

Database Modification Requests  
NWEI Database Development Project

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## Purpose

This document lists modification ideas developed from review of draft databases created during this database development project. All modifications listed here were suggested after November 1, 2001.

## Modification Requests

ID	Database	Layout	Description	Response	Estimated time used
1	NAMES	Data Entry 1	(Ebase "origin" field) Alter value list to ("course", "event", "friend", "media", "website", "org", "NWEI pubs"). Import values recently placed in NWEI "the database" file	Completed (12/12/2001). Requires revisit/alteration of existing data transformation scripts to include this field in import/transfers.	<10 min
2	TBD	TBD	Add display of "National Categories" which explicitly shows possible values (i.e."check box" display or similar)	Completed (12/17/2001). Consider whether a single repeating value field is preferable to several separate "Y/N" type fields. (LFB –"National" data is generally not suitable for extensive database structuring, since use and definitions change through time and across records. Simply putting a single field with a value list here seems wisest.)	<10 min
3	TBD	TBD	Add ability to track "training attendance" for individuals	Completed (12/17/2001). Easily handled as a "class" through a very minor extension of the currently planned "class information" data model. Basically, the only change is that a new "organizer" value must be allowed for "class participant role" field.	<10 min
4	CUSTOM	TBD	Add separate layout mimicking function of layout "national outreach" in "the database". "Membership level" display on this layout is not required.	Completed (12/17/2001). Class attendance info not incorporated on this layout – resulting layout size is too large and duplicates functionality of the "NW Class Participation" layout already provided.	30 min

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				Addition of a “modification date” field is a bit problematic. A FileMaker “modification date” field will show when ANY modification on a record is made. If the desire is to indicate records for which ONLY modifications on THIS layout have been made, this won’t work. Perhaps a better approach would be to provide a date field the user sets to the current day when they alter any of the information on THIS layout?	
5	TBD	TBD	Add capacities of “the database” layout “nat’l outreach lo support”	Possibly completed (1-4-2002), with addition of “NWEI Natl outreach notes” button to OUTPUT layout. This layout is used for printing select information from a “find” of recently altered records, to be used as a reminder of tasks to be done. (LFB- If so, then it is perhaps more of a “report” than a “working layout” used for data manipulation?) It seems to duplicate information stored on the “natl outreach” layout, but this layout isn’t really used for data manipulation.	40 min
6	TBD	TBD	Add capacities of “the database” layout “intro packet tranking nat’l”	Possibly completed (1-4-2002), with addition of “NWEI Natl outreach notes” button to OUTPUT layout. This layout is used for printing select information from a “find” of recently altered records, to be used as a reminder of tasks to be done. (LFB- If so, then it is perhaps more of a “report” than a “working layout” used for data manipulation?) It seems to duplicate information stored on the “natl outreach” layout, but this layout isn’t really used for data manipulation.	
7	TBD	TBD	Add ability to handle different uses of “class attendance” information for “local” and “nonlocal” individuals. (“Non-local” use is typically to indicate “course organizers” as opposed to	Completed (12/17/2001). Extend use of proposed “class info” data model to cover this need by adding a new “class participant role” category – “organizer”. No additional modifications	<10 min

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			“class attendees”)	seem required – this allows use of the same “class participant” structure for both purposes.	
8	NAMES	Data Entry?	Add additional “notes” field for specific use for notes relevant to operation of the “National” earth institute program	Completed (12/17/2001). Usage must be guided so that general info about this person is entered in the “general use” MEMO field... ONLY info related to operation of the Natl EI program specifically should be entered in THIS field. Can this be better covered by thorough use of the NOTES database and layouts?	<10 min
9	NAMES	Data Entry?	Add additional “notes” field for specific use for notes relevant to operation of NWEI’s “volunteer organization” functions	Already present on Volunteer layout. Can this be better covered by thorough use of the NOTES database and layouts?	<5 min
10	NAMES	n.a.	Add importing functions for recently added “country” field in “the database”.	Requires revisit/rescripting of data transfer scripts from “the database” to two intermediate databases used in data cleanup/transformation. Completed 2/14/2002.	
11	NAMES	Data Entry 1	Add “origin detail” field for entry of free text related to more general assignment of “origin” value	Completed (12/12/2001).	<10 min
12	PAYMENT	Add payment/ View payment	Add temporary display of “Memo” or “\$Notes” field on “add payment” layouts to facilitate manual transfer of payment information now entered as free text comments into more rigorous individual payment records	Completed (12/17/2001).	<10 min
13	n.a.	n.a.	Note that some cases gift membership results NOT from purchases, but is a privilege of high-level “giving” status.	No modification needed. Entry of such a gift membership as a gift membership purchase with amount zero would seem to be adequate for handling these actions	
14	NOTES		(Notes layout) Add a “note date” or “contact date” field to allow entry of an appropriate date for notes which will be manually transferred from existing general purpose “memo” field to more	Completed (12/12/2001). New field “nw_NoteDate” will be created with a default date computed as “record creation date” but the user will have ability to override the value. The “add date” field	<10 min

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			rigorous “notes” records. The current “add date” is by default the date of record creation and seems inappropriate for such entries	will be left as is, since knowledge of the record creation date may be useful.	
15	NOTES		(Notes layout) Alter value list for “Program” to “nw dept list”, using values (“NW programs”, “national network”, “volunteer”, “membership”)	?Is this correct? Meaningful use of “Program” on the “actions” layout is the intent, right? Completed (12/12/2001). But there is a potential problem: Buttons labelled “fundraising”, etc. on the Ebase layout depend on entry of matching “Program” values – alteration of “Program” value list “breaks” these buttons. The “customized” version of the layout modifies these buttons to instead bring up the values used by NWEI. Ebase output functions and reports should be checked to ensure this change doesn’t cause problems in other parts of Ebase.	2 hrs
16	All	All with navigating “tabs”	Check operation of “NW Class” tab, make sure it works for “admin”, “user”, AND “master” privileges	Completed (1-3-2002). Works for “admin” password in L.Bednar’s copy of the database. (1 test from NAMES HOME layout). This navigation tab has been placed on 12+ layouts, ALL of which should be checked. (Problem was related to setup of Ebase on K.Converse’s PC to run files with “103” extension using FileMaker runtime executable provided with Ebase – files which were not part of the original Ebase package were not licensed to run with the provided runtime version of FileMaker.)	<10 min
17	NAMES	Activist?	Preferred action “county coordinator” SHOULD be “community coordinator”.	Completed (12/12/2001) Required coordinated update of the “actions” value list used in database ACTIONS.	<10 min
18	NAMES	Activist?	Remove “other” wording from preferred action categories	Completed (12/12/2001) Required coordinated update of the “actions” value list used in database ACTIONS.	<10 min
19	NAMES	Activist	Alter value list for Issues2 to use	Superseded by request number ??	

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
	ACTIONS		“NWEI regional focus” value list with values (“Portland”, “NW”, “National”)	The NAMES and ACTIONS databases use different value lists for “Issues 2”. A coordinated update is therefore required. Also, “Issues 2” is setup as a single-value field. This may be problematic for individuals who indicate an that more than one of these values apply to them.. (LFB – My notes are not completely clear about the intended use here, verify intent with Kristin.)	
20	NAMES	Activist?	Add an “available after” date field to be used to indicate when a member who currently doesn’t want to be contacted for volunteer actions may be interested in volunteering again	Completed (12/12/2001). Added “nw_VolAfterDate” date field to CUSTOM database, displayed on “Activist” screen with label “AVAILABLE AFTER:”	<10 min
21	NAMES	Activist?	“Activist?” field should employ a different value list (“future”, “yes”, “no”)	Completed (12/12/2001).. Value list named “nw activist”, and field display on layout enlarged to display full length of values selected.	10 min
22	NAMES	Activist?	(preferred actions fields) Add a “neighborhood coach” field	Completed (12/12/2001). Required coordinated update of the “actions” value list used in database ACTIONS.	15 min
23	NAMES	Activist?	(preferred actions fields) Add a “eco party” field	Completed (12/12/2001). Required coordinated update of the “actions” value list used in database ACTIONS.	<10 min
24	NAMES	Activist?	Evaluate development resources required to provide a rigorous approach to managing information about committee participation. (Committees are dynamic and changing...)	Evaluation completed (12/13/2001). Completed (12-27-2001) Implemented as a single field designed to track current committee involvement. Changes in committees used by NWEI will need to be reflected in alteration of value list used for field.	30 min
25	CUSTOM	TBD	(The database, layout #1, fields labeled “special categories) Add equivalent to the “Invitation list” and “NW community” fields. (The relationship of these two fields is perhaps more clearly indicated by the names “NWEI Portland community”/”NWEI NW	Completed (12/17/2001). Two fields added to CUSTOM file (nw_NWEIPortlandCommunity, nw_NWEINWCommunity) and displayed on “Activist” layout using checkboxes and value list “Y/Unk”.	<10 min

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			community”, where “Portland community” is equivalent to “invitation list”.		
26	NAMES	Activist?	Set up a find for “NWEI Portland community”	Completed (12/17/2001).	<10 min
27	NAMES	Activist?	Set up a find for “NWEI NW community”	Completed (12/17/2001).	<10 min
28	NAMES	Bio?	Remove current “dummy” values of “affiliation” field from database	Completed (12/12/2001)..	<10 min
29	NAMES	Data Entry 1	Establish standard coding of “contact fields” (“Y”, “N”, “ “)	Already in place.	0 min
30	NAMES	Data Entry 1	Evaluate need for more detailed “contact fields” concerning “solicitation”	Does this need any work? Resolved 3/21/2002 – no further fields needed.	
31	NAMES	Data Entry 1	Change name of contact field “call” to “telephone”	Completed (12/12/2001).. Changed to “phone”	<10 min
32	NAMES	Data Entry 1	Change name of contact field “Anon” to “conf”	Completed (12/12/2001)..	<10 min.
33		n.a.	Check for/outline Ebase uses of “nickname” field	Completed 2/14/2002.	20 min
34		TBD	Check on need to add “class5” field	Modification not needed. This suggested approach may be rendered obsolete by the planned approach for handling “class info” data – which will allow entry of an unlimited number of classes for each individual	10 min
35		TBD	Add capacity to track mailing of introductory information packet for national program. (“Intro packet tracking nat'l”?)	Completed (12/17/2001).	10 min
36		TBD	Check that “national communications” field in “the database” is usefully stored in NWEI Ebase database	Completed (12/17/2001).	15 min
37	NOTES	Add Note View Notes	Alter value list indicating staff members to whom notes may be assigned (uses Ebase Admin tab layouts)	Completed (12/12/2001 NOTE: Ideally, values should NEVER be REMOVED from this list, only ADDED, unless a global replace is done to assign notes for obsolete values to current staff. Otherwise, NOTES entered by staff	<10 min

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				members no longer on the value list may be orphaned and become unrecoverable by regular database workers.	
38	NAMES	Activist	Establish standard coding for “preferred action” fields.	Completed (12/12/2001).	<10 min
39	NAMES	Activist	Reorder preferred action fields to be in alphabetical order? (LFB suggestion)	Completed (12/12/2001).	<10 min
40	All	All with navigating “tabs”	Add tab for “NWEI class participation”. Should open layout displaying individual class participation (on CUSTOM screen 2 as of 12-11-2001)	Completed (12/12/2001).	70 min
41	All	All with navigating “tabs”	Add tab for “NWEI Natl” displaying items covered under request ID 4 above.	Displayed under CUSTOM screen 1 as of 1-4-2002.	70 min
42	All	All with navigating “tabs”	Remove tab for “Vot/Dem”	Maybe not wise – too big an alteration of standard Ebase interface. Postpone final decision until later. Needs review.	
43	NAMES SUMMARY PAYMENT	All displaying “donor level” or “membership level”	Create/display NWEI versions of Ebase summary fields that assign “membership level” value within fiscal year based on total of contributions, membership dues, purchases of gift memberships.	Completed (12/14/2001) Deciphering/understanding the approach employed by the original Ebase developers for computing these summary fields is somewhat involved. However, there are potential maintenance advantages to using similar techniques for newly constructed NWEI computations.	2.5 hrs billed
44	??	Automated Finds	Add “Mbr Exp - next month” find to list of automated finds	Completed (12/14/2001)	40 min
45	??	Automated Finds	Add “Current members” to list of automated finds	Completed (12/12/2001).	<10 min
46	??	Automated Finds	Add “Mbr Exp – 2d month prev” to list of automated finds	Completed (12/14/2001)	30 min
47	??	Automated Finds	Add “Mbr Exp – 4 <sup>th</sup> month prev” to list of automated finds	Completed (12/14/2001)	30 min
48	??	Automated Finds	Add “Last Contrib – prev biweek” to list of automated finds	Completed (12/14/2001)	30 min
49	??	Automated Finds	Add “Dues Pmt – prev biweek” to list of automated finds	Completed (12/14/2001)	30 min
52	??	Automated Finds	Add “Newsletter recipients” to list of	Completed (12/14/2001)	<10 min

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
			automated finds		
53	NAMES?	Data Entry 2 Bio	Alter "Affiliations" value list to provide Earth Institute chapters	Completed (12/14/2001)	<10 min
54	NAMES	Automated Finds	Add "OR/WA/ID addresses" to list of automated finds	Completed (12/14/2001)	<10 min
55	NAMES	Activist	Add text field for tracking current committee involvement of individuals	Completed (12/19/2001) Added "nw_CurrentCommittee" field to CUSTOM database, placed a display of this information on NAMES/Activist layout using check box display of new value list "nw committee"	15 min
56	ClassSession		Add ability to handle circumstances where only the city/state of the class location are known	Completed (12/19/2001) Added fields to ClassSession database to display city/state of matching NAMES record in case where such specificity is desired. Added fields to ClassSession database to allow manual entry of city/state information in cases where no more specific information is available. Altered main layout of ClassSession database to display all information clearly.	2 hrs
57	NAMES	Data Entry 1 Bio?	Add yes/no field to indicated deceased individuals	Completed (12/27/2001)	<5 min
58	NAMES	Data Entry 1	Add use of popup lists to all contact flag fields	Completed (12/27/2001)	15 min
59	PAYMENTS	Data Entry 1	Add an "anonymous" field to indicate a payment the donor wishes to remain anonymous	Completed (1-4-2002)	<5 min
60	NAMES	Data Entry 1	Remove contact flag fields fro "E-activist", "fax", "alerts", "trade"	Completed (12/27/2001)	10 min
61	NAMES	Bio?	Check automated deconstruction of combined phone numbers to verify transfer of phone number notes	Completed 2-4-2002	Several hrs
62	CUSTOM	Screen 1	Add a "national notes" field	Already implemented	<5 min
63	ClassSession	(main)	Alter current ID to allow demonstration entry of newly synthesized "test" class session records	Completed (12/27/2001)	

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64	NAMES	Data Entry 1?	Only one line is needed for field "origin detail"	Completed (12/27/2001)	<5 min
65	NAMES	Data Entry ½	Move "ClassLoctn" fields from Data Entry 2 to Data Entry 1	Completed (12/27/2001)	
66	NAMES	Activist	Add border to "current committees" field	Completed (12/27/2001)	<5 min
67	NAMES	Activist	Change wording of "NWEI Portland Community" and "NWEI Community" fields to "NWEI community Portland" and "NWEI community all".	Completed (12/27/2001)	<5 min
68	NAMES	Activist	Alter use of values in "Issues 2" value list. These values should be listed under "Focus" instead.	Completed (12/27/2001)	
69	PAYMENTS	Add Payment?	This layout is too large vertically to display on one screen without scrolling. Try to widen and shorten display	Completed (12/27/2001)	
70	PAYMENTS	Add Payment?	"Add by" field lists staff names, but doesn't allow entry. Autoentry value is "network machine name", which doesn't correspond to an employee's name on the NWEI local area network. Consider modifying/changing this field or adding another which allows a worker to indicate the name of an EMPLOYEE.	Completed (12/27/2001) For time being, added "nw_NoteTaker" field	
71	NOTES	(main layout?)	Consider relabelling "NWEI Program" field to "NWEI Dept"	Completed (12/27/2001)	
72	NAMES	(value list)	"Issues 1" value list should be "VS, DE, ..."	Completed (12/27/2001)	
73	ACTIONS	("Actions" value list)	Check this value list, Kristin feels this shouldn't be an exact match to "preferred actions" displayed on NAMES/Activist layout. A new, different list will be provided with better construction of categories	Completed 2-4-2002 using relatively crude approach	
74	NAMES	Activist	"Issues 2" list should be blank – there seems to be no suitable use for this field	Completed (12/27/2001)	
75	NAMES	Activist	An additional field indicating a "second preference for contact method" would	Completed (12/27/2001)	

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			be helpful.		
76	NAMES	Activist	Add "volunteer availability" fields: "geographic region (Portland area)" (NE, SE, NW, SW, westside, outer eastside) "preferred time" (weekday, weekends, evenings) "frequency" (same value list as "contact frequency" field)	Completed (12/27/2001)	
77	NAMES	Activist	Move "date available" field to somewhere near "ACTIVIST?" field	Completed (12/27/2001)	
78	NAMES	???	Add capacity to store Class Location Contact notes which are NOT associated with a specific Class Session. (Provide direction about format for entries.)	Completed (1-4-2002)	15 min
79	NAMES	????	Add portal to list Contact information associated with individual class sessions for a given Class Loctn	Completed (1-4-2002)	20 min
80	NAMES	All layouts	Modify tab order	Completed (1-4-2002)	5 min
81	PAYMENTS	All layouts	Modify tab order	Completed (1-4-2002)	5 min
82	NOTES	All layouts	Modify tab order	Completed (1-4-2002)	5 min
83	CUSTOM	All layouts	Modify tab order	Completed (1-4-2002)	5 min
84	ClassSession	All layouts	Modify tab order	Completed (1-4-2002)	5 min
85	Class Participant	All layouts	Modify tab order	Completed (1-4-2002)	5 min
86	OUTPUT	n.a.	Check for use of NICKNAME field in generation of NAME fields for output	Completed 2-4-2002 As delivered, Ebase does not use nicknames in construction of mailing labels, etc. It seems that nickname is provided primarily to facilitate direct communication between constituents and staff during conversation. Alteration to replace use of first name with nickname is relatively straightforward in terms of replacement, fairly messy in terms of clearly labeling altered fields and comprehensively sweeping the database to ensure their use EVERYWHERE. These fields are used in dozens and dozens of layouts, reports, etc.	15 min

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87	NAMES	Data Entry 1	Add capacity to store NICKNAME2	Completed (1-4-2002)	10 min
88	n.a.	n.a.	DATA IMPORT: Automate assignment of IDs for EFO payment records, if possible. Field "EFO Amount" will have value>0 on layout "The Database" "M Contributions"		30 min
89	n.a.	n.a.	DATA IMPORT: Design layouts to facilitate ID value match between Worksite and "The Database" records	Completed (1-4-2002)	60 min
90	NAMES	Custom find screen	Alter finds to exclude records with "Research address" (data entry screen 2 layout) checked (How about "deceased", "bad address", etc)	QUESTION: Should a single calculated field named "exclude from contacts" or similar be created to cover all these? The finds could get rather complex otherwise. Needs attention.	
91	NAMES	Data entry screen 1	Add "bad address" field (checkbox, Y or blank)	Completed 2-4-2002	5 min
92	ACTIONS	View actions	Reorder display of fields in portal and readjust the widths of fields to me more equal – current differing width are inappropriate to expected values	Completed 2-4-2002	<5 min
93	NAMES	Activist	Check display of alternate "contact: at" fields	Completed 2-4-2002?	<5 min
94	NAMES	Activist	Alter "current committee" field properties to allow entry	Completed 2-4-2002	<5 min
95	ClassSession	NWEI Ebase Class Session Detail	Can "dept" or "division" type information be added to this display and storage?	Completed 2-4-2002fs	
96			Add source code "EV", for "event"	Completed 2-4-2002	<10 min
97			Change current "AP" source code to "AR"	Completed 2-4-2002	<5 min
98	PAYMENTS	Add a Payment	Alter value list for Event to ("lecture","training")	Completed 2-4-2002	<5 min
99	PAYMENTS	Add a Payment	Alter value list for Event to exclude "merchandise". Check related data transfer/transformation scripts for "gift memberships"	Value lists altered 2-4-2002. Scripts still to be checked. Completed 3/12/2002.	<5 min
100	Names	Class Participation	Location name now indicates "numeric values only", which seems incorrect	The displayed fields are calculated fields that were erroneously specified as "number" calculations. Completed 3/6/2002.	20 min.

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101	Names	Class Participation	Can't modify course codes	Course codes displayed here are from a Class Session that an individual has been identified as attending. This is modified in the associated "Class Session" record. The only editable fields on this record are ClassSessionID, Role, and Notes. Completed 3/6/2002.	<5 min
102	Names	Class Participation	Seems like too many "organizers" are identified	All individuals NOT in ID, OR, WA are assumed to be "organizers" in classes they participated in, as directed by Adrienne Sturbois in earlier conversations. Completed 3/6/2002.	<5 min
103	Names	Activist	Committee list currently displayed doesn't reflect current NWEI committees	This requires only an alteration in the value list used for this field, as requested in earlier conversations. Any "master" or "admin" user can alter value lists. Changed to ("Comm Bldg", "Hospitality", "Training Team", "Large Donor", "Curriculum"). Completed 3/12/2002.	10 min
104	Names	Custom screen 1	Natl Categories "member" value should instead be "Sister Earth Institute"	Completed 3/6/2002.	<5 min
105	Names	Data Entry screen 2	"Membership level" field seems confusing compared to "NWEI Mbr level" and "Donor type"	Standard Ebase "Membership level" field integrates only membership dues payment amount. Standard Ebase "Donor Type" field integrates only "contributions". "NWEI Mbr Level" field applies the NWEI approach which integrates both membership and contribution payments into a single "Member Level" designation. Since these are standard Ebase fields described in the Ebase documentation, I'm hesitant to remove or change them. Completed 3/7/2002.	5 min
106	Names	Class Participation	National training info should be imported into the "class participation" information. See "the database" checkbox labeled "Nat'l training 2001".	Need indication of date and/or session information to be assigned for these individuals. Resolved at 3/21/2002 meeting – session identified. Completed 3/22/2002.	
107	Names	Activist	2d contact "or" field is not editable/modifiable	Completed 3/6/2002.	<5 min
108	Names	Data entry screen	Delete 2d set of "During" and "freq" –	These are Ebase standard fields –	10 min.

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
		2?	replace with 2d "by"	consequently, I'm hesitant to remove them. The 1 <sup>st</sup> set of "During"/"Freq" fields are custom additions added at request of NWEI. Completed 3/7/2002?	
109	ClassSession	Detail	Employ drop down list for course code	Completed 3/6/2002.	<5 min
110	ClassSession	Detail	Would be advantageous if the ClassSession database maintained position on a given record when the user moves to NAMES and then returns. Currently places user back at the first record upon return	This is the result if the user simply clicks on the already-open ClassSession window. Repositioning to the first record of the current found set occurs when the user instead uses the "Class" tab to navigate back to ClassSession records. Completed 3/7/2002?	<5 min
111	Names	Class Participation	Can a combined display of class session information from Class Sessions and individual notes be used?	A separate, but similar display could be provided. However, this allows a big possibility for later data problems. It might be hard to clearly indicate on the layout what kind of information should be entered where. Completed 3/12/2002, but needs review. Also see ID 127.	40 min
112	ClassSession	Detail	Value "attendee" in drop-down list for "role" should be replaced with "participant"	Completed 3/6/2002.	<5 min
113	NAMES	Class Participant	Value "attendee" in drop-down list for "role" should be replaced with "participant"	Completed 3/6/2002.	<5 min
114	NAMES	Class Participant	Check assigned "organizer" role for record number 757. Seems like "organizer" shouldn't have been assigned here.	Seems mysterious as of 3/6/2002. Needs attention.	
115	NAMES	Data entry screen 1	"Nickname2" field will not allow entry	Completed 3/6/2002.	<5 min
116	NAMES	Data entry screen 1	"Record Type" not filled in?	All records in the new_Names database used as the source of info for Ebase IMPORT operations have an assigned value. Many of these had the first letter in lower case, however – Ebase expects an uppercase first letter. I've implemented a script step that translates all values to the form expected by Ebase. Testing to see if this is the source of	20 min

ID	Database	Layout	Description	Response	Estimated time used
				the problem is underway. Current scripts seem to work correctly 3/20/2002. .	
117	NAMES	Data entry screen 1	“Origin” not filled in?	This field was inadvertently excluded from the import. It is an easy task to add it. Completed 3/12/2002?.	10 min
118	NAMES	Data entry screen 1	“Donor type” not filled in?	? This is a standard Ebase field, NOT the NWEI Mbr Level computation. Does this understanding clarify? Completed 3/7/2002?	<5 min
119	NAMES	Data entry screen 1	Change contact flag field “Conf” to “Confidential”	See ID 32 above. Completed 3/6/2002.	<5 min
120	NAMES	Data entry screen 1	Add contact flag field indicating “don’t contact for any reason”	Completed 3/6/2002.	<5 min
121	PAYMENTS	View Payment?	Last contribution date not filled in	This is a standard Ebase field. The value probably considers only “contribution” payments, unlike the typical NWEI understanding and may require additional updating of find fields to provide correct values. This field has not been modified from the standard Ebase provision, so I don’t think that this indicates anything that we need to correct. Completed 3/7/2002.	<5 min
122	NAMES	Custom screen 1	“Intro packet sent dates” are missing	This field was inadvertently excluded from the last script importing NWEI field values directly into Ebase. It should be relatively fast to add it to that script Completed 3/12/2002.	10 min
123	NAMES	Data entry screen 1	See Tom Johnson record. Work phone number is missing a digit which is present in “the database”	Result of data editing scripts contains all digits. Result of data transfer to new_Names.fp5 database includes all digits. “Import Work Phone” field in new_Names.fp5 database contains all digits. The last digit therefore seems to have been lost during execution of Ebase’s IMPORT operations. This is confirmed by check of Ebase import calculations, which were constructed in a way that did not account for the possibility of white space being located at the end of an imported phone number. The Ebase calculations were corrected and	2 hr

ID	Database	Layout	Description	Response	Estimated time used
				this project's data import scripts altered to trim these trailing characters from phone numbers. In addition, Extension numbers were separated for passing into Ebase as separate fields (ID 231). <b>Completed 5/2/2002.</b>	
124	NAMES	Activist	NWEI action prefs field contains data, but no data should have been imported	May be a "test" record provided with Ebase. Because of that, the values entered don't reflect the values lists that have been constructed for NWEI use. This record should be deleted. Completed 3/12/2002.	<5 min
125	NAMES	Activist	"Curriculum" is misspelled	Completed 3/6/2002.	<5 min
126	ClassSession	Detail	How is a class added	A new record is created in the ClassSession database. An "Add ClassSession" button was added, to parallel the approach used elsewhere in Ebase Completed 3/6/2002.	20 min
127	NAMES	Class Participation	Individual notes aren't broken into separate fields	<p>Data for which a specific class session can be clearly identified are fundamentally different than data for which a specific Class Session can NOT be clearly identified. My concern here is that if we make the displays look the same then it is likely that similar data will end up being entered in different ways, and this will subvert the information content of the data and the ability of the database design to provide desired information.</p> <p>Many of the comments entered under ID 128 in this document are also relevant to this issue, missing and erratic use of start date and brown bag date make automated linking of individual class attendance records with worksite records very complex.</p>	40 min
128	Class Session	Detail	Where does "Brown bag time" data come from?	<p>Displayed value seems to be value of "Worksite:Time" field (described as "Introductory session time", according to Rolf's documentation provided to me).</p> <p>There is also a "bptime" field in "worksites".</p>	35 min

ID	Database	Layout	Description	Response	Estimated time used
				<p>Although Rolf indicated “time” should be transferred, in my own review of these two fields I find no consistent relationship indicating one field to contain different or more reliable data than the other. They both are assigned values in approximately the same proportion of records. In some records, one value is earlier than the other, while in other records the relationship is reversed. In many cases, the values are equal. In many records, one or both of the values are missing. The brown bag date and start date fields are often one or both missing.</p> <p>I think I need to get a clearer outline of the class terminology that applies to NWEI courses. The distinction between the following terms is not completely clear to me: “mentor”, “presenter”, “brown bag volunteer”, “organizer”, “contact”, “introductory session”, “introduction”, “brown bag”, “presentation”. Is the “start_date” the date the “introductory session” is held? How does “start date” relate to “brown bag date”? Do you have a written description of how this terminology is applied? I think that such a description would be very helpful. I have not been successful at clarifying these terms by examination of the data either.</p> <p>In fact, it would be helpful if a second pass were taken at Rolf’s “Field description” documentation provided to me. I feel that there are a number of cross-referencing or circular descriptions of class terminology in that document that makes it difficult for me to be sure I really understand the data properly.</p> <p>Final direction: Do not import time values,</p>	

ID	Database	Layout	Description	Response	Estimated time used
				and alter time fields provided for use (see ID 173). Completed 3/16/2002.	
129	Class Session	Detail	There are discrepancies between worksites data and the data displayed in Class Session. See “west hills friends church”... (photocopy incomplete...)	When I search my 2-14 copy of worksites, I find two records with this site name. When I do a find in nw_ClassSession, I find both these records to be present. Perhaps I need a little more detail to clearly understand the issue?...Needs attention.	30 min
130	ClassSession	Detail	Can't modify Dept/Div field	Completed 3/6/2002.	<5 min
131	ClassSession	Detail	Can location info be shifted to top of layout?	Completed 3/6/2002.	5 min
132	ClassSession	Detail	SessionID is not modifiable	It must be this way to offer a good solid identification of each class session entered in the database. It's a serial number field, which ensures that every ClassSession record has a unique value. Display altered to try to make this status more obvious. Completed 3/6/2002.	<5 min
133	ClassSession	Detail	Attendee role field doesn't list “participant” as a value	Related to ID 112 above. Completed 3/6/2002.	<5 min
134	ClassSession	Detail	“View as” buttons not working?	Completed 3/6/2002.	10 min.
135	ClassSession	Detail	“Find” results are lost if worker switch to NAMES, etc.	Completed 3/6/2002.	<5 min
136	ClassSession	Detail	Some class locations from worksites not in Ebase (“Friends of Columbia Gorge” – 10 classes listed in worksites database, 6 in ClassSessions database)	Seems like I need a little more detail. When I sort my 2-14 copy of “worksites.fp5”, I only find one record with site name “Friends of Columbia Gorge”. If I sort by “name” instead, I still see only one record. When I sort by linked “ClassLoctnName” identifying “official” “database” records using MemberID, I still see only one record.	40 min
137	ClassSession	Detail	It is desirable to have the (“church”, “work”, “home”, “school”,...) categorization present in the “worksites” database here	Became a relatively complex job because of unusual employment of values lists in “worksites”. It took some time to clear this up. See ID 184 for description of work required. Completed 3/16/2002	
138	Names	Class Participation	A large number of individuals are not matched to a unique class session, probably due to slight differences	I attempted an additional match by week number and this added a few hundred matches. However, the bulk of unmatched	90 min

ID	Database	Layout	Description	Response	Estimated time used
			between the date entered for the individual's attendance and the start date for a class session. Can we match by a range of dates to get more matches?	class attendance records are still not matched to a specific class session. My examinations indicate that about 80-90% of these cases are actually attributable to "where?" values in "the database" that don't match any "site name" value in the "worksites" database.	
139	All	All	Suggested changes to tab labels "NW Class" and "NW Class Part" - rename to "Sites" and "Attendance"	Too bad "sites" is such a firmly entrenched nomenclature. I think it implies "class location" more than "class session" if someone hasn't already learned the overriding definition used at NWEI. Completed 3/12/2002.	15 min
140	ClassSession	?	Need to add a code to course list to represent national training ("NT"?)	Already in database. Completed 3/6/2002.	10 min
141	All		Why is Ebase so much slower than the old FileMaker databases?	There's a lot more info and a lot more computation going on during use of Ebase. A LOT more. Completed 3/7/2002.	
142	All		Are USERS prohibited from doing sorts in Ebase? If so, why?	From examination of an unchanged V1.03 database, it looks like both USER and ADMIN passwords are prohibited from sorting. This is confirmed in recent exchanges between Ebase users and expert developers on the Ebase support mailing list. As to the reasons for this restriction, I can only really guess at present. Long-time Ebase developers have indicated to me that a sort function is available on pull-down menus for reports...I haven't checked this yet, but this might meet NWEI needs. <b>Needs attention.</b>	5 min
143	All		Can fonts be enlarged?	Yes, the only constraint is the size of the layouts, and many of the Ebase layouts have a rather complex overlay of locked and grouped elements. So, although this is definitely doable and conceptually easy, there may be some nagging details accompanying the change. Completed 3/6/2002.	
144	NAMES	Custom find	Custom finds may be	It is possible to improve this performance by	16 hrs

ID	Database	Layout	Description	Response	Estimated time used
			UNACCEPTABLY slow	ensuring that custom finds make use of stored, indexed fields and avoid using unstored calculated fields. This also requires modification of Ebase scripts used to update fast find fields to ensure that these fields are updated using the same action as the Ebase "update find fields" functions. Completed 3/15/2002. .	
145	NAMES	Custom find	"Current members" find doesn't give the proper record count	Completed 3/14/2002.	10 min
146	NAMES	Custom find	"Newsletter recipients" produced no result	<p>Part of the problem is that this find uses the "Newsletter" contact flag, and assumes "Y" indicates a newsletter recipient. This field contains data from "the database" field "newsletter, which only has values for those individuals who as an exception from the usual NWEI procedure do NOT get the newsletter? (Did I get this correctly?) If you don't intend to use this field to indicate both recipients AND those who should NOT get the newsletter, the find will have to be reengineered.</p> <p>I actually would like to discuss the use of this field further. It seems it would be so much more obvious to use this field to indicate both "Yes" and "No", rather than only exceptions to some other more complex rule. In general, I feel that this represents better long-term data management. Fields with "conditional" definitions are difficult to handle and create problems and confusion in the long-run.</p> <p>In a 3/21/2002 meeting, it was decided to implement a calculation for this field, see ID 198.</p> <p>Completed 3/22/2002.</p>	
147	Varied		Source code is not modifiable	The MASTER and ADMIN users can create	<5 min

ID	Database	Layout	Description	Response	Estimated time used
				or modify source codes in several different ways. See the Ebase User's and/or Admin manuals. Completed 3/6/2002.	
148	Payments	Payment History	Seems like the buttons to the left of each portal record here should move the user to an individual record, but they don't	An unchanged copy of Ebase V1.03 does in fact transfer the user to the View Payments layout. I restored that functionality in the NWEI customization. What should be done to these values? Should they be carried forward, translated, some other action? Completed 2/6/2002.	10 min
149	Payments?		How can the data be sorted by EarthShare/Nike contribution?	Is a sort operation the best choice here, or would a find actually be more appropriate? If sorts are needed, login as "admin" or "master" provides this capacity. .	
150	Payment?		How can the data be sorted by membership level?	Is a find a more direct approach to the functions supported by the sort operation? If sorts are needed, login as "admin" or "master" provides this capacity.	
151	Payment		Can Gift membership field titles be renamed	The display labels can be changed. One advantage of the current naming is that it is similar to the naming of the underlying fields. This might be some advantage to someone working with database layouts later. I myself found one of the hardest parts of working with historic NWEI data to be the fact that everyone refers to fields by the label used on layouts, when the name of the field placed there differs. Completed 3/7/2002.	<5 min
152	Payment		Finds performed in "payments" seem to be lost when a user switches to NAMES	The find results are preserved if you switch windows by clicking inside the boundaries of the windows displayed. However, if you switch my using the tabs, the script that is run clears the found set in payments and replaces that with records corresponding to the found set in the database where you hit the tab. Completed 3/7/2002. <b>While working in PAYMENTS, if you select the TRANFER "Names" button, the current found set of payments is used to display the</b>	30 min

ID	Database	Layout	Description	Response	Estimated time used
				corresponding group of NAMES records once you are transferred to the NAMES database.	
153	Payments	View payments	What's the difference between START DATE and POST DATE?	POST DATE is the date a payment is entered into the organization's records, START DATE is used for memberships and might not be the same as the actual date of payment. Completed 3/7/2002.	<5 min
154	Payments		EFO is not yet entered	It is, but in a rough way intended only as an example. All EFO payments are associated with the record of one individual who list EFO as "business/organization". Need to know which record EFO contributions should be indicated to come from. Completed 3/22/2002	<5 min
155	Payments	View payments	Sometimes displays a blank screen	(LB) Doesn't seem that we can reproduce this problem. Completed 3/22/2002.	
156	Payment	Add Payment	What is "Acct Code" and "Acct Entity" Is a pop-down list needed for this field if NWEI doesn't expect to use more than one value?	These are used in organizations where several funding accounts are used. I believe that NWEI will not make use of these fields. I think we can change the value list to offer a default value... Completed 3/15/2002..	10 min
157	Payments	View Payment	No gift membership dollars are attributed to anyone.	A data transfer computation has now been implemented which correctly assigns gift membership payment amount for about 80-90% of the cases applicable. In addition, scripts used in transformation of dues payment records were altered to avoid exporting the same records exported as gift membership receipts, so these records are not double-entered.	1.5 hrs
158	Payment	View Payment	Only record number can be entered for purchaser/recipient, not name	Record number is a much tighter ID, and although a bit more of a pain, will keep your data in tighter synchronization overall. The displayed name field is just a copy of data associated with the entered record number – it isn't really a part of the record to be edited on this layout. Don't think that I'm insensitive to the inconvenience, I just want	10 min

ID	Database	Layout	Description	Response	Estimated time used
				<p>to make sure to suggest a rigorous, tight approach and abandon that only if it seems we can't get it to work well.</p> <p>Alternatively, if you really don't care about tracking the relationship between membership recipient and purchaser, perhaps this isn't needed at all.</p> <p>We could probably add a Portal that displays some very brief information about records that match a last name, an organization name, etc. (Similar to what was done on several of the editing layouts I provided a few weeks back.) However, I felt that this was a small advantage over clicking in the NAMES window and simply doing a FIND there.</p> <p>Completed 3/7/2002?</p>	
159	Payment	Letter layouts	Can wording of letters be changed? Can pages be added?	Yes. Anything you can do to a FileMaker letter layout can be done. Completed 3/7/2002.	<5 min
160	Payment		Can letters be printed one at a time?	<p>(LB – I'll need to check.) Answer from the Ebase support listserv seems to be "no". This type of approach probably requires providing user access to the layout and then allowing a manual print of a single record.</p> <p>When working from the PAYMENTS file, if you select the PRINT "Thank you" button, you are presented with the option of either printing the current record or the entire found set. By contrast, standard or "solicitation" letters associated with the NAMES file seem to work only with the entire found set. I think this is consistent with the Ebase perspective that a "solicitation" letter would be broadcast to a GROUP of persons, while "thank you" letters associated with PAYMENT records may be sent to</p>	30 min

ID	Database	Layout	Description	Response	Estimated time used
161			Can a list be summarized within Ebase	<p><b>INDIVIDUALS.</b></p> <p>Ebase is internally complex. A user who adds a summary field has to be quite careful about exactly which database they create that field in. It would be easy to think you were adding a field to database “X”, only to find that you’d actually added it to database “y”. I suspect that if summary fields were often added, they’d end up eventually sprinkled throughout the Ebase database files, and there probably would be multiple copies of similar fields in different databases, etc.. These kind of “leftovers” from varied operations can eventually make it more difficult to understand, work with, and maintain the database.</p> <p>In addition, a clear naming convention should be used to highlight the fields added by NWEI to distinguish them from standard Ebase fields. My observation is that past field names were constructed in a variety of ways, with different levels of clarity etc. Since this reflects actual NWEI use, it may be unrealistic to expect a consistent naming convention to be reliably applied during continued database use. S</p> <p>As an IDEAL, I’d say that you should probably try NOT to add fields and layouts to your copy of Ebase for ephemeral needs. For instance, it is my current understanding that Ebase V2 was developed specifically from the perspective that such work would be accomplished with data exported to Excel spreadsheets etc. If a FileMaker database is preferred, these types of tasks are better performed using a peripheral FileMaker database to which you export appropriate data. Again, ideally this database would be</p>	10 min

ID	Database	Layout	Description	Response	Estimated time used
				<p>created, named and stored to make the purpose of the database obvious during later file management operations by administrators.</p> <p>We might want to talk a bit about approaches that might work for this purpose, and we'll also want to check on how the ability of the user to export is affected by the password they use to log on.</p>	
162	ClassSession	Detail	More info is needed on this layout (class name, address, etc.)	Seems to be primarily an issue of unmatched ClassSession/Class locn records as per 3/2/1/2002 meeting. See also Ids 201, 207. Needs attention.	
163	ClassSession		(From LB) Some data from "worksites" is not currently transferred due to difficulties of transforming to the new database format. Examples: Brown Bag Volunteer, Mentor,	Should this info be transferred? 3-14-2002 NWEI meeting resolved this. The new database needs the addition of "nw_BookPmtReceived", "nw_BookPmtOwed". "Class organizer", "class contact", and "alternated class contact" will be transferred as records in "ClassParticipants" for a Class Session. These historic records will not be linked to a names record via a NAMES record number, although later editing could add this link. Completed 3/16/2002	10 min
164	ClassSession		(From LB) Computation for individual book cost is now a computation based on course code value. Yet Rolf in his documentation indicates the use of "Course Book Paid 12" to store this value.	Calculation changed. Completed 3/6/2002, also see ID 169.	10 min
165	ClassSession		(From LB) Rolf indicated a need to transfer items pertaining to book costs expected from participants, amount outstanding, etc. These are not currently being transferred, however.	Do these need to be added to the import process? Covered by ID 163.	10 min
166	ClassSession		(From LB) There are a number of "Course" values in the Worksites	Resolved during 3/21/2002 meeting. <b>May still need some attention.</b>	10 min

ID	Database	Layout	Description	Response	Estimated time used
			database which are NOT members of the value list used with that field. (“all”, “D/V”, “book”, “SPN”, “STG”, )		
167	ClassSession		(From LB) There seems to be some ambiguity in “worksites” concerning the relationship/distinction between the “Workplace Contact”, “Current Contact”, and “contact phone”, and “contact phone2” fields.	Resolved at 3/14/2002 meeting. Completed 3/14/2002.	15 min
168	All	All	Alter “Close” scripts to automatically close the additional databases added to the Ebase “standard” as a part of the customization	Completed 3/12/2002.	10 min
169	ClassSession	Detail	Alter the computation for nw_IndivBookCost to assign a default value of \$15.00. An additional script should be created and run which sets all values prior to September 2001 to \$12.50 and all those after August 2001 to \$15.00	Completed 3/16/2002.	
171	ClassSession	Detail	Fill “nw_ManualDept” field with value from Worksites database field “Group name”	The action outlined here was implemented literally on 3/16/2002. But...is this the best approach? Or is the nw_ManualDept field really better called “Group Name/Dept” or something similar? <b>Field name changed to nw_DeptOrGroup</b>	
172	ClassSession	Detail	Change all use of term “brown bag” to “presentation”	Completed on layouts 3/15/2002, conversion of data transformation fields also completed. Some related changes in field labeling on Class Session invoices was also converted. Completed 3/16/2002. .	
173	ClassSession	Detail	Make sure this database has all these fields: nw_PresentationDate (filled with values from “worksites:brown bag date”), nw_PresentationTime (no values imported), nw_ClassStartDate, nw_ClassStartTime (no values imported), nw_CelebrationDate (no values imported), nw_CelebrationTime	I used field names nw_CelebrationDate and nw_CelebrationTime, although I was tempted to use names nw_EndDate and nw_EndTime instead of names that included the term “celebration”. I felt that “celebration” implied a current <i>practice</i> that might be changed or named differently in the future. On contrast, it seems that there will	20 min

ID	Database	Layout	Description	Response	Estimated time used
			(no values imported).	ALWAYS be an “end date” for a course. If the current practice is for the last day to be a celebration, or whether it would be a potluck, etc. there will still be an “end date”. My suggestion is that “nw_EndDate” and “nw_EndTime” would be better names for this field because of this probably greater stability through time. Completed 3/15/2002.	
174	ClassSession	Detail	Change font size to Arial 12 throughout layout	Needs attention.	
175	ClassSession	Detail	Alter display of nw_Notes to be vertically larger, horizontally smaller	Completed 3/15/2002.	10 min
176	ClassSession	Detail	Add display of zip code for class location	Completed 3/15/2002.	10 min
177	ClassSession	Field value import	Translate all historic “SPN” course codes to “NSP”	Completed 3/16/2002	20 min
178	Payment	Add Payment	Set default entry for “Pay Method” to “CK’	Completed 3/15/2002.	5 min
179	(Data transfer from “the database”)		Run script to copy firstname and lastname to firstnameA and lastnameA where firstnameA and lastnameA are empty. This must be run prior to import to members.fp5 database during data translation operations.	Completed 3/16/2002	30 min
180	ClassSession	Detail	Add “Add a ClassSession” button	Completed 3/15/2002.	15 min
181	ClassAttendance		Worksite records on Organizer and contacts should be exported to ClassAttendance	Completed 3/16/2002	1.5 hr
182	Actions	Add Action	Alter displayed value lists for Issues 1 and Actions. The correct values lists are displayed on layout View Actions. Issues2 value list should be empty.	Completed 3/15/2002.	10 min
183	ClassAttendance	(value list edit)	The value list for “roles” should have these values: “contact”, “coordinator”, “mentor”, “presenter”, “participant” (default)	Completed 3/15/2002.	10 min
184	ClassSession	Detail	Add drop down value list field for “site type” using values (“faith”, “gov”,	See also ID 137.	2 hrs

ID	Database	Layout	Description	Response	Estimated time used
			<p>“home”, “public”, “work”)</p>	<p>Layout/value list work completed 3/15/2002.</p> <p>Data transfer is not entirely clean.</p> <p>First, there are two records (group number 1411 and 1294 which record TWO different values for the same class session)</p> <p>Second, the Worksite field “church”, although it looks like a single value field, is actually a multiple valued field using a value list composed of the values (“business”, “Public Agency”, “School (faculty/staff)”, “Non Profit/Organiz”, “Home/Volunteers”, “Community group”, “Church”, and “Test”). The currently displayed check box actually corresponds to the value “business” for this field, while the other similar fields (“home”, “workplace”, etc.) all display a checkbox which enters an “X” into the field.</p> <p>Additionally, even though the “church” field doesn’t have “X” as a value on it’s value list, there are records with have an “X” entered (which will not display under the current “worksites” database layout). Some records have both an “X” AND another value entered for “church” (see group numbers 1245 and 1246 for examples). To transform this data, it was assumed that the class was held at a church if ANY value was entered for the “church” field.</p> <p>Completed 3/16/2002</p>	
185	ClassSession	Detail	<p>Add a “Y” value list field named nw_PortlandMetroArea.</p>	<p>Fields added to layout, and data transformation steps required to load values from “worksites” completed. Completed 3/15/2002.</p>	10 min
186	ClassSession	??	<p>Add layouts corresponding to current “worksites” layouts “Brown Bag/Class Start Invoice” and “Class Coordinator Instructions”.</p>	<p>Layouts transferred 3/18/2002. Needs attention regarding mechanism for accessing layouts.</p>	30 min

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
187	NAMES?	Volunteer/Activist Preferences	Reduce the size of the “current committees” display and move “nwei community” display to place to the right of “current committees”	Completed 3/15/2002.	<5 min
188	NAMES?		Map “The database:special categories” values of “community coord” to set values of “nwei action pref “community coordinator” to “Y”	Needs Attention.	
189	NAMES?	Volunteer/Activist Preferences	Alter labeling of “nwei community Portland” to “Portland metro”.	Completed 3/15/2002.	<5 min
190	NAMES?	Volunteer/Activist Preferences	Alter labeling of “Activist?” to “Current Activist?”	Completed 3/15/2002.	<5 min
191	ClassSession	Detail	Add fields nw_TotalBookPmtExpected, nw_TotalBookPmtReceived, nw_TotalBookPmtDue (calculated)	Fields added to layout, and data transformation steps required to load values from “worksites” completed. Completed 3/15/2002. Also see ID 165.	10 min
192	NAMES	Natl Program Info?	Add display of Origin and Origin detail fields	Completed 3/21/2002	10 min
193	Data transfer (MEMBERS)		Alter calculation of date for Class4 to account for the fact that class4 is a text field, NOT a date field	Completed 3/21/2002	30 min
194	ClassSession	Detail	Modify display of ClassSessionID to allow entry for purposes of “find” operations	Completed 3/22/2002	<5 min
195	ClassSession	Detail	Change portal displaying participants to display RECORD NUMBER rather than LegacyID	Completed 3/22/2002	30 min
196	ClassAttendee	(Value list)	Alter value list to display “presenter” instead of “brown bag volunteer”	Already done in current revision. Completed 3/22/2002	10 min
197	(data transfer)		In creation of Class Attendee records, alter the assignment of “organizer” role to be used for persons outside of OR, WA, ID, and BC (BC is the addition here).	Completed 3/22/2002	10 min
198	NAMES	(script changes)	Create a calculation that will update the value of “nw_Newsletter”, and “nw_AnnualReport”. If the individual is a member with either “current” or “grace” status, set the value to “Y”,	Completed 3/25/2002.	15 min

ID	Database	Layout	Description	Response	Estimated time used
			UNLESS a manual value of “N” (no newsletter) or “C” (complimentary copy) has been set. Whenever “N” or “C” values have been set, no change should be implemented by the script. The update calculation should be run when “replace ALL find fields” script is run.		
199	NAMES	(data transfer)	Populate (ADD DATE) with “creation date” field from worksites	Already implemented.	<5 min
200	(data transfer)		Although the 3/21/2002 meeting indicated that a number of payment quantities in the database will contain text fields, my very fast check showed only one value with form “999 Gift” suffix, and a very few with form “*999”, “999*”, and “999*?”. Am I missing something?	See also ID 204. Needs attention.	1 hr
201	ClassSession	Detail	Several hundred class session records are not showing matched to NAMES records. This seems to be at odds with the intent that new NAMES records would be created for each unmatched WORKSITES records.	Revision of data transfer scripts has helped considerably with this issue. As of 3/25/2002, only 178 class session records in the final database do not have matching “location” records identified in the NAMES database. These situations seem to correspond to “worksite” records that show a “site name” value for which no record has been indicated to contain the “Best Info” for creation of NAMES records. The data transfer scripts therefore have no way of selecting WHICH record to use to create a new NAMES “location” record, and so no record is created. The best remedy is probably to sweep “worksites” records again to ensure that each site name that doesn’t have a matching record in “the database” DOES have a single record marked as having the “best info” for that site among the existing “worksite” records for that “location”. It may be possible to create a	7 hrs

ID	Database	Layout	Description	Response	Estimated time used
				database/layout that displays the records in question, although my guess is that this task would require an hour or two of time. This should only be undertaken if we feel that the time spent creating this display provides at least that much benefit to the person editing the “worksites” records based on that display. Resolved 3/28/2002.	
202	NAMES	OUTPUT Natl Outreach Support?	Tune up layout according to notes provided from A.Sturbois	All suggestions implemented. However, some review of display of class participation is required. Because the number of classes associated with an individual is variable, and in some cases large, it is difficult to design a compact layout which will reliably display all class sessions an individual has participated in. Perhaps a different layout concept is required? Perhaps just a list of course codes corresponding to each TYPE of class a person has attended (rather than a list of EVERY class they’ve attended)? Or a clarification – is it ALL class participation that is needed? Or only the latest? (The latest is an easy addition.) Needs attention	2 hrs
203	ClassSession???		Provide equivalents to WORKSITES layouts “Portland Volunteer Report”, “NW Course Report”, “Contact Labels”, “Class coordinator instructions”, “Layout #35”.	Can “Contact Labels” function be provided by existing Ebase “output” functions?  Other questions: Are these typically used for computer screen checks, or are they printed? Printed one at a time, or for an entire “found set” of records simultaneously?  Draft versions of these layouts are now in place. Most access set up to operate through Ebase OUTPUTS tab.	4 hr
204	(data transfer)		Check on what is happening to payment quantities that contain text in a numeric field (i.e. “B999”, “999*”, etc.)	It seems that the data transfer scripts are stripping out the nonnumeric items during their operation. Completed 3/222/2002.	5 min
205	NAMES	(relationship def)	Check that relationships to “nw_ClassAttendee” carry out	This functionality is consistent with the behavior or Ebase with regards to payments,	<5 min

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
			cascading deletes (if an individual is deleted from NAMES, all related class attendance records are also deleted)	notes, and other records related to a NAMES record, so it seems wise to implement the same behavior with regard to class participation records. Completed 3/25/2002	
206	nw_ClassSession	(relationship def)	Check that relationships to “nw_ClassAttendee” carry out cascading deletes (if a class session is deleted, all related attendance records are also deleted)	Already implemented.	<5 min.
207	Worksites	(data transfer)	I believe we agreed that “group name” values would be used to populate the “nw_ManualDept” field in the “nw_ClassSession” database. However, the copy of the “worksites.fp5” database I have does not provide any values for “group name”. Instead, it looks like the value of “site name” includes mixed data types – in some cases, the value seems to represent a “location” (i.e. “Martha Stewart Home”), in other cases it seems to represent something else (like “test VS session”). An automated transfer of values to “nw_ManualDept” is made more difficult as a consequence.	While the field label on the “worksites” layout is “group name”, the field named “group name” is NOT the field displayed here. The field is actually called “Name”. The data transfer scripts have now been changed to transfer the correct field. Completed 4/2/2002.	<5 min
208	NAMES	(All layouts)	Should all layouts be widened to match the width of the navigation tabs at the top of the screen? Is this “cosmetic” detail worth enough to warrant 30-40 minutes work?	Not critical – postponed for later attention.	
209	PAYMENTS	Payments	Add capacity to automatically insert appropriate identifying info for Gift membership recipients, gift membership purchasers, and Proxy donation original donors without requiring user to switch files and perform finds, etc.	Completed 4/1/2002	1.5 hrs
210	nw_ClassSession	NWEI Class Session detail	Add capacity to automatically insert appropriate identifying info for Gift	Completed 4/1/2002	1.5 hrs

ID	Database	Layout	Description	Response	Estimated time used
			membership recipients, gift membership purchasers, and Proxy donation original donors without requiring user to switch files and perform finds, etc.		
211	NAMES	NWEI Class Participation	Add capacity to automatically insert participant name associated with an individual course participation role.	Completed 4/1/2002	1 hr
212	ACTIONS	(all layouts)	Alter values lists for “action” and “issues1” to be conditional value lists	Completed 4/1/2002	25 min.
213	NAMES	(origin value list)	Imported “origin” values do not exactly match value list for this field (e.g. “Website” vs. “web site”, “Organization” vs. “organization”).	Completed 4/8/2002.	
214	PAYMENTS	VIEW PAYMENTS	Ebase seems to provide this display for “read/find” only use – no modifications are allowed to displayed Ebase fields. However, the NWEI-added fields for Gift recipient ID, etc. actually ALLOW modification. It might be a good idea to alter this behavior to match the standard Ebase behavior for the other fields.	First completed 4/4/2002. However, the Ebase START DATE field was the only field on this display that ALLOWED modification, and was left that way. This seems to be an Ebase design error, as there is a “display only” field for START DATE available for use in the PAYMENTS file. The layout display has been altered to make use of this field, so all fields displayed on this layout are now “read only”. Completed 4/5/2002.	30 min
215	WORKSITES	Accounting fields	Numbers in the accounting fields don’t really match when calculations are double-checked.	I’ve suggested an alternate approach to tracking this information that I think will allow tighter tracking of information: Books delivered and books returned are manually entered. Individual book cost may be manually entered. Expected book payment is calculated from number of books retained multiplied by individual book cost. Total payment received is manually entered. If part of the payment is “forgiven”, this is entered as a Book Pmt Credit. The BookPmtOutstanding is calculated as Expected Book Pmt – Pmt Received – Pmt Credit. This allows explicit tracking of	45 min

ID	Database	Layout	Description	Response	Estimated time used
				credits provided as well as payments received and gives an accurate computation for "outstanding". There are some data import difficulties associated with this change however, due to the varied definitions and uses of the legacy database accounting fields.  Completed 4/8/2002.	
216	NAMES	NWEI Natl Info	Nickname 2 field does not allow entry	Completed 5/1/2002	5 min
217	NAMES	(nickname fields)	These values are apparently not being imported?	925 records in "the database" have "called by" values. Many of these really don't fit as a nickname or a salutation. Only 55 records have values in either "called by A" or "called by B". Only the "A/B" values are imported into Ebase. This makes it APPEAR that nicknames aren't being imported. Data import scripts altered to overwrite value generated for MIDDLE NAME and LAST NAME during Ebase import operations with the exact value entered during work with "the database". Completed 5/6/2002.	10 min
218	NAMES	(nickname fields)	Values from legacy "Called by" fields should be placed in both "nickname" and "salutation" fields in Ebase. The data contained is of mixed type and a later editing project will be required to ensure that values are removed from the appropriate field after import.	Many of the "called by" values in "the database" are lengthy and may not display usefully in the space provided for salutations on Ebase layouts. Data import scripts altered to accommodate. Completed 5/6/2002.	
219	NAMES	Activist	An additional "Contact: At" field is required here.	Completed 5/1/2002	20 min
220	PAYMENTS	Add Payment	Alter location of Temp Name Match display – place towards bottom of data fields.	Completed 5/1/2002	10 min
221	PAYMENTS	Add Payment	Add display of "Anonymous Donation"	Completed 5/1/2002	15 min
222	nw_ClassSession	NWEI Class Session Detail	Alter location of Temp Name Match display – place towards bottom of data fields.	Completed 5/1/2002	<5 min

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
223	nw_ClassSession	(field defn)	\$15 should be the default value for individual book expense after 9/1/2001	Completed 5/1/2002	5 min
224	NAMES	Payment History	Add display of "Pay Method"	Completed 5/1/2002	15 min
225	PAYMENTS	(field/value defn)	Change "Anonymous Donation" to use a value list composed of only "Y" or blank values.	Completed 5/1/2002	<5 min
226	NAMES	Data Entry 1	"Donor type" field value list now seems obsolete – check notes on purpose.	Completed 5/3/2002.	
227	PAYMENTS	(New layouts)	Add letter layouts "Thank you \$100", "Thank you \$250", "TY Stock Gift", "TY ESOR Renewal", and "TY ESOR New Member" from "The database".	Completed 5/1/2002	45 min
228	NAMES	(New layouts)	Add "Regular Renewal Letter" and "Third Renewal Letter" layouts from "The database".	Completed 5/1/2002	45 min
229	NAMES	(data import)	Add mechanisms for importing "volunteer interests" and "special categories" information from "the database".	Completed 5/2/2002.	2.5 hrs
230	NAMES	(data import)	Alter import to load "notes" into "nw_NatlNotes" field if the individual's location is not OR, WA, ID, BC.	Completed 5/1/2002.	15 min
231	NAMES	(scripts)	Alter phone number transformation scripts to separate work phone extensions into a separate field for Ebase import.	Completed 5/1/2002.	20 min
232	NAMES	(data import)	Records with "the database" field "natl category" holding a value of "member" should be have "natl category" value "sister earth institute" set in Ebase (see "NWEI Natl Info" layout)	"The database" "Natl category" field contains a number of apparent date values that don't correspond to the value list used for this field. Completed 5/1/2002.	2 hrs
233	NAMES	(letter generation)	The current procedures seem to provide a default "date" value for letters that is not very reliably useful. Seems like this should be the current day's date by default.		
234	PAYMENTS	(letter generation)	The current procedures seem to provide a default "date" value for letters that is		

ID	Database	Layout	Description	Response	Estimated time used
			not very reliably useful. Seems like this should be the current day's date by default.		
235	CUSTOM	(data import)	Records with setting of "national communications" value "neighborhood S. of P. Proj. Manual" on "The database" layout "Nat'l Outreach" should have value "Neighborhood S. of P. Proj. Manual" set in field nw_NatlCommunications after import into Ebase.	Looks as if the value imported into Ebase contains TWO spaces between "Proj." and "Manual", while the value list in Ebase used only ONE space. A script was implemented during import that changes the TWO place spacing to ONE place. <b>Completed 5/1/2002.</b>	35 min
236	PAYMENTS	(value list mod)	Alter value "pay method list" to include "proxy" to indicate payment record from original proxy donor.	<b>Under consideration.</b>	
237	PAYMENTS	(data import)	Payment amounts should be entered on both proxy and original donor records for proxy donations, "pay method" should be set to "proxy" for original donor's payment record	<b>Under consideration.</b>	
238	PAYMENTS	(data import)	Import "CK" value for "pay method" unless payment is for "InKind", "Proxy" or "Gift membership receipt" payments.	Calculation of "InKind" values completed and transfer fields completed as needed. Script in new_Pmts.fp5 assigns "CK" to records where no value is imported. <b>Completed 5/6/2002.</b>	15 min
239	NAMES	(data import)	Records newly created from Worksite records are marked with Record Type "Ind", which seems inappropriate. Better choice would be newly added value "loctn"	<b>Completed 5/1/2002.</b>	20 min
240	(varied)	(all layouts)	Change navigation tabs now labeled "site" to "class".	<b>Completed 5/1/2002.</b>	10 min
241	NAMES	Payment History/ Home	"NWEI \$YTD" and "NWEI Level" labels actually display different fields on these two layouts. It seems that Home layout has the correct display (which is only updated when "update fast find fields" script is run – the "Payment History" layout displays a calculated field which is updated	The fields displayed on the "home" layout are now also displayed on the "Payment History" layout. <b>Completed 5/2/2002.</b>	5 min

ID	Database	Layout	Description	Response	Estimated time used
			instantly upon entry of a new payment record, but which is not indexable, and consequently results in very slow “find” operations. .		
242	(General)	(NAMES)	Investigate possibility of scripting the running of “fast find field updates” so that this is automatically done once a day.		
243	NAMES	Data entry 1	Alter value lists used for “Ann Rpt” and “Newsletter” fields to use “Comp” instead of “C”.	Requires coordinated change of computations performed by scripts added to execution of “update fast find fields” script. Completed 5/2/2002.	15 min
244	NAMES	(calculation)	Computations of NWEI “level” should include payments made for purchase of gift memberships, but not other types of “event/merchandise” payments.	Already implemented.	5 min
245	NAMES	Home	See if assignment of “NWEI level” value uses same mechanism used for Ebase “standard” member level computation. If NOT, then alter the Ebase calculation to only assign “member/not member” values.	The assigned level values and the conditions for their assignment are taken directly from those stored by Ebase during Ebase installation/setup. The calculations are therefore not easily separated as is desired.	5 min
246	nw_ClassAttendee	(data import)	“Mentor” participants should be imported as well as coordinators, etc.	Completed 5/2/2002.	10 min.
247	NAMES	Payment History	Display nw_AnonymousDonation field in portal	Completed 5/2/2002	15 min
248	nw_ClassSession	(calculations/data import)	nw_BookPmtExpected and nw_BookPmtOwed are not being calculated.	This was left like this because it is impossible to import data into a calculated field. Checks of import data reveal very few problems requiring import and maintenance of “hand-modified” values, however, so these fields were changed to calculations. Completed 5/2/2002.	20 min
249	NAMES	Loctn	The “ClassLoctn” check box is currently a manually set value. This could be changed to a calculation that is checked when Class Loctn Name is filled in, or when a NAMES records		

ID	Database	Layout	Description	Response	Estimated time used
			has been designated as a class session loctn in the nw_ClassSession database. <i>Is this desirable?</i>		
250	PAYMENTS	(data import)	“Gift membership receipt” payment records should have “pay method” values of “proxy”. These same records should have “amount” value equal to the “amount” entered on the corresponding “gift membership purchase” payment record.	Completed 5/6/2002.	35 min.
251	NAMES	(data import)	Transfer data from “notes” to “nw_NatlNotes” only when state is NOT empty and is not in ('OR','WA','ID','BC')	Completed 5/9/2002	20 min
252	nw_ClassAttendee	(data import)	Load contents of nw_IndivLoctnName into nw_Notes. This will allow later decisions about whether to use NWEI Class Participation layout V1 or V2.	I instead added a display of nw_IndivLoctnName to the V1 layout and made display of the IndivNotes field smaller – I felt that this was a better layout overall when it was done this way... Completed 5/9/2002.	20 min
253	NAMES	Payment History	Add display of NWEI Mbr Status field.	Completed 5/9/2002	<5 min
254	NAMES	Home	“Disable” displays of Ebase “\$YTD and “Mbr Status” fields.	Altered field to prevent entry, then “overlaid” each with a white rectangle with the text “(disabled)” on it. Completed 5/9/2002	10 min
255	NAMES	(Payment calc)	Verify that “indefinite” membership duration is calculating correctly.	Memberships of duration “indefinite” ALWAYS have an expiration date that is 730 days greater than the current date. Today the date will be 730 days ahead, tomorrow the date will be 730 days ahead, 1 year from today the date will be 730 days ahead of that date... Completed 5/9/2002.	10 min.
256	NAMES	Data entry 1	Verify that “record type” field is importing.	Overlooked as an accident during data import.	<5 min
257	NAMES	Class Session Detail	Correct action of “activist” navigation tab – current takes user to “actions”.	Completed 5/9/2002.	5 min
258	nw_ClassAttendee	(data import)	Records with matching ClassSessionID	Script to change “organizer” to “participant”	10 min

ID	Database	Layout	Description	Response	Estimated time used
			values should never have “organizer” imported – should be participant.	in these cases added to data import routines. Completed 5/9/2002.	
259	NAMES	Data entry 1 / (data import)	Import “address2” from “worksites” database. NOTE: sometimes “address” is empty while “address2” is filled. Also, contents of “address2” vary.	If “address” is empty and “address2” is filled, contents of “address2” are moved to “address”. Import of “address2” to Ebase “Address\Supplementary” field implemented. Completed 5/9/2002.	15 min
260	NAMES	Data entry 1	Alter value list for “renewals” contact flag to display “Y”, “I”, “N”.	Completed 5/9/2002	5 min
261	nw_ClassAttendee	NWEI Class Attendance V2	Widen display of “LoctnName” and reduce display width of “Notes”. See record number 332 to set appropriate width.	Completed 5/9/2002.	10 min.
262	NAMES	Data entry 1	Add “corporate” to value list for “donor type”	Completed 5/9/2002.	<5 min.
263	(All)	(All)	Startup requires response to several prompts for password.	These problem startups were manifest when starting the database using the nw_ClassSession.fp5 file and on machines without a “file type” established for “.103” file extensions. Tests in office indicate this problem disappears when Ebase is started by opening the “ebase.103” file and when a “.103” file type indicates “*.103” files to be filemaker V5 files. All machines should have the “.103” file type established and should start Ebase using the shortcut now located in <a href="\\memosa\c\ebase\data">\\memosa\c\ebase\data</a> . This shortcut can be copied to any machine on the NWEI network.	20 min.
264	(All)	(All)	Need more streamlined, reliable backup process.	We should set up the zip_backup.pl, WinZip with command line option, and ActivePerl on Memosa to address this need.	
265	NAMES	NWEI Class Attendance V2	Implement TWO portals to the nw_ClassSessionAttendee.fp5 file – one to display “participants”, another to display “class session” volunteers.		
266	nw_ClassSession	Detail	Records are always sorted when		

ID	Database	Layout	Description	Response	Estimated time used
			entering.		
267	NAMES	NWEI Class Attendance V2	Streamline this layout to display less info (remove session ID, notes, participant one/two buttons, duplicate Loctn info) and to be read only.	Completed 6/9/2002.	20 min
268	nw_ClassSession Attendee	NWEI Class Attendance Entry (new)	Create a non-portal layout which displays all info for a single class session participant with more verbose explanations, etc.	Completed 6/9/2002	3 hrs
269	NAMES	Admin 1	Check function of “replace current fast find fields” function to determine whether this provides a workaround to frequent use of the “replace all find fields” function if used properly.	It does, if used religiously on each record that is modified. Completed 6/24/2002.	15 min
270	(Many)	(Many)	Check function provided by “TRANSFER” buttons. Is this safe for use in moving from one layout or file to another without losing “found sets” or are other functions performed which result in this use being unwise?		
271	(Several custom layouts)	(several)	Check on whether “show all records” script step is used in layout navigation scripts. If so, delete that step from scripts so that found sets are retained. (Check NAMES script moving user to home from Natl Info, etc.)	Completed 6/9/2002	20 min
272	(All)	(All)	Check on need for graceful shutdown of FileMaker. Is this helpful primarily on the host computer? Or is it important for clients also?		
273	NAMES	(Envelopes)	Can envelope-addressing font be changed? (Preferred font would be title case and arial, or uppercase and time new roman)	The actual layout used for envelopes is NAMES_.103 layout “Envelope – Portrait”.	20 min
274	(All)	(All)	If a faster computer is purchased for purposes of speeding up Ebase use, should it be used as a host or as a client?	Answer appears to be complex – the greater benefit sometimes results from server upgrade, sometimes from client.	30 min
275	(All)	(All)	Can backups be scheduled on a Win98	I feel the better solution is the use of the	5 min

ID	Database	Layout	Description	Response	Estimated time used
			PC? Is there shareware available that would allow this?	newly designed "nw_server_functions.fp5" database, which allows the administrator to perform startup, shutdown, backup and fast find field updates in useful combinations using single button clicks.	
276	NAMES	NWEI Portland Class Volunteer Report	Mentor and Presenter names not displayed on each row.	There are a few complexities here related to the possibility that one record may represent two different persons. For data imported from legacy databases, the first person listed on a record will be the one whose name is represented. While this will be correct in 90% of records, there will be SOME where this is NOT correct. Newly entered records for which the correct individual is represented will not have this problem. <b>Completed 6/9/2002.</b>	10 min
277	nw_ClassSession Attendee	NWEI Invoice	Class coordinator, presenter, and mentor names not displayed.	Displayed correctly when class participant's "record number" is filled in. Left in this state, although it would be possible to link using a relationship based on SessionAttendeeID and avoid this requirement, if desirable. <b>Completed 6/9/2002.</b>	20 min
278	nw_ClassSession	NWEI Class Session Detail	"Notes" field for individual participant is used almost entirely for telephone numbers.	I recommend leaving "notes" as a general purpose field, but it is possible for the default value to be the home phone number for a related NAMES record in cases where the role is "contact", "coordinator", etc.	
279	nw_ClassSession	(scripts)	Navigation scripts for "list" and "table" still contain undesirable "sort" steps.	Not present in my latest revision. Will have to modify during next database exchange.	10 min
280	(All)		Startup on Memosa server should automatically open all FM files.	I believe this can be done by passing a script to FileMaker for execution in the startup command. Constructed a new FM database which provides buttons and scripts for this and a few other "Ebase server" functions. <b>Completed 6/24/2002.</b>	1.5 hr

ID	Database	Layout	Description	Response	Estimated time used
281	(All)		Written explanation of procedure for setting up "file type" and shortcut for starting Ebase on a new client machine would be helpful.	Completed 6/24/2002.	25 min
282	nw_ClassSession	NWEI Class Session Detail	Would it be possible to display entry of standard class session volunteer roles in a set location and in such a fashion that it isn't necessary to enter the role each time?	Yes, it is possible, but establishment of several specialized relationships and placement of 4 new portals on the form would be required.	
283	NAMES_.103, others?	HOME	Deletion of payment records doesn't result in appropriate update of NWEI YTD and NWEI member status.	Check box for "relookup" operation was set to "do not replace if empty". Change in check box setting corrected problem for "Replace ALL find fields" script. Three additional "SET FIELD" steps were added to the "Replace current find fields" script to correct the problem for that find field updating approach. Completed 7/21/2002.	30 min
284	PAYMENTS	??	Membership level does not seem to be filling in for credit card payments.	I find nothing specific to credit card payments. Look at record 12653, which seems to correctly assign values to membership level fields based on a credit card payment. The cases I found where it did not APPEAR to be functioning properly were cases where the CC payment was made in the PREVIOUS fiscal year. Perhaps the setup of fiscal year in Ebase must be changed. Completed 7/21/2002.	10 min
285	PAYMENTS	??	Found sets in PAYMENTS are lost when going to NAMES and coming back	I just did this on the copy of the database obtained from NWEI without any problem. I think the trick is that you shouldn't use the buttons located on the layouts if you want to preserve FIND results – you instead actually click on the window. In fact, I did a find in PAYMENTS, went to NAMES, did a find in NAMES and then returned to the found set in PAYMENTS... Completed 7/21/2002.	10 min
286	OUTPUT	Mailing labels	Can these be changed to Avery 5160.	Yes, but at this point I'm not willing to do that as a donation to NWEI. Probably this	

<b>ID</b>	<b>Database</b>	<b>Layout</b>	<b>Description</b>	<b>Response</b>	<b>Estimated time used</b>
				will only take 15-30 minutes.	