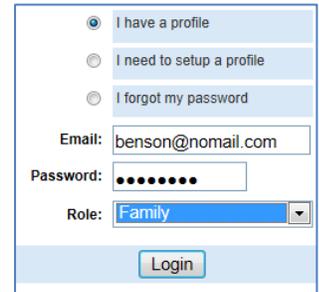


Logging in as a club leader

Club Leaders must first contact the County Extension Office to obtain club log-in permissions and obtain your log-in information and club password. After you have that, then you can login either to your family record, or as a club leader.

- Go to the website: <https://idaho.4honline.com>
- To Log in, select “I have a profile” and enter the email address & FAMILY password provided to you. The Role field should be set to “Family”.



I have a profile
 I need to setup a profile
 I forgot my password
 Email:
 Password:
 Role:

On the next screen, select your name, club name and enter your CLUB password. **Remember passwords are CASE SENSITIVE.** Click Login to Club when you have the right info entered.



Announcements & Newsletters
 1. pull down name 2. pull down club name
 Club Leader Login 3. enter club password
 Select a profile ... Password:

Viewing member records

- ① **Do not panic on the first screen when it says “There are no records”.** Notice that the highlighted icon on the dashboard is “Confirm Members”.



Dashboard
 Members Search Reports
 Enrollment Reporting
MEMBERS/VOLUNTEERS NEEDING CLUB APPROVAL
 There are no records

Members Icon:

This returns a list of all the ACTIVE members of your club—the ones who have enrolled or re-enrolled, and been approved by the county 4-H Online manager. Notice the “Edit” button beside each record—it’s a little misleading.



Dashboard
 Search Reports
 Enrollment Reporting
CLUB MEMBERS Quick Report (Excel) 

County	Name	4-H Age	4-H Status	Type	Gender	Primary Club Title	Enrollment Date	Edit
zDemo	Benson, Julie		Active	Adult	Female	Zdemo Zippy Clovers	Oct 3 2012 11:52AM	<input type="button" value="Edit"/>
zDemo	Benson, Robbie	17	Active	Youth	Male	Zdemo Zippy Clovers	Nov 1 2012 11:09AM	<input type="button" value="Edit"/>

- ① **If all you need is a quick list of the active members of your club (all the info that is on the screen), you can click the Excel icon in the upper right corner of the list, and an Excel spreadsheet will be generated, containing exactly the information that is on the screen.**

The Edit button beside a member's record doesn't allow you to edit their record, only to view profile information on screen, along with club(s) and project(s). The only option on that screen is the "Close" button at the bottom.

Search Icon:

In order to see all the members and leaders of your club, including the ones who are not fully enrolled yet, you must use the Search icon. If you "Clear Filters" you will see a list of all youth/leaders that have been associated with your club, regardless of whether they have enrolled for the current year yet.

Members/Volunteers

Keyword(s) (4-H Age, Address, Birthdate, Email, First Name, Preferred Name, Last Name, Primary Phone)

Enrollment Date
 From: To:

Adult Contact Custom Youth Status
 Active Archived Inactive Incomplete Not Participating Pending Short-Term Volunteer
 Yes No Male Female

8 Records Returned

MEMBERS/VOLUNTEERS										
Name	V	Years	Member #	Status	4-H Age	Role	Gender	Primary Club	Enrollment	Approved
Benson, Julie	V	6	368236	Active		Adult	Female	Zdemo Zippy Clovers	Oct 03, 2012	Oct 03, 2012
Benson, Robbie		8	408267	Active	17	Youth	Male	Zdemo Zippy Clovers	Nov 01, 2012	Nov 01, 2012
Benson, William	V	3	440064	Inactive		Adult	Female	Zdemo Zippy Clovers	Sep 29, 2011	May 22, 2012
Clover, Christine		2	333415	Incomplete	15	Youth	Female	Zdemo Zippy Clovers	Nov 15, 2012	
Holden, Joe		1	440070	Inactive	12	Youth	Male	Zdemo Zippy Clovers	Sep 22, 2011	May 22, 2012
Johnson, Shelley		6	167125	Inactive	18	Youth	Female	Zdemo Zippy Clovers	Sep 20, 2011	Oct 11, 2011

Profile Information

Robbie Benson - Youth record created: 09/29/2011

Email: benson@nomail.com

First Name: Robbie
 Last Name: Benson
 Mailing Address: 789 Maple
 City: Ames
 State: Iowa
 Zip Code: 50000
 Birth Date: 02/10/1995
 Gender: Male
 Primary Phone: 452-458-4589
 Cell Phone:
 Text Message Domain:
 I wish to receive notices via text message: No
 Years in 4-H: 8
 Parent 1 First Name: William
 Parent 1 Last Name: Benson
 Parent 1 Cell Phone:
 Parent 1 Work Phone:
 Parent 2 First Name: Julie
 Parent 2 Last Name: Benson
 Parent 2 Cell Phone:
 Parent 2 Work Phone:
 Parent 2 Email:
 Second Household Send Correspondence: No
 Second Household Correspondence Preference: Mail
 Second Household Family Name:
 Second Household First Names:
 Second Household Primary Phone:
 Second Household Address:
 Second Household City:
 Second Household State: Iowa
 Second Household Zip Code:
 Second Household Email:
 Emergency Contact Name:
 Emergency Contact Phone:
 Emergency Contact Email:
 Emergency Contact Relationship:
 4-H County: zDemo
 Second 4-H County:

There are several options to search for only a specific group of people:

Keyword(s)

Enter in a portion of the person's first/last name, email, address, phone... be aware of the possibility of "unexpected results" if you enter in their age of 13. It will also bring up someone who lives at 1356 Elm Street, and someone whose birthday is 2/13/1998. Numbers aren't as reliable as names in searches!

Enrollment Date Fields:

Use these if you only want to see people who have enrolled since the last time you logged in, or who haven't enrolled since before September 1, etc.

Roles:

- **Adult** = adult volunteer, another club leader
- **Youth** = youth members
- **Contact & Custom** = in Iowa, we don't use Custom, and Contacts are not associated with clubs.

Status:

- **Active** = enrollment is complete and approved by county staff
- **Archived** = aren't going to be enrolling this year, their records are still archived in the program
- **Inactive** = haven't begun the enrollment process for this year yet
- **Incomplete** = have begun the enrollment process, but have not clicked the Submit button
- **Not participating** = they enrolled this year, and then later dropped out or moved
- **Pending** = have begun the enrollment process, it's complete except for county approval
- **Short-term** = not available as an option in Iowa

Club List

Club
Zdemo Zappers
Zdemo Zippy Clovers

Project List

Club	Project	Years in Project
Zdemo Zappers	Horse and Pony	6
Zdemo Zippy Clovers	Beef Breeding Beef	6
Zdemo Zippy Clovers	Mechanics	4

Flagged:

You can use the checkboxes to the left of the name to hand-designate a specific group. The “Reset Flag” button clears all currently entered flags.

Gender, Volunteer:

Demographic sort options

Clear Dates, Clear Filters

Automatically removes those search criteria so that you don’t have to go into the fields and manually remove each one.

① **Notice the Excel icon is also on this screen, so you can quickly get an Excel file of the information on the screen.**

Reports

Although you will default to the Custom folder when you first click on Reports, that option is not available to you. You cannot create your own custom reports, but there are a variety of **shared report formats** and **standard reports** available for you to use. Many of these reports contain information that was not viewable on the profile screen—like information about animals identified, or health forms and authorizations.

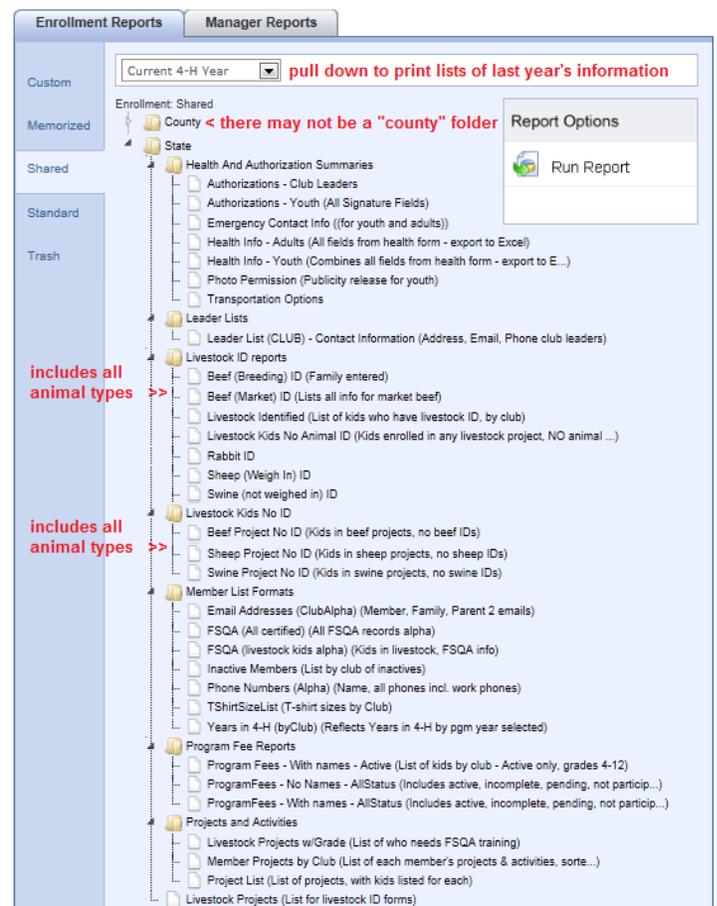
- ① **The ONLY youth/families/leaders that will show up on your reports are the ones that belong to your club.**
- ① **To print information from a previous year, use the pull-down at the top of the screen where it says “Current 4-H Year” and select a previous year—then highlight the report, and click Run Report.**

Shared Reports:

These are report formats that were created either by your county office or at the state office, and were shared out for club leaders to use. The format on these is always “one-line”, meaning that all the information about each person will be on one single line of the report. That’s useful for exporting to Excel.

There may or may not be a “County” folder in your Shared reports folder. It depends on whether there has been a need for your county manager to create a report for the leaders in your county. Most counties probably just rely on the state-shared reports because they are pretty comprehensive.

Although the names of the reports are designed to be pretty self-explanatory, see the next page for some additional information about the reports you will find in each of the sub-folders.



The screenshot displays the 'Enrollment Reports' section of the 4-H Online Club Leaders interface. At the top, there are tabs for 'Enrollment Reports' and 'Manager Reports'. Below the tabs, there is a dropdown menu for 'Current 4-H Year' with a red arrow pointing to it and the text 'pull down to print lists of last year's information'. The main area shows a tree view of report folders. The 'Shared' folder is expanded, showing sub-folders like 'Health And Authorization Summaries', 'Leader Lists', 'Livestock ID reports', 'Livestock Kids No ID', 'Member List Formats', 'Program Fee Reports', and 'Projects and Activities'. A red arrow points to the 'County' folder with the text 'includes all animal types'. Another red arrow points to the 'Livestock ID reports' folder with the text 'includes all animal types'. A 'Report Options' box is visible on the right with a 'Run Report' button.

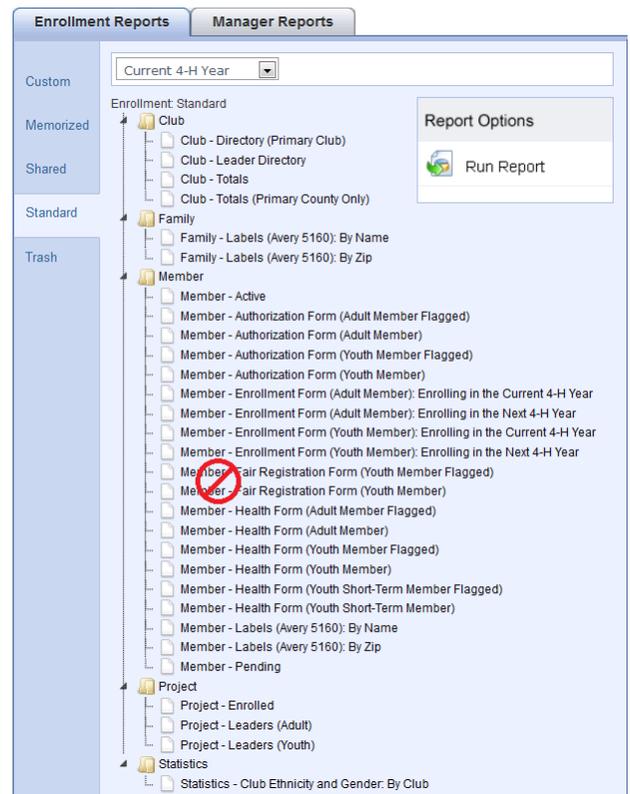
- Health And Authorization Summaries**
 These are one-line-per-person summaries of all the checkboxes, etc. on the authorization forms, health forms, permissions, transportation, etc.
- Member List Formats**
 Various information about your club members (should be self-explanatory by title)
- Projects and Activities**
Member Projects by Club: prints a list of each member, with the projects they have enrolled in this year
Project List: lists the name of the project, then a list of the youth who are enrolled in that project (same info as previous report, just arranged differently, grouped by project rather than by member).

Standard Reports:

These are report formats that have a more complicated layout, and are standard to the program. They are NOT going to work well in Excel, only as print (paper) reports.

The best way to get a feel for what these reports look like is to just select one, and “Run Report”. If it’s useful to you, then you can print it. Here are a few that may be:

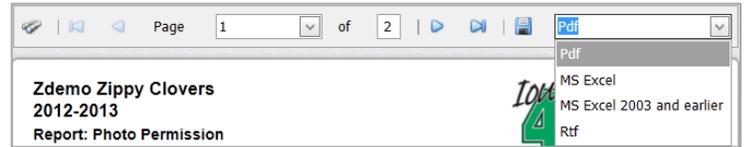
- Club folder: Club – Directory (Primary Club)**
 Complete listing of all your active members and their enrollment info—family, projects, etc. But it only includes youth if your club is their primary club. If they belong to 2 clubs, they’re not going to show up for the secondary one.
- Family folder: Family – Labels (Avery 5160)**
 This is another way to get those mailing labels, sorted either by name or zip code. Be sure to set your printer options for “no scaling” from Adobe Acrobat.
- Member folder: Member – Authorization Form**
 These reports contain the entire text of what the family/youth “signed” online—for their code of ethics, etc. You can print for all your youth members, or only a set that you have flagged on the Search screen.
- Member folder: Member – Health Form**
 These reports are formatted to contain all of the information from the health form, again can be printed for all your youth members or just the ones that are flagged on the Search screen.
- Member folder: Member – Labels (Avery 5160)**
 Same as family labels, but will be addressed to the member (Sally Smith) instead of the family (The Smith Family).



Viewing, Saving, Printing reports

To view any of these reports in PDF format, highlight the report you want, then click the Run Report icon on the right.

To print the report from the PDF preview, first click on the pull-down at the right to indicate which format you wish to Save this preview.



- PDF will save the report exactly as it looks now.
- MS Excel (either format) will preserve the look of the report, but put it into Excel—information will be in columns and rows, but will probably need some “clean-up”.
- Rtf – this is the format that will open in Microsoft Word (or other word processors). However, much of the text is in “text boxes” instead of in true text format.

Once you have selected the format, then click the Save icon (disk) directly left of the list. Depending on your browser, you may be given the option to Save or Open the file. Once you have the file saved, then you can open and print it as you normally would with a file of that type.

Label options with reports



Besides the “Run Report” option, if your computer has a right-button mouse, you have other options with the reports. Highlight the report you want, then RIGHT-click on the name of the report to see the pop-up menu.

- **Run, Export to PDF, Export to Excel** – basically the same as using the Run Report button on the right, then choosing format to save/print.
- **Family (or member) Labels** – creates a PDF of 5160 mailing labels either for families or individual members. Be sure to set the printer options for “no scaling” in order for the labels to print correctly.

Tips and Technical Support

- **My password won't work.**

There are 2 ways to reset your password: click on the "I forgot my password" link on the login page of 4-H Online, or send your county office a message and they can reset it for you. Either way, a message will be sent to your "family" account with the new password. You will be required to change that password as soon as you login the next time, for privacy. Passwords must be a minimum of 8 characters, and include at least one number or symbol.

- **I'm having pop-up blocker issues, even though I set it to allow pop-ups.**

Some browser issues can be resolved by switching to Firefox or Google Chrome instead of Internet Explorer. Go to <http://www.mozilla.com> to download Firefox. When it's finished downloading, double-click on it to install it on your computer. Otherwise, set your browser's preferences or options to allow pop-up windows from 4-H Online.com.

- **My emails from the program are not coming through, even though the ones sent directly from my county office ARE arriving.**

One of two things is true: either the email address that is on your family account has a typo in it, OR your email provider (or your personal account) is blocking those messages or tagging them as "spam".

- First, verify that your email address is typed correctly in 4-H Online.
- Then, check your junk mail, deleted items, or spam folders to see if the messages have landed there.
- Next, change the settings on your email account to always accept messages from 4-H Online.com.
- If none of that solves the issue, and your email account is provided through your local internet service provider, you may have to contact them to un-block messages from 4-H Online.
- A last resort (that will work) is to set up a separate email account with a service like Gmail, not linked to your internet service provider. Of those "free" email accounts, the only one that has been problematic has been AOL. **Remember that if you set up a new email account, you will need to login to 4-H Online and change the email associated with your family record.**

- **Can't I (club leader) just login with one of my member's family accounts, and enter their re-enrollment information for them?**

It is NEVER acceptable for a club leader to know the password for other families' accounts. Even though it doesn't SEEM like there is any sensitive information in the records, at some point we will probably be accepting registration payments online. You can't know someone else's password, in the same way that you can't know someone's Amazon account password. Liability, privacy, security. Don't do it.

- For additional help with 4-H Online, please contact your county extension office.