DRAFT 11

HoRT Book
(Horticultural Resources Tracker)

Training Guide

Version 1.0.5

June 2004
## CONTENTS

Welcome ......................................................................................................................................... 5  
Objectives ................................................................................................................................... 5  
Overview..................................................................................................................................... 5  
Capabilities ................................................................................................................................. 6  
System Requirements ................................................................................................................. 7  
Support Contacts......................................................................................................................... 7  
Training Guide Conventions....................................................................................................... 8  
Class Schedule ............................................................................................................................ 9  
Using the HoRT Book Training Guide ....................................................................................... 9  
Skill Requirements.................................................................................................................... 10  
HoRT Book Version 1.0.5 Training Objectives ....................................................................... 10  
HoRT Book Version 1.0.5 Class Files...................................................................................... 10  
Understanding the HoRT Book Program ................................................................................. 11  

### Lesson 1: Opening and Closing the HoRT Book Program .......................................................... 12  
   Exercise 1: Opening HoRT Book Using the File Menu ....................................................... 12  
   Exercise 2: Opening HoRT Book Using a Mouse................................................................ 13  
   Exercise 3: Closing the HoRT Book Program Properly....................................................... 13  
   Passwords ................................................................................................................................. 14  
   Multiple HoRT Book Programs on One Computer ............................................................... 14  
   Saving a Compressed Set.......................................................................................................... 15  
   Saving a Cloned File................................................................................................................. 15  
   Recover Damaged Files.......................................................................................................... 15  

### Lesson 2: Reviewing the Main Menu........................................................................................... 16  

### Lesson 3: Setting Main Menu Preferences ................................................................................... 18  
   Exercise 4: Setting Main Menu Preferences for Person on Duty and Office Name Fields.. 18  
   Exercise 5: Learning How to Add User Names to the Person on Duty Field ................. 18  
   Exercise 6: Adjusting the Office Name List to Suit Your Preferences .......................... 19  
   Function of the Client ID Warning and the Update Client ID:Ph.No Warning ................. 20  
   Exercise 7: Setting the Client ID Warning Prompt ............................................................ 21  
   Exercise 8: Setting the Client ID Label Prompt ................................................................. 21  
   Exercise 9: Setting Labels to Print on Dymo Labels or on Envelopes ............................ 22  

### Lesson 4: Reviewing the Client Request and Client History Screens.......................................... 23  
   Understanding the Client Request Screen ........................................................................... 233  
   Understanding the Client History Screen ........................................................................... 244  

### Lesson 5: Navigating HoRT Book using Tabs and Buttons......................................................... 255  
   Using Screen Buttons ............................................................................................................. 255  
   Exercise 10: Using Tabs to Navigate HoRT Book ............................................................. 255  
   Exercise 11: Using the Filemaker Book Icon to Navigate the Current Set of Records..... 26  
   Exercise 12: Using the Records Buttons to Navigate the Current Set of Records ........... 266  
   Using the Client Request and Client History Buttons ....................................................... 277  

### Lesson 6: Finding Records Using the Begin Search, Do Search, and Find All Buttons.............. 28
Exercise 13: Using the Begin Search and Do Search Buttons ........................................... 288
Advanced Exercise 1: Using Operator Symbols in Search Criteria to Find a Group of Records .............................................................................................................................................. 30
Advanced Exercise 2: Using Operator Symbols in Search Criteria to Find a Group of Records Having More Than One Field in Common .............................................................................................................................................. 30

Lesson 7: Using the Sort Button ................................................................................................. 311
Exercise 14: Using the Sort Button to Alphabetize Records .................................................. 311

Lesson 8: Using the Delete and New Records Button ............................................................... 322
Exercise 15: Using the Delete Button to Delete a Record ...................................................... 322
Exercise 16: Creating a New Record .................................................................................. 322

Lesson 9: Using the "Incomplete" Buttons on the Main Menu ............................................... 333
Exercise 17: Using the Incomplete Client Inquiries Button .................................................. 333
Exercise 18: Using the Incomplete Lab Results Button ...................................................... 344

Lesson 10: Using the Client Request Screen .............................................................................. 377
Exercise 19: Creating a New Client Record ....................................................................... 377
Exercise 20: Spellcheck the Record ................................................................................. 40
Exercise 21: Completing the Client History Screen ......................................................... 40
Exercise 22: Completing Another Client Request Screen and Client History Screen ......... 40

Lesson 11: Reviewing the Resources Catalog ............................................................................. 42

Lesson 12: Using the Search Resources Catalog Section ..................................................... 444
Exercise 23: Using the Topic and Search Topic Features (Key Word Search) ................. 444
Editing List of General Horticultural Topics ......................................................................... 455
Exercise 24: Using the Other Topic to Search Field and Other Topic Search button ........ 455

Lesson 13: Viewing Information on the Results Screen ............................................................ 466
Exercise 25: Adding Publication Titles from Resources to Client Request ........................... 477
Printing the HoRT Book Reports ........................................................................................... 355

Lesson 14: Using the Resources Catalog ..................................................................................... 50
Exercise 26: Using the Text Search Feature ......................................................................... 51
Exercise 27: Using the Subject Search Feature ................................................................... 51
Exercise 28: Using the Author Search Feature .................................................................... 54
Exercise 29: Practice Creating New Records in the Resources Catalog .............................. 54
Using the Import / Export Records Feature ........................................................................ 56

Lesson 15: Using the E-Mail Merge ............................................................................................ 57
Exercise 30: Practice Using the Perform an E-Mail Merge Feature .................................... 57

Future Updates and Training ........................................................................................................ 59

Final Questions and Answers ....................................................................................................... 59
Welcome

Objectives

1. Record the nature of a client’s question or problem.
2. Record recommendations made to clients for specific problems.
3. Record mailing information for clients and provide a history for each client.
4. Track calls still requiring attention including plant, pest, and soil samples sent to PSU diagnostic labs.
5. Provide reports with monthly totals of the subject of questions asked by clientele as well as totals of Publications sent.
6. Track gardening trends, specific regional pest or other problems requiring further educational programs or information.
7. Provide a means of tracking client database statistics for better reporting to funding resources.
8. Record location and inventory numbers for office resources.
9. Add information on additional resources to the database.
10. Provide a database for resources to research questions or locate a publication for a client.

Overview

The Horticultural Resources Tracker (HoRT Book) is a FileMaker Pro 4 database designed to help extension agents and Master Gardeners answer consumer and commercial clients’ horticultural related questions at the county level.

HoRT Book achieves these objectives through two separate but related components: the Caller Log and the Resources Catalog.

The Caller Log consists of the Client Request and Client History Screens. This HoRT Book feature allows users to maintain a daily contact log of phone calls or office visits, samples sent to diagnostic labs, types of client inquiries answered, client contact and mailing information, and publications mailed. The program can produce annual reports on the number of inquiries by location and topic as well as basic demographic data.

The Resources Catalog contains bibliographic information on each resource including the title, author, length, and date of production. It also contains specific information on ordering the publication or accessing it on the Internet. By performing a text search or an enhanced subject search function HoRT Book can locate specific resources.

Resources are first indexed by general horticultural topics such as Berries and Small Fruit; Tree Fruit; Nut Trees; Vegetables and Field Crops; Herbaceous Ornamentals (Annuals and Biennials, Perennials, and Bulbs); Indoor Plants; Woody Ornamentals (Trees and Shrubs); Turf, Vines, and Groundcovers; Other Pests; and Wildlife. Resources are indexed by sub-topics to a specific crop or cultural practice.
Version 1.0.5 (v1.0.5) of the HoRT Book contains about 700 references to resources from the Penn State College of Agricultural Sciences and other well-regarded sources, and includes fact sheets from both the Entomology and Plant Pathology Departments.

HoRT Book v1.0.5 also provides local offices with an opportunity to inventory the location of resources existing in their offices. A local office can add records for additional resources unique to their location. The import and export feature enables county programs to exchange resources.

Capabilities

1. A Main Menu Screen provides a "home base" from which the user can access the HoRT Book’s major features. The user can navigate the HoRT Book Main Menu using buttons and tabs. Minimal FileMaker experience is required to operate the HoRT Book program.

2. The Caller Log provides an interface for users to perform multiple functions. The Caller Log is comprised of records displayed on the Client Request and Client History screens. A record contains all the basic information required to provide complete, efficient, and effective customer service to a given client. An optional add-in set of files allow the client's address information to be transferred to the College's Mailing List program.

3. At the Client Request Screen, the user enters information about the nature of a client’s inquiry, contact type, and inquiry topic. The Client Request Screen also helps the user track plant, pest, and soil specimens sent to PSU diagnostic labs, record recommendations made, publications mailed, and indicate the need for any further action required to complete customer service. If the client provides an E-mail address, the HoRT Book can generate an E-mail letter to the client based on their record's information.

4. Enter basic client demographic and contact information at the Client Request Screen. Enter additional information and edit existing information at the Client History Screen. Retrieve a previously entered client history by simply entering the client’s phone number. The Client History Screen allows users to track a specific client’s history based on the nature of their interest in Cooperative Extension services.

5. A direct link to the Resources Catalog provides the user with the ability to search for topic-related resources without completely leaving the Caller Log.

6. The Resources Catalog contains a thorough bibliographic database of publications that allows the user to find resources specifically geared to answer a client’s inquiry. Within the Resources Catalog, county programs may add additional resources, edit, and inventory existing resources. HoRT Book enables the user to perform timesaving pre-designed searches for text, author, and subject. Users linked to the Internet can use a direct URL link for applicable publications, particularly disease and entomology fact sheets.

7. A unique feature of the HoRT Book is the incorporation of a graduated subject hierarchy, which allows the user to catalog and find resources according to a unique indexing system designed to be compatible with the Master Gardener Handbook.
8. The Caller Log component of the HoRT Book program generates the following reports:

<table>
<thead>
<tr>
<th>Annual Reports:</th>
<th>Client address and publication list (for mailing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Inquires by Topic</td>
<td>Client Demographics</td>
</tr>
<tr>
<td>Monthly Inquires by Zip Code</td>
<td>Publications Mailed</td>
</tr>
<tr>
<td>Monthly Inquires of Lab Samples</td>
<td>Client Request Form for Manual Entry</td>
</tr>
<tr>
<td>Monthly Summary of Inquires</td>
<td></td>
</tr>
</tbody>
</table>

9. The Export/Import feature allows county offices to share local resource records. This feature allows the user to select records in the Resources Catalog to export or copy to a file. County offices that are also using the HoRT Book program can send this file by E-mail to other Cooperative Extension personnel. Offices can import these additional records into an existing HoRT Book database using the same feature.

**System Requirements**

To use the HoRT Book program, you will need:

1. FileMaker Pro Version 4.0v3 or higher.  
   **Please Note:** Do not use HoRT Book with FileMaker Pro Version 5.

2. PC with Windows 98 or higher.


4. The HoRT Book 1.0.5 User Guide.

5. These FileMaker Pro files (all should be in the same folder):


**Support Contacts**

1. For help with questions or problems with FileMaker as you use the HoRT Book Version 1.0.5 program, please contact Computer Support at 814-865-1229 or send e-mail to AgCompSupport@psu.edu.

2. For help with content related questions concerning a particular resource or horticultural topic, please contact the extension specialist who authored the resource.

3. For help with questions or suggestions related to future improvements to the HoRT Book, please contact Mr. Terry Schettini at 570-963-6842 in the Lackawanna County Office of Penn State Cooperative Extension or send e-mail to him at tschettini@psu.edu.
## Training Guide Conventions

| Italic Text                      | Indicates the name of a disk, file, or icon.  
<table>
<thead>
<tr>
<th></th>
<th>An example file name would be: <em>HortBook.fp3</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step-by-Step instructions</td>
<td>Numbered text will ask you to perform some action. Bulleted text indicates items of information about the previous or upcoming step. Alert items, identified by a check box icon, are key items of information or requests to perform an action. Examples:</td>
</tr>
<tr>
<td></td>
<td>1. From the File menu, choose Print.</td>
</tr>
<tr>
<td></td>
<td>- Be sure to enter mixed-case text.</td>
</tr>
<tr>
<td></td>
<td>✓ Each record must have a value entered in this field.</td>
</tr>
<tr>
<td>Bold Text and Specific keys</td>
<td>Indicate items you enter by typing from the keyboard or pressing specially named keys.</td>
</tr>
<tr>
<td></td>
<td>Type, refers to spelling out the word or character. For example:</td>
</tr>
<tr>
<td></td>
<td>Type <em>York</em> in the County field.</td>
</tr>
<tr>
<td></td>
<td>Your response would be to type the county name in that particular field.</td>
</tr>
<tr>
<td></td>
<td>Press, refers to pressing a specific key on the keyboard.</td>
</tr>
<tr>
<td></td>
<td>At times, you will need to press more than one key to perform a command. For example:</td>
</tr>
<tr>
<td></td>
<td>Press <strong>SHIFT + TAB</strong>.</td>
</tr>
<tr>
<td></td>
<td>Your action would be to press and hold the <strong>SHIFT</strong> key; then, press the <strong>TAB</strong> key, and then release both keys.</td>
</tr>
<tr>
<td></td>
<td>Click, refers to clicking (left-click with a Windows computer) the mouse button when selecting an item on screen. For example:</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Printing Screen</strong> Tab; or, Click the <strong>Preview</strong> button.</td>
</tr>
<tr>
<td></td>
<td>Your action would be to position the mouse pointer on the correct spot, then press and release the mouse button.</td>
</tr>
</tbody>
</table>
Class Schedule

To participate in the HoRT Book training, each participant needs a copy of the HoRT Book Training Guide Version 1.0.5 and an unused copy of the HoRT Book Version 1.0.5 Class files. The Class files contain completed Caller Log records (Client Requests and Client History) to facilitate learning how to use the HoRT Book.

☑ Provide copies of the HoRT Book User Guide Version 1.0.5 for reference during the training.

Adjourn
Welcome
History of the Project
Lesson 1: Opening and Closing the HoRT Book Program
Lesson 2: Reviewing the Main Menu
Lesson 3: Setting Main Menu Preferences
Lesson 4: Reviewing the Client Request and Client History Screens
Lesson 5: Navigating HoRT Book using Tabs and Buttons
Lesson 6: Finding Records Using the Begin Search, Do Search, and Find All Buttons
Lesson 7: Using the Sort Button
Lesson 8: Using the Delete and New Records Button
Lesson 9: Using the "Incomplete" Buttons on the Main Menu
Lesson 10: Using the Client Request Screen
Lesson 11: Reviewing the Resources Catalog
Lesson 12: Using the Search Resources Catalog Section
Lesson 13: Viewing Information on the Results Screen
Lesson 14: Using the Resources Catalog
Lesson 15: Using the E-Mail Merge
Future Updates and Training
Questions and Answers

Using the HoRT Book Training Guide

This Training Guide contains exercises designed to use with an unused copy of the HoRT Book Class files. The HoRT Book User Guide provides additional information about topics covered in the training exercises.

The objectives of these exercises are to:

1. Acquaint the user with how to use the major features of the HoRT Book through exercises with specially prepared class files.

2. Acquaint the user with how to find information in the HoRT Book User Guide.
Skill Requirements

General keyboarding skills.

General understanding of directories, windows, and folders.

General familiarity with using FileMaker Pro 4.0.

HoRT Book Version 1.0.5 Training Objectives

The objectives of this training session are to:

1. Review the HoRT Book project history, purposes, and future updates.
2. Explain how to navigate the HoRT Book program using tabs and buttons.
3. Practice using the basic features of the Caller Log on the Client Request and Client History Screens.
4. Become acquainted with the Resources Catalog.
5. Practice entering data into both the Caller Log and Resources Catalog.
6. Illustrate how the various search functions help you find specific client records and resources.

HoRT Book Version 1.0.5 Class Files

HoRT Book Version 1.0.5 Class files contain completed Caller Log records to facilitate learning without risking corruption of the office's Master files.

Before you begin using the HoRT Book program for office use, download the HoRT Book Version 1.0.5 Master files.

The download link for the Horticultural Resources Tracker (HoRT Book) is http://ict.cas.psu.edu/Support/HortBook.html

☑ Each student using the HoRT Book Training Guide must start with an unused copy of the Class Files; otherwise, the exercises will not perform correctly. Once the exercises in the Training Guide are completed, a student may use his or her Class files for general practice.
Understanding the HoRT Book Program

This "program" is a set of related FileMaker Pro databases. Please refer to page 10 of the HoRT Book User Guide 1.0.5 to view a flow chart outlining the data flow through the HoRT Book process.

The HoRT Book has a Main Menu with buttons to simplify steps when entering or editing records. There are two ways to open the HoRT Book program.

- The guide does not list the .fp3 file extension when referring to program files. Therefore, HortBook.fp3 is simply referred to as HortBook.

Notes:
Lesson 1: Opening and Closing the HoRT Book Program

Exercise 1: Opening HoRT Book with a Shortcut

- A Shortcut is an icon that, if clicked on, will start a program or file located somewhere else on your computer. This type of icon on your desktop is advantageous because if you or someone else throw it into the trash (or recycle bin) then your program is still intact.

- You need to create the Shortcut before you can use it.

1. **Windows**: Open the directory (folder) in which you installed the HoRT Book Class files. You should see the file *HortBook*. Single-click on the file. From the File menu, click **Create Shortcut**. Click and drag the new **Shortcut to HortBook.fp3** icon to your desktop. You may re-name the "shortcut" file to a name of your choice. Ex: *Open HortBook*

2. Double-click on the file named **Open HortBook**.

3. When prompted, type **EDIT** as the password. Click **OK**.

- A dialog box displays the following message:
  "Before adding new records to the Caller Log, edit the Person on Duty and Office Name preference fields. Editing these fields may not be necessary each time you open the HoRT Book program. Thank you!"

4. Click **OK** to continue. The Main Menu Screen displays.

Exercise 2: Opening HoRT Book Using the File Menu

1. Open the FileMaker Pro 4 application.
   Click **Start**; select Programs; select **FileMaker Pro 4.0**; then select **FileMaker**.

2. The Open or new File Dialog Box appears. Click on Open an Existing File and then click **OK**.

3. Open the directory (folder) in which you installed the HoRT Book Class files. Open the file named *HortBook*. When prompted, type **EDIT** as the password. Click **OK**.

- A dialog box displays the following message:
  "Before adding new records to the Caller Log, edit the Person on Duty and Office Name preference fields. Editing these fields may not be necessary each time you open the HoRT Book program. Thank you!"

4. Click **OK** to continue.

5. The Main Menu Screen displays.
If you have recently opened the HoRT Book program, you can click on the filename (HortBook.fp3, HortBook) at the bottom of the File menu to open the HoRT Book program. To be able to do this, you must enable this feature in FileMaker by specifying the number of recently opened files that FileMaker Pro tracks. Set this feature in Application Preferences by selecting from the menu: Edit, Preferences, Application, and specify a number in the “Recently opened files” option.

Exercise 3: Opening HoRT Book Using a Mouse

1. **Open** the directory or folder in which you installed the HoRT Book class files.
2. Double-click on the file named *HortBook*.
3. When prompted, type **EDIT** as the password. Click **OK**.
   - A dialog box displays the following message:
   - "Before adding new records to the Caller Log, edit the Person on Duty and Office Name preference fields. Editing these fields may not be necessary each time you open the HoRT Book program. Thank you!"
4. Click **OK** to continue.
5. The Main Menu Screen displays.

Exercise 4: Closing the HoRT Book Program Properly

Clicking on the "Exit HoRT Book" button will exit FileMaker without creating backups. Clicking on the "Save Backup and Exit HoRT Book" will create backup copies of the *HortBook*, *HortCaller*, and *Resources* files.

1. From the Main Menu, click the **Exit HoRT Book (without creating backups)** button.
2. The files will all close and FileMaker Pro will Exit.
3. You can now safely backup the HoRT Book program files to a disk or backup drive.

Other ways to quit/exit HoRT Book properly include
- From the **File** menu, choose **Exit**.
- From the keyboard, press **Ctrl + Q**.

DO NOT use the "close box" in the corner of the window to close HoRT Book.

DISCUSS the "Save Backup and Exit HoRT Book (preferred method)" from pages 17 - 18 of the User Guide.
Passwords

Passwords allow users to protect program information during day-to-day use. A password dialog box appears when you open a HoRT Book program file. Passwords control the actions users can perform, such as editing, deleting, or browsing records.

In HoRT Book, three levels of password protection give users the ability to perform the tasks that they need to complete without allowing them to inadvertently change or lose information. Use the EDIT password as your primary password for daily use of the files.

For more information on passwords used with the HoRT Book program, please refer to page 66 of the User Guide.

Multiple HoRT Book Programs on One Computer

If you want to maintain multiple copies of the HoRT Book program on your computer, they must be stored in their OWN folders/directories. Do not change individual FileMaker program filenames. If you do, the HoRT Book program will not operate correctly.

Please refer to page 9 in the HoRT Book User Guide 1.0.5 for more information.
Saving a Compressed Set

FileMaker Pro saves automatically as you work. A compressed copy is a compact copy of a FileMaker Pro file that contains all the contents of the original file.

Since the HoRT Book program is now made up of "related" files, you should use the button found on the Main Menu in the Save File As … section to compress your files. Do not attempt to manually save compressed copies of all your files.

Please refer to page 41 in the HoRT Book User Guide 1.0.5 for more information.

Saving a Cloned File

If you make a change, to the program, clones, or copies of these "changed" files, SAVE the file to a disk (floppy, Zip, etc.). A cloned copy of a FileMaker Pro file contains all the contents of the original file with the exception of the data. A cloned copy takes up much less disk space. Make any major changes to a file in a clone of the database, which you can refill with data via an import after you complete the design work. The importance of using a clone for design modifications increases as the database size grows.

Please refer to page 42 in the HoRT Book User Guide 1.0.5 for more information.

Recover Damaged Files

If FileMaker Pro files become damaged due to a power failure, system error, hardware failure, or low storage space, many times FileMaker can automatically repair a damaged file. If you receive the message when opening a file, "This file was not closed properly. FileMaker is now performing a consistency check.", let the process continue. If the file opens, the file has been repaired and you may use it normally. If a file is severely damaged, you may be told to use the "Recover" command to repair the file. If this occurs, follow these steps to use FileMaker's Recover to repair the damaged file. Because the HoRT Book program is made up of "related" files, you should always recover the three main files at least. These are HoRTBook, HortCaller, and Resources. Optionally, you may recover any of the other files in your HoRT Book program folder.

Please refer to page 43 in the HoRT Book User Guide 1.0.5 for more information.

Notes:
Lesson 2: Reviewing the Main Menu

HoRT Book has a Main Menu with buttons to simplify steps when entering or editing records. The Main Menu displayed below is composed of several buttons and one “Preferences” Section. There are five types of buttons on the Main Menu:

- **Tabs** - These buttons appear across the top in all program files. These buttons allow you to navigate easily through various Entry and Search Screens.

- **Incomplete Client Request**: Finds all Client inquiries that **still require attention** with respect to mailing publications, e-mailing, or returning a call with the appropriate information. **Incomplete Lab Results**: Finds all Client inquiries that **required sending a plant, pest, or soil sample** to Penn State University diagnostic labs AND where the results have not yet been returned.
  - See page 15 of the HoRT Book User Guide 1.0.5 for more information on these two features.

- **Reports** - Clicking on the Annual Reports, Client Demographics, or Publications Mailed buttons will take you through the HoRT Book reports process. The Annual Reports include Monthly Inquiries by Topic, Monthly Inquiries by Zip Code, and Summary Monthly Inquiries by Topic. Client Demographics presents the demographic characteristics (race, gender, disabled) for consumer and commercial client inquiries per month as a **simple tally** (each person is counted once) and as a **detailed tally** (each person is counted as many times as they have requests). Publications Mailed extracts the list of Publications sent from the Publications field. You have the opportunity to print the information in 4 separate reports (Total, by Publication, by Month, by Zip).
  - See page 16 of the HoRT Book User Guide 1.0.5 for more information on these two features.

- **Preferences** - HoRT Book will use values entered in these fields. You may change these values at any time. See pages 13 – 14 of the HoRT Book User Guide 1.0.5 for more information.

- **Close Options**
  - The Exit HoRT Book button will exit the program. **DO NOT** use the "close box" in the corner of the window to close HoRT Book.
  - The Save Backup and Exit HoRT Book button will also save copies of the three main files. See Pages 17 - 18 of the HoRT Book User Guide 1.0.5 for more information.
Please refer to page 12 of the HoRT Book User Guide 1.0.5 for more information on the Main Menu Screen.

Notes:
Lesson 3: Setting Main Menu Preferences

A dialog box displays when you open the HoRT Book program to remind you to set these preferences. Editing these fields may not be necessary each time. You may change these values at any time.

The Preferences setting box is located in the middle left of the Main Menu Screen. The HoRT Book program will use values entered in these fields. Please refer to page 13 of the HoRT Book User Guide 1.0.5 for more information on Setting Main Menu Preferences.

Exercises used in this training utilize a specially prepared set of Caller Log records.

Click once on a button. (You do not need to double click.)

Your office will need to develop a user name or ID scheme for the Person on Duty field that meets the unique technological capabilities and staffing needs of your local program.

You can edit the Person on Duty field to include a drop-down menu of the initials or ID’s of staff and volunteers working with the HoRT Book program. Examples: tms for the initials of the individual logging onto the HoRT Book, hotline for hotline staff or volunteers, staff for general staff use.

Exercise 4: Setting Main Menu Preferences for Person on Duty and Office Name Fields

- The Person on Duty field allows a county office to create ID’s for individuals or groups. HoRT Book automatically adds this value to a record when created. Therefore, you will then be able to go back and find all records entered by a certain individual.

1. Open the HoRT Book program using one of the methods learned in Exercise 1 or Exercise 2. Use EDIT as your password.

2. From the Main Menu, click on the Person on Duty field. Click on the menu choice, hotline. “Hotline” displays in the Person on Duty field and the cursor moves to the Office Name field.
- The Office Name field identifies the OFFICE that entered the records - not where the Clients live. To have your office name appear at the top of this list, use the following procedure:

3. From the list provided, click on the office you represent. This office name displays in the Office Name field.

4. Click on the Client Request Tab at the top of the menu. The Client Request Screen displays.

5. Note that the Office name you selected displays in the screen title at the top left of the page, Your County Horticulture Client Request, and “hotline” displays in the Person on Duty field.

- When you are viewing the Client Request, Client History, or Resources Catalog Screens, you will see a large, left-pointing, green arrow in the upper-left corner of all screens. Clicking this button returns you to the Main Menu

6. Click on the Return to Main Menu button.

- When you are viewing the Text Search, Subject Search, or Author Search Screens, clicking on the Exit Search button returns you to the Resources Catalog Screen, and then clicking the green arrow returns you to the Main Menu.

**Exercise 5: Learning How to Add User Names to the Person on Duty Field**

1. Click on the Person on Duty field.

2. Click on EDIT at the bottom of the menu. Use the scroll bar to view the entire list.

3. Type your initials in the blank space below the hyphen (-). Press the hard return key.

4. Practice adding two or three other user names or ID’s. Separate each line by a hard return. When you are done adding ID’s, click OK.

5. Click on the Person on Duty field. Added to the list are your initials and any other user ID’s you typed.

6. HoRT Book does not automatically alphabetize the list of ID’s you enter into the Person on Duty field.

**Exercise 6: Adjusting the Office Name List to Suit Your Preferences**

The Office Name field identifies the OFFICE that entered the records - not the Client's County. An alphabetical list of Pennsylvania counties displays as a drop-down menu when you click in the Office Name field. If the name of your office is near the end of the alphabet, such as York, you may want to simply the selection of your office name by entering it as an option near the top of the drop-down menu.
To have your office name appear at the top of this list, use the following procedure:

1. Click in the Office Name field. A drop-down menu of office names presented in alphabetical order displays.

2. Scroll down to the bottom of the list and click on Edit…. The Edit Value List dialog box for the field Office displays.

3. Scroll to the top of the list and enter your office name in the blank line.

4. When you complete typing, click OK.

5. Click in the Office Name field. Your office name should now be at the top of the list. Once you edit the list to your preference, you should not have to edit this value again. The value remains in place even when you shut and re-open files.

Function of the Client ID Warning and the Update Client ID:Ph.No Warning

The “Client ID Warning” and the “Update Client ID:Ph.No Warning” are two separate functions. They are linked to the "ClientID:Ph.No" field and the "Update Client ID:Ph.No" field, respectively.

☑ The ClientID:Ph.No field is the field that you use to create a relationship between the HoRTBook and the HortCaller files.

Client ID Warning: If you set the Client ID Warning to "No", you will not see the Reminder message and the next Client ID quickly fills the field when you are creating a new Client Request record.

To display or suppress the Client ID Warning prompt, follow the procedure outlined in Exercise 7. Please refer to page 14 of the HoRT Book User Guide 1.0.5 for a review on the purpose of the Client ID Warning.

☑ The Update Client ID:Ph.No field is the field that you use to update a relationship between the HoRTBook and the HortCaller files. You would want to update this information when a client's phone number has changed or when a client who already had been assigned a Client ID number is able to give you a phone number.

Update Client ID:Ph.No Warning: If you attempt to edit an existing ClientID:Ph.No. without using the Update ID/Ph button, this message displays:

"This field is not modifiable."

Your only option is to click OK. If you need to edit the ClientID:Ph.No, you must use the "Update ClientID:Ph.No" field and the Update ID/Ph button. The button will change the linked records in both HortBook and HortCaller - so they will stay linked.

Please refer to page 22 of the HoRT Book User Guide 1.0.5 for a review of creating and updating Client IDs, and on the purpose of the "Update Client ID Warning." In Exercise 18, you can practice using this update function while creating a new client record.
Please refer to page 14 of the HoRT Book User Guide 1.0.5 for a review on the purposes of the Client ID Warning and Client ID Label.

Exercise 7: Setting the Client ID Warning Prompt

The HoRT Book program requires a "Client ID" or a "Phone Number" in order to link the HortBook file to the HortCaller file. Normally you will want to enter a phone number in the ClientID:Ph.No field. When a client will not provide or does not have a phone number, you must enter a ClientID number instead.

1. Return to the Main Menu screen.
2. To display the Client ID Warning, click the Client ID Warning field and select Yes.
   ✓ The ClientID:Ph.No field is the field that creates a relationship between the HoRTBook and the HortCaller files. The Client ID Warning is linked to this field.
3. To suppress the reminder message, return to the Main Menu, click the Client ID Warning field, and select No.
   ✓ The Update Client ID:Ph.No field is the field that updates a relationship between the HortBook and the HortCaller files. The Client ID Warning is NOT linked to this field.

Exercise 8: Setting the Client ID Label Prompt

1. Click on the Client ID label field.
2. Enter your label text, T-
3. Open the Client Request Screen.
4. Click on New to create a new record.
5. Click on the Next Client ID button.
6. The value T-0006 displays in the field.
7. Delete this record.
8. Return to the Main Menu.
Exercise 9: Setting Labels to Print on Dymo Labels or on Envelopes

1. Click on the Print Dymo or Envel field.
2. From the list, choose Dymo.
3. Open the Client Request Screen.
4. Click the Print Labels button.
5. The label will preview. Note that it appears in the upper-left.
6. Click Continue. Click Cancel. (we don't want to print).
7. Return to the Main Menu.
8. Click on the Print Dymo or Envel field.
9. From the list, choose Envel.
10. Click the Print Labels button.
11. The label will preview. Note that the address now appears in the middle of the page.

✓ You should test your choice with a sample record. A one-time adjustment to your HortBook file may be needed. Contact Computer Support for assistance.

12. Click Continue. Click Cancel. (we don't want to print).
13. Return to the Main Menu.
Lesson 4: Reviewing the Client Request and Client History Screens

Understanding the Client Request Screen

The HoRT Book Client Request Screen provides the primary interface between the user and client. You will use this screen to track your clients. You can add or edit records at this screen.

Please refer to page 19 of the HoRT Book User Guide 1.0.5 for a review on the Client Request Screen.

The Client Request Screen consists of six main sections.

- **Client Profile** – Mailing and contact information, including client type. This is the yellow area at the top of the Client Request screen.

- **Client Inquiry** – Description of the client’s question or problem. Notes that may help the person taking or completing the inquiry. Located in the blue area of the screen.

- **Staff Recommendations** – Description of what the staff thinks should be done to help this client. This field is located in the blue area of the screen.

- **Search Resources Catalog** – This section serves two purposes: 1) Record the general topic of a client’s inquiry and 2) Search the Resources Catalog for appropriate resources to answer a client’s need for horticultural information or cultural and pest management recommendations. This section is located in the blue area of the screen.

- **Status of Client Request** – Diagnosis, recommendations, comments, and publications distributed. This section is located near the bottom of the screen in the pink area. There is also a Print Report button to print a Publications to be Mailed report and a Print Label button to print the Client’s label. Two Send E-mail buttons are also in this section as well as a field that tracks if an Email was sent.

- **Status of Sample Sent to PSU Lab** – Tracking plant and disease tissue samples, and recommendations. This section is located at the bottom of the screen in the pink area.
Understanding the Client History Screen

The Client History Screen is an extension of the Client Request Screen. At this screen, the user may enter additional client contact and demographic data, which is not required to answer and research a client's inquiry. The Client History provides a customer service history, recording each time a client contacts the county office.

Please refer to page 20 of the HoRT Book User Guide for a review on the Client History Screen. The Client History Screen consists of three main sections.

- **Client Info** – This field provides extra space for entering additional client contact and mailing information. There are additional fields for entering more contact names and Minor Civil Division.

- **History** - View a log of customer service for the client including date of inquiry, Person on Duty, topics searched, and action taken.

- **Office Use** - A county office can use these fields to remind clients of special events; create a newsletter mailing list; and record demographics of individual clients such as gender, race, and disability.
Lesson 5: Navigating HoRT Book using Tabs and Buttons

Using Screen Buttons

The HoRT Book program provides a set of common buttons to help users perform basic database commands. These buttons appear on the Client Request, Client History, and Resources Catalog Screens.

Exercise 10: Using Tabs to Navigate HoRT Book

1. Open the HoRT Book program.

2. At the Main Menu, set your preferences for the Person on Duty and Office Name fields. Note at the top of the Main Menu Screen the index-like menu tabs. These buttons appear across the top of the screen in all program files. These buttons allow you to navigate easily through various Entry and Search Screens.
   - Press the **TAB** key to move among fields in a record. "Tabbing" always places the insertion point at the end of any text currently in the field.
   - The **TAB** key is located on your keyboard. The Client Request and Client History Tabs are located at the top of the HoRT Book Screen.

3. At the Main Menu Screen, click on the Client Request Tab at the top of the screen. The Client Request Screen displays.

4. At the Client Request Screen, click on the Resources Catalog Tab. The Resources Catalog Screen displays.

5. Return to the Client Request Screen by clicking on the Client Request Tab.
   - When you are viewing the Client Request, Client History, or Resources Catalog Screens, you will see a large, left-pointing, green arrow in the upper-left corner. Clicking this button returns you to the Main Menu.

6. Click on the Return to Main Menu button.
   - When you are viewing the Text Search, Subject Search, or Author Search Screens, clicking on the Exit Search button returns you to the Resources Catalog Screen, and then clicking the green arrow returns you to the Main Menu.

7. Return to the Client Request Screen.
Exercise 11: Using the FileMaker Book Icon to Navigate the Current Set of Records

On the left-hand side of the Client Request Screen, you will see a vertical bar. This is the FileMaker Pro 4.0 status bar.

The “book-like” icon near the top of the status bar is the FileMaker Pro 4.0 book icon. The status and total number of records displays here. It is also a FileMaker control for moving from one record to another record. By clicking on the top or bottom page of the book icon or by using the scroll bar button to the right of the book icon you can browse the current records in the database.

The number located just beneath the lower right corner of the book icon indicates the number of the record you are currently viewing. In the example to the left, you are viewing record 1.

The number located under the word **Records**: indicates the total number of records in the current database. In the example, there are 25 records in the database.

The number located under the word **Found**: indicates the subset or number of records found that met the criteria specified in the most recent Do Search function. In the example, there are 15 records found.

Unsorted indicates the records are not sorted in any particular order. If you sort the records, for example, by last name, the word Sorted appears.

1. Switch between using the notebook icon and the scroll bar button to browse the records.
2. Find the following client records: Melissa Davis, Bob Finn, New Millennium Nursery
3. When you are done, return to record number 1 (Russell Barnhart).

Exercise 12: Using the Records Buttons to Navigate the Current Set of Records

Another set of buttons, which helps you navigate through the current set of records, is located to the top right of the screen. These buttons are the Records buttons: **First**, **Back**, **Next** and **Last**.

1. Make sure that you are looking at the Client Request Screen. The first client record displays with the name Russell Barnhart. If this client record does not display, inform the instructor.
2. Click once on the **Last** button. This button takes you to the last record in the current database. The client record for Anonymous with a ClientID:Ph.No of C-0005 displays.
3. Click on the **First** button. The client record (record 1) for Russell Barnhart displays.
4. Click on the **Next** button. The client record (record 2) for Marisa Boyer displays.
5. Click on the **Back** button. The client record for (record 1) for Russell Barnhart displays.
Using the Client Request and Client History Buttons

The yellow Client Request and Client History buttons simplify switching between the Client Request and Client History Screens for the current client.

To switch to the Client History Screen from the Client Request Screen, click on the yellow **Client History** button.

![Client History]

To switch to the Client Request Screen from the Client History Screen, click on the yellow **Client Request** button.

![Client Request]

Although the Client Request and Client History Tabs at the top of the screen will switch you between screens, you may not stay in the current client's record. Using the yellow buttons to switch between the Client Request and Client History screens will make sure that you stay with the current client's request or history.

Notes:
Lesson 6: Finding Records Using the Begin Search, Do Search, and Find All Buttons

Exercise 13: Using the Begin Search and Do Search Buttons

The HoRT Book program provides a set of common buttons to help users perform basic database commands like finding records. The Begin Search and Do Search buttons appear on the Client Request, Client History, and Resources Catalog Screens.

1. Make sure that you are looking at the Client Request Screen.

2. Clicking the Begin Search button is the first step to find data in any text, number, or date fields. To start the Find, click the Begin Search button.
   - You are now in FileMaker Pro's Find mode. The Find Mode allows you to search for records based on specific criteria. The Find Mode Screen appears as a blank form based on the current screen layout.

3. Click in the field you plan to search for information and enter your search text. Click in the City field (the field next to the CSZ label) and type York.
   - Search requests can be simple or complex, from a single request for a name in a field to multiple requests using operators and omissions. See page 65 of the HoRT Book User Guide 1.0.5 for more information.

4. To perform the Find, click the Do Search button.

5. The Book in the left-hand vertical bar indicates that the program found eight (8) of 25 records. You can now work with the subset of records found by the search.
   - If you click the Do Search button and no records are found, a dialog box displays the message, "No records were found. Please enter new search criteria and try again." Click OK. Click on the Begin Search button and try entering different search criteria.

6. Click on the Find All button. Clicking on the Find All button restores all the records in the current database.

7. Using steps 1 – 6 above, practice using the HoRT Book search features. Use the following criteria to find records in the database.

<table>
<thead>
<tr>
<th>In the field . . .</th>
<th>You type or select from drop-down menu . . .</th>
<th>Number of Records Found</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person on Duty</td>
<td>MG</td>
<td>8</td>
</tr>
<tr>
<td>Client Type</td>
<td>Consumer</td>
<td>12</td>
</tr>
<tr>
<td>Zip Code</td>
<td>17403</td>
<td>2</td>
</tr>
<tr>
<td>Action Taken (Status of Client Request)</td>
<td>Publication Distributed</td>
<td>11</td>
</tr>
<tr>
<td>Publications Distributed</td>
<td>Red Raspberry</td>
<td>2</td>
</tr>
</tbody>
</table>
8. Click the yellow Client History button and open the Client History Screen of the Caller Log.

9. Using steps 1 – 6 from the previous page, practice using the HoRT Book search features. Use the following criteria to find records in the database.

<table>
<thead>
<tr>
<th>In the field . . .</th>
<th>You type or select from drop-down menu . . .</th>
<th>Number of Records Found</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify Special Events</td>
<td>Yes</td>
<td>3</td>
</tr>
<tr>
<td>Gender</td>
<td>Female</td>
<td>5</td>
</tr>
<tr>
<td>City</td>
<td>York</td>
<td>2</td>
</tr>
<tr>
<td>Business</td>
<td>Indoor Foliage Finery</td>
<td>1</td>
</tr>
</tbody>
</table>

Notes:
Advanced Exercise 1: Using Operator Symbols in Search Criteria to Find a Group of Records

Problem: You need to find all the Caller Log (Client Request and Client History) records entered between 1/1/2003 and 3/31/2003. To do this you will need to specify a range of dates. The ellipsis character or three periods (…) is a symbol that defines finding values within a range you specify.

1. Make sure that you are looking at the Client Request Screen.
2. Click the Begin Search button.
3. Click the date field at the top of the screen. Type 1/1/2004…3/31/2004
4. Click the Do Search button. Sixteen (16) records display.
5. Click the Find All button to redisplay all the records.

Advanced Exercise 2: Using Operator Symbols in Search Criteria to Find a Group of Records Having More Than One Field in Common

☑️ If you enter search criteria in more than one field, you perform a logical "and" search -- your find request returns an "intersection" of the two criteria.

Problem: You find a note on your desk left by a volunteer that a Mary from Glen Rock would like a call returned to her regarding the identification of an insect she brought into the office. All volunteers are good-hearted people, but some volunteers take better messages than other volunteers do.

You know the client’s first name is Mary and you know the client lives in Glen Rock.

1. Click the Begin Search button.
2. Click the First Name field. Type Mary.
3. Tab to City field. Type Glen Rock.
4. Click the Do Search button. One (1) record displays.
5. Click the Find All button to redisplay all the records.

☑️ Using FileMaker operator symbols can help you focus your search AND when you enter criteria in more than one field, you narrow your search. Refer to page 65 of the HoRT Book User Guide 1.0.5 for a list of FileMaker operator symbols.
Lesson 7: Using the Sort Button

The HoRT Book program provides a set of common buttons to help users perform basic database commands like sorting records. The Sort button allows you to sort (temporarily rearrange) records in the current set of records based on a set of values you specified.

Please refer to page 31 of the HoRT Book User Guide 1.0.5 for a review of how to use the Sort button.

Exercise 14: Using the Sort Button to Alphabetize Records

1. Make sure that you are looking at the Client Request Screen.
2. To perform the Sort, click the Sort button.
3. The Sort Dialog box displays.
4. To clear fields used in previous Sort functions, click on Clear All. This clears all the fields listed in the right-hand side.
5. From the left-hand side click on Last Name and then click Move.
6. The Last Name field appears in the right-hand side.
   - You can select this field name and then set sorting options. You can sort records in Ascending Sort Order (A-Z or 1-100), Descending Sort Order (Z-A or 100-1), or a custom order based on a field's value list.
7. Select the Last Name field in the right-hand side by clicking on it. Note the Ascending order button at the bottom of the screen is dark. This indicates that the program will sort the records in ascending order or alphabetical order by Last Name.
8. Click the Sort button in the middle of the Sort dialog box.
9. HoRT Book sorts the records in ascending or alphabetical order by Last Name. Browse the records. Note the alphabetical order by the client's last name.
Lesson 8: Using the Delete and New Records Button

Exercise 15: Using the Delete Button to Delete a Record

The Delete button will allow you to delete the current record from the database.

1. Find the record for an ANONYMOUS client with the ClientID:Ph.No of C-0005. You decide to delete this record.

2. To delete the current record, click the Delete button.

☑ There is no undo for deleting a record. You cannot recover a deleted record.

3. You will see a warning message, “Permanently delete this ENTIRE record?”

4. If you do not want to delete the record or are unsure of your action, click Cancel.
   To delete the record, click Delete.

5. HoRT Book deletes the Record. Look at the notebook icon in the left-hand side of the screen. There are now 24 records in the current database.
   - The level of password you enter when opening or starting HoRT Book determines your ability to delete records. Note, in the Resources Catalog, even with a "high" level password HoRT Book does not permit you to delete resource records that are marked as a "State" record.

Exercise 16: Creating a New Record

To add a blank, empty record, click the New button in upper-right portion of the screen.

1. Make sure that you are looking at the Client Request Screen.

2. Click on New to create a blank record for data entry.

3. You will see the following message: "You are about to add a new record to Client Request. Do you want to Continue?" If you choose to click Continue, you will be taken to the New Client Request Record Screen and a new record will be added automatically.

4. Note the Person on Duty, Office Name, and the Date fields fill in automatically.

5. Look at the notebook icon in the left-hand side of the screen. There are now 25 records in the current database.

6. Return to the Main Menu.
Lesson 9: Using the "Incomplete" Buttons on the Main Menu

Clicking either the Incomplete Client Inquiries or Incomplete Lab Results buttons takes you through an automated process to find clients’ inquiries still requiring attention. You can choose to find ALL inquiries still requiring attention or you can find a subset of inquiries based on a Person on Duty ID value.

Please refer to page 15 of the HoRT Book User Guide 1.0.5 for more information on Finding Incomplete Client Inquiries and Incomplete Lab Results.

Exercise 17: Using the Incomplete Client Inquiries Button

☑ Incomplete Client Inquiries: Finds all Client inquiries that still require attention with respect to mailing publications, E-mailing, or returning a call with the appropriate information, including lab results.

1. From the Main Menu, click on the Incomplete Client Inquiries button. The screen to the right displays.

2. You can select a value from the drop-down list.

3. For the purpose of this exercise, select ked at the prompt.

4. Click the Continue button. One Caller Log entry appears for Bill Murray, The Pest Busters, 7878 Thorax Avenue, York PA 17402.

5. Note that the Person on Duty field in the Caller Profile section at the top of the page displays the initials, ked.

Also, note that the left-hand mode status bar shows one record found of 25 existing records. This record is the only incomplete client inquiry taken by the user ked.

Most importantly, note the Inactive Request radio button in the Action Taken section of the screen. The button has a black center, indicating that the user ked selected it in a previous session to indicate that the caller’s inquiry required more attention.

☐ Selecting a specific Person on Duty user name or ID limits the search to Caller Log records that were created by that person.

☑ The Find Incomplete Client Inquiries function locates Caller Log records where a previous user 1) Entered NOTHING in the Completion field; 2) The Completion field is marked as "Inactive Request" and the Lab field is NOT empty and Lab Results IS empty; or 3) The Completion field is marked as "Completed Request" and the Lab field is NOT empty and Lab Results IS empty.
6. Return to the **Main Menu**.

7. Now, click on the **Incomplete Client Inquiries** button and leave the Person on Duty field blank. Note in the left-hand mode status bar that HoRT Book found four (4) of the 25 total records. These five (5) records represent all the client inquiries requiring additional information regardless of user name or ID.

- **Incomplete Lab Results**: Finds all Client inquiries that **required sending a plant, pest, or soil sample** to one of the Penn State University diagnostic labs AND where the results have not yet been returned. The button find records with 1) Nothing entered in the Completion field and the Lab field is NOT empty; 2) The Completion field is marked as "Inactive Request" and the Lab field is NOT empty; 3) The Completion field is marked as "Completed Request" and the Lab field is NOT empty and Lab Results IS empty.

8. Click the Return to Main Menu button.

**Exercise 18: Using the Incomplete Lab Results Button**

1. Click on the **Incomplete Lab Results** button. At the next screen (see graphic on last page from Exercise 17).

2. Leave the Person on Duty field **blank**.

3. Press the **Continue** button.

4. The program finds four records for **Melissa Davis (Herbs R’ Us)**, **Bill Murray (The Pest Busters)**, **Mary Contrary**, and **Anonymous Consumer/Commercial**.

    Note in the left-hand mode status bar that the program finds four (4) of the total 25 records. These 4 records represent all the client inquiries where the caller has not received the lab results.

    Most importantly, note in the Sample to Lab section near the bottom of the screen that a previous user entered information in the Lab field **AND** that the Lab Results field is blank. These records will be found even if they are marked as "Completed Request" in the Completion field. (Example: **Melissa Davis (Herbs R’ Us)** and **Anonymous Consumer/Commercial**.

- **The Find Incomplete Lab Results function includes Caller Log records where a previous user selected the Inactive Request radio button (or neither radio button) and the Results field is blank. If both radio buttons were left blank, you should determine the status of the request and select the appropriate button.**

- **If HoRT Book finds no records, you will see the following message, "No records have been found. Click OK to search again. Click Cancel to return to the Main Menu."** If you choose to click OK and search again, try leaving the ID Field blank. Then click **Continue**. If the search fails again and you have no Incomplete Client Inquiries, click **Cancel** to return to the Main Menu.
Printing the HoRT Book Reports

Clicking on the Annual Reports, Client Demographics, or Publications Mailed buttons on the Main Menu will take you through the HoRT Book reports process.

The Annual Reports include Monthly Requests by Topic, Monthly Requests by Zip Code, Monthly Inquiries of Lab Samples, Summary Reports by Topic and Lab Samples.

**Monthly Inquiries by Topic:**
Tallies and summarizes the general horticultural topics recorded for all Clients. The report presents an alphabetical listing of inquiry topics and for each topic displays a monthly record of the total number of inquiries, as well as subtotals for the type of client (consumer/commercial) making the inquiry. This report will page break by the Client's county listed in their profile.

**Monthly Inquiries by Zip Code:**
Tallies and summarizes the Zip Code or geographical areas from which clients are making inquiries. The report presents a numerically ascending listing of zip codes and for each zip code displays a monthly record of the total number of inquiries, as well as subtotals for the type of client (consumer/commercial) making the inquiry. This report will page break by the Client's county listed in their profile.

**Annual Report: Summary Monthly Inquiries by Topic:**
Tallies and summarizes the general horticultural topics recorded for all Clients. The report presents an alphabetical listing of inquiry topics and displays a monthly record of the totals.

**Samples Sent to Lab Annual Report (by Month, Total):**
Tallies and summarizes the Lab entries recorded for all Clients. These reports will display a monthly and yearly tally of the categories for the Lab and the Sent By fields for both the Consumer and Commercial clients. The reports use the same date selection/design/display format that are used for the Annual Reports.

Client Demographics presents the demographic characteristics (race, gender, disabled) for consumer and commercial client inquiries per month.

**Client Demographics from Client History:**
This report presents the demographic characteristics (race, gender, disabled) for consumer and commercial client requests. This is a *simple* tally. Each person is counted once. This report will display summaries by the Client's county listed in their profile.

**Client Demographics by Client Request:**
This report presents the demographic characteristics (race, gender, disabled) for consumer and commercial client requests. This is a *detailed* tally. Each person is counted as many times as they have requests. This report will display summaries by the Client's county listed in their profile.

The Publications Mailed Reports extracts the list of Publications sent from the Publications field. You have the opportunity to print the information in 4 separate reports.

**Publications Mailed (Total, by Publication, by Month, by Zip):**
These reports will print totals by the Client's county listed in their profile as well as Grand Totals. The 1st report previews and prints by default. The other 3 may be cancelled if not needed.

The printed format of each report contains a title on the first page. On every page prints a header row, page number, and the date. In addition, the reports first display in Preview mode, and then the user can choose to print. Please turn to page 16 the HoRT Book User Guide 1.0.5 for a review on the HoRT Book Reports.

Turn to pages 44–51 of the HoRT Book User Guide 1.0.5 for examples of the HoRT Book printouts.
Lesson 10: Using the Client Request Screen

For additional information on the Caller Log (Client Request and Client History screens), refer to pages 19, 20, and 22-28 in the HoRT Book User Guide 1.0.5.

For additional information on the Field Definitions for the Client Request and Client History Screens, refer to pages 52-53 in the HoRT Book User Guide 1.0.5.

Exercise 19: Creating a New Client Record

Mr. William brings samples of apples he is growing in his home garden to your county office. The sample looks like the apples pictured below. Mr. Williams wants to know what is wrong with his apples. He would like to have a publication to take home to help him grow better apple trees. He is willing to buy a publication. He is also interested in growing strawberries at home.

Clue: a _ _ l e m _ g g _ t

Use these steps to create a new Client in the HoRT Book Program.

1. **Exit/Quit** HoRT Book.

2. Open *HortBook*. Type **EDIT** as the password. Click **OK**.

3. The Message about editing the Person on Duty and Office Name displays. Click **OK**.

4. If necessary, select new values from the drop-down lists for the Person on Duty and Office Name preference fields.

5. From the Main Menu, click on **Client Request** Tab.

6. To add a blank, empty record, click the **New** button in upper-right portion of the screen.
   - The Person on Duty, Office Name and the Date fields fill in automatically.
7. Your cursor is in the ClientID:Ph.No field. It appears in RED. You MUST enter a value in this field before entering any other information in this record. You may enter a Phone Extension (ex: 555-555-1212 Ext. 123) to distinguish callers from the same office or even the same home. This value is the client's unique identification code. In this record, type 717-846-1450

☐ Use the value in the ClientID:Ph.No field to retrieve a repeat client's customer service history and assist in retrieving client contact and mailing information in order to communicate lab results and mail publications.

☐ If you fail to follow the above Alert, an error message appears telling you that "This field cannot be modified until "ClientID:Phone.No" is given a valid value." Click OK (don’t click Revert Field if you have that choice). You must reset the record and start again. Click the New button. If you had entered text in error, it will be cleared. Be sure to enter a ClientID:Ph.No in the RED field before adding information to any other fields.

☐ When a client will not provide or does not have a phone number, you must enter a ClientID number. Click the Next ClientID button. If the Client ID Warning field is set to Yes on the Main Menu, click Proceed. Press Tab.

8. If the Client ID Warning field is set to No on the Main Menu, the next available value appears in the ClientID:Ph.No field.

☐ If you attempt to edit an existing ClientID:Ph.No, without using the Update Client ID:Ph.No button, this message displays:

"This field is not modifiable." You must click OK.

9. Next, finish entering data into the Client Profile fields – The Client Profile includes mailing and contact information, including client type. This section is at the top of the Client Request screen.

10. In the Contact Type field, select a value from the drop-down list. Select Office.

11. In the Client Type field, select a value from the drop-down list. Select Home Gardener or Consumer.

12. Fill-in the remaining fields in the Client Profile section. Press Tab to move between fields. Be consistent with letter case used among records. We recommend that you use mixed case.

    Mr. Terry Williams
    405 Waving Hand Avenue
    York, PA 17403
    Work phone: 717-848-6822
    Email: tw48@netrax.net

☐ The first time you enter a value in the ClientID:Ph.No field along with the client's contact and mailing information, this data becomes part of the Caller Log (Client Request and Client History) database. Entering the same ClientID:Ph.No at a future date will automatically fill in that client's contact and mailing information that already has been completed.
If you need to edit an ALREADY ENTERED ClientID:Ph.No, i.e., you need to update a client’s Phone Number to a new Phone Number or to change a Client ID to a phone number; you must enter a new value in the Update ClientID:Ph.No field. You then click the Update ID/Ph button. This will correctly re-link the client’s customer service history.

13. Next, finish entering data into the **Client Inquiry** field. The Client Inquiry field is a description of the client’s question, problem, or notes that may help the person taking or completing the inquiry. This field is located in the middle of the screen.

   Mr. Williams describes the apples on the trees as nearly ready to pick and having small pierced sunken areas. The fallen apples are full of tiny white worms. You may also note your personal observations of the above samples in this area of the screen.

14. Next, enter a description in the **Staff Recommendations** field of what the staff suggests to help this client. This field is located in the middle of the screen. You may opt to leave this area blank until later.

**Status of Client Request section** - Use the **Action Taken** field to track what the office did for the client. The purpose of the **Completed Request** and **Inactive Request** radio buttons is to identify which client’s inquiries still require attention. The Publications field will hold any publication titles you send to the Client.

   You can edit the **Action Taken** menu to include actions preferred by your office. Drop-down menu options include Diagnosis/Recommendation, Diagnosis/No Recommendation, General Information, and Specimen to PSU Lab, Home Visit, Commercial Visit, and Publication Distributed.

15. You may leave the **Action Taken** field **blank** until you or a staff member finishes researching the client’s problem.

16. In the **Completion field**, mark as either "Completed Request" or as "Inactive Request".

17. You may leave the Publications field **blank** until you or a staff member finishes researching the client’s problem.

**Status of Sample Sent to PSU Lab section** - The Sample to Lab fields track plant, pest, or soil samples, and recommendations. This section is located at the bottom of the screen. Be consistent with letter case used among records. We recommend that you use mixed case.

18. **TAB** to or **click** in the **Lab** field. A general list of lab types displays including, Disease, Insect, Plant ID and Soil. Click on the **action** you wish to select. Fill-in the remaining fields in this section as needed.

   For a complete list of Caller Log (Client Request and Client History) field definitions, refer to pages 52 and 53 of the HoRT Book User Guide 1.0.5
Exercise 20: Spellcheck the Record

After entering a record you may use the Spellcheck Record button to check the spelling of the current record. This button may be used at any time. The Spellcheck Record button also appears on the Resources Screen.

FileMaker’s Spelling command must be enabled before using this button. See Page 67 of the User Guide for more information.

1. To start the Spell Checker, click on the blue Spellcheck Record button.

2. Choose one of the following options if a questionable word appears in the Word box.

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept a suggested spelling</td>
<td>Select a suggestion in the list and click Replace.</td>
</tr>
<tr>
<td>Use your own replacement</td>
<td>For Word, type your replacement. Click Check if you want the new word's spelling verified, or just click Replace.</td>
</tr>
<tr>
<td>Leave the word as it is</td>
<td>Click Skip. The spelling checker skips this word during the rest of the current spelling session.</td>
</tr>
<tr>
<td>Leave the word as it is and add it to the user dictionary</td>
<td>Click Learn.</td>
</tr>
<tr>
<td>Show (or hide) the word in question in context</td>
<td>Click the triangle at the lower right of the dialog box.</td>
</tr>
</tbody>
</table>

3. When the spelling check is complete, click Done.

Exercise 21: Completing the Client History Screen

Client History Screen - The Client History Screen is an extension of the Client Request Screen. At this screen, the user may enter additional client contact and demographic data, which is not required to answer and research a client’s inquiry. The Client History provides a customer service history, recording each time a client contacts the county office.

The yellow Client Request and Client History buttons simplify switching between the Client Request and Client History Screens for the current client.

4. To switch to the Client History Screen from the Client Request Screen, click on the yellow Client History button.

5. Note that the Client Info that you entered in the Client Request Screen links automatically to the Client History Screen.

6. Three main sections comprise the Client History Screen.

- Client Info – This field provides extra space for entering additional client contact and mailing information. There are additional fields for entering more contact names and Minor Civil Division.

- History - View a log of customer service for the client including date of inquiry, Person on Duty, topics searched, and action taken.
Office Use - A county office can use these fields to remind clients of special events; create a newsletter mailing list; and record demographics of individual clients such as gender, race, and disability. You are not required to fill-in all fields

**Practice** switching between the Client History and Client Request Screens. Use the toggle button at the left edge of each line of the History Section to switch back to the Client Request record for that particular client contact. Use the yellow *Client History* button on the Client Request Screen to switch back to the history for that client.

7. In the **Office Use section**, enter any additional information you know about Mr. Terry Williams.

**Exercise 22: Completing Another Client Request Screen and Client History Screen**

Create a new record for another client. This caller brings in a spider with odd markings. See the illustrated sample below. Since it is so unusual, your office decides that it would be a good idea to send it to the Penn State insect lab for identification.

Anthony D. Edwards
113 Poe Lane, York, Pennsylvania 17401
717-848-1616
Email: raven@cingular.com
Found in brick wine cellar.
2” wide
Wife: Virginia
Interested in receiving the newsletter

**Notes:**
Lesson 11: Reviewing the Resources Catalog

The Resources Catalog contains a thorough bibliographic database of publications that allows the user to find resources specifically geared to answer a client’s inquiry. Within the Resources Catalog, county programs may add additional resources, edit, and inventory existing resources. The user can perform timesaving pre-designed searches for text, author, and subject. For those users linked to the Internet, a direct URL link directs your browser to websites with the applicable publications, particularly disease and entomology fact sheets.

1. To switch to the Resources Catalog, click the Resources Catalog Tab at the top of the screen.

2. The Resources Catalog Screen consists of three main sections.
   - **Top (Coral)** – This section contains information about inventory and bibliographic information: resource title, type, date of publication, and author(s).
   - **Middle (Aqua)** - This section contains availability information: publisher or source, whether or not Internet access is available, price, and how to order.
   - **Bottom (Yellow)**- This section contains state and local office information: an abstract, how the resource is indexed, from what part of the country the resource originated, the audience for which the resource was written, and any local office notes.
The user can conveniently review and print fact sheets and other publications while connected to the Internet utilizing the hyperlinks on this screen or on the Results Screen.

In order to view a .pdf file (Adobe® Portable Document Format file), Adobe Acrobat® Reader™ must be installed on the computer. Download this program free from the Internet. Contact Computer Support for more information.

See pages 21, 26, 29, and 33 - 38 of the HoRT Book User Guide 1.0.5 for more information on using the features of the Resources Catalog.

Notes:
Lesson 12: Using the Search Resources Catalog Section

Exercise 23: Using the Topic and Search Topic Features (Key Word Search)

The Topic # fields (Topic 1, Topic 2, and Topic 3) and the Text for Search fields with their associated buttons can be used to: (a) Record the general topic of a client’s inquiry; and, (b) Search for resources to help answer a client’s need for horticultural information or cultural and pest management recommendations.

The Topic # fields allow the user to select general topics from a drop-down menu to document up to three areas of inquiry from a single call. This list of general horticultural topics (see below) also corresponds with terms used to index resources in the Resources file. See pages 63 and 64 of the HoRT Book User Guide 1.0.5 for a complete list of topics used to index resources.

For more information on these search features, please refer to page 25 of the HoRT Book User Guide 1.0.5.

1. Find the record for Terry Williams that you created in the previous exercise.

2. TAB to or click in the Topic 1 field. A general list of horticultural topics display. Mr. Williams is interested in growing apples and apple tree diseases.

3. Using the scroll bar, click on the topic Tree Fruit.

4. Select Other Pests for Topic 2 and leave Topic 3 blank.

✓ Note: When the "Search for in-stock resources only?" search looks for information, it looks for records with information in the Inventory Location field, NOT the # in Inventory field.

5. Next to "Search for in-stock resources only?" click No. If you select Yes, the search will be limited to only those resources that you have listed as being in your local inventory.

6. Click on the Topic 1 Search button to the right of the Topic 1 field. Clicking on the Topic 1 Search button accesses the Resources Catalog. Resources indexed by Tree Fruit display in the Results Screen.

✓ If no records matched the request, you will see a message prompting you to search again. You can click Cancel and try a different search.

7. To return to the Client Request Screen, click the Client Request tab.
Editing List of General Horticultural Topics

The Topic # fields allow you to select and edit general topics from drop-down menus to document up to three areas of inquiry from a single call. This list of general horticultural topics also corresponds with terms used to index resources in the HoRT Book Resources Catalog.

The following is the list of menu options available for the Topic # fields.

- Beekeeping
- Berries and Small Fruit
- Composting
- Food Safety
- Herbaceous Ornamentals - Annuals and Biennials
- Herbaceous Ornamentals - Bulbs
- Herbaceous Ornamentals - Perennials
- Indoor Plants
- License/Regulations
- Nutrition
- Nut Trees
- Other Pests
- Tree Fruit
- Turf, Vines, and Groundcovers
- Vegetables and Field Crops
- Wildlife
- Woody Ornamentals - Shrubs and Trees

You may add additional topics to this list by clicking in a Topic # field to display the drop-down list. Then, scroll to the bottom of the list and click on Edit…. Type (enter) your horticultural topics in this box. If you would like them to be in alphabetical order, you must enter them in alphabetical order. When you finish typing, click OK.

Please refer to page 32 of the HoRT Book User Guide 1.0.5 for more information.

Exercise 24: Using the Other Topic To Search Field and Other Topic Search button

- The Other Topic To Search field and Other Topic Search button will help to narrow a search or find a specific search string of alphanumeric text not specified in the Topics list.
- The Other Topic To Search field searches within ALL these fields in the Resources Catalog: Title, Series Title, Abstract, Notes, and the six Subject-Hierarchical Level fields.

1. Find the record for Terry Williams that you created in the previous exercise. Click in the Other Topic To Search field (dark gray colored).
2. Type apple diseases. Click the Other Topic Search button.
3. If no records matched the request, you will see a message prompting you to search again. You can click Cancel and try a different search.
4. If the program finds records, the Results Screen of the Resources Catalog will display.
5. To return to the Client Request Screen, click the Client Request tab.
Lesson 13: Viewing Information on the Results Screen

☑ To view the Results Screen, perform a Search while at the Client Request Screen. When you click on one of the four Search buttons, the program switches you to the Results Screen.

☑ To view the Results Screen without performing a Search, click the Resources Catalog Tab. Then click the View List button.

The Results Screen in the Resources Catalog provides a listing of publications, fact sheets, and materials that match the criteria of a search. Each line on the Results Screen displays selected fields of information about a separate record or resource.

The information displayed from the left to the right of the screen includes:

- **Title**: Full title of the resource. May include Series Title if listed that way by Publisher/Source.
- **Location**: Location left blank for local office use. Use this field to indicate the office location of the listed resource. For example, Drawer B, Shelf 1, CAB-COF (cabinet behind the coffee maker).
- **Price**: The price of the resource as provided by the publisher or source. When the field is left blank, resources are free for public distribution.
- **Ordering ID**: Number associated with the publication, especially for the purposes of ordering. For example, pub. number AGRS-60 in the PSU Publications catalog is "Plant Bugs on Strawberries".
- **URL**: The Internet access address of the resource. Clicking once on the hyperlink points your browser to the website and if you have an Internet connection, it will attempt to access it.

At the top of the screen, you will see the number of "records found" in the search. Number of "records marked" refers to records ready for transfer to the Client Request Screen.

Adjust the order of the information in each column by clicking on either the **Ascending Sort Order** (A-Z or 1-100) button or the **Descending Sort Order** (Z-A or 100-1) button.

The following buttons switch between the Resources Screen, Results Screen, and Detailed Results Screen:

- **View Resources** button (a yellow, left-pointing arrow) is located at the beginning of each resource listed on the Results Screen. Click it to switch from an entry on the Results Screen to the entire record for that at the Resources Catalog Screen.
The View List button will switch from the Resources Catalog Screen back to the selected list of resources on the Results Screen.

The View Details button switches from the Results Screen to a Detailed Results Screen. This screen includes the resource's abstract, if available.

Some Publication Titles may not completely display on these screens. To see the full title, click in the Title field. The field will expand to show the whole title.

Exercise 25: Adding Publication Titles from Resources to Client Request

In the Action Taken Section of a Client Request, you have the opportunity to add information to the Publications field. The HoRT Book Program can AUTOMATICALLY transfer Publication information from the Resources Catalog to a Client Request.

Refer to page 19 of the HoRT Book User Guide 1.0.5 for a review on the Client Request Screen. Refer to page 29 for How To: Add Pub Titles from Resources to Client Request.

☑️ You MUST start this process by using one of the four Search buttons or the three Search tabs to switch to the Resources Catalog from the current Client Request. When you do this, HoRT Book will search the Resources Catalog from the current client request and display the Results Screen.

1. Find the record for Terry Williams that you created in the previous exercises. The text string apple diseases may still be displayed the Other Topic to Search field. If not, retype apple diseases.

2. Click on the Other Topic Search button.

3. At the Results Screen, click once on the empty box in front of the publication entitled, “Apple Maggot (Tree Fruit Production Guide)”. When you click on the empty box, it is checked.

4. After you “check” or “mark” the Marked to Copy field, the number of "records marked" will appear in RED next to the Add to Client Button.

5. You may click the View Details button to see more info on a Publication. The Marked to Copy field appears on the Results - Detail Screen as well.

☑️ The Find "X" button is optional! You do not need to use it before using the Add to Client button. The Add to Client button will automatically find just the "marked" records. You could use the Find "X" button to verify what records you will be transferring.

6. Check or mark other publications that you think will help address Mr. Williams's inquiry. When all the Publications you need are "marked" for transfer, click the Add to Client button.
7. The program switches you back to the Client Request Screen and the Publication info transfers to the Publications field in the bottom right-hand side of the screen.

Title. Location, Price and URL are brought over. These four fields are separated by a "bar" character. Example:

1) Apple Maggot (Tree Fruit Production Guide) | $13 | http://www.ento.psu.edu/extension/fact_sheets.htm

If the Publication information isn't in the Client record, from the Script menu choose Reset "Add to Client" Publications. Click Continue. Repeat Steps 2 - 7 again.

8. You may repeat Steps 1 - 7 with different Search criteria. Any additional publications transfer to the end of the list.

If you enter the information manually, please follow Guidelines A, B, and C.
By following these guidelines the Publications Mailed reports will be able to "put together" and count Publications with the same name.

a) Each Publication should be on their own line!

b) You aren't required to number each line. But, when records are imported from the Resources Catalog, they are assigned a number automatically.
If you decide to add these yourself, you must use 1) ... 2) ... etc. Don't use a number followed by a period or letters followed by parentheses or a period.

c) The Publications Mailed report will not print any data in the Publications field that appears AFTER a Bar "|" or Dollar Sign "$" character. If you enter these characters manually be aware of this fact. The "|" and "$" characters are added automatically by the import from Resources Catalog process to separate the Publication name from Location, Price and URL information.
Printing Client’s Address and Publications Report

In the Action Taken Section of the Client Request Screen, you have the opportunity to add information to the Publications field. You can print this information using the Print button in this section. See example below.

7/1/2004

Name, Address

Terry Williams
405 Waving Hand Avenue
York PA  17043

Publications to be mailed:

1) Apple Maggot (Tree Fruit Production Guide)  |  $13 |
http://www.ento.psu.edu/extension/fact_sheets.htm

This report will print the date, name, address, and publications to be distributed for the client currently listed on the screen. For printing directions, please refer to page 27 in the HoRT Book User Guide 1.0.5.

Printing Client’s Label or Envelope

In the Status of Client Request Section of a Client Request, you have the opportunity to print a label or envelope for the client currently listed on the screen. The label or envelope may be used to mail the Client Address and Publications report (see above).

The program can print on either Dymo LabelWriter labels or on Envelopes. If you plan to print Client Labels, choose either Dymo or Envel from the Preferences section of the Main Menu. Then, when you click the Print Labels button, it will use that choice.

For printing directions, please refer to page 28 in the HoRT Book User Guide 1.0.5.

MELISSA DAVIS
18 DOGWOOD ST
MOUNT HOLLY SPRINGS PA  17065
Lesson 14: Using the Resources Catalog

To access the Resources Catalog click once on the Resources Catalog Tab from the Main Menu. The Resources Catalog Screen is divided into three main sections.

- **Top (Coral)** - This section contains information about inventory and bibliographic information: resource title, type, date of publication, and author(s).

- **Middle (Aqua)** - This section contains availability information: publisher or source, whether or not Internet access is available, price, and how to order.

- **Bottom (Yellow)** - This section contains state and local office information: an abstract, how the resource is indexed, from what part of the country the resource originated, the audience for which the resource was written, and any local office notes.

Please refer to page 21 in the HoRT Book User Guide 1.0.5 for more information.
Exercise 26: Using the Text Search Feature

Activate the Text Search function by clicking on the Text Search tab. The Text Search finds all resources where the title, abstract, or subject contains the text in the first field or the text in the second field. Enter words delimited by commas in either field.

Please refer to page 33 in the HoRT Book User Guide 1.0.5 for more information.

1. Click on the **Text Search** Tab from the Resources Screen. The **Text Search** Screen displays.

2. Type **strawberry** in Search 1 and **strawberries** in Search 2.

   ✓ If you are looking for a term commonly referred to in both the singular and plural forms, enter both forms to expand your search. For example, instead of typing only "strawberry", type "strawberry" in the Search 1 and "strawberries" in the Search 2.

   ✓ Select the appropriate option at the bottom of the screen for the Inventory toggle. Click the Yes radio button to search resources only available in your local office. Click the No radio button to search all resources in your Resources Catalog.

   ✓ For a resource to be included in the local inventory, you must complete the **Inventory Location** field on the Resources Screen.

3. When you are finished typing text in the Search fields and selecting an option for the Inventory toggle, press **Continue**.

4. The Results Screen for "strawberry" and "strawberries" displays.

   ✓ If no records meet the search criteria, the following message displays, "No records matched this request. Click **OK** to try again. Click **Cancel** to return to the Resources Screen". If you select **OK**, the program returns you to the Text Search Screen to try another search. Selecting **Cancel** returns you to the Resources Screen.

Exercise 27: Using the Subject Search Feature

1. Activate the Subject Search function by clicking the **Subject Search** tab.

2. Click on the **Subject Search** Tab from the Resources Screen. The Subject Search Screen displays. The Subject Search function utilizes the HoRT Book Subject Hierarchy for indexing horticultural resources.

3. Click on **Level 1**. The pop-up or drop-down list of choices for the Level 1 category displays. These categories represent the major groups used to index resources in the HoRT Book.
4. Click on **Berries and Small Fruit** from the pop-up or drop-down menu. Your selection displays in Level 1.

5. Based on your selection for Level 1, a related list of subcategories displays in Level 2. For example, selecting Berries and Small Fruit in Level 1 produces the following Level 2 subcategories:

   - General
   - Berries
   - Small Fruit
   - Tropical

6. **Click on the red arrow to the left of the option Berries.** Your selection displays in Level 2.

7. Based on your selection for Level 2, a related list of crops and subjects displays in Level 3. For example, selecting Berries in Level 2 produces the following Level 3 list of crops and subjects:

   - General
   - Bramble
   - Blueberry
   - Elderberry
   - Gooseberry and Currant
   - Strawberry

8. Click on the **red arrow** to the left of the option **Strawberries.**
   Your selection displays in Level 3.
<table>
<thead>
<tr>
<th>HoRT Book Subject Hierarchy Level 4 and Level 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>(Available for all records. What you select in Level 4, determines what is available in Level 5.)</em></td>
</tr>
<tr>
<td><strong>Level 4</strong></td>
</tr>
</tbody>
</table>
| Cultivar and Species Information | By Type or Use  
| | General  
| | Pollination  
| Cultural Management | General  
| | Establishment  
| | Maintenance  
| | Propagation  
| | Pruning, Thinning, Training  
| | Soil and Fertility Management  
| | Water Management  
| Harvest and Postharvest | General  
| Pest Management | General  
| | Beneficial Organisms  
| | Diseases  
| | Insects  
| | Mites  
| | Nematodes  
| | Weeds  

9. Levels 1-3 work independently from Levels 4-6. The relationships for Levels 4 and 5 are standard. For example, if you choose Cultural Management at Level 4, you can select any of the following options that appear at Level 5.

   General  
   Establishment  
   Maintenance  
   Propagation  
   Pruning, Thinning, Training  
   Soil and Fertility Management  
   Water Management  

10. Level 6 options are based on what group you select for Level 1. Level 6 descriptors are very specific—referring to a variety, cultivar, usage, soil, pest, light, or ornamental characteristic.

- **Leave Levels 1 – 3 blank to search for topics that meet the general criteria of Levels 4 and 5.**

- **The more levels selected the narrower or more specific the search.**

11. Continue selecting Levels 4 – 6 in the method described for Levels 1 – 3.  
   Level 4 – Pest Management  
   Level 5 – Insects
12. When you are finished choosing levels and selecting an option for the **Inventory** toggle, press **Continue**.

13. The **Results Screen** displays a list of resources for subjects as indexed.

**Exercise 28: Using the Author Search Feature**

1. Activate the Author Search function by clicking on the **Author Search** tab.

2. Click on the **Author Search** Tab from the Resources Screen. The Author Search Screen displays.

3. Type **Crassweller** in Last Name. Typing author’s first name in First Name is optional.

4. **Select** the appropriate option at the bottom of the screen for the Inventory toggle.

5. Press **Continue**.

6. The Results Screen displays a list of resources authored or co-authored by Robert Crassweller.

**Exercise 29: Practice Creating New Records in the Resources Catalog**

Your office may enter your own resources in the Resources Catalog (see page 37 of the HoRT Book User Guide 1.0.5). This allows you to perform searches on them as well as to track inventory (see page 36 of the HoRT Book User Guide 1.0.5). In addition, the HoRT Book program allows offices to share their resource information via an Export / Import feature (see page 38 of the HoRT Book User Guide 1.0.5).

We recommend that “approved” individuals in your office perform these steps. To keep inventory numbers accurate and up-to-date, consider establishing standard office procedures. You will need to use a higher-level password to make these changes.

Please refer to page 37 and 66 in the HoRT Book User Guide 1.0.5 for more information.

1. Return to the **Main Menu**

2. **Exit/Quit** HoRT Book

3. **Open** the **HoRT Book program** using the password, **INVENTORY**

4. **Open** the Resources Catalog Screen.

5. Click on the **New Record** button to create a new record.

- The new data entry screen in the Resources Catalog is labeled, **New Resources Record Screen**. The new data entry screen in the Resources Catalog uses a different color scheme. This is to help you know that you are at a different screen.
☑ In addition, there is a **Back button** here instead of the View List button. DO NOT click "Back" until you finish entering the record.

☑ **Press TAB** to move between fields in a record. "Tabbing" always places the insertion point at the end of any text currently in the field. Practice creating new records in the Resources Catalog using the information provided from the following example publications.

**Brooklyn Botanic Garden Gardener's Desk Reference**  
Janet Marinelli, general editor  
Hardcover - 800 pages (October 1998)  
7" x 9"  
0-8050-5095-7  
Henry Holt and Company, LLC.  
115 West 18th Street  
New York, NY 10011  
Retail: $40.00

*The most comprehensive and authoritative -- and easy to use -- reference ever published for North American gardeners. In this landmark volume, you will find the answers to every imaginable plant question! Includes sections on growing tips, botany for gardeners, kitchen gardening, the world's most beautiful gardens, and much, much more. Edited by Janet Marinelli, director of publishing at the Brooklyn Botanic Garden, with contributions by more than 20 BBG experts.*

To order contact: [http://www.henryholt.com/](http://www.henryholt.com/)

**Invasive Plants: Weeds Of The Global Garden**  
Editor Randall, John // Editor Marinelli, Janet  
Paperback  
112 pages  
Language: English  
Publication Date: January 1997  
Publisher: Brooklyn Botanic Garden  
ISBN: 0945352956  
USA/Canada: US $9.95

*Hundreds of horticultural plants have jumped the garden gate, threatening native species. This groundbreaking book tells you which plant invaders are problems in your area and how to control them. It ought to be in every library, and on every gardener's bookshelf!*  
To order contact: [http://www.bbg.org/](http://www.bbg.org/)

**The Plants of Pennsylvania: An Illustrated Manual**  
Ann Fowler Rhoads and Timothy A. Block.  
Illustrations by Anna Anisko  
1,072 pages / 7” x 10”  
Cloth 2000 / 0-8122-3535-5  
$69.95

"Finally, an illustrated guide to written by highly respected authorities! A highly technical but user-friendly manual; every serious amateur and professional naturalist in Pennsylvania will want a copy."

--Larry J. Schweiger, President, Western Pennsylvania Conservancy  
To order contact: [http://www.upenn.edu/pennpress/book](http://www.upenn.edu/pennpress/book)
Using the Export / Import Records Feature

The Export and Import feature allows you to share your office's resource records in the Resources Catalog with other offices using the HoRT Book program. Use the file called Res-import to send records back and forth.

We recommend that “approved” individuals in your office perform these steps. Consider establishing procedures to keep these records accurate and up-to-date. You will need to use a higher-level password to make these changes.

Please refer to page 38 of the HoRT Book User Guide 1.0.5 for more information on the Import and Export Records feature.

Notes:
Lesson 15: Using the E-mail Merge

In a manner similar to a traditional mail merge, the HoRT Book program will generate a text-only letter that can be sent via your E-mail application. You may add a Subject, Signature and Disclaimer message to the E-mail merge letter when you send it. The body of the message is created for you as well as headings (Ex: Client Information) and divider lines.

Please refer to pages 39 - 40 of the HoRT Book User Guide 1.0.5 for more information on the Perform an E-Mail Merge feature. These steps are designed for use with the Outlook and Eudora E-mail applications. They will not work with Netscape Mail for example.

Exercise 30: Practice Using the Perform an E-Mail Merge Feature

☑️ You can still create a sample message in class even though you aren't connected to the Internet. You will delete the message instead of sending it when you’re done.

1. Find the record for Terry Williams that you created in the previous exercises. His e-mail is tw48@netrax.net.

☑️ The HoRT Book program can E-mail just the Current record or the Found Set of records. If a record has an empty Email field, the process will not start. Be sure that each record you plan to send an E-mail to has a valid E-mail address. We will use the E-mail button to send to just the current record.

2. When ready to start the process, click E-mail to send to the record you are viewing.

3. In the confirmation dialog box, click Continue to proceed. You could click Cancel to stop the process at this point.

4. At the E-mail Merge screen, you enter a Subject for the message. Type Information on Apple Maggots.

5. Enter or edit the Signature for the message. Unlike the Subject, once entered the Signature information will be left in place. You may add or edit this information as needed.

6. Enter or edit the Disclaimer for the message. Once entered it will left in place. You may add or edit this information as needed.

7. Review the E-mail message. Scroll down in the white E-mail message field.

8. You MAY EDIT the information if needed. Example: Since there were no Staff Recommendation, highlight and delete that part of the message.

☑️ Note: The URL is too long to fit on the one line. This is why it will wrap to the next line sometimes.
☑ Scroll down in the APPLICATION window to see all four Text Placeholder Fields or make the window size larger. These fields are similar to the Signature and Disclaimer fields. Once text is entered in these fields it will remain from session to session. You may place standard responses to questions in these fields.

9. **Edit** the sample text in Copy Field 1 to reflect your office hours.

10. Click the **Copy Field 1** button. Click **OK** in the "Be sure to click in the E-mail message field where you need the text to go before using the Paste command. Thanks." message.

11. In the white, E-mail message field, **click beneath the York County line** that is part of the signature.

12. From the **Edit** menu choose **Paste**; or,
   Use the appropriate keyboard command. Windows: **Ctrl + V**.

13. Click the large **Continue** button at the top of the screen.

14. FileMaker Pro displays a message asking you to "verify the appropriateness of the content before pressing the final Send key." Click **OK**.

15. Your E-mail application (Ex: Eudora Pro or Outlook) should open. It may take time for the application to process the mail, depending on the number of messages. Allow it to COMPLETE before clicking on any messages.

16. Open the Out mailbox. If the message is there. open it (BUT DON'T TRY TO SEND IT).

17. You could still edit the message at this point or **you could add an Attachment to a message**.

18. DELETE the message.

19. From the **File** menu choose **Quit** or **Exit**.

20. You should be back at the Client Request screen.

**Notes:**
Future Updates and Training

Final Questions and Answers