mis-coordination between the two databases.

About Serial Numbers

All MasterDBs and CopyDBs are serialized. The CopyDB also contains the serial number of its master. The MasterDB will merge only CopyDBs it created, and the merge can take place only once. The MasterDB maintains a log of merges. This log is checked to make sure the CopyDB has not already been merged. Once merged, the CopyDB is considered to be void and should no longer be used. Create a new CopyDB to continue using the laptop or notebook.

Use Help, About from the menu bar to see the current database's serial number. If it is a CopyDB, the serial number of its MasterDB will also be shown

Prepare Copy Database

The four steps required to prepare a CopyDB are shown in Figure 14-3.

A DOS Path of C:\ERS4\COPYDB is a good choice for the location of the CopyDB. Use File Manager to create it if it does not already exist. The system remembers the last path used, so once established, you can continue to use the same path. Do not attempt to make a CopyDB on a floppy drive. It will probably fail with a "disk full" error.

If you set the system to access the CopyDB as a DataDB, you can use the backup function in ERS Tools to make a diskette that can then be restored as a DataDB on the other computer.

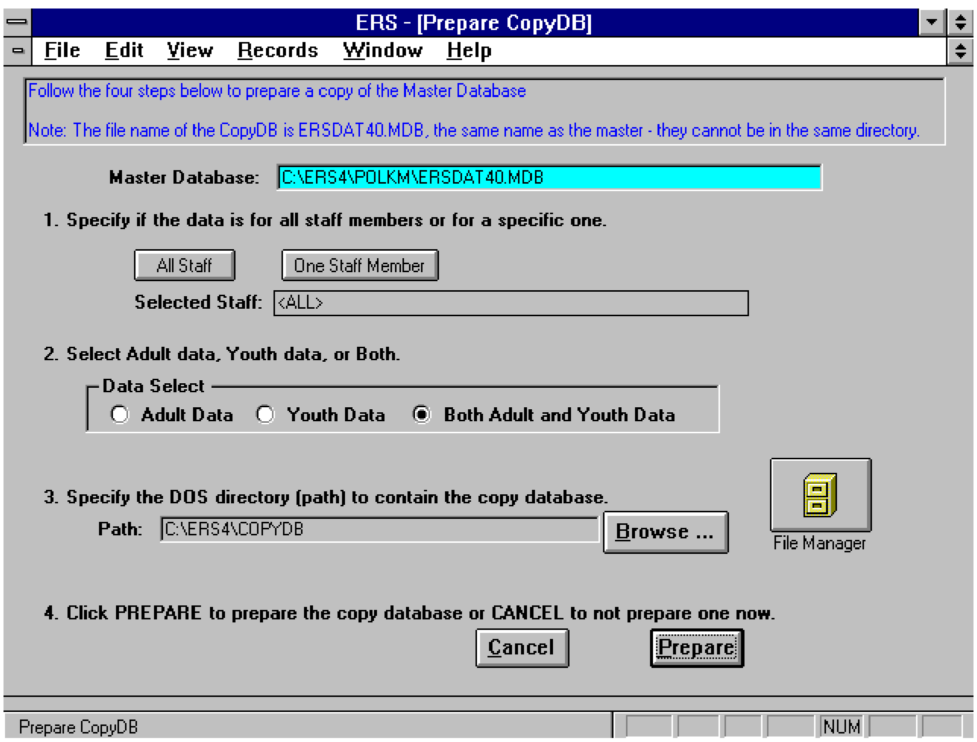


Figure 14-3. Prepare CopyDB

You can use any means at your disposal to transfer the CopyDB to the other computer and transfer it back to yours once it has been updated. Use of the Backup and Restore functions of ERS Tools is suggested.

! *When transferring the CopyDB back onto your computer,* ***be careful not to overwrite the MasterDB.***

Merge Copy Database

The four steps required to start a merge operation are shown in Figure 14-4.

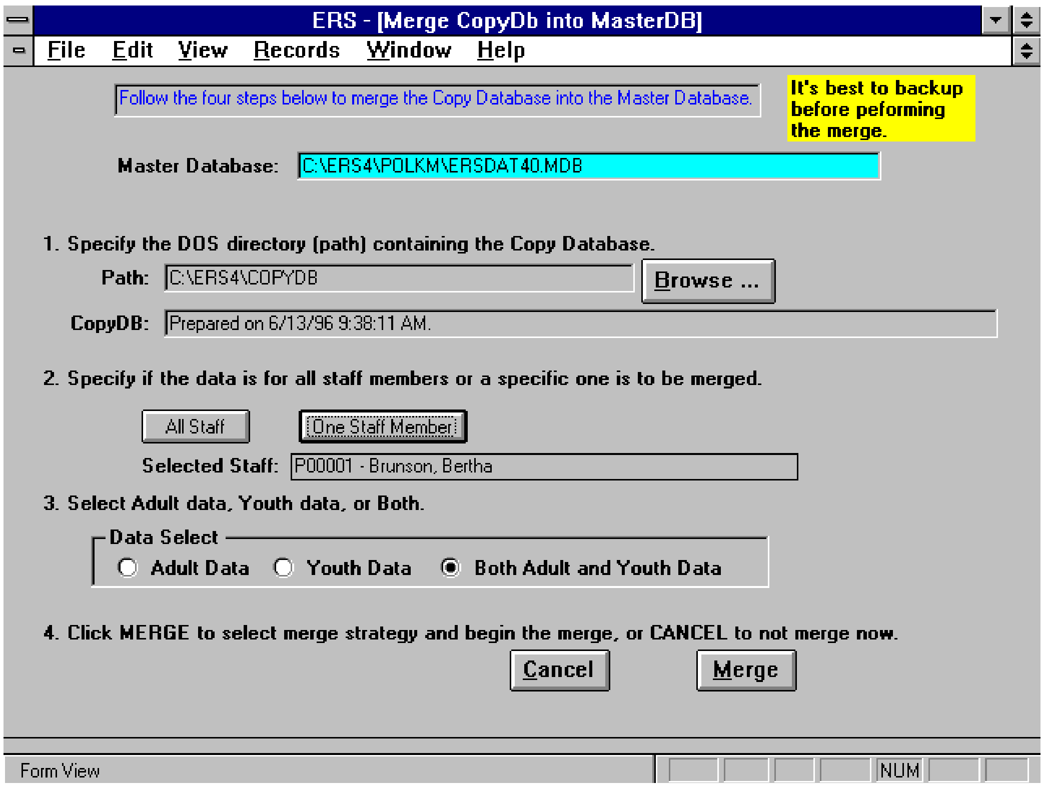


Figure 14-4. Merge CopyDB into MasterDB

After you click Merge, the system will prompt for the merge strategy to be used. Separate strategies are used for adults and youth. After you select the merge strategy, you will be given a choice of performing the merge or canceling. Once the merge is underway, you may cancel by clicking the Cancel button on the “Merging CopyDB to MasterDB” popup.

Merge Strategy

The merge strategy determines what data will be considered for merge and what action the system is to take when a conflict occurs. There are two types of conflicts:

An **ID Conflict** occurs when the same ID was used to add a record to both the MasterDB and CopyDB. The system automatically assigns a new, non-conflicting ID to the record in the CopyDB. For adult and youth ID conflicts, you specify if the system is to notify you each time or if it is to silently assign the new ID.

An **Update Conflict** occurs when a record was updated in one or both of the databases. The merge strategy determines which one will be retained in the MasterDB. The default is to use the one that was modified last. Sometimes one of the other options may be appropriate.

Volunteer Merge Strategy

The system has a fixed merge strategy for volunteers. All update and ID conflicts are resolved manually. You may select the MasterDB record, the CopyDB record, or both. If you choose both, a new ID will be assigned to the record from the CopyDB.

Volunteers added to the CopyDB without ID conflict are automatically added to the MasterDB. Thus, if a volunteer is deleted from the MasterDB, but not from the CopyDB, it will be re-added to the MasterDB. If a volunteer is deleted from the CopyDB, but not the MasterDB, it remains in the MasterDB.

Depending on the staff selection, all volunteers or only those volunteers assigned to the selected staff member are merged. Note that if the selected staff member is a volunteer, no volunteers in the CopyDB will be merged since none can be assigned to another volunteer.

As adult and youth data are merged, the system checks that the staff member assigned to the adult exists in the MasterDB, and that all youth group leaders are in the MasterDB. If the check fails, the missing staff member (professional, paraprofessional, or volunteer) is automatically copied from the CopyDB to the MasterDB.

Adult Merge Strategy

The adult merge strategy establishes how the adult data, including recall, behavior checklist and perinatal projects data, in the CopyDB is to be merged into the CopyDB.

The default, and recommended, strategy is shown in Figure 14-5. Select a different strategy when appropriate. A description of each strategy choice is provided on-screen to aid in selecting the appropriate strategy.

Adults added to the CopyDB without ID conflict are automatically added to the MasterDB. Thus, if an adult is deleted from the MasterDB, but not from the CopyDB, it will re-added to the MasterDB. If an adult is deleted from the CopyDB, but not the MasterDB, it remains in the MasterDB.

If a specific staff member was selected, only data for adults assigned to that staff member is considered. Otherwise, all adult data is considered.

Separate strategies are available for the recall, behavior checklist, and perinatal projects components. For each component, all data for an adult will come from either the MasterDB or CopyDB. It is possible for the surviving recall data to come from the CopyDB and the surviving behavior checklist data to come from the MasterDB. In fact you may wish to force this in cases where only the recall data was (or was supposed to be) modified in the CopyDB.

Note that if an adult was added to the CopyDB, all its component data (except those with a skip strategy) will also be added to the MasterDB along with the adult record.

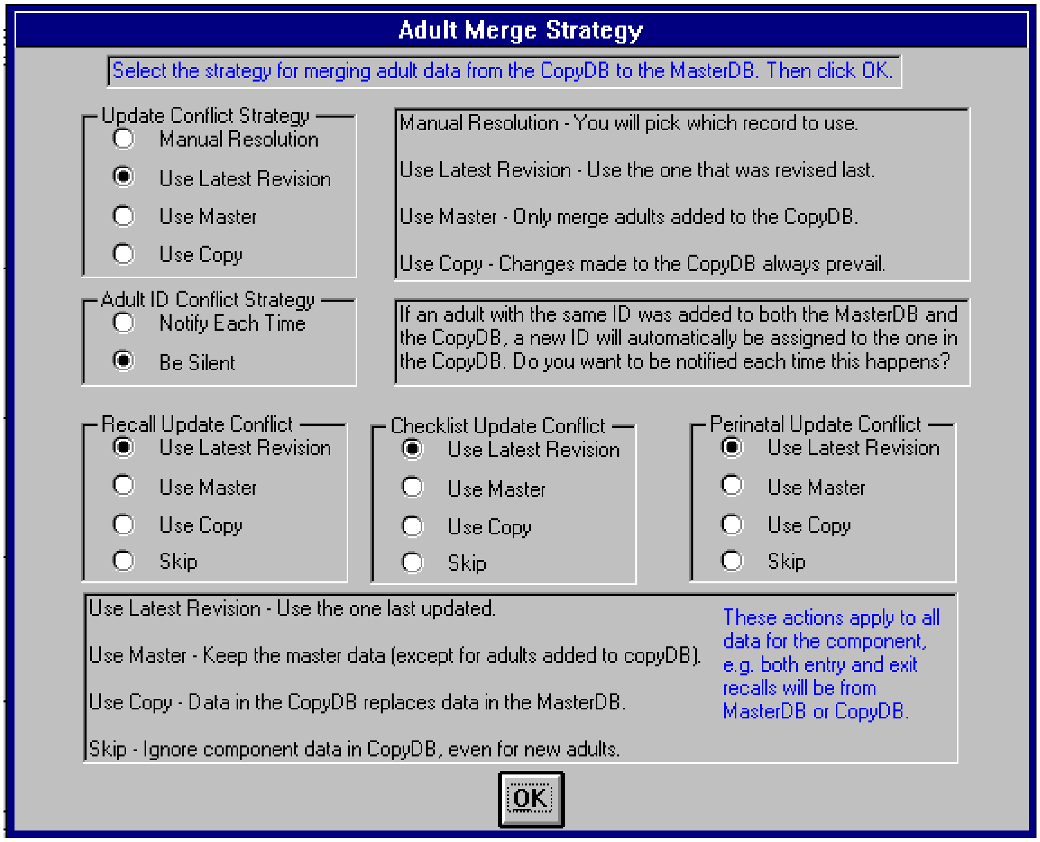


Figure 14-5. Adult Merge Strategy Selection

<u>Youth Merge Strategy</u>

The merge strategy applies mainly to youth groups. The individual youth in a group go with the group used. If a group in the MasterDB is retained, the youth in the MasterDB for that group are also retained. If a youth group in the CopyDB is copied to the MasterDB, the individual youth for that group in the CopyDB replace all youth in the MasterDB for that group.

The default, and recommended, strategy is shown in Figure 14-6. Select a different strategy when appropriate. A description of each strategy choice is provided on-screen to aid in selecting the appropriate strategy.

If a number of youth were transferred from one group to another in the CopyDB, there may be a large number of youth ID conflicts. Requesting notification in that case may not be a good idea.

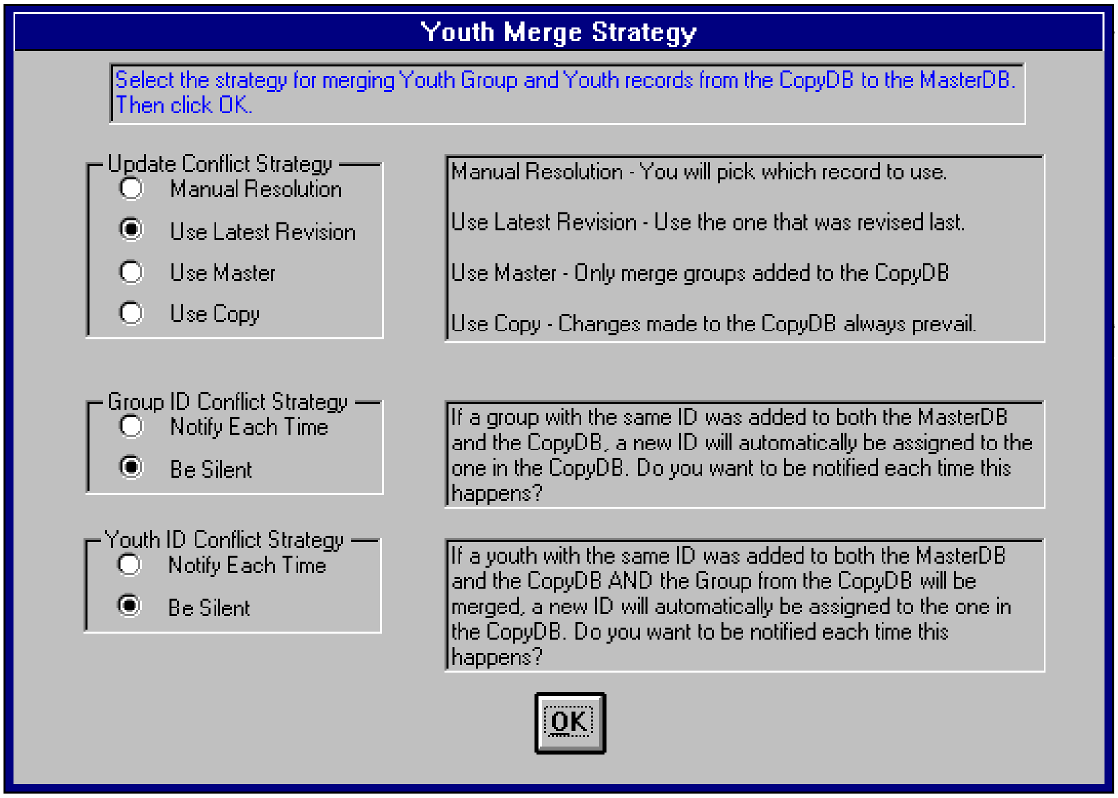


Figure 14-6. Youth Merge Strategy Selection

Staff Selection

The CopyDB can contain all adult and youth data, or only the data for one staff member. Also, when merging the CopyDB data back into the MasterDB, you may merge all data or only the volunteer, adult and youth data associated with one staff member. Selection is made by clicking the One Staff Member button on the Prepare CopyDB or Merge CopyDB screen. The following screen, Figure 14-7, is used for making the selection.

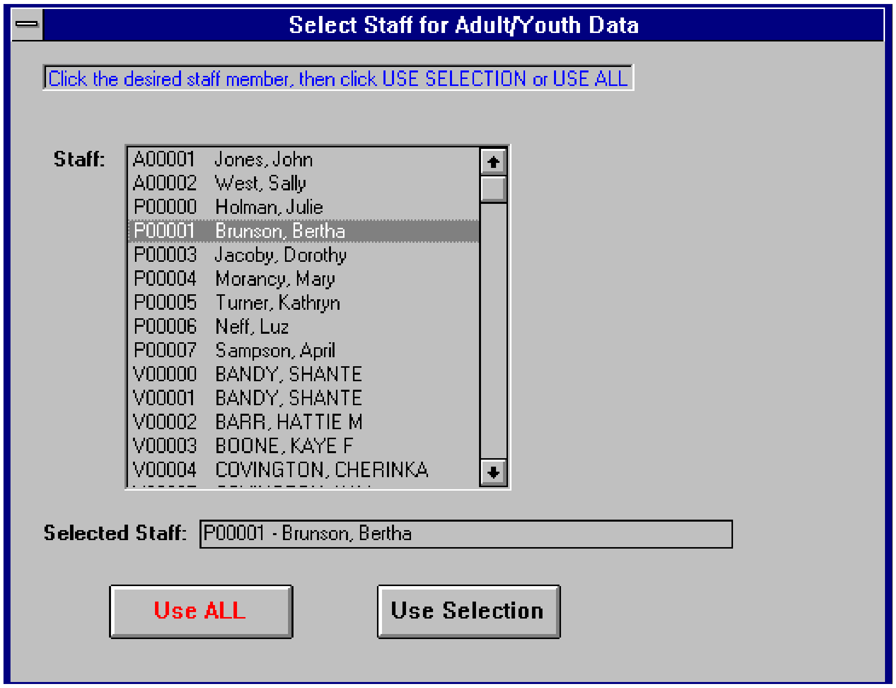


Figure 14-7. Staff Selection

View Merge Log

Use the View Merge Log button on the Data Interchange Switchboard to see the log of merges already performed.

CHAPTER 15 - ERS TOOLS

About the ERS Tools Switchboard

ERS Tools provides functions for maintaining a healthy, reliable system. It is started by double clicking the ERS Tools icon in the ERS Program Group. It can also be accessed directly from ERS by clicking the Tools button on the ERS Main switchboard. The ERS Tools Switchboard is shown in Figure 15-1.

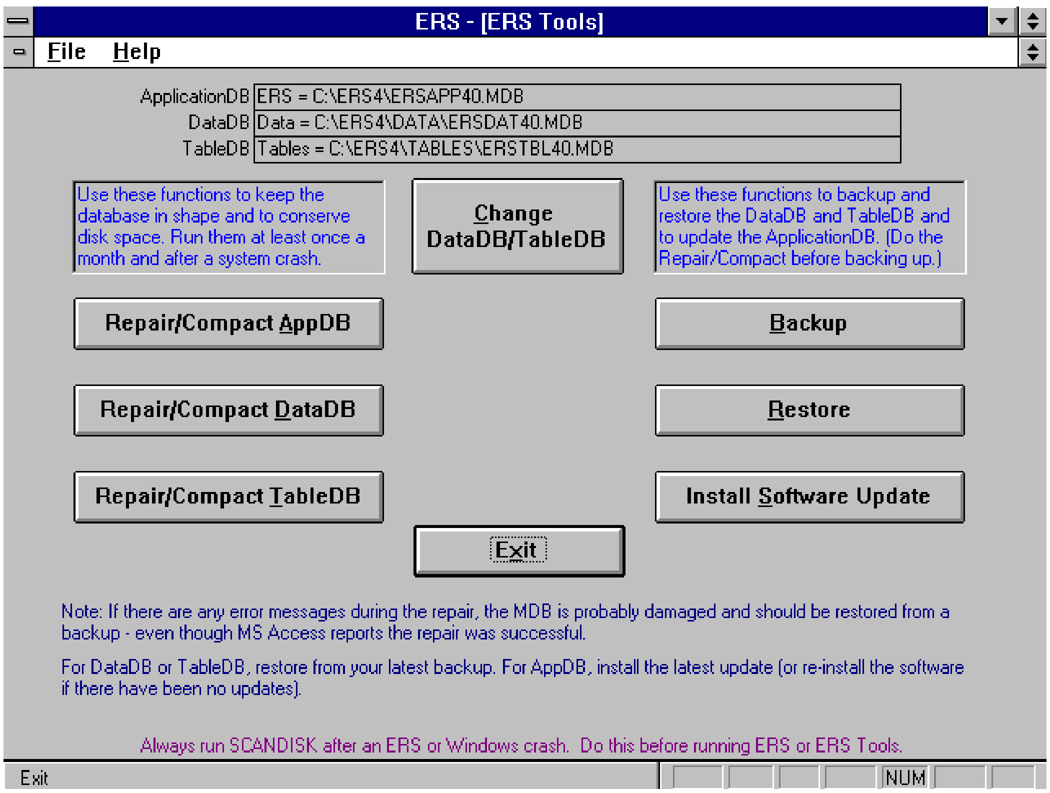


Figure 15-1. The ERS Tools Switchboard

Repair/Compact Database

The system consists of three databases. They should be repaired and compacted on a regular basis.

The database may become corrupted if the system quits unexpectedly; for example, if there is a power outage or your computer experiences a hardware problem. The database will not become corrupted if you quit the system normally.

The compact operation prepares a copy of the database, rearranging how the database file is stored on disk if it is fragmented. File storage can become fragmented when you make many changes to a database. The compacted database file is usually smaller and often provides better performance. (This Repair/Compact operation is analogous to the dBase Pack Database function used in ERS 3.x.)

! *At the completion of the repair phase, Microsoft Access will issue a popup message that the repair completed successfully. Click OK to continue to the compact step.*

If any error messages are issued during the repair operation, there is a good chance some data was lost even though the database is no longer corrupted. If this happens, you need to restore from a backup as the data is no longer valid!

Backup

The backup function, Figure 15-2, prepares a Zip file of the DataDB or TableDB. Use these backup and restore functions if your computer does not have better backup software.

Use the Browse button to change the Backup-To directory. You can place the Zip file on your hard drive. If you do, remember where you placed it.

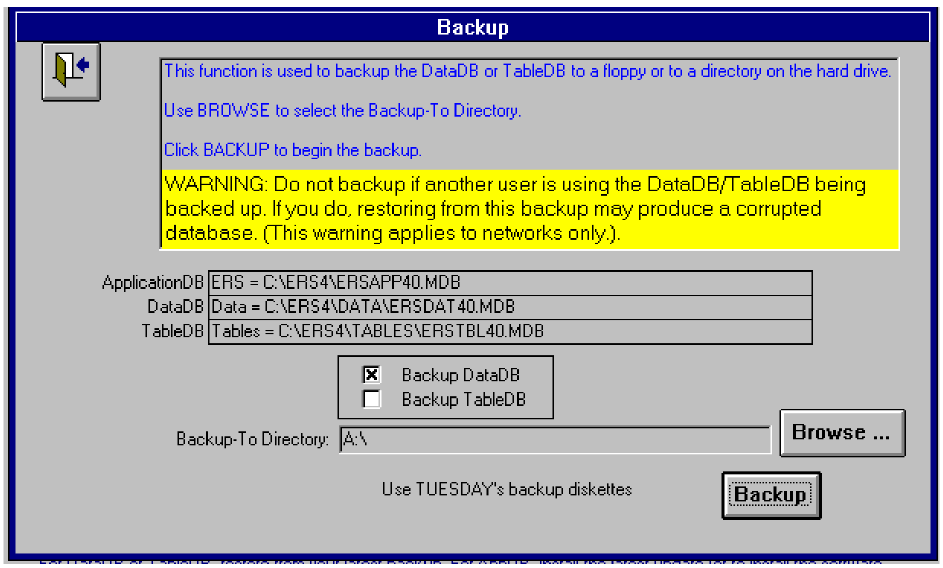


Figure 15-2. Backup DataDB or TableDB

! *Be sure to establish a rotation scheme for your backup diskettes. Sometimes a problem will go undetected for several days.*

After you backup to floppy disks, it is a good idea to test them. Testing the backup floppies now reduces the chances of a disk read error should you need to restore later. Restores only work from good backups! To test, remove and re-insert the diskette. This makes sure Windows will actually read the floppy and not use a memory copy. Then use the Restore Test function described below.

Restore

The restore function unzips the Zip file created by the Backup function. Figure 15-3 shows the first step of the restore: locating the Zip file to be restored. Figure 15-4 shows the screen that appears once the Zip file has been located and opened. Note that you can restore to a different directory than the one used for the backup. The system allows you to test the file before you do the restore. The Test function reads the Zip file and simulates a restore. It is a good idea to do this test in case the diskette has developed a bad spot.

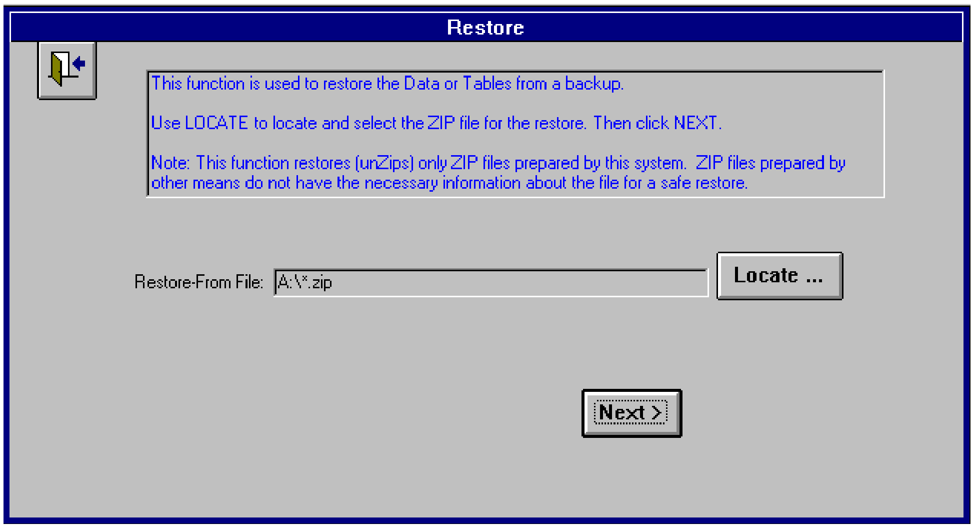


Figure 15-3. Restore - Locating the ZIP File

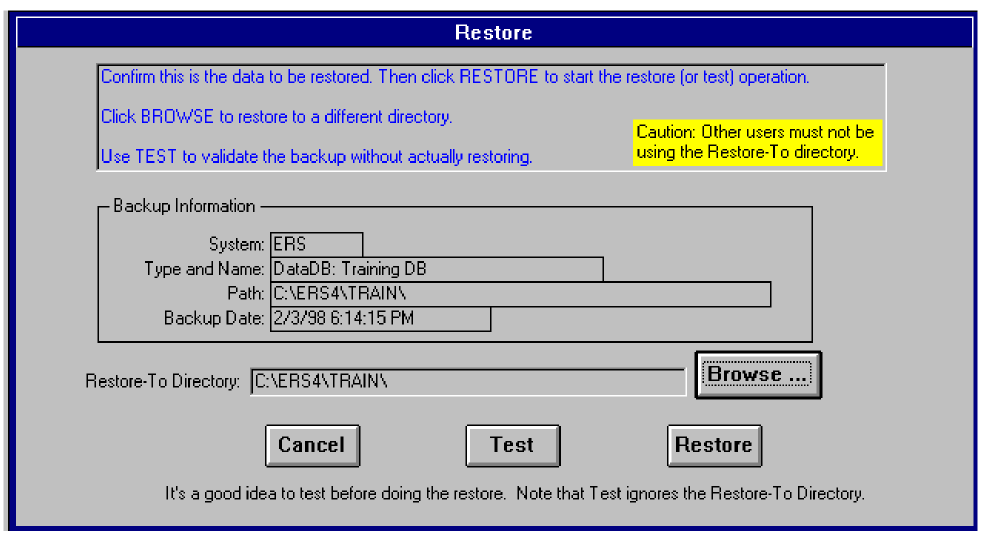


Figure 15-4. Confirm/Initiate Restore

Be sure to examine the Type and Name, Path, and Backup Date to be sure you are restoring from the desired backup.

! Test does not use the Restore-To Directory. If you are restoring to a different directory than the one used to prepare the backup, wait to use Browse to locate it after you test.

Backup/Restore Errors

A common error is to attempt to backup to an unformatted, full, or write protected diskette. Another is to start the backup or restore without first inserting the proper backup diskette into the floppy drive.

If a backup diskette develops I/O errors, you may want to try reformatting it. Attempts of using ScanDisk to repair bad spots in ZIP files are usually unsuccessful.

Install Software Update

Software updates will be distributed in two forms:

1. Zip File - Basic updates will be distributed as a Zip file.
2. SETUP.EXE - More complex updates will be distributed as an EXE file.

The initial screen for installing a software update is shown in Figure 15-5. Be sure to follow the instructions that came with the software update, as they may alter the standard procedures described here.

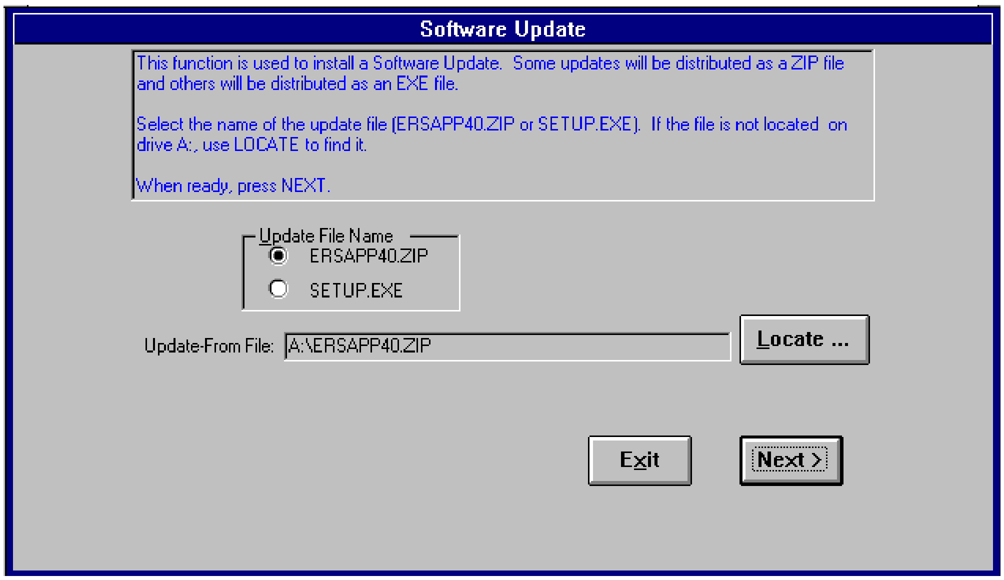


Figure 15-5. Install Software Update

Select ERSAPP40.ZIP or SETUP.EXE according to the type of update file. Click Next to begin the installation of the update.

Figure 15-6 shows the update description for ZIP files. You must test the Zip file before you can install the update. This is a precaution to minimize problems with faulty diskettes. Once the test completes successfully, the Install button will become enabled. Click it to install the update.

Figure 16-7 shows the start of an update with a SETUP.EXE. A SETUP.EXE is used for updates that can't be handled with a simple ZIP file. These updates will usually involve a number of steps much like a new installation.

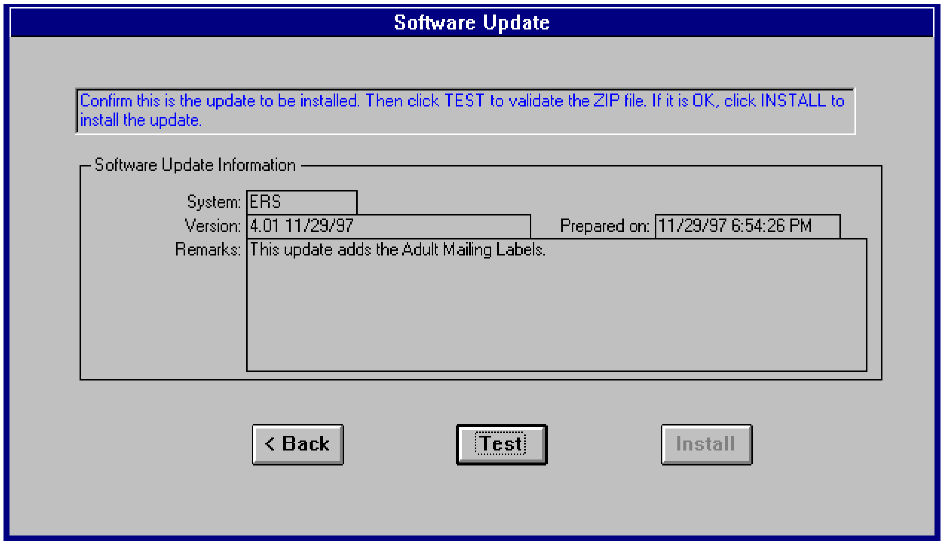


Figure 15-6. Description of Update from a Zip File

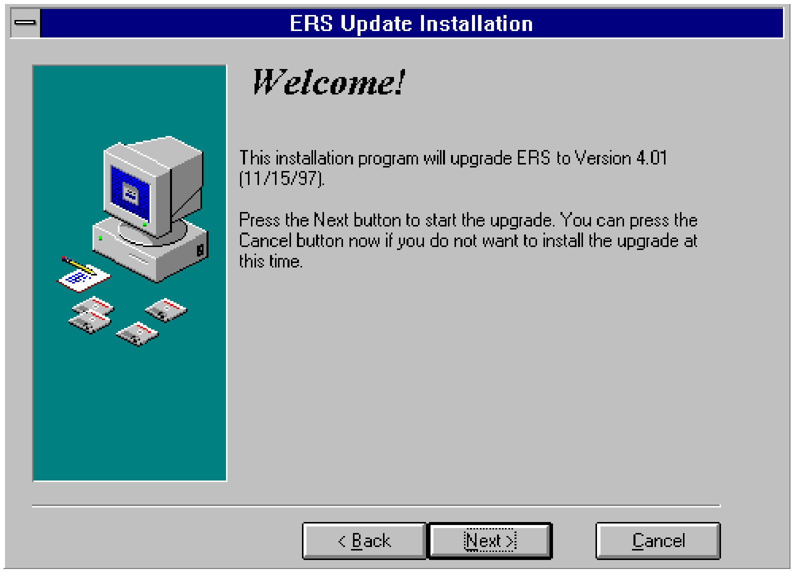


Figure 15-7. Start of Update with SETUP.EXE

CHAPTER 16 - INSTALLING THE ERS SYSTEM

Running ERS Setup

The ERS system installs much like many Windows programs: Run the SETUP.EXE located on the first installation (setup) diskette.

! *You are strongly advised to not install the system on a computer that uses drive compression. Operations that take five minutes on a regular computer may take 50 minutes on one with drive compression.*

Steps to install ERS

1. Make sure you have sufficient disk space. You should have at least 20MB of available space. Installation may be to any hard drive on your system. Do not install on a server unless you are willing to live with very slow response. (See LAN Installation below for placing the DataDB or TableDB on a server.)
2. Verify you have a complete set of setup diskettes.
3. Place the first diskette in your floppy drive, usually A:.
4. Run SETUP.EXE from that diskette. (Information on how to do this is given below.)
5. Follow the instructions on the screen. If you are installing to the default directory, C:\ERS4, you can press the Next button for each response.
6. Insert the other diskettes as requested and press the Enter key or click the OK button. ***On many computers, Disk 2 will not be used.***
7. Windows may restart at the end of the setup.
8. Remember to remove the last diskette when the setup has completed.

Ways to run SETUP.EXE with Windows 3.1 or Windows for Workgroups

You may use any of the following procedures to run SETUP.EXE. Use the one you are most comfortable with.

From File Manager, locate SETUP.EXE on the diskette, click it once to highlight it, then double click it.

From File Manager, locate SETUP.EXE on the diskette, click it once to highlight it. Then use File, Run from the menu bar to run it.

From Program Manager, click File on the menu bar (or press Alt-F). Then click Run and type A:\SETUP.EXE (or B:\SETUP.EXE if you are using the B: drive) in the Command Line box. Then click the OK button.

From Program Manager, click File on the menu bar (or press Alt-F) and click Run. Then use the Browse button to locate SETUP.EXE and fill in the Command Line for you. Then click the OK button.

Ways to run SETUP.EXE with Windows 95

You may use any of the following procedures to run SETUP.EXE under Windows 95. Use the one you are most comfortable with.

Open Control Panel and double click Add/Remove Programs. Follow the instructions on the screen.

Click Start, then Run. Then type A:\SETUP.EXE (or B:\SETUP.EXE if you are using the B: drive) in the Open box. Then click the OK button.

Click Start, then Run. Use the Browse button to locate SETUP.EXE and fill in the Open box for you. Then click the OK button.

! *Hint for Windows 95 users: Use Start, Settings, Task Bar to set the Task Bar options to Auto Hide. This hides the task bar until the mouse is moved over it.*

The Setup Dialogue

During installation, Setup will prompt you for information and display the status of the installation. The dialog is slightly different for new installations and for re-installations. For re-installations, you specify where the existing DataDB and TableDB are located. When setup starts, the version about to be installed is shown:

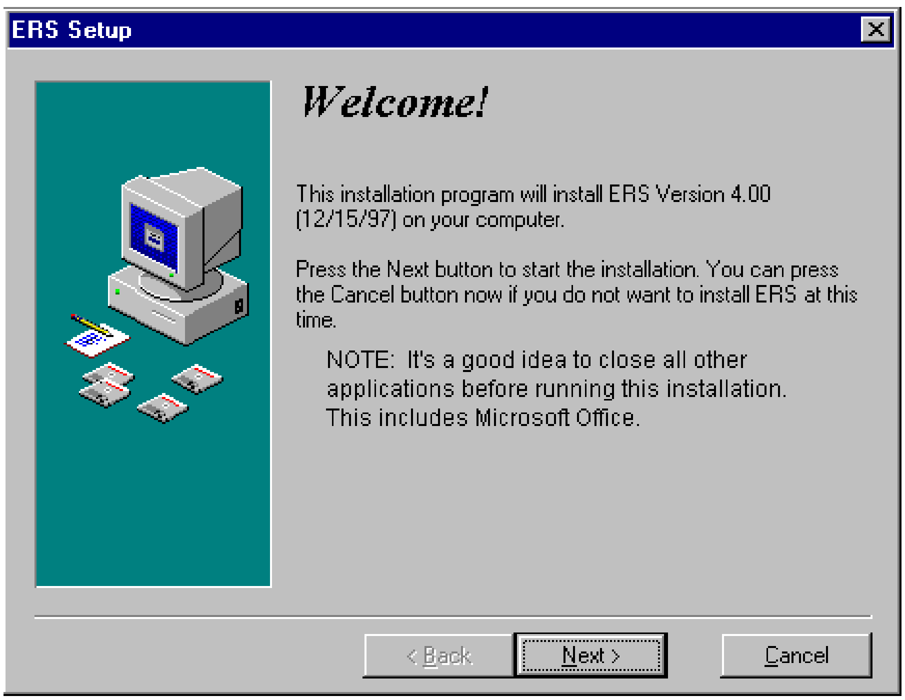


Figure 16-1. Setup Welcome Screen

For Windows 3.1 users in particular, it is important that all other programs be closed. Otherwise Setup will not be able to install newer versions of some Windows System files. If this happens an error message will be displayed. Your choices are to retry after you Alt-Tab to the other programs and close them, or to cancel the installation. The Microsoft Office Tool Bar is known to prevent installation under Windows 3.1.

Next, you are asked where you want the software to be located. If possible, use the suggested directory, C:\ERS4.

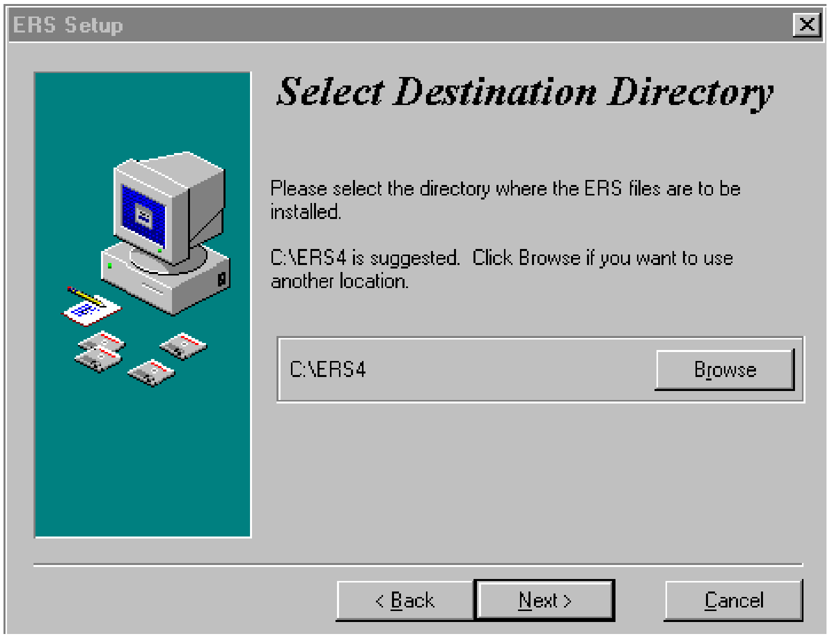


Figure 16-2. Supply Destination Location

Next, you are asked if this is a new installation or if the DataDB and TableDB databases exist from a prior installation.

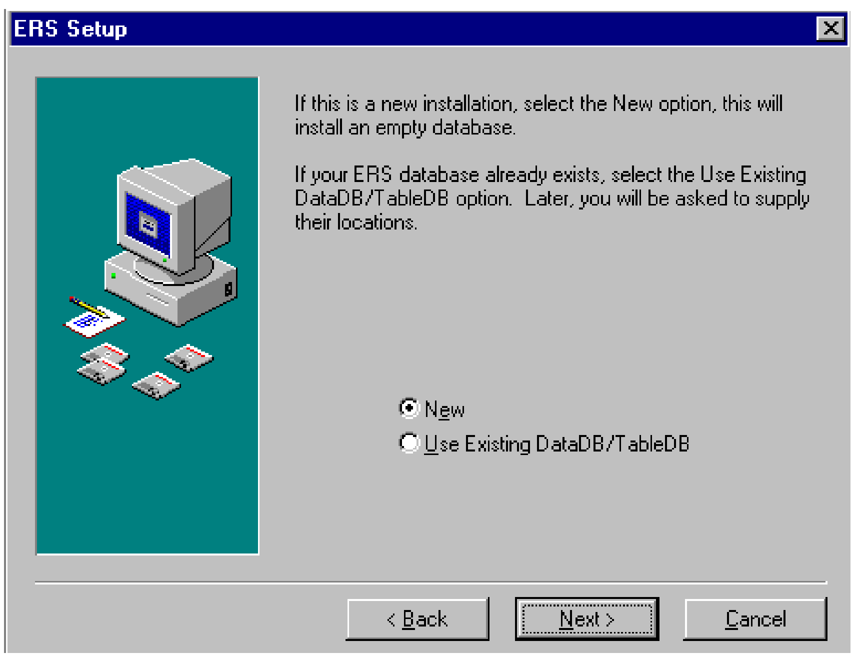


Figure 16-3. New or Existing Data

If you selected New Installation, but Setup found a DataDB, the following screen will appear. A similar screen will appear if you selected New Installation and Setup finds a TableDB. In either case your choices are to start over and select re-installation so the existing DataDB and TableDB will be retained, or to select Replace Existing. *If you select Replace Existing DataDB, the existing DataDB will be replaced with an empty one. If you select Replace Existing TableDB, the existing TableDB will be replaced with the default one.*

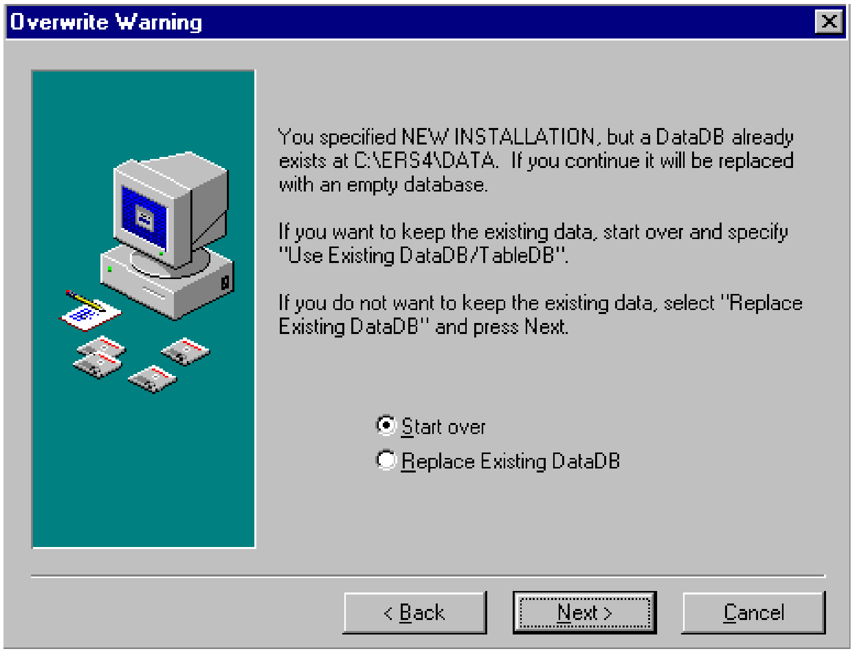


Figure 16-4. Overwrite Warning

If you selected Use Existing DataDB and TableDB, Setup will ask you for their locations. If they are not at the default locations, use Browse to specify their location. Separate screens will appear for DataDB and TableDB. Setup needs these locations in order to continue the installation.

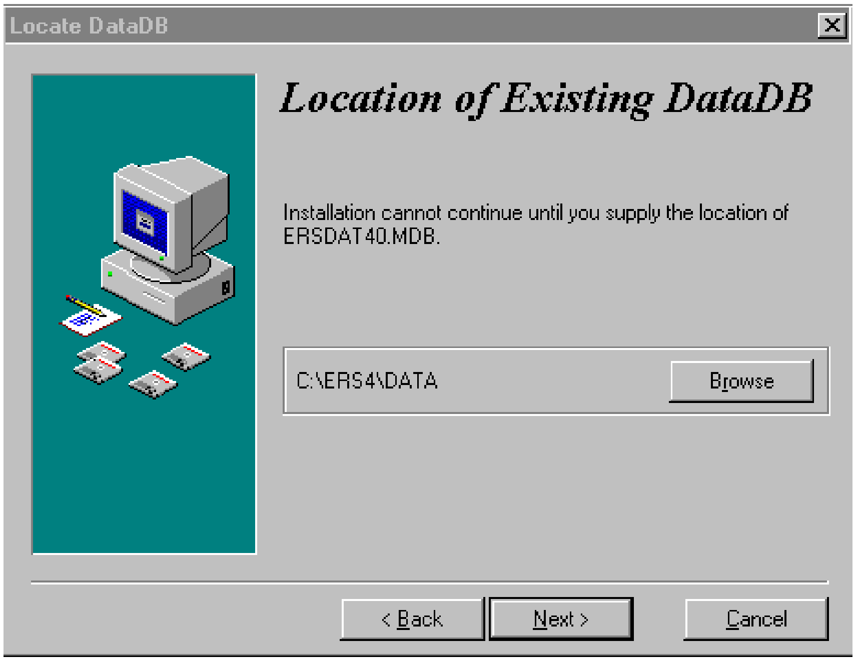


Figure 16-5. Location of Existing DataDB

Next, Setup requests the name of the Program Manager group. It is best to use the suggested name. If you are running Windows 95, Setup will place a short cut to the Program Group on your desktop. You may find this a faster way to access the program group. However, if you wish to remove it, wait for Setup to complete, then return to your desktop and right click on the short cut and select Delete.

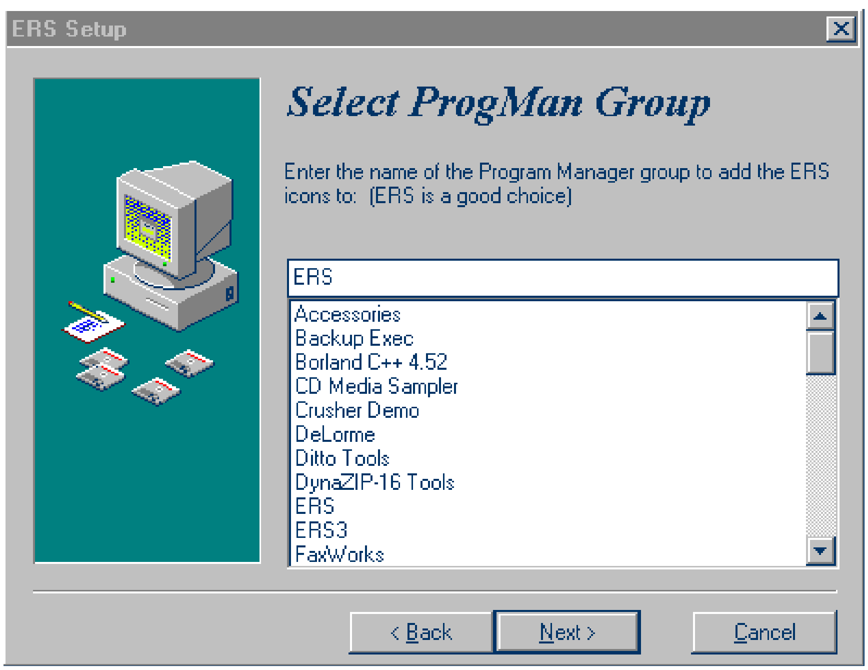


Figure 16-6. Name of Program Group

Once you have supplied all the information Setup needs to complete the installation, Setup displays the locations of the system (Application), the DataDB, and the TableDB. Setup also shows the database Action:

New = New Installation
Retained = Existing DataDB/TableDB was retained
Replaced = Existing DataDB/TableDB was replaced.

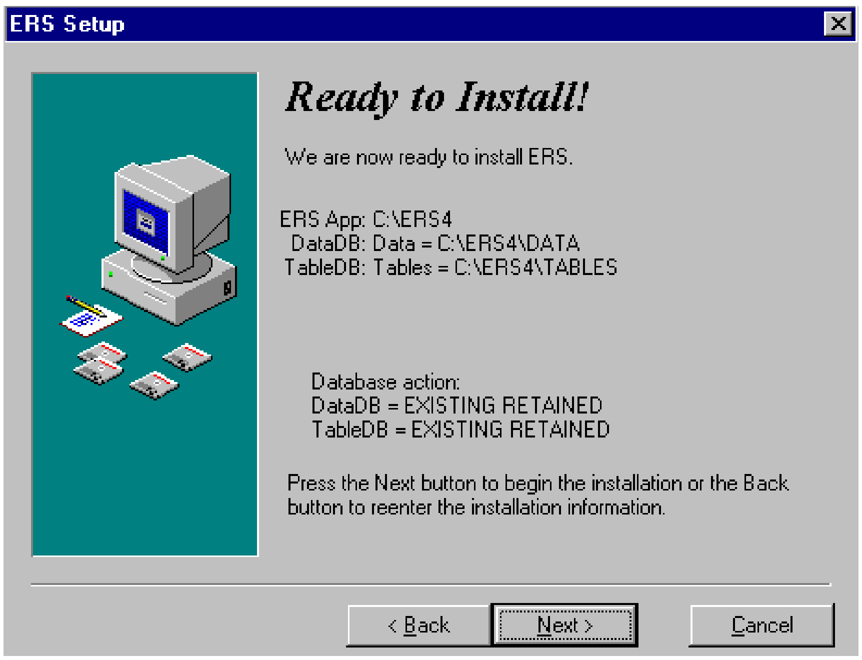


Figure 16-7. Ready to Install

When Setup has completed installation, the following screen will appear. Be sure to press Finish before removing the last diskette. Otherwise, you may get a Drive Not Ready error as Setup is closing itself.

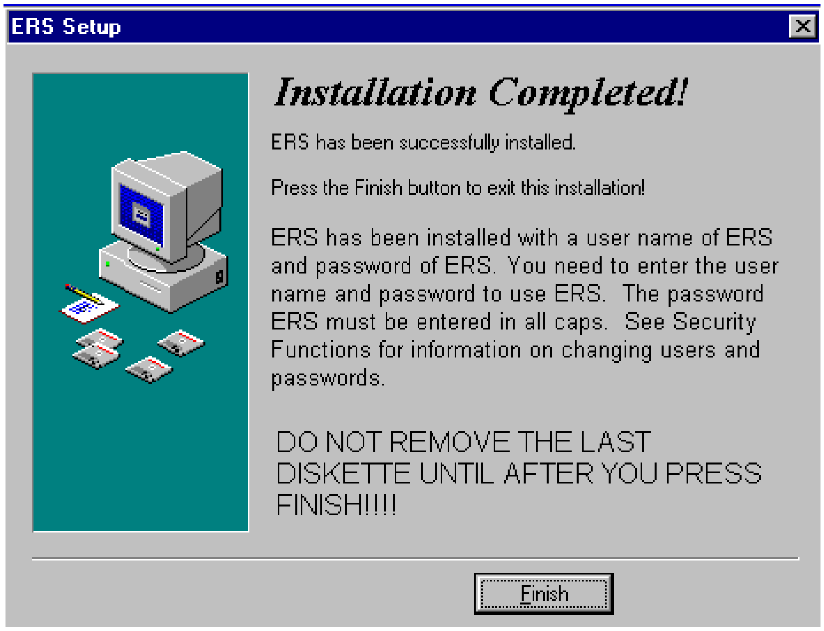


Figure 16-8. Installation Complete

Problems with the Installation

If you encounter a faulty diskette, you will need to obtain a new set of installation diskettes. If your hard drive is full, you will need to delete some files or move them to another drive.

If you receive the "File in Use" error, cancel the installation, restart windows, close all programs and tool bars, and try again. If the problem persists, choose the Skip option. Use Skip as a last resort.

LAN Installation

The ERS application (ERSAPP40.MDB) should be on a local hard drive. The DataDB and TableDB may be on a file server. You may want to consult your network administrator before attempting a LAN installation.

Follow these steps to install ERS on the first workstation:

1. Run the ERS setup program on the workstation.
2. Run ERS on the workstation and create a DataDB and a TableDB on the server's shared drive. (See Chapter 12.)
3. Enter some data then exit to Windows.

Now, follow these steps with the other workstations:

1. Install ERS on the other workstations. Select Use Existing DataDB/TableDB. (See Figure 16-3.)
2. Use Browse to locate the existing DataDB and TableDB. (See Figure 16-5.)
3. Run ERS on each workstation and confirm it is accessing the DataDB established by the first workstation.

It's a good idea to place SYSTEM.MDA on the file server so all workstations accessing the database will be working from the same set of user IDs and passwords. With this approach, any user can access the data from any workstation using his/her ID and password. If, instead, local SYSTEM.MDAs are used, each workstation will have its unique set of user IDs and passwords. Then, a user may have a different password when working at a different workstation. To use a common SYSTEM.MDA, you need to copy it to the file server and configure each workstation to use it:

1. Copy the SYSTEM.MDA from the local ERS4 directory to a shared directory on the server. You may wish to name this directory ERS_SYS.
2. Use NOTEPAD to edit ERS.INI (which is in ERS4 directory) for each workstation. Find the line beginning SystemDB= in the [Options] section and change it to reference the SYSTEM.MDA on the server.
3. Run ERS on each workstation to confirm it can access the DataDB and TableDB on the server, and that user IDs established on one workstation are available on the others.

The system runs on the following LANs:

Microsoft LAN Manager
Microsoft Windows for Workgroups
Windows 95 Network
Microsoft Windows NT
Novell Netware
Lantastic

Running ERS on a LAN

Any number of LAN users may be accessing the same ERS database (ERSDAT40.MDB) at the same time. If two users attempt to update the same record at the same time, one will be locked out until the other finishes.

An *optimistic locking strategy* is used. This is the most efficient strategy when only a few users will be using the system at once and the environment is cooperative.

With this strategy, you may receive an error message that your changes cannot be saved because someone else made changes while you were in the middle of making yours. Do not copy the data to the clipboard. Instead, cancel your changes, wait a few seconds and access the record again. Review the changes made by the other user and then re-enter your changes.

In keeping with the "cooperative environment" assumption, the system does not lock out other users during some critical operations. For example, if you import a new Foods database while another user is entering recalls, it is likely the import will fail or the other user will encounter problems.

Important Files

The ERS Setup utility will store a number of files in the ERS4 directory. Also, other files are placed in your WINDOWS\SYSTEM directory unless they are already present.

The following files are important and you may need to know their location:

ERSAPP40.MDB - This is the ERS Application database. It is located in the ERS4 directory. It contains the system's screens, reports, and code.

ERSDAT40.MDB - This file contains the data for adults, youth, staff, recalls, etc. It is the **DataDB**. More than one DataDB may be on a computer.

ERSTBL40.MDB - This file contains the race codes, foods database and other tables. It is the **TableDB**. More than one TableDB may be on a computer.

SYSTEM.MDA - This is a Microsoft Access file. It contains user names, passwords and related information.

ERS.INI - This is the Windows initialization file for ERS. It is located in the ERS4 directory. In addition to information required by Microsoft Access, this file contains the locations of the DataDBs and TableDBs. Use NOTEPAD to view or revise ERS.INI. Revise it with caution as the system may not run if this file becomes damaged.

MSARN200.EXE - This is the Microsoft Access program that 'runs' ERSAPP40.MDB.

LDB files - For each MDB file there is an associated LDB file. This file contains locking information. On rare occasions, this file may not be closed correctly by Microsoft Access. When this happens, simply confirm no one, including you, is accessing the associated MDB, then delete the faulty LDB. Microsoft Access will recreate it the next time the MDB is used.

CHAPTER 17 - REFERENCE

This chapter describes look up tables and codes used by the system. They appear as drop down lists on screens.

The code values are stored in the database record to conserve space. In some cases the drop down list on the edit screen will show the code in the first column. In those cases typing the code will position the drop down to the appropriate entry. In other cases, the code may not be displayed. In those cases, press the first letter of the description to position to the appropriate entry.

Birth Outcome (Perinatal Projects)

The following codes are used for the birth outcome in the Perinatal Projects Component:

Birth Outcome	Description
M	Miscarriage
P	Premature
S	Stillborn
T	Full Term

Breastfeeding Plans (Perinatal Projects)

The following are used to code the expecting mother's breastfeeding plans:

Plan Code	Description
Y	Plans to
N	Does not plan to
U	She is not sure
X	Not indicated

Breastfeeding Support Perinatal Projects)

The following codes are used for breastfeeding support:

Support Code	Description
A	Family and/or friends
B	MD, RN, other health professional
C	EFNEP or Extension Staff
D	WIC Staff
E	Other
X	No Support

Curriculum (Perinatal Projects)

The following are used to code the prenatal curriculum:

Curriculum	Description
A	Have A Healthy Baby
B	Great Beginnings
C	Eating Right During Pregnancy
D	EXCEL
E	TAMS
F	Smart Choices: A Nutrition Education Program for Women, Infants and Children
G	Taking Care of Two, Nutrition for Moms and Babies
H	Eating For Two
I	Eating Right Is Basic
J	My Child, My Choices

Delivery Mode (Youth)

The mode of delivery for youth groups is coded as follows:

A - Organized Club. An organized group of youth led by an adult with a planned program which is carried on throughout all or most of the year. 4-H clubs may meet in any location and typically have elected officers and a set of rules approved by the membership to govern the club. Includes 4-H Clubs (which meet these criteria) in school age child care settings.

B - Special Interest, short-term programs, and Day Camps. Groups of youth meeting for a specific learning experience which involves direct teaching by Extension staff or trained volunteers, including teachers. Program not part of school curriculum and not restricted to members of 4-H Clubs.

C - Overnight Camps (resident, primitive, or travel). Youth taking part in an Extension-planned educational experience of group living in the out-of-doors which includes being away from home at least one night (resident, primitive or travel camping). This is not restricted to members of organized 4-H Clubs.

D - School Enrichment Programs. Groups of youth receiving a sequence of learning experiences in cooperation with school officials during school hours to support the school curriculum. Involves direct teaching by Extension staff or trained volunteers, including teachers.

E - Individual learning, mentoring, or family learning. Planned learning which occurs independent of a formal group setting, such as a club, an individual, paired, or family learning effort. Self-directed, usually with limited adult involvement except for parents (or mentor). Examples include self-study, home study course, mentoring or shadowing with an 'expert', whole families together.

F - School Age Child Care. Educational programs offered to youth outside of school hours, usually in a school or other community center, and incorporating 4-H curricula. The primary purpose is to provide care for youth while parents are working or unavailable. (4-H Clubs in school age child care settings should be reported under "Organized Clubs").

G - Instructional TV/Video. Youth offered learning experiences through Extension via broadcast or closed circuit television, including satellite transmissions or videotape replays of such series.

Exit Code (Perinatal Projects)

The reason the mother ended the prenatal program is coded as follows:

Exit Code	Description
0	Not yet exited
1	Graduated before delivery
2	Terminated before delivery
3	Active in program at time of delivery

Exit Reason (Adult)

The reason adult participants leave the program is coded as follows:

Exit Code	Description
0	Not yet exited
1	Ed. objectives met
2	Returned to school
3	Took a job
4	Family Concerns
5	Staff vacancy
6	Moved
7	Lost interest
8	Other
9	Other obligations

A	Lost contact with client

Initiative (Youth)

The default initiative code for EFNEP is A. These codes are subject to change. Administrative procedures will be used to communicate the current codes.

Code	Initiative
A	Children, Youth and Families at Risk
B	Food Safety and Quality
C	(reserved)
D	Waste Management
E	Water Quality
F	Communities in Economic Transition
G	Decisions for Health
H	Sustainable Agriculture
I	Managing Change in Agriculture
Z	Not part of a National CES Initiative

Lesson Location (Perinatal Projects)

The following are used to code the lesson location:

Location Code	Location
A	Home
B	Agency site (WIC office, Food Stamp office, etc.)
C	CES Location
D	School
E	Community Center
F	Other

Lesson Type (Adult)

The adult lesson type codes are as follows:

Lesson Type Code	Lesson Name	Short Name
1	Group	GROUP
2	Individual	INDIV
3	Both group & individual	BOTH
4	Other	OTHER

Meal Type Codes

The meal type codes are used with Nutritional Method 1 to identify when the food item was consumed.

Meal Type Code	Meal Description
1	Morning meal or snack
2	Midmorning meal or snack
3	Noontime meal or snack
4	Afternoon meal or snack
5	Evening meal or snack
6	Late evening meal or snack

Nutritional Method (Recall Method)

The system supports three methods of recording the adult participant's dietary data:

Nutritional Method 1: Computerized Nutrient Analysis. Computerized Nutrient Analysis involves the entry of each food item consumed. The system uses the Foods Database to calculate the nutrient values.

Nutritional Method 2: Food Group Servings Entry. Food Group Servings Entry involves the entry of the number of servings of each food group consumed by the adult participant.

Nutritional Method 3: External Nutrient Analysis. External Nutrient Analysis involves the entry of food group servings and nutrient values as computed by another computer system.

Place of Birth (Perinatal Projects)

The following are used to code the place of birth:

Code	Place of Birth
H	Hospital, clinic or birth center
O	Other
R	Home
X	Do not know

Public Assistance

The following public assistance programs are recognized for entry in the Adult database:

WIC/CSFP (Women, Infants & Children). The WIC/CSFP programs provide supplemental food or vouchers to eligible pregnant and lactating women, infants, and children up to the age of 5. Eligibility is determined by income and nutritional risk.

Food Stamps. Food stamps are used to supplement the food buying power of eligible low-income households. It is administered locally through State welfare agencies.

FDPIR (Food Distribution Program on Indian Reservations). FDPIR provides commodity foods to Native American families who live on or near Indian reservations, and to Pacific Islanders.

TEFAP (The Emergency Food Assistance Program). TEFAP provides commodity foods to low-income households.

Head Start. Head Start provides low-income preschool children with balanced meals and nutrition education, health services (medical, dental, nutrition and mental health), parent involvement and social services.

Child Nutrition (School Lunch/Breakfast). Child Nutrition Programs include the free and reduced price School Lunch Program, School Breakfast Program, Child Care Food Program, Summer School Food Service Program, and Special Milk Program. (Do not include children who pay full price for school meals.)

TANF (Temporary Assistance to Needy Families). TANF replaces AFDC (Aid to Families with Dependent Children) under the Personal Responsibility and Work Opportunity Act. TANF has time limits for eligibility.

Other Public Assistance. Other Public Assistance is to be defined within a State. It could include Medicaid, public housing, or other programs that require low income for eligibility.

Race Codes

Racial/ethnic designations do not denote scientific definitions of anthropological origins. A program participant may self-select the group in which he or she appears to belong, identifies with, or is regarded in the community as belonging to. No person should be counted in more than one racial/ethnic category. The specific categories listed below conform to definitions for legally-protected classes.

In compliance with Department of Justice rules and regulations, all recipient agencies of federally-assisted programs, which are required to collect racial participation data, must use the following revised racial/ethnic categories:

1-00 - White (not of Hispanic Origin)
A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

2-00 - Black (not of Hispanic Origin)
A person having origins in any of the black racial groups of Africa.

3-00 - American Indian/Alaskan Native
A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal identification or community recognition.

4-00 - Hispanic (of any race)
A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.

5-00 - Asian or Pacific Islander
A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

Reason Breastfeeding was Discontinued (Perinatal Projects)

The following are used to code the mother's reason for discontinuing breastfeeding:

Reason Code	Description
A	Infant self-weaned
B	Sore nipples/physical discomfort
C	Breast infection or other illness
D	Inadequate milk supply
E	"bad" milk
F	Returning to school and/or work
G	Too demanding
H	Embarrassment
I	Infant was sick or hospitalized
J	Mother didn't like doing it
K	Mother breastfed as long as she intended
L	Inability of mother and child to successfully connect
X	Other

Residence Codes

The place of residence codes are as follows:

Code	Residence
1	Farm
2	Towns under 10,000 and rural non-farm
3	Towns & cities 10,000 to 50,000 & their suburbs
4	Suburbs of cities over 50,000
5	Central cities over 50,000

Volunteer Roles

The following volunteer roles are used to indicate the volunteer's capacity within the unit.

Current/former EFNEP Participant
Volunteers who were or are currently a participant in EFNEP adult or youth programs. (This designation is not, in and of itself, a role, but is collected and reported with the following volunteer roles.)

Instructional
Teaches food and nutrition and related subject matter to EFNEP adults and youth; gives demonstrations; helps program families make most use of food stamps or other resources; assists experienced volunteer, paraprofessional or professional with food demonstration or in-service training for volunteer or aides; helps homemakers with language barriers; visits graduated participants to encourage them to continue learning about food and nutrition and to become involved in other Extension programs.

Advisory Committee
Serves on EFNEP Advisory Committee or Home Economics or 4-H program committee.

Educational Service
Provides clerical help including preparation of teaching materials, visuals, etc. Recruits, organizes, provides publicity and public relations.

Support Service
Provides baby-sitting, transportation, meeting place, refreshments, equipment, clothing, housekeeping arrangements, emergency food, or financial help.

Middle Manager
Unpaid service to or leadership of other volunteers by a youth or an adult.

Weight Gain (Perinatal Projects)

The following are used to code the mother's weight gain during pregnancy:

Weight Gain Code	Gain Description
A	Not enough
B	Too much
C	About right
D	Not commented on
E	Mixed
X	Information not available

Index

Y