Club Leader and Project Leader Setup

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OVERVIEW

4-H Online offers three levels of access to adults. First, all adult family members have access to their family’s enrollment data. Secondly, for those adults with club leader responsibilities, it is possible to grant “Club Leader” access, giving them much greater access to their club’s data. The third option is to grant leaders “Project Leader” access.

Tip sheets have been posted to the Family/Leader helpsheet page which walk through login steps for leaders at [http://web.cals.uidaho.edu/4hreporting/4h-online/](http://web.cals.uidaho.edu/4hreporting/4h-online/)

SETTING UP VOLUNTEER STATUS

In order for an adult to be granted Club Manager access, they must first be a Category B (or equivalent or higher) volunteer screening status. This will be indicated by the [Are you a Volunteer?] question on the personal information section in their profile.

This status will also appear on the Search screen results, indicated by a green “V”.

Once their volunteer status is set for their general enrollment, the leader must also be enrolled in the club AND have a specific [Volunteer Type] set for that club. This is found on the [Clubs] tab of the [Participation] enrollment data.
The club volunteer type can be set when a club is first selected or can be indicated later by clicking on the [Edit] button next to an adult volunteer's enrollment for that club. Be sure to click on the [Update] button if using this method, to finalize this designation. If a person is an organizational AND project leader be sure to indicate Organizational leader on the Club tab. If a leader is affiliated with multiple clubs make sure that those are listed in the clubs tab before moving on to the projects tab. In the Projects tab a leader can select the appropriate projects and if project leader or resource leader.

In the sample to the right the leader is already listed as a project leader for horse. She is adding Beef Breeding. So simply select the club, select the project, years in project and volunteer type. Then click add project.
ACCESS TO CLUB – CLUB LEADER

Once the above settings have been put in place for an adult volunteer, the next step is to specifically grant them access to the club.

1. Click on the [Clubs] icon on the Manager Dashboard
2. Click on the [Edit] button (not the [Login] button) for the desired club.
3. Scroll down to view “eligible” adult volunteers and to set their Club Manager access
   - Click [Allow Login] to grant access to reports and searching capabilities. Be sure to click [Save] at the bottom of the screen to retain the setting.
   - Click [Allow Member Management] this feature will allow a club leader to enter and edit enrollment data).

The other piece of critical information on the screen is the “club password”. This password is initially set by the 4-H Online server, but can be reset to a more manageable password using the fields/tool further down this screen.
When families log in, they see this screen (at right).

Under [Club Leader Login] they need to:

- Select their name under select a profile
- Select their club which appears in the middle
- Enter in the club password
- Click Login to club

To understand the capabilities of a Club Manager you can experiment with existing leader profiles or create a leader profile in the Demo County. Helpsheets are also listed on the Leader/Families help page at http://web.cals.uidaho.edu/4hreporting/4h-online/

Club Leaders have the option of “confirming” new (applying) members. This action on their part does not ultimately confirm or accept applying members into active membership. It can however, serve as a guide for staff, indicating that the Club Manager has reviewed the member application. This shows up as follows:

- Either click on the [Confirm Members] icon, or click on the [Enrollments Pending] link to list all “Pending” members. There, in the [Club Status] column you will see [Confirmed] by members that have been confirmed by a Club Manager.
If at any point, you would like a report of which leaders have been granted Club Manager access, do the following, after logging in as a Manager:

1. Click on the [Clubs] icon
2. Choose the report [Club – Leaders Allowed Login] under either [Quick Exports] or [Quick Reports]

**PROJECT LEADER LOGIN**

To grant project leader login privileges

On the “Enrollment” tab on the Dashboard click “Options” and Click on “Project Leaders"
A screen will popup that lists all of the project leaders in your county.

You have the option to

- **Allow Login** – will allow them to see member listings for their project/in their club only
- **Allow County Wide** – provides a county-wide view – handy if you have only county-wide projects or if perhaps this person is a swine superintendent etc. and needs to see member names for all members in the county for a particular project.
- The passwords for the particular project(s) are listed in the far right column. At this point Extension offices have to email/provide the password to the project leader. (A request has been submitted to have a system email sent to the leader with that password information or some sort of system correspondence).
When families login they will see the screen to the right. In this same you can see Club leader AND Project leader Login options. 

To login as a project leader:

- Under “Project Leader Login” Select profile
- Select Club
- Enter password
- Click Login to Project

After logging in the project leader will see the screen to the right which identifies which project they have signed in on. The report lists members – basic contact information.

The Quick Reports on the right right are to get a .pdf report of the Member List or a .pdf report of Member Labels.