New Jersey Membership Excel Template
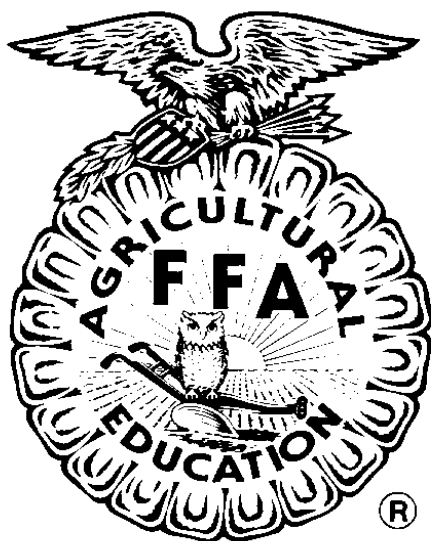
Instruction Manual
Instructions, Hints and Procedures

Table of Contents

Before you can open the membership excel template you must have WinZip (PC) or Stuffit (Mac) installed on your computer.

It is recommended that you contact your local network administrator and IT staff to secure assistance if needed.

What is zipping and unzipping?

Zipping is a file compression process that reduces the size of a large file. The compressed or zipped version takes less time to down load to your system. Compressing or zipping a file also allows large files to be sent via email. A zipped or compressed file can pass through the school's server firewall.

Where can I get WinZip and download it to my PC?

Go to download pages of the FFA website **http://www.ffa.org/html/download.html** or directly to WinZip **http://www.winzip.com/ddchomea.htm**

Where can I get support on how to use WinZip?

If you have any questions go to the same download assistance and go to the section titled download support and click on the WinZip FAQ http://www.ffa.org/html/download.html or go to the FFA Membership Support site http://www.ffa.org/membership/index.htm and download the Power Point tutorial for loading WinZip.

Where can I get a file compression program (Stuffit) for my Macintosh?

Go to download pages of the FFA website **http://www.ffa.org/html/download.html** or directly to the Stuffit web page **http://www.stuffit.com/win/expander/index.html**
Click on download assistance
Select – download a Stuffit Expander **http://www.stuffit.com/win/expander/index.html**

Where can I get support on how to use Stuffit?
If you have any questions, go to the same download assistance and go to the section titled download support and click on the Aladdin System's Macintosh FAQ page.

*Mac users also can use the ZipIt compression program as an alternative.

Obtaining My Chapter's Roster

Contact your state staff to obtain password and URL for your membership roster. Your state staff will supply you with a password. For obtaining your chapter roster, your chapter number is your user name.

Obtain your chapter roster at this web site: http://www.ffa.org/membership/index.htm

To obtain training or practice rosters use chapter numbers:
TR0031, TR0032, TR0033, TR0034 or TR0035.
The password for all training files is "testpassword"
Do not use training rosters to submit your members, these are for practice only.

Additional resources on the website:

Excel Template PowerPoint
Roster Access For Mac PowerPoint
Downloading WinZip PowerPoint
Zipping Files PowerPoint
Membership Data Form – useful for gathering member information
Frequently Asked Questions

Opening Your Roster

- Go to http://www.ffa.org/membership/index.htm.
- Select "Access Files" (it's the far right yellow tab at the top of the page).
- Enter your chapter number or training file number in the white box and click "Get My Chapter Roster". (Example: TR0031 or AZ0034)
- Enter Network Password. Your user name is your chapter number. Your password will be given to you by your state association or use "testpassword" to get the training files. **Passwords are case sensitive**!
- Select "Save" option when the download dialogue box opens.
- We recommend saving the zipped file to your desktop ("Save in: Desktop"). Then click "Save" to close window.
- Close the dialogue box after the "zipped" file has been downloaded.
- Close the Explorer window (corner "X") to return to the desktop.
- Double click on the "zipped" file on your desktop to open (zipped file icon looks like a file cabinet with a vice around it).
- A zip dialogue box will open with the file (ex: TR0031) inside. Click on the "Extract" button on the top tool bar of the dialogue box.
- In Folders/drives window, select Desktop (top of list). Click "Extract".
- Enter the password supplied by state staff (same password as used above) or "testpassword" for training files, after password box has opened.
- Once password box is gone, close WinZip window.
- You now have two files on your desktop. One Excel file (icon is a piece of paper with a green X) and one Zip file (icon has a file cabinet with a vice around it). Delete the zip file. You should only have the Excel file left on your desktop.
- Open the remaining Excel file on your desktop. Be sure to "Enable Macros" on the first screen. This allows the template to sort information and transfer data from page to page.
- Now you are ready to:
    1) try out the training template or
    2) begin the update and renewal process with your actual roster.

- **When working on the roster, SAVE and SAVE often! Back up your files. Update back up files after making additions, changes or adjustments to your working roster file.**

- Save your finished template on your computer system (**create a separate back up copy on disk or CD too**) and then follow your state's instructions for returning a copy of the template to the state association for processing.

*Only submit your main roster <u>once</u> to the state association. If you have additional students to add at a later date, use a supplemental roster. See page 15 for more information on the supplemental roster.

Hints to make it easy to move around in the workbook

Moving around in cells
Each box in the workbook is referred to as a cell
Use the **TAB** key to move from cell to cell.

Using the tabs at the bottom of the workbook
At the bottom of the workbook you will see seven tabs. If you cannot see all the tabs, move the arrow (left of the tabs) at the bottom of the screen to the left or right. If you still can't see tabs go to tools (on your toolbar)/options/view/window options/sheet tabs and see if sheet tabs is checked. To view a larger portion of the workbook go to the View command on your toolbar, find "zoom" and lower it to 75%.

Caps Lock key
Click on the **Caps Lock key** on the keyboard because you will need to type everything in CAPITAL LETTERS.

Description/Dialogue Box and Code Menu
Most cells will automatically open a description/dialogue box – this will give you an explanation of what is being asked for. You can "drag" this dialogue box to any location on your screen and it will stay there for any cell that you are viewing.
Those cells will have a **pointing down arrow in the lower right corner of the cell** – click on this arrow and it will show you a menu - select the correct code from this menu

Freeze Panes - Keep name and column headers visible as you scroll
If you want to freeze specific columns and rows in the workbook so that they stay on your screen while you are scrolling to the right or scrolling down.
To freeze the top horizontal pane, select the row below where you want the split to appear. (Example: click on row 9 on roster page so that you can always see the blue headers on the top of the page)
To freeze the left vertical pane, select the column to the right of where you want the split to appear. (Example: click on column F on roster page so that you can always see the member name as you scroll to the right)
To freeze both the upper and left panes, click the cell below and to the right of where you want the split to appear.
Then go to the toolbar and select "Window" and click "Freeze Panes". To turn off feature, click "Unfreeze Panes".

Cutting and pasting in the workbook

Warning: Do not **CUT** and paste in the workbook! It effects how the macros operate.
You can **COPY** and paste **OUT** of the notebook and into another spreadsheet.

How To Print just the Print Area
* This lets you print a selected area of your screen
Note: This is the best way to print each page to avoid unnecessary pages printing!

(If you use the print button from your toolbar on the School Staff & Partners or Roster pages without setting a print area you will get all 1000 entry lines!)

1. Highlight the area that you want to print (the columns and rows with text) by clicking on the first cell in the upper left corner of the workbook and dragging the mouse to cover the area that you want to print – then let go of the mouse.
2. Go to "File" on the toolbar, then "Print Area", then "Set Print Area".
3. Click on the Print icon in the toolbar. **If you want more columns to print on one page change your document to landscape layout (on toolbar: File/print/properties/layout).**
4. Only the area that was highlighted will print.

Membership Excel Template Page by Page

Chapter

All the data on this page refers to the Chapter.
Many items will be automatically filled in for you.
Some cells have a drop down selection list for a specific answer.

"Upload CHAPTER Data to PeopleSoft" and "Create Chapter Template (export)"
buttons are disabled. They are for National FFA functions only.

Details:

- **PS Cust ID:** National FFA Use Only (This is a read only/protected cell)

- **Advisor Name:** Enter the name of a chapter advisor who will be the primary contact. Put only ONE name in this cell.

- **Primary Address:** Where Advisor receives their chapter mail. (This address will be entered in the address field on the Total page)

    - *Note: Only enter information in the Billing and Shipping Cells if the information is different from the Primary Name and Primary Address.*

- **Shipping Name & Address:** To whom/where you want packages sent (cannot be a P.O. Box). Fill in complete name & address.

- **Billing Name & Address:** Person and address where invoices are sent. Fill in complete name & address.

- **State FFA Region/District/Area:** Enter the region your chapter is located in the State.

- **Status:** National FFA Use Only. (This is a read only/protected cell)

- **Membership & Billing Contacts:** Name to contact for questions in each area. Please place one name in these boxes even if it is the same name used in the primary, shipping or billing contact fields. Only ONE name per cell.

School

All the data on this page refers to the School and the population that it pulls students from.
Use the tab button to navigate and the dialogue and drop down menus to supply requested information.

Upload buttons are disabled.

Details:

✍✍ **School Code:** National FFA Use Only.

✍✍ **School Name, Phone, Fax, Email and School Website:** Enter appropriate information in each cell. Make sure this is the school's name, not the chapters.

✍✍ **Advisor Name:** Enter primary advisor's name. Put one name only.

✍✍ **School Type:**

✍✍ **Total Ag Students:** Enter the combined number of all Agriculture students in all classes (example, 5 classes of 20 students = 100 total Ag students)

✍✍ **Unduplicated Ag Students:** Enter the actual number of agriculture students enrolled in the agriculture program. Count the student one time, regardless of the number of classes they are enrolled in.

✍✍ **Estimate of Ethnicity:** Enter best idea of % of ethnicity in your total school population (not just Ag students). Total must = 100% Note: If % is 0, just leave the cell blank. **Use whole numbers!** The software will recalculate any percentage less than 1 (for example; do not put 1.3% Hispanic, use either 1% or 2%)

✍✍ **State FFA Region/District/Area:** This field is inactive on school page. Information will pull from Chapter page.

✍✍ **Facilities & Instructional Areas:** Enter a "Y" if the facility is found in your school program. "N" for no.

School Staff & Partners (previously known as Form C)

Note: Please set a Print Area before trying to print this page!

Upload buttons are disabled.

Sort by Name button is an **active** feature useful for finding duplicate names.

Use this page to:
- ✍ Supply necessary information for all agricultural teachers who teach in your program. The additional demographic information requested on this page is only needed for the agriculture teachers who teach at your program, not other school staff.
- ✍ List other school staff, administration, counselors, parents or supporters who would like to receive pertinent information from FFA or who might be involved in your program. (Suggested staff/partners list below)
- ✍ List individuals, businesses or partners who want to receive a copy of New Horizons magazine **NOTE: In order to receive a magazine subscription you must have: AR status code and K under Member Type (AR + K = magazine).**

Details:
- ✍ **Status:** **(*Required Field)** **You must enter a status code for every name.**
  - o AR = Active, for new & renewing names. Will keep the staff or partner active in the National FFA Data Base
  - o DR = Do Not Renew. This will remove the staff or partner from the National FFA's database.

    Note: NEVER "clear" the cells that are already there (that already have an ID #), you may change the information to update an address or other information, but if you want to get rid of that particular listing use the "DR" status code. The information on that line will then be removed from your roster once National staff uploads the template.

- ✍ **FFA ID#:** Generated by National FFA (this is a read only/protected cell)

- ✍ **Staff Type:** Select the appropriate staff type for the individual you are entering
  - o C = Chapter advisor or Chapter Employee
  - o H = School Employee other than chapter advisor or chapter employee
  - o O = Other, parent, advisory committee, business, partner…
  - o S = State Employee

✍ **Salutation:** Select the appropriate salutation from the drop down menu

✍ **Last Name/First Name:** **(*Required Field)**
- o Individual: List complete first and last name in appropriate field
- o Business or Organization: When entering the name of a business, organization, etc. enter the full name in the last name column and an * in the first name column.
  Warning: this is a required field and it only accepts 30 characters.

✍ **Suffix:** Select the appropriate salutation from the drop down menu

✍ **Title:** Select a recommended title from the table below and type this name into the cell.

Recommended Titles for School Staff

Advisor/Ag Teacher	Alumni/Volunteer
Superintendent	Ag-Ed Advisory Team
Principal	Sponsor/Business Representative
Other School or District Administrator	Former Member
Career/Vocation Coordinator	State Staff – Director
Guidance Counselor	State Staff – Executive Secretary
Counselor – Career	State Staff – Other
Teacher (other than Ag teacher)	University Staff/Faculty
School Support Staff	State or Local Government Official
Parent	School Board Member
Sponsor	Company/Organization

✍ **Address, City, State and Zip:** **(*Required Field)**
Review this information, make necessary changes or add a new address when adding additional staff and partners.

✍ **Member Type:** **(*Required Field)** **You must enter a member type for every name.**
Identifies which staff and partners will receive a subscription to the New Horizons Magazine.
- o K = Magazine Subscription
- o N = No Magazine Subscription

✍ **Email:** enter agriculture teacher's email address

*Required field

The remaining columns on the staff and partner page pertain only to this program's agriculture teachers. It is recommended that contact information for key partners are recorded in the appropriate columns as needed.

✍ **First Year Teaching:** Enter the four-digit year of the first teaching year (Ex: 1979).

✍ **Gender:** Use the drop down box and select this teacher's gender.

✍ **Highest Degree:** Select appropriate degree from drop down box.

✍ **Degree Major:** Enter major degree name

✍ **Degree Minor:** Enter minor degree name

✍ **Teacher Training:** Select type of training using drop down box.

- o Traditional = Agriculture education training that followed the standard or normal path to earn degree and certification:
- o Non-Traditional = Entering teaching force from industry or from another teaching field. Can include those who started teaching agriculture with an emergency certificate or license.

✍ **Certification Type:** Please select the response that best matches the current certificate or licensure held by this teacher.

✍ **Ethnicity:** Select this teacher's ethnicity from drop down box.

✍ **Home Location:** Select the appropriate response from drop down box.

✍ **Salary Range:** Select the appropriate salary range from the drop down box.

✍ **Telephone:** Enter telephone number for this teacher. Note: The number used here could be a secondary or alternative telephone number for use in contacting this teacher, I.E. cell phone, pager or home telephone number.

✍ **Primary Specialty:** Select the response that best matches this teacher's specialty area.

✍ **Mail Option:** Is this teacher, partner or business to receive relevant mailings from the National FFA. "Y" for yes and "N" for no. **Answer for every name.**

✍ **State Use:** *defined by state, whatever data you would like to collect.

Code Reminders for Staff & Partners:

In order to receive a <u>magazine subscription</u> you must have:
AR Status code and K under Member Type (AR + K = magazine)

To delete someone from the list you must:
Put DR as the status code and leave all other information on that line alone

To add someone new:
Go to a blank row, start with an AR status code and enter in their information. The FFA id # will be applied to the name by National staff once it's uploaded. Make sure that you identify the person as either a "K", wanting a magazine or an "N", no subscription.

Helpful hints before you start working in the Roster

*This roster is for use ONCE a year. To make any additions or changes after you return this roster to state please use the supplemental roster only.

Membership Data Form:

Give the Membership Data Form (page 24) to your members as an easy way to collect the data necessary for updating the roster.

Adding a new member:

Enter new members in the first available empty row at the bottom of the roster page. Put "AR" as their status code and list their membership type. The FFA Id will come later. Do not add a new member by inserting a row into the workbook. **DO NOT** add a new member by typing over an existing member.

Removing or deleting a member:

You cannot delete/remove a member from the roster that already has an Id number. Enter the correct status code and leave all other information on that line alone. Just use the drop down status code list to define reason for leaving program. The member will be removed from the roster when National uploads the template.

You can clear information from your roster on new students with **NO** ID number.

Easy way to check for duplicates:

The Sort by Name button can be found at the top of the roster page.

Click the Sort by Name to check for duplicate names. A student's name should only appear once on the roster.

Supplemental Roster:

This is a separate roster to be used for Member and Staff & Partner additions that happened AFTER the original roster was turned in. Go to the FFA Membership Support Center website to access the supplemental/add-on template (it's a white link located in the center of the home page **http://www.ffa.org/membership/index.htm**). The template will download as a zipped file with no password required. Once you have opened the template you will need to enter your chapter information on the chapter page (the program will automatically update the other pages). Add your new students or staff just as you did in the original roster. The totals will transfer to the totals page. Please enter in the correct amount in the state dues column for your state dues. The state dues **total** column will then show the calculated totals. Save the supplemental roster. Name the file by chapter number and "s" for supplemental (ex: AZ0034s1).

This supplemental roster WILL NOT automatically enter your state due amount like your original roster. This is not a state-specific roster. Check to see that your totals are correct and then forward this roster to your state staff as directed.

Roster (Use Membership Data Form, available on page 24, to gather student info)

Note: Please set a Print Area before trying to print this page!

This page is for renewing, editing and adding new members ONCE a year. Once this roster is submitted to your state you must use the supplemental roster to make additions and changes.

Use the **TAB** key to navigate.
Some cells will have dialogue and drop down menus.

Sort buttons are active.

Upload buttons are disabled. Force Uppercase button is for National FFA use.

Details:

 ✍ **Status:(* Required Field) You <u>must</u> select a status code from the drop down box for each new or renewing member.**

   o AR – Active, Is Renewing (for new or returning members)
      "AR" is the only code that keeps a member active, all the other codes explain reasons for leaving FFA.
   o DR – Don't Renew
   o DE – Deceased
   o DS – Disciplinary
   o M – Moved

 ✍ **FFA ID#**: FFA use only (this is a read only/protected cell). National FFA will assign new members their ID # after National FFA approves and processes the roster. The student will receive one specific ID for their whole FFA career.

 ✍ **Membership Type:(* Required field)** Select membership type from drop down menu.

   o M = Regular 1 year member
   o T = Regular 3 year member
   o F = Regular 3 year + 1 year
   o K = FFA New Horizons Magazine Subscription only

 ✍ **Last Name, First Name, Middle Name and Suffix:(* Required Field)** Review spelling on all renewing members. On a blank row add new member's Last, First and Middle Name. Select Suffix from drop down box. **The first name must be the complete name of the student as it appears on their birth certificate. If the student uses a nickname place it in the nickname field.**

✍ **Address, City, State, Zip:(* Required field)** Review and update renewing members' address make corrections as necessary. Enter address for new members as needed. If you do not know the student's address please enter the school's address. <u>If a renewing student's address (or any other information) has changed, enter their new information in place of the old and keep student active (AR) with their current FFA Id number.</u> The upload will update the listing.

✍ **Gender:(* Required field)** Use the drop down box and select this member's gender.

✍ **Grade:(* Required field)** Use the drop down box to select this member's grade.

✍ **Birth Date:** Enter birth date for the member. The database system will enter a default date, 01/01/1900. The data base system uses the members first initial, last name and birth date to check for duplicates. It is highly recommended that you supply the member's birth date to eliminate the extra work caused by common names (i.e. John Jones) during the duplication check process. **Dates MUST be entered as: MM/DD/YYYY.**

✍ **Ethnicity:(* Required field)** Select this member's ethnicity from drop down box.

✍ **Home Location:** Select the appropriate response from drop down box.

✍ **Email:** Enter student's email address. This data can be utilized for chapter records and database.

✍ **Chapter Office:** Select the appropriate response from drop down box.

✍ **State Office:** Select the appropriate response from drop down box.

✍ **Degree:** Select the appropriate response from drop down box.

✍ **Owns FFA Jacket:** Select the appropriate response from drop down box.

✍ **SAE Type:** Select the appropriate response from drop down box.

✍ **State Use**: To help keep track of 1+3 and 3-year members, use this field as the year membership will end.

✍ **Last Year Member Type**: Automatically fills in: This cannot be changed.

✍ **Career in Ag-Ed:** Select yes for those members who plan to become agriculture education majors. This will add them to the National Ag-Ed Prospecting List.

- **Career in Agriculture:** Select yes if the member is planning on seeking employment or a career in the agriculture industry.

- **Nick Name:** Enter members nickname. Assists National Staff in completing membership checks for degrees, awards, scholarships and CDE participation.

- **Nat'l Staff Use Only:** National defines

Note: Members should not be listed on the roster more than once!

Totals

The instructions that follow are generic.

This is NOT an official invoice!

Details:
- ✍ School Name, Chapter Name & Address are automatically filled in from data on earlier pages.
- ✍ The Totals are also tabulated from earlier pages.

    Student AR status code + Member Type = <u>member</u>, you need both codes!

    Staff & Partners AR status code + Member Type K = <u>magazine subscriber</u>, you need both codes!

Helpful Hints:
- ✍ Review the number of students renewed or converted to a different membership type.
    * Some pre-paid students on the roster may expire before the current school year starts if they have an Aug '03 expiration date!
- ✍ Double-check all the amounts and totals.
- ✍ This page can be printed to submit to your school to obtain a purchase order (PO) number or a check. Note: This is not an invoice!

Checklist

What to look for before sending roster in to State

- ✍ Recheck each page for errors, empty fields and duplicates
- ✍ Make sure totals equal the number of students in your program
- ✍ Save each page
- ✍ Print hard copy for your files of each page when satisfied with accuracy
  Hint: remember to set print area <u>before</u> printing!
  (<u>Especially</u> on the School Staff & Partners and Roster pages!)
- ✍ Keep a back-up file of the master file in a safe location.
- ✍ Keep only one completed **master** file per membership year

What do I do next?

- ✍ Once you have completed the Roster, you will need to zip the file before you email it to the Office of Agricultural Education. To zip the file:
  - o First go to where you have the file saved.
  - o Right click on the icon
  - o Scroll down to WinZip
  - o Then click on Zip and email NJ_ _ _ _. Zip

- ✍ After clicking on this, a new email message window will appear.
  - o Send the your chapter's roster to the Office of Agricultural Education at ag.ed.registration@ag.state.nj.us.
  - o In the subject type "chapter's" Roster
  - o When the email has reached the office and has been processed you will receive a reply indicating that we have received your roster.

Additional File Opening Instructions:

How to open and save the Excel workbook from a floppy disk

1. Put the disk into the floppy (A:) drive
2. Double click on My Computer (located on your desktop)
3. Double click on 3½ floppy
4. Double click on the workbook icon to open it
5. Click on Enable Macros (The sorting buttons in the template will only work if Macros are enabled *when* the file/workbook is opened)

Do save the file to your desktop when you first open it
Do save the original floppy as your back up copy
Do save the file to a **new** floppy if you are going to be mailing it to your state staff or national.

Don't save the file back to the same original floppy once you have made any changes in it.

1. Go to File
2. Select Save As
3. Use the drop down menu in the Save In box and select where you want to save the file (recommend saving on your desktop)
4. Go to File Name and name your file (recommend that you call it draft roster with the date)
5. Then click Save
6. Close out of the workbook on your screen
7. Close out the other windows on your screen
8. Remove the disk from the floppy drive
9. Go to where you saved the file
10. Double click on the workbook icon to open it

How to open and save the Excel workbook from a CD

Same as floppy disk instructions on previous page, except for using your CD (E) drive instead of your floppy (A) drive.

How to open and save the Excel workbook from an e-mail attachment

1. Double click on icon or attachment in your e-mail.
2. Screen will read, "What would you like to do with this file?"
3. Select "Save the file to disk"
4. Save in: Desktop (you might want to change the file name to draft roster with the date so that you can better identify it)
5. This will put the file on your desktop so that you can work on it there. You can either go there directly from this page or close out your screen and look for it on the desktop.
6. Once you open the excel template it would help to create a Master File on your computer. To do this go to File (top left); after file opens, select Save As. Rename the file with your chapter number and save the file on your desktop or other location that you can remember. Hint: On your C drive you could add a folder called Membership 03-04 to keep the file in.

How to Compress or Zip a File

Compressed or zipped files take up less server space. Compressing also hides macros from your school's server and firewall.

1. Update and save the Excel Roster to your desktop, hard drive or server.
2. Close the file and then go to the location where you saved the file.
3. Place the cursor over the file name and press or click the right mouse button. This will open a menu box.
4. Select WinZip in the menu box.
5. Select Add to Zip File. This will open the WinZip Menu Box
6. Select Add on the WinZip menu box. Top right hand corner. When the compressing or zipping process is completed the WinZip file box will open.
7. Close the WinZip file box.
8. The compressed or zipped file can be found in the same directory or location as the original file.

How to Email a Zipped File

1. Open your email program.
2. Add the address of the person you are sending the email to in the address field.
3. Select attach command or go to the zipped file location and copy the file.
4. Paste the file into your email.
5. Add any notes or additional information to the email.
6. Click the send button.

Notes:

FFA Membership Data/Excel   Date:

Membership: (circle one)

1 year (M)   3 year (T)   3+1 (F)   Magazine Only (K)

Last Name: _____ First Name: _____ Middle: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Sex: M   F

School Grade: _____ Birth Date: _____/_____/_____

Ethnicity: (circle one)

Decline to Answer   Asian/Pacific Islander   Black

Filipino Hispanic   Native American   White

Residence/Community Where You Live: (circle one)

Rural, Farm

Rural, Non-Farm

Small City

Urban/Suburban

E-Mail Address: _____

Current Chapter Officer Position: _____

Current State Officer Position: _____

FFA Degree Achieved: (circle one)

Discovery   Greenhand   Chapter State   American

Do you own an FFA jacket: Y or N

SAE Type: (circle one)

Entrepreneurship

Placement

Improvement

Research/Experimentation

Exploratory

State required info: _____

Are you interested in Ag Education?   Y or N

Do you have career interests in agriculture?   Y or N

Nickname: _____