

Records Cleanup

As we progress with system features in 4-H Online and University Requirements (i.e. Backgrounds Screens and Protecting Minors Trainings) it is extremely critical that valid, working emails are identified in 4-H Online.

There are several email types that impact the functionality of 4-H Online where reports are concerned. Examples include:

- 4-H Professional emails for County Login
- 4-H Professional personal email – facilitates completion of Protecting Minors Training
- Family email addresses – gateway to login to 4-H Online
- Member email addresses – helps facilitate correspondence to members (youth or adult)

There is a lot of variance in building reports – for reporting and or use for creating broadcast emails where this becomes critical. There is an opportunity for ‘members’ (youth or adult) can identify a separate email where correspondence goes directly to them.

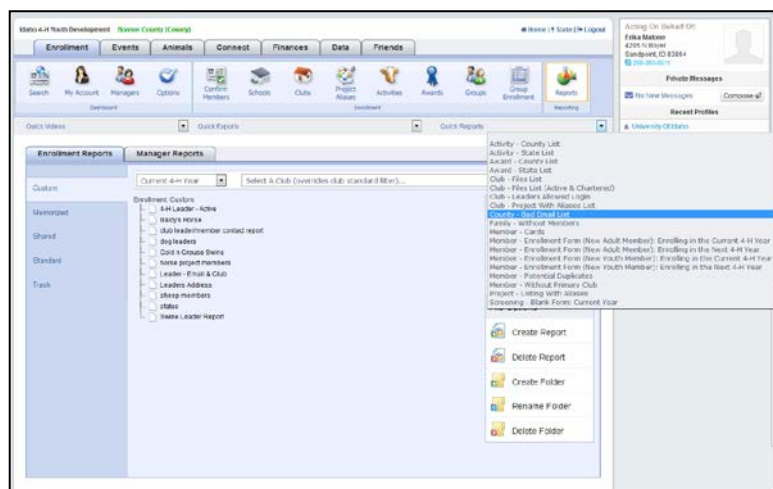
There is a need to keep this information as up to date and valid as possible. This tipsheet will walk you through things that you can do to clean up your records.

BAD EMAIL AND EMAIL CLEANUP REPORTS

The Bad Email report and the Email Cleanup Report helps to identify 1) if an email address has been identified for the family and/or adult 2) if the email addresses are valid

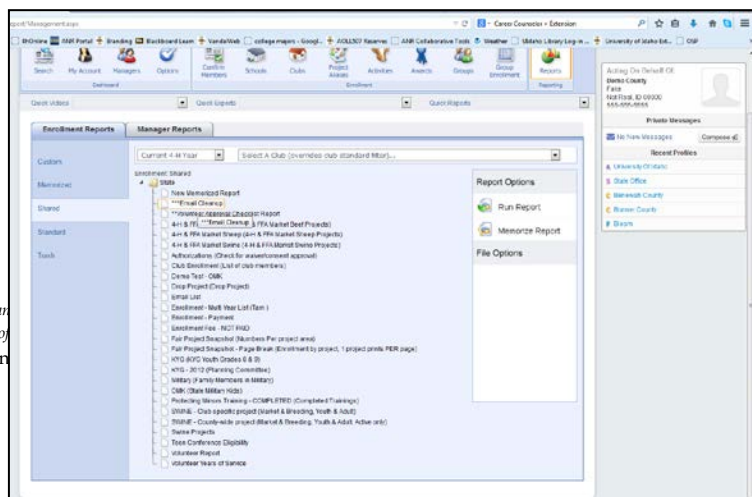
STEP ONE: Run a Quick Report of Bad Emails:

- Login to your manager account on 4-H Online at <https://idaho.4honline.com>
- On the dashboard click the ‘Reports’ Icon
- Select ‘Quick Reports’ in the gray area below the Reports Icon
- From the Dropdown list click on ‘County – Bad Email List’
- A popup will appear, this list automatically exports as a .pdf file



STEP TWO: Run ***Email Cleanup Report (Shared State Report):

- Login to your manager account on 4-H Online at <https://idaho.4honline.com>





- On the dashboard click the 'Reports' Icon
- Select 'Shared' from the Enrollment Reports Tab
- Click on '***Email Cleanup' and Click Run Report
- **OR** Right Click on '***Email Cleanup' and Export to Excel
- Once you export you *may or may not* get results based on the parameters set with the email cleanup report.

Troubleshooting

Be sure to check the family email addresses as well as the member email addresses. If a member (youth or adult) has an email address in their record – there may not be an email address in the family record. The family email address is the gateway for login into 4-H Online to access member records, but it is very important that this email address is valid and active.

If families have not set up an email account, work with them at the office to set up either gmail, yahoo, or hotmail account. The process is very simple. These email addresses can be then accessed by the adult/family at the library or at the county extension office if the family does not have a home computer and/or internet access. We want to encourage folks to check their emails on a regular basis.

DUPLICATE RECORDS

An easy way to check for duplicate records is to search by a members name or email address in the member/volunteers tab AND the family tab.

If you find duplicate records please email Erika (member name, email address) she will be able to do a records merge. That said, sometimes there is an overlap in the 4-H year, which in that case the duplicate record will be archived and then the records should be able to merge after the overlapping year has expired.