***HELP FILE FOR HISTORICAL COLLEGE HILL NEIGHBORHOOD DATABASE***

**SECTION I**

**FIELD NAMES:**

Address Code – A shortened, distinguishing representation of each address; starting with three letters designating the street, and ending with three numbers matching the house number for the member.

Address – In the Address form; this is the street address of a residence in the Historical College Hill neighborhood. In the Contact form; it is the business address for a vendor or home address for a supporter that is not a member.

Architecture Style – The architectural style of the historical residence.

Begin Date – The date the officer officially took this office.

Check Date – (Not a required field) it should be included for transactions involving checks.

Check Number – (Not a required field) it should be filled in for transactions involving checks. This field can have duplicate numbers.

City – This field should be defaulted in Maryville, and it can be overridden for a member or contact that needs to receive mail at a non-College Hill address.

Class – A designation for (C – Commercial, R – Residential, EDU – Educational, REL – Religious, NP – Nonprofit, and CITY - City) associated with the type of organization in a member’s address.

Credit – An incoming amount of money or check from a single source.

Date Built – The date of record that the residence was built.

Debit – An outgoing amount of money or check to a single source.

Deposit Date – The date credits are deposited in the bank.

Email – The member or contact’s best email address for availability.

Emergency Name – The best person to contact in the event of an emergency. This person should preferably be local.

Emergency Number – The best phone number to contact the person designated as your emergency contact.

Empty – A yes/no data field that reflects if a residence is unoccupied.

End Date – When the indicated person’s term for this office ends.

Event Code – An abbreviated code that represents the type of event being entered into the system. (See the Code Key page for a complete list of event types and their codes)

Event Date – The date of the planned event.

Event Number – A number assigned when a new event is entered into the database.

Event Time – The scheduled start time of the event.

First Name – In the Member form, this is one member’s first name (duplicate members are allowed to be entered in an address, so multiple names should not be entered). In the Contact form, this field is the first name of an organizational supporter who will receive mailings, or a vendor who works on historical houses.

Is Officer – A yes/no data field to designate a member as an officer in the historical association.

Last Name – In the Member form; this is the member’s legal last name. In the Contact form, it is the supporter or vendor’s last name.

Member ID – For most forms, this is a unique number automatically assigned when each member is entered into the system’s member form. For the Event form, Member ID is not a required field. It can be filled out if someone other than the Social Chair is the main point of contact for an event.

Nickname – The member’s preferred name to be used in correspondence.

Officer Code – A two letter entry representing the member’s assigned office:

* PR – President
* VP – Vice President
* TR – Treasurer
* MC – Membership Chair
* SC – Social Chair
* NC – Newsletter Chair

Officer Title – The full title of the officer’s position included in the listing above.

Original Owner – The original owner of the residence.

Owner At Time – The legal owner of a property at the time of sale or issuance of a work permit.

Parcel ID – The legal parcel ID registered with the state of the address provided.

Phone – The best phone number where this member or contact can be reached. It can be a home or mobile number.

Sale Amount – The price at which a house is sold.

Sale Date – The legal date ownership is transferred to a new owner.

State – This field is defaulted to TN. This setting can be overridden if the member or contact receives mailings in another state.

Start Date – The date this person became a member.

Status Number – The number assigned to identify a change of status (work permit or sale) of a historical residence in College Hill.

Transaction Number – An automatic number assigned to each transaction entered into the transaction table. This number should not be changed by the user, and cannot be easily reset or created again if accidentally deleted.

Unusual Expense – A yes/no data field to represent an expense that is not part of an officer’s ordinary actions. Example: The Membership chair receives a check that is not a dues payment.

Work Permit – The number of the work permit issued by Maryville Codes Enforcement, usually consists of four numbers.

Work Start Date – The date authorized on the work permit for construction to start.

Work End Date – The date authorized on the work permit for construction to be completed.

Zip – This field is defaulted to the College Hill zip code. This setting can be overridden if an alternative zip code is needed, like in a contact’s address for a vendor or supporter.

**SECTION II**

**CODE KEY:**

**AddrCode**:

The rule for AddrCode is the street direction (if included) + first and last letter of the street name + house number. For example 115 Bryan Ln. would be represented as BN115, and 1107 S. Court St. would be represented as SCT1107.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Street** | **Street Code** |  | **Street** | **Street Code** |
| Belle St | BE |  | E Goddard Ave | EGD |
| Bryan Ln | BN |  | Hunter Ln | HR |
| Cates St | CS |  | Indiana Ave | IA |
| Clarion Ave | CN |  | Miller Ave | MR |
| Clark St | CK |  | Montvale Rd | ME |
| N Clark St | NCK |  | Stanley Ave | SY |
| S Court St | SCT |  | Waller Ave | WR |
| W Goddard Ave | WGD |  | Wilson Ave | WN |

**EventCode:**

To understand listed events held by the association, an identifying code is utilized:

|  |  |
| --- | --- |
| **Event** | **EventCode** |
| Annual Meeting | AM |
| Progressive Dinner | PD |
| Neighborhood Clean Up | NC |
| Summer Freedom Picnic | SP |
| Fall Gathering | FG |
| House Walk | HW |
| Luminary Prep | LP |
| Luminary Distribution | LD |
| July 4 Flag Prep | FP |
| July 4 Flag Distribution | FD |

**OfficerCode:**

In order to be able to reflect a history of officers, past officers will have a start year discriminator in their OfficerCode, as seen at the end of the list:

|  |  |
| --- | --- |
| **Officers** | **OfficerCode** |
| President | PR |
| Vice President | VP |
| Treasurer | TR |
| Membership Chair | MC |
| Social Chair | SC |
| Newsletter Chair | NC |
| Member-at-large 1 | M1 |
| Member-at-large 2 | M2 |
| Secretary | SE |
| President (Past is implied) | PR-14 |

**SECTION III**

**FORMS:**

**General Form Buttons:**

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**First Record** – This button takes the user back to the first record of the current table.

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**Previous Record** – This button takes the user back by one record. The only time this button will not function is if you are already on the first record of the table. You will receive the warning message, “You can’t go to the specified record” if you attempt to do this. You must press ‘OK’ to make this warning message go away in order to proceed.

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**Next Record** – This button takes the user forward by one record.

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**Last Record** – This button takes the user to the last record of the current table. If the user wishes to input a new record, they can either use the Add New Member button or press the Last Record button and the Next Record button to reach the first blank record field. Note that hitting last record alone generally still leaves you in a record that contains data. The next record after that is the first blank record for entry.

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**Search** – The search button allows for both search and replace functions.

In order to search the entire database, please ensure that the ‘Look In’ option is set to ‘Current Document’ instead of ‘Current field.’ Current field only searches the current record you are looking at and not all the records the organization has.

The Match option allows you to match Start of Field, which could pull all fields starting with ‘A’ for example. Whole Field, which will pull down only exact matches. For example, if you are looking for ‘Smith,’ with this option, it would pull down Robert Smith but would not find Amy Smithfield. The last Match option, Any Part of Field, would find Robert Smith and Amy Smithfield with this example.

Match Case must be selected in order to make your query case sensitive. It is defaulted to ignore the case of what you are trying to find.

Specific buttons for each form will be defined in the individual form tutorials that follow.

**NOTE:** The field names are related to forms, queries and records, so an explanation of the field contents is in Section I of this help guide.

**A. Address Information Form:**

The purpose of this form is to input or edit historical address related data. Historical addresses should not be deleted to keep a history of each address.

This form includes the following field names:

Address Code (See Section II Code Key for an explanation of address codes)

Address

City

State

Zip

Parcel ID

Class

Original Owner

Data Built

Architecture Type

(Please see Section I for a description of field content by name.)

**Adding New Records:**

If you wish to enter a new address for a vendor (mason, plumber, etc.) or a supporter that is not living in a historical house within the district, please enter this information in the Contact Information form, not the Address form. Contact addresses are included in the mailing list.

**Add New Address Button**:

If you wish to add a new record simply press the Add New Address and input your new data. If the record refuses to add, please look to ensure you have included an Address Code because this field cannot be left empty. If Address Code is left blank, the user will get a persistent error message and must either enter an Address Code or exit the database without saving to escape the error sequence if no new record needs to be added.

**B. Contact Information Form**:

The purpose of this form is to input or edit contact information related to a supporter of the historical organization or vendors that provide services to historical houses.

This form includes the following data fields:

First Name

Last Name

Address

City

State

Zip Code

Phone Number

Email

VendorType

(Please see Section I for a description of field content by name.)

None of the fields are required, but a name should be entered. This form can be used to store an email address, a phone number or an address, as long as it is not an address of a member within the historical district. These addresses should be inputted into the Address table using the Address Information form.

**Adding and Deleting Contact Records**:

Contact information can be added or deleted using the Add Record and Delete Record buttons.

NOTE: If the user accidently clicks the delete record button, a confirmation window will open verifying that the user wants to delete the current record visible in the form. If this button was clicked by accident, simply click the ‘no’ button when this happens.

**C. Credit Transaction Form:**

This form is for entering new credit transactions into the database. It is specifically for transactions adding funds into the account of the association. If you are writing a check from the association to reimburse a member, then the Debit Transaction Form should be used.

The fields of this form include:

Transaction Number

Officer Code (See Section II Code Key for an explanation of these abbreviations)

Member ID

Event Number

Check Number

Check Date

Deposit Date

Credit

Description

(Please see Section I for a description of field content by name.)

**NOTE**: An officer code must be entered with every transaction. Example: Member Chair (MC) for dues transactions; Social Char (SC) for event fund receipts, etc. If you do not know which officer code should be entered, please check with the treasurer before entering data into this form.

If a transaction is to be deleted, the treasurer will need to do this. If you get caught in an error message cycle for entering a transaction by mistake, it would be best to exit the database without saving to cancel the transaction.

**D. Debit Transaction Form:**

This form is for entering new debit transactions into the database. It is specifically for transactions taking funds out of the account of the association, but **positive** values should be entered into the form. The amounts will be processed as negative when the report is generated. If recording checks received from a member, the **Credit** Transaction Form should be used.

This form includes the following data fields:

Transaction Number

Officer Code (See Section II for Officer Codes)

Member ID

Event Number

Check Number

Check Date

Debit

Unusual Expense

Description

(Please see Section I for a description of field content by name.)

**NOTE:** An officer code must be entered with every transaction; Ex. Member Chair (MC) for dues reimbursements, Social Char (SC) for event expenses, etc. If you do not know which officer code should be entered, please check with the treasurer before entering data into this form.

Section II of this help file has a key for Officer Codes.

If a transaction is to be deleted, the treasurer will need to do this. If you get caught in an error message cycle for entering a transaction in error, it would be best to exit the database without saving to cancel the transaction.

**E. Event Information Form:**

This form is for entering new events into the Event table.

The table includes the following fields:

Event Number

Member ID

Event Code (See Section II for Event Codes)

Event Date

Event Time

(Please see Section I for a description of field content by name.)

**NOTE:** If questions arise concerning adding an event, please consult the Social Chair before entering incomplete data. The Member ID field should only be completed if someone other than the Social Chair is responsible for coordinating an event and wishes to be contacted directly.

**F. Member Information Form:**

This form is used to add, modify or delete a member’s record. It is used to hold contact information, emergency contact data and identify officers in the organization.

It holds the following data fields:

Member ID

Address Code

First Name

Nickname

Last Name

Is Officer

Phone

Email

Emergency Name

Emergency Number

Start Date

(Please see Section I for a description of field content by name.)

The Member ID is automatically generated and should not be overridden. Address Code should be filled in if the member lives in a home within the College Hill Historical Neighborhood district. Each member should have their own record in the membership table. Spouses should not be put on the same record.

**NOTE:** Only current officers should be checked off in the ‘Is Officer’ box.

**G. Officer Information Form**

The Officer Information form tracks current and past officers of the Historic College Hill Association. All fields of information are needed for complete historical records of association leadership.

The following fields are part of Officer Information form:

Member ID

Officer Code (See Section II of this help file for the key of field codes)

Begin Date

End Date

Officer Title

(Please see Section I for a description of field content by name.)

Member ID and Officer Code are required fields on this form. You cannot leave these fields blank. If you get caught in a persistent error code because you entered a record by mistake, it would be best to exit the database without saving.

**NOTE:** When officers move from present to past officer status, the start year of their tenure in the post should be added to their Officer Code. Ex M2-13 for past Member-at-Large 2 who took tenure in the position in 2013. This change must be done each year because Officer Codes are required to be an original field.

**H. Property-Work Status**

This form tracks the issuance of work permits and the sale of houses in the Historical College Hill district. The form contains the following fields:

Status Number: an auto-number field that should not be changed. Deleting not advised.

Address Code (See Section II for an explanation of codes used in the database)

Owner At Time

Empty

Sale Amount

Sale Date

Work Permit

Work Start Date

Work End Date

(Please see Section I for a description of field content by name.)

Because this form is used to track different types of actions, most of the fields are optional, but an Address Code should always be included.

**SECTION IV**

**QUERIES:**

The Historical College Hill Neighborhood Association database has several queries set up for use by the officers of the association.

For questions about the data fields or their contents, please consult Section I. of this help file for a description. The key for the code fields are in Section II of this help file.

The current queries include:

A. Address Code Lookup – This query is sorted alphabetically by Address Code and allows the user to see names and an address associated with a given address code. This query is used to provide a drop down menu for the field Officer Code in the Officer table.

B. Address Code Report Query – This query is sorted alphabetically be Address Code to allow the user to see the address and current members residing there. This query is used to general a report for referencing the information associated with the Officer Code field.

C. Balance Sheet Query – This query is used to compile a report showing the credits and debits with a running sum balance of accounts with of the combined total. It could easily be adapted to provide periodic reports.

D. Check Number Lookup – This query is sorted by check number and is designed for easy lookup of transaction number and all pertinent data associated with a known check number including deposit date.

E. Deposit Query – This query is used to compile the Deposit Report, which summarizes deposit payments grouped by month given a user defined date range for deposit date. This query can be used to produce monthly, annual or periodic deposit reports.

F. Dues Status – This query is designed for easy look up of dues payment by name.

G. Event Summary – This query summarizes the income and expenses associated with each association event. It is sorted by event date.

H. Expense Query – This query will provide expenses paid out by the organization summarized by officer and for a period that is user defined (monthly, yearly, etc.).

I. Member ID Query – This query allows lookup of members by Member ID number, name, or address/address code to make the transition to the database easier. It is ordered by Member ID.

J. Membership Report Query – This query is used to compile the Membership List for the association providing member names, addresses, officer information, and emergency contact information.

K. Property Work Status – This query will allow for the look up of all status actions by address.

**SECTION V**

**REPORTS:**

The following reports are compiled based on database queries:

A. Address Code Report – This report is providing a formatted list including the address, member and officer status for a given address sorted alphabetically by Address Code. It allows members to look up an Address Code independently of the database, if needed.

B. Balance Sheet Report – This report provides a running total of income and expenses for the organization.

C. Deposit Report – This report groups and totals deposits by the month. It also groups transactions by deposit date within the month.

D. Expense Report – This report currently groups expenses paid by officer within a user defined period of time.

E. Member ID Report – This report is ordered by the Member ID number and provides the member’s name, officer status, address, address code and Officer Title.

F. Membership List – This report provides a listing of members in the organization to facilitate communication. It including member names, addresses, phone numbers, and emergency contact information.

G. Events List – The purpose of this report is to provide a listing of past events held by the association.

It includes Event No., Event Code, Event Date and Event Time.

H. Address Master List – This report provides a master detailed list of addresses with in the Historic College Hill Association. It includes Address Code, Address, City, State, Zip, Parcel ID and Class.

I. Officer List – This report is an account of all officers within the HCHNA. It includes both past and present officers. The fields that the report displays are: Officer Code, Officer Title, Member ID, First Name, Nickname, Last Name, Begin Date and End Date.

J. Past Vendor Reference – The purpose of this report is to show all of the vendors used by the HCHNA. The report includes First name, Last Name, Phone Number, Email and Vendor Type.