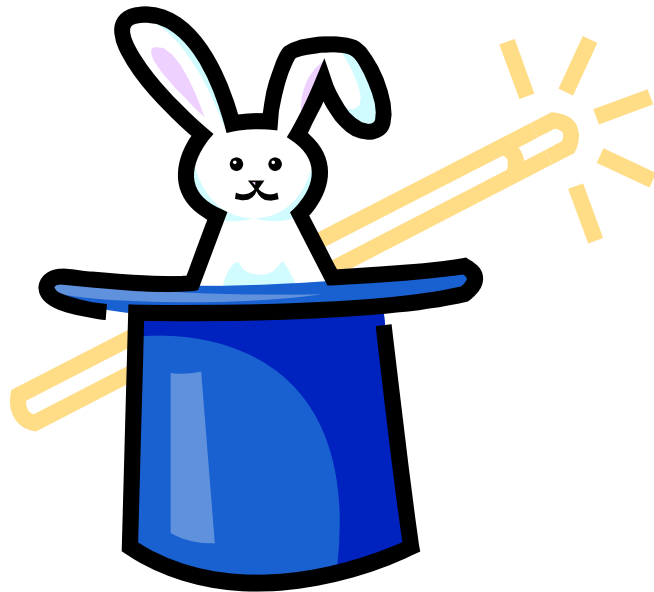




# Using the Excel Membership Roster



Tappa Tappa Poof!



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## Obtaining My Affiliate's Roster

### State Coordinators

The rosters of your state will be delivered via CD. You are responsible for forwarding the rosters to each individual affiliate. We recommend e-mailing them.

### Affiliate Coordinator

Your roster will be provided to you by your state coordinator.

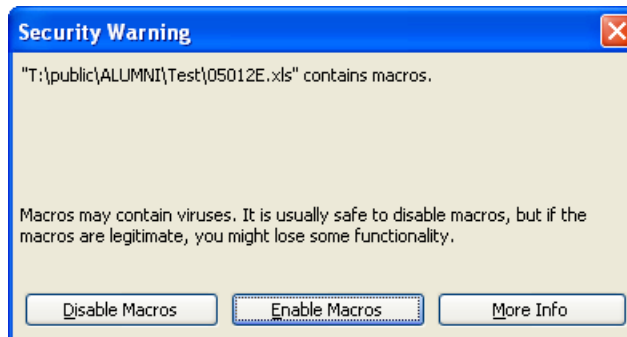
## Opening Your Roster

### State Coordinators

- Insert the roster CD into the CD ROM drive of your computer.
- Click on My Computer
- Click on CD Drive
- You may now copy and paste the files to a folder on your computer or send each file as an attachment in an email to the corresponding affiliate coordinator.
- To review the file when returned by the affiliate continue with the steps provided below.

### Affiliate Coordinator

- Download the Excel file from your e-mail.
- We recommend making a copy of your Excel file (ex: AZ02008Original)
- 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.
  - If the "Security Warning" popup window does not appear proceed to \*Macro Security



- Now you are ready to begin the update and renewal process of your 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 roster on your computer system as the original filename + FINAL (ex: AZ02008FINAL) (**create a separate back up copy on disk or CD too**) and then follow your state's instructions for returning a copy of the roster to the state association for processing.

## \*Macro Security:

For your roster workbook to open correctly you must choose to "Enable Macros" from the security popup window, pictured above. If this window does not popup, please follow the steps below to ensure your roster work correctly.

1. Click Tools (from the toolbar menu)
2. Click Options
3. Click the Security tab
4. Click the Macro Security button
5. Change the security level from High to Medium
6. Close Excel, then reopen the roster workbook,
7. The security popup window should appear.
8. Select "Enable Macros" when asked about enabling macros.

# Instructions For Excel Membership Roster



## Additional File Opening Instructions:

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

**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.

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

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)
6. Go to File
7. Select Save As
8. Use the drop down menu in the Save In box and select where you want to save the file (recommend saving on your desktop)
9. Go to File Name and name your file (recommend that you call it draft roster with the date)
10. Then click Save
11. Close out of the workbook on your screen
12. Close out the other windows on your screen
13. Remove the disk from the floppy drive
14. Go to where you saved the file
15. 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, 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.



## General Hints for the Excel roster

### 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.

### Navigating the workbook using buttons

Navigation buttons have been provided to assist you as you move through the workbook. Simply click on the “Next” button to move to the next page and the “Previous” button to move to the previous page. In many cases the “Next” button has checks built in, which will help troubleshoot your workbook prior to submitting it. Fixing the errors these checks find will allow for your roster and its information to be uploaded in a more efficient manner.

### Using the tabs at the bottom

If you are unable to use the navigation buttons to move through the workbook, you can use the sheet tabs. At the bottom of the workbook you will see six 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. Simply click on the page you would like to view. The tabs **DO NOT** safeguard against errors which could cause delays in processing your roster.

### Caps Lock Key

Click on the **Caps Lock** key on the keyboard. All information should be entered in UPPERCASE.

### Description/Dialogue Box and Code Menu

Most cells will automatically open a description/dialogue box – this will give you an explanation of information requested. You can “**drag**” this dialogue box to any location on your screen and it will stay there for any cell that you are viewing.

Cells with dialogue boxes will have a **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.

### Cutting and pasting in the workbook

**Warning:** Do **NOT** cut and paste in the workbook! It affects the operation of the macros.



## Membership Excel Template Page by Page

### Affiliate Page

All the data on this page refers to the Affiliate.  
Many items will be automatically filled in for you – some items are optional.

#### Details:

- **Affiliate ID:** National FFA Use Only (This is a read only/protected cell)
- **Affiliate Name:** National FFA Use Only (This is a read only/protected cell). To change the name of an affiliate you must file an affiliate name change form with national.
- **Phone\*:** Phone number for affiliate contact (this may be different than advisor). Remember to include your area code. **(required)**
- **Fax:** Fax number\* for affiliate contact (*optional*)
- **Affiliate Website:** Website address for affiliate (*optional*)
- **Main E-mail:** E-mail address for affiliate contact (this may be different than advisor) (Highly recommended but *optional*)
- **Affiliate Address:** Primary address for mailings (this may be different from the school address) **(required)**
- **School Name, Address:** Enter appropriate information in each cell. Please enter the school name, not the affiliate name. In the case of multiple schools per affiliate, enter school information for primary advisor contact. **(required)**
- **Advisor Name, Phone\*, and E-mail:** Enter the name/information of the chapter advisor who will be the primary contact. Put one name only. Remember to include your area code. **(required)**
- **Preparer's Name, Phone\*, E-mail:** Enter name and information of person who prepared the roster. Remember to include your area code. **(required)**
- **Affiliate Officer's names, phone, Email:** Enter name and information of current affiliate officers to better aid in communication from the state level. (Highly recommended but optional)

*\* For all phone numbers enter **10 NUMBERS ONLY** (no hyphens or parentheses) – the formatting will be done automatically.*



## Roster Page

### Helpful hints before you start working in the Roster

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

(Note – the supplemental roster is currently under development, if you need to submit additional members please contact National Office at 317-802-4332 or [pmcdonald@ffa.org](mailto:pmcdonald@ffa.org))

#### **Membership Form:**

Give the Membership Form (page 14) 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 be issued by National. **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. **DO NOT** add a new member by changing an existing member’s name.

#### **Removing or deleting a member:**

You cannot delete/remove a member from the roster that already has an ID number. Enter a “DR” in the status code and leave all other information on that line alone. The member will not be renewed and will not appear on the next year’s roster. (In the case of a deceased member, see instructions under Details page 9.)

You **CAN** clear information from your roster on new members 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 member’s name should only appear once on the roster.

# Instructions For Excel Membership Roster



## Roster Page

(Use Membership Form, available on page 14, to gather member info)

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. Some cells will have dialogue and drop down menus.

For SPECIAL circumstances: 1) Transfer of LIFE member to your affiliate; 2) Name change of LIFE member; or 3) Other special requests, see **Special Instructions Page**.

### Details:

- **Status: (Required Field)** You must select a status code from the drop down box for each new or renewing member.  
**NOTE: All existing members are automatically coded as AR (Active-Renew). The status of a LIFE member cannot be changed. Annual members can be changed as follows:**
  - AR – Active, Is Renewing (for new or returning members)  
“AR” is the only code that keeps a member active.
  - DR – Don’t Renew
- **FFA ID#:** FFA use only (this is a read only/protected cell). National FFA will assign new members IDs. Each regular (annual), life, corporate and collegiate member will be assigned a unique ID.
- **Membership Type: (Required field)** Select membership type from drop down menu.
  - R = Regular (Annual) 1 year member
  - L = Life membership (issued in individual’s name only)
  - C = Corporate 1 year member
  - U = Collegiate 1 year member – must be from a Collegiate FFA Chapter
- **Last Name and First Name: (Required Fields)** Review spelling on all renewing members. Add new member’s Last and First Names to a blank row at the bottom of the list. Name suffixes can be included in the last name field (ex: Smith Jr, Smith III). Middle initial/name can be included in First Name field if needed (ex: Mary Jo, Robert L).  
**NOTE: Life member’s names CANNOT be changed. In the event of a legal name change such as marriage/divorce see “Special Instructions Page.” Minor spelling corrections may also be done by using the “Special Instructions Page.”**
- **Address, City, State, Zip: (Required field)** Review and update renewing member’s address make corrections as necessary. Enter address for new members. If you do not know the member’s address please leave blank.  
**NOTE: If a renewing member’s address (or any other information) has changed, enter their new information in place of the old and keep member active (AR) with their current FFA Id number. The uploading process will update the listing.**  
  
Special note: After updating a member’s address highlighted in GOLD, you must update the Undeliverable field. If the Undeliverable field contains a “Y” (yes-undeliverable) you must change to an “N” (no-deliverable). If you have left the address field blank, change the Undeliverable field to a “Y.” The upload will update the listing.
- **New Visions Newsletter:** Enter a “Y” for Yes or an “N” for No to newsletter. (The newsletter is one per household even if more than one member has indicated Yes)
- **New Horizons Magazine:** For **Annual** members only enter a “Y” for Yes or an “N” for No to the magazine. An additional \$2.00 subscription fee will be added for every “Y.”  
**NOTE: Life member’s magazine designation CANNOT be changed. If a Life member would like to change their magazine designation they will need to notify the National office.**

## Instructions For Excel Membership Roster



- **Receive New Visions Electronically?: (Optional)** Would the member prefer to receive the quarterly New Visions newsletter electronically instead of via mail? Enter a “Y” for Yes or “N” for no. (Defaults to “N”) If you choose “Y”, you must enter an e-mail address. All hard copies of the email will be stopped and the member will start receiving the newsletter in their email.
- **Undeliverable:** “Y” indicates address is undeliverable, a blank or “N” indicates a valid address. **NOTE: If the member’s address was undeliverable and has now been updated, you MUST change the undeliverable flag to an “N” in order for them to receive mailings (see Address, City, State, Zip field).**
- **E-mail: (Optional)** Enter member’s e-mail address. This data can be utilized for affiliate records and database. An e-mail address must be entered here to receive the New Visions newsletter electronically.
- **Deceased:** For ANNUAL members change to a “Y” if member is deceased. Status should be set to “DR.” For LIFE members change to a “Y” if member is deceased, status CANNOT be changed (will be updated by National).
- **Former FFA Member: (Optional)** For National to compile membership statistics. Enter a “Y” for Yes or “N” for no. (Defaults to “N”)
- **Collegiate FFA Members Enter College/Univ Name:** If MEMBER TYPE is U (Collegiate) college/university name **must** be supplied. This membership type is for current Collegiate FFA dues paying members.
- **Last Year Member Type:** Automatically fills in: This cannot be changed.
- **Nat’l Staff Use Only:** National defines
- **State Member Type:** For state use to calculate state dues. Must enter membership type in both national and state type for database to calculate both state and national dues. The dues amounts are entered on the Totals page in the top right “State Dues” box.
- **State Use:** State defines. (For example: States with state life membership can track previous year status in this column).

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

# Instructions For Excel Membership Roster



## Totals Page

See your state staff for specifics for your state.

### Details:

- Affiliate Number, Affiliate Name, & Affiliate Address are automatically filled in from data on earlier pages.
- The Totals are tabulated from earlier pages.

**STATE DUES:** Rosters **WILL NOT** automatically enter your state due amount. Enter state dues in the cells at the top right. State dues will be tabulated for all members renewing. Check to see that your totals are correct and then forward this roster to your state staff as directed.

**NOTE: All members on roster with AR status will be subject to National dues.**

**LOCAL DUES:** Local dues/fees can be entered in the cells midway down the page on your right. These amounts are not calculated by the program but the total amounts can be entered for your record-keeping.

*Per your State's instructions – submit your roster/dues to your State Association.*

**AT THE STATE LEVEL:** A hard copy of the **Totals** page should be submitted to National FFA Alumni with payment. Electronic rosters should be submitted using the UPLOAD instructions provided in a separate file. Rosters will not be processed until payment is received.

### Additional:

**State Use:** The cells in the bottom left corner are for state/affiliate use. You may choose to use them as a means to track the roster (ex. Roster submitted to state 2/10/08, Roster submitted to National 3/15/08...)

### Helpful Hints:

- Review the number of members renewed or converted to a different membership type.
- Review the number of magazines for annual members.
- Double-check all the amounts and totals.



## Special Instructions Page

Data on this page is for special circumstances not covered in the normal entering of members on the roster page. These changes/updates will be manually entered by the National FFA Alumni staff.

The Affiliate Number, Affiliate Name, and Affiliate Address are automatically filled in from data on earlier pages.

### Special Requests:

- **Life Member Transfers:** Only Life Members being transferred **TO** your affiliate should be listed. Enter Life Member's **Member #**, **Name on File**, and **Current Address** (include city, state, zip) in appropriate cells. In **Change** cell enter "**TRANSFER FROM.**" In **Comments** cell enter the **Name** and **Number** of their previous affiliate and the member's previous address if applicable.
- **Name Changes for Life Members:** Can be done in the event of a legal name change such as marriage/divorce/adoption or for a spelling correction. Life memberships are **NOT** transferable to another individual. Enter Life Member's **Member #**, **Name on File**, and **Current Address** (include city, state, zip) in appropriate cells. In **Change** cell enter "**CHANGE NAME.**" In **Comments** cell enter the **New/Corrected Name**.
- **Other:** For all other special circumstances that require our attention please enter **Member #**, **Name**, and **Current Address** (include city, state, zip) in appropriate cells. In **Change** cell enter "**OTHER.**" In **Comments** cell briefly state your inquiry/request.

# Instructions For Excel Membership Roster



## Print Page

Once you have completed your roster, you will have an opportunity to review and print any or all of your pages.

The top box on this page is the “Thank You” and “Review” box. This box contains a button for each page of the workbook. Selecting any button will take you directly to that page allowing you to review the information which you have entered. From this page you will need to use the navigation buttons to proceed to the previous/next page, reviewing your pages, and making changes as necessary. After you have completed your review, proceed to the Print Page and go to the bottom box, the PRINT box.

In the bottom box, you are now ready to click on the “Print Preview Roster Workbook” button. This feature will preview and print the four main pages of the roster in **black and white**, in the order they appear; Affiliate, Roster, Totals and Special Instructions. **It will also calculate the total number of roster pages to print, ensuring only the pages you need are printed!** Click on the “Print Preview Roster Workbook” button. It will automatically take you to the Affiliate page. If you would like to print the Affiliate page, click on the “Print” button. Once it has been sent to your printer, the next page in the workbook, the Roster page, will appear and you can choose to print it. If you have already printed the Affiliate page and choose not to print it, simply click on the “Close” button and you will be forwarded to the next page, the Roster page. Follow the same steps, Print or Close, to the end of the workbook.

**(Special Note: Using any of Excel’s standard print features on the roster page will result in printing of 1000 entry lines or approximately 21 pages. You MUST remember to set your print area if you elect NOT to use the “Print Preview Roster Workbook” button described above!!)**

# Instructions For Excel Membership Roster



## Final Checklist

What to look for before submitting final roster to State

- Recheck each page for errors, empty fields and duplicates
- Make sure totals equal the number of members in your affiliate
- Save each page
- Print a hard copy for your files of each page when satisfied with accuracy
- Keep a back-up file of your final roster workbook in a safe location.
- Please use the following naming convention when submitting your completed roster to your state association: Original Filename + FINAL (ex: AZ02008FINAL)

## What do I do next?

Your state staff will instruct you on where and how they want you to submit your electronic roster.

**DO NOT send payment to the National FFA Alumni Association** -- submit it to your state office.

## Supplemental Roster:

A supplemental roster is a separate roster to be used for adding members AFTER the original roster was turned in.

**Special note: Supplemental Rosters are available from National by contacting Phyllis McDonald at [pmcdonald@ffa.org](mailto:pmcdonald@ffa.org) or 317/802-4332.**



# FFA Alumni Membership Form

Date: \_\_\_\_\_

Membership: (check one)

- Regular/Annual \$10 (R)
- Life \$150 (L)
- Corporate \$300 (C)
- Collegiate \$5 (U) (Must have Collegiate FFA Chapter, provide college/university name below)

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

New Visions Newsletter (one per household):      Y      N

New Horizons Magazine + \$2.00 (annual members only):    Y      N

Would like to receive New Visions electronically (optional):      Y      N

E-mail Address (optional, however you must provide if you choose to receive the New Visions electronically): \_\_\_\_\_

Former FFA Member (optional):      Y      N

Collegiate Members Only–College/University Name: \_\_\_\_\_