

Club Leader and Project Leader Setup

Created: August 2013

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.

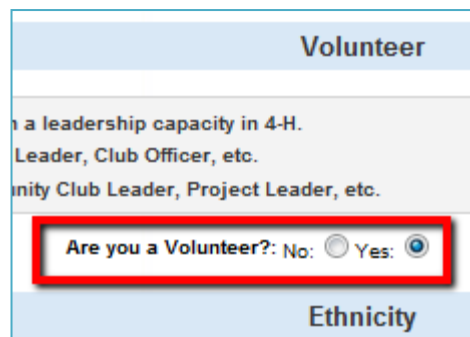
Tip sheets have been posted to the Family/Leader helpsheet page which walk through login steps for leaders at <http://web.cals.uidaho.edu/4hreporting/4h-online/>

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.



Volunteer

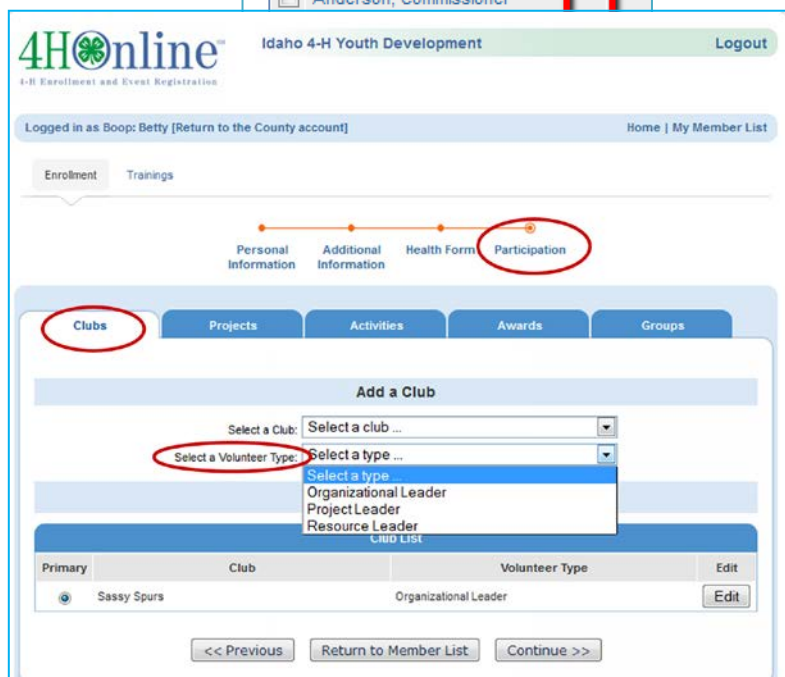
... a leadership capacity in 4-H.
Leader, Club Officer, etc.
Community Club Leader, Project Leader, etc.

Are you a Volunteer?: No: Yes:

Ethnicity



Name	V	Mer
<input type="checkbox"/> Andersenly, John	V	8153
<input type="checkbox"/> Anderson, Commissioner		



4Honline™ Idaho 4-H Youth Development Logout

Logged in as Boop: Betty [Return to the County account] Home | My Member List

Enrollment Trainings

Personal Information Additional Information Health Form **Participation**

Clubs Projects Activities Awards Groups

Add a Club

Select a Club:

Select a Volunteer Type:

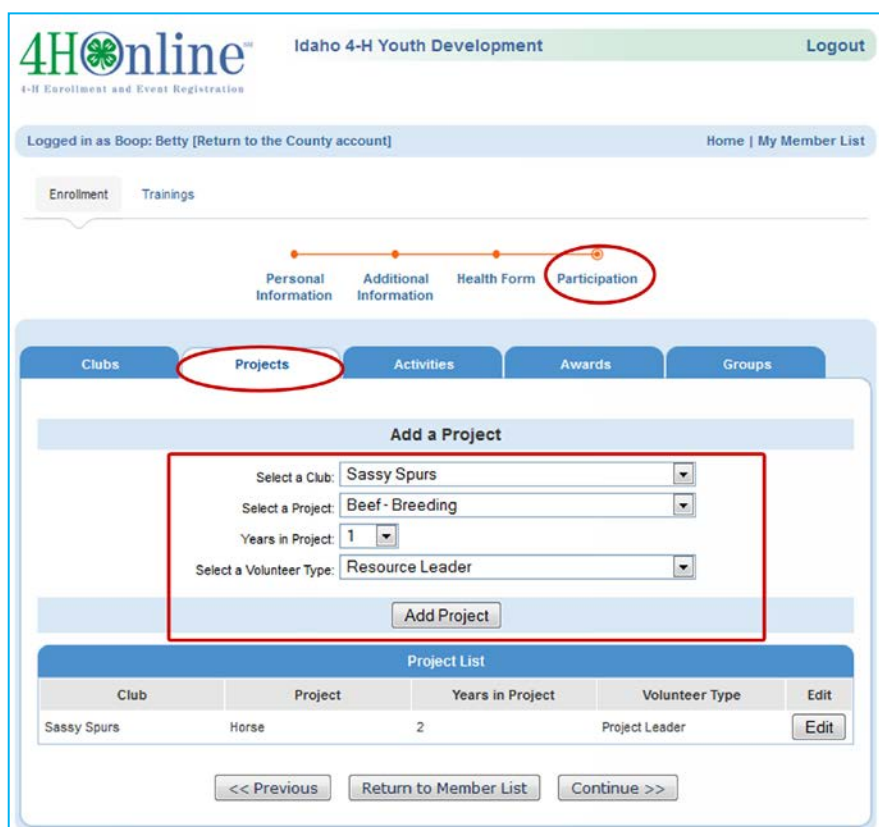
Select a type:
Organizational Leader
Project Leader
Resource Leader

Primary	Club	Volunteer Type	Edit
<input checked="" type="radio"/>	Sassy Spurs	Organizational Leader	Edit

<< Previous Return to Member List Continue >>

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.



The screenshot shows the 4Honline interface for Idaho 4-H Youth Development. The user is logged in as Boop: Betty. The 'Participation' tab is selected and circled in red. Below it, the 'Projects' tab is also circled in red. The 'Add a Project' form is highlighted with a red box and contains the following fields:

- Select a Club: Sassy Spurs
- Select a Project: Beef - Breeding
- Years in Project: 1
- Select a Volunteer Type: Resource Leader

Below the form is an 'Add Project' button. At the bottom of the page, there is a 'Project List' table with the following data:

Club	Project	Years in Project	Volunteer Type	Edit
Sassy Spurs	Horse	2	Project Leader	Edit

Navigation buttons at the bottom include '<< Previous', 'Return to Member List', and 'Continue >>'.

ACCESS TO CLUB – CLUB LEADER

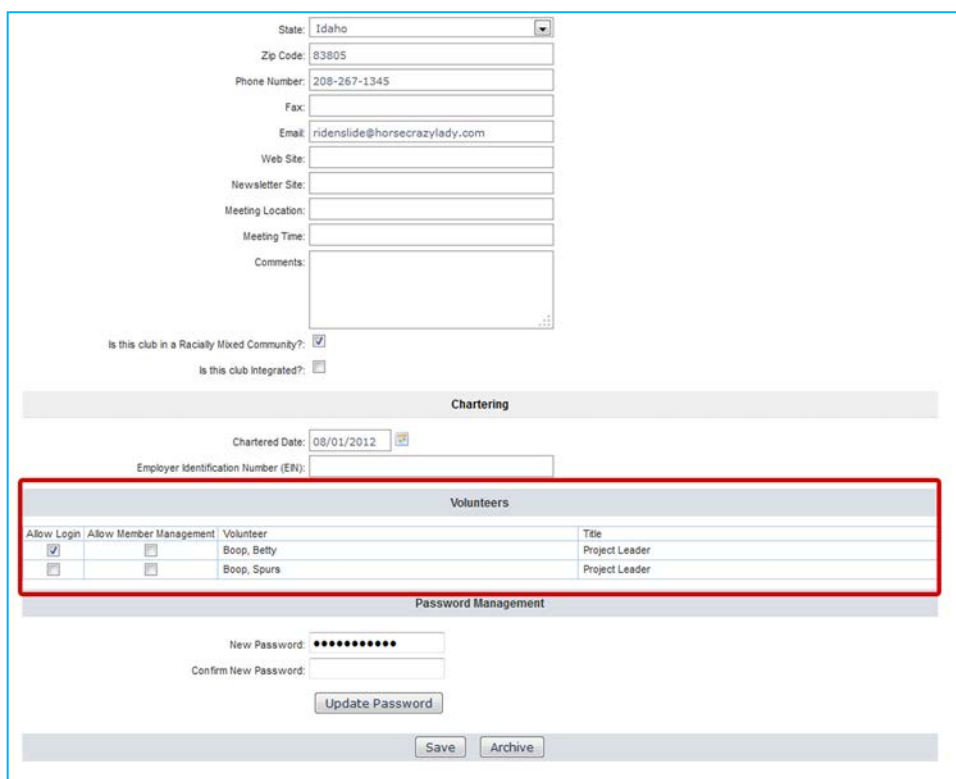
Once the above settings have been put in place for an adult volunteer, the next step is to specifically grant them access to the club.

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).



State: Idaho
Zip Code: 83805
Phone Number: 208-267-1345
Fax:
Email: ridenslide@horsecrazy lady.com
Web Site:
Newsletter Site:
Meeting Location:
Meeting Time:
Comments:

Is this club in a Racially Mixed Community?
Is this club integrated?

Chartering

Chartered Date: 08/01/2012
Employer Identification Number (EIN):


Allow Login	Allow Member Management	Volunteer	Title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Boop, Betty	Project Leader
<input type="checkbox"/>	<input type="checkbox"/>	Boop, Spurs	Project Leader

Password Management

New Password:
Confirm New Password:
Update Password

Save Archive

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.



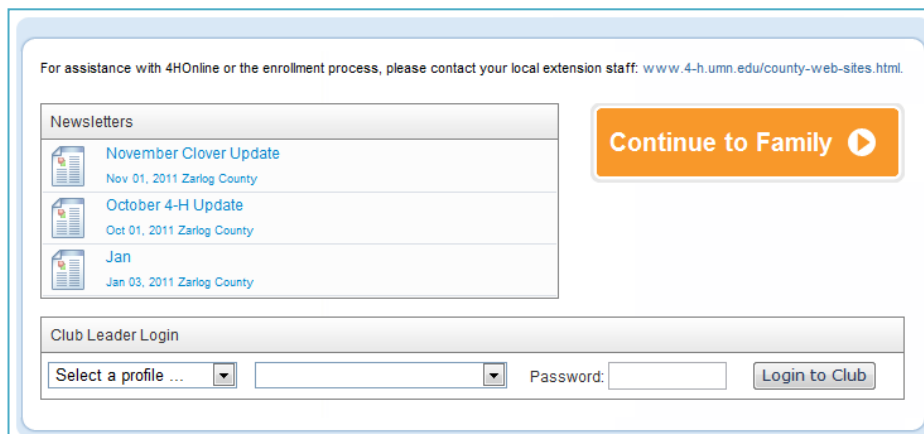
Club Information

Club Title: Amboy Area Adventurers
Description: Test Club
Delivery Mode: 1a) Organized 4-H Community Club
Report Method: Individual
Club Password: F36iFm56
County: Zarlog

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



For assistance with 4HOnline or the enrollment process, please contact your local extension staff: www.4-h.umn.edu/county-web-sites.html.

Continue to Family

Newsletters

- November Clover Update
Nov 01, 2011 Zarlog County
- October 4-H Update
Oct 01, 2011 Zarlog County
- Jan
Jan 03, 2011 Zarlog County

Club Leader Login

Select a profile ... [dropdown] [dropdown] Password: [input] **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/>

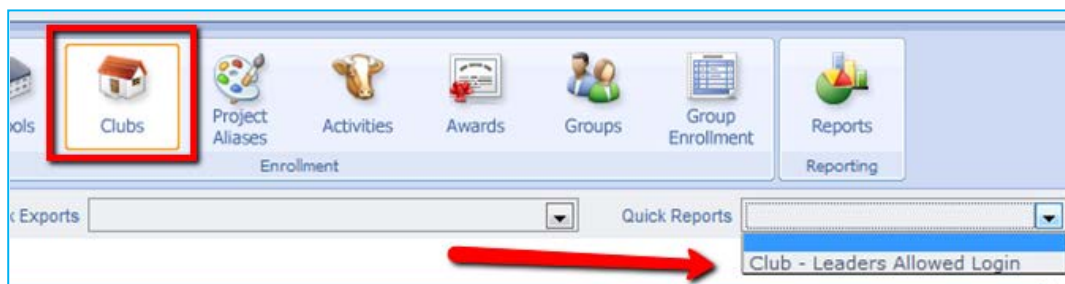
Club Leaders have the option of “confirming” new (applying) members. This action on their part does not ultimately confirm or accept applying members into active membership. It can however, serve as a guide for staff, indicating that the Club Manager has reviewed the member application. This shows up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

Name	4-H Age	Type	Gender	Primary Club Title	Club Status
Frack, Apollo	11	Youth	Male	Amboy Area Adventurers	Confirmed
Helio, Mary	15	Youth	Female	Amboy Area Adventurers	Pending

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:

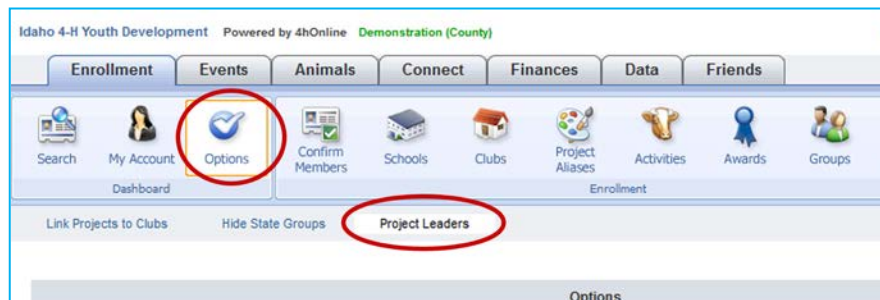
1. Click on the [Clubs] icon
2. Choose the report [Club - Leaders Allowed Login] under either [Quick Exports] or [Quick Reports]



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 pop up 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).


Idaho 4-H Youth Development Powered by 4hOnline Demonstration (County) Home | Return to the Admin account | Logout


Enrollment
Events
Animals
Connect
Finances
Data
Friends



Search



My Account



Options



Confirm Members



Schools



Clubs



Project Aliases


Activities


Awards


Groups


Group Enrollment


Reports

Project Leaders

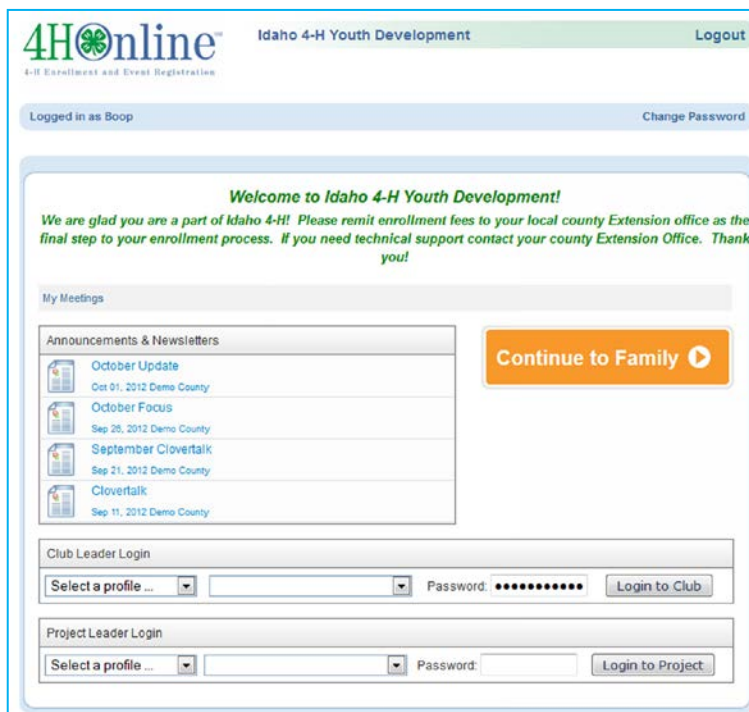
Allow Login	County Wide	Project	Club	Volunteer	Volunteer Title	Password
<input type="checkbox"/>	<input type="checkbox"/>	Beef - Breeding	Sassy Spurs	Boop, Betty	Resource Leader	860BEE
<input type="checkbox"/>	<input type="checkbox"/>	Beef - Breeding	Sassy Spurs	Boop, Spurs	Project Leader	860BEE
<input type="checkbox"/>	<input type="checkbox"/>	Beef - Market	Demo Club	345, zoo	Project Leader	100BEE
<input type="checkbox"/>	<input type="checkbox"/>	Beef - Market	Demo Club	Smith, John	Project Leader	100BEE
<input type="checkbox"/>	<input type="checkbox"/>	Biological Sciences	Demo Club	345, zoo	Project Leader	520BIO
<input type="checkbox"/>	<input type="checkbox"/>	Birds - Family Flock, Domestic Poultry, Gamebirds, Pigeons or Waterfowl	Demo Club	Smith, John	Project Leader	102BIR
<input type="checkbox"/>	<input type="checkbox"/>	Horse	Bits n' Bridles	Bill, Madison	Project Leader	160HOR
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Horse	Sassy Spurs	Boop, Betty	Project Leader	160HOR
<input type="checkbox"/>	<input type="checkbox"/>	Horse - Miniature	Bits n' Bridles	Help, Needs	Project Leader	104HOR
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Swine - Market	Pork belly babies	Boop, Betty	Project Leader	230SWI

6

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:

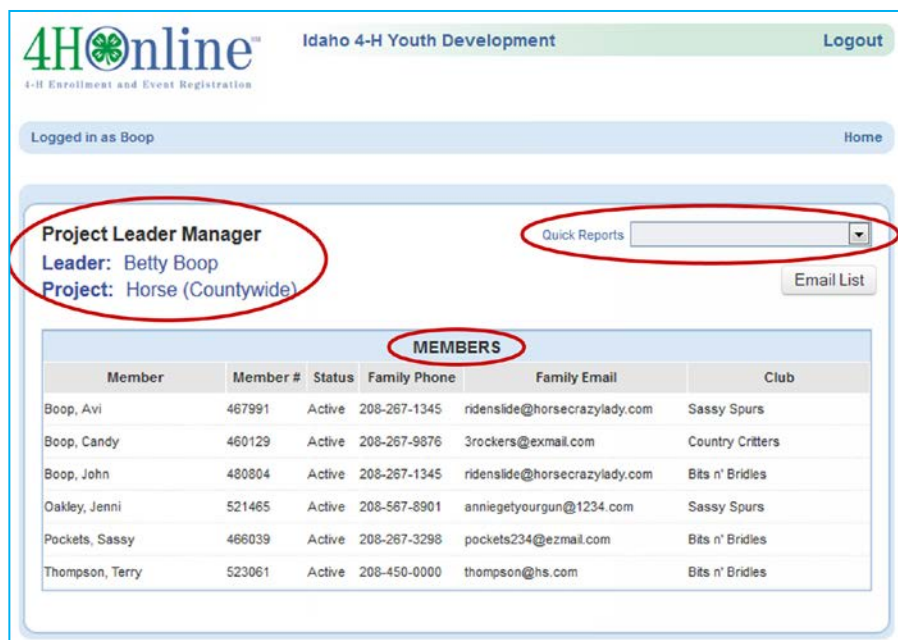
- Under “Project Leader Login” Select profile
- Select Club
- Enter password
- Click Login to Project



The screenshot shows the 4Honline login interface. At the top, it says "4Honline Idaho 4-H Youth Development" with a "Logout" link. Below that, it indicates "Logged in as Boop" and a "Change Password" link. A welcome message reads: "Welcome to Idaho 4-H Youth Development! We are glad you are a part of Idaho 4-H! Please remit enrollment fees to your local county Extension office as the final step to your enrollment process. If you need technical support contact your county Extension Office. Thank you!". There is a "Continue to Family" button. Under "My Meetings", there is a section for "Announcements & Newsletters" with a list of items: "October Update", "October Focus", "September Clovertalk", and "Clovertalk". Below this are two login sections: "Club Leader Login" and "Project Leader Login". Each section has a "Select a profile ..." dropdown, a password field, and a "Login to Club" or "Login to Project" button.

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.



The screenshot shows the 4Honline dashboard for a project leader. At the top, it says "4Honline Idaho 4-H Youth Development" with a "Logout" link. Below that, it indicates "Logged in as Boop" and a "Home" link. The main content area shows "Project Leader Manager" with "Leader: Betty Boop" and "Project: Horse (Countywide)". There is a "Quick Reports" dropdown menu and an "Email List" button. Below this is a table titled "MEMBERS" with the following data:

Member	Member #	Status	Family Phone	Family Email	Club
Boop, Avi	467991	Active	208-267-1345	ridenslide@horsecrazylady.com	Sassy Spurs
Boop, Candy	460129	Active	208-267-9876	3rockers@exmail.com	Country Critters
Boop, John	480804	Active	208-267-1345	ridenslide@horsecrazylady.com	Bits n' Bridles
Oakley, Jenni	521465	Active	208-567-8901	anniegetyourgun@1234.com	Sassy Spurs
Pockets, Sassy	466039	Active	208-267-3298	pockets234@ezmail.com	Bits n' Bridles
Thompson, Terry	523061	Active	208-450-0000	thompson@hs.com	Bits n' Bridles