Events
As Idaho has progressed with using 4-H Online there has been an increase of State event registrations facilitated through 4-H Online. Counties are able to create event registrations for county events or can even collaborate to facilitate event registration for District events.

For best results use the Firefox browser.

Before getting started in events
• Take time to “pre-plan” your events – look at prior paper enrollment forms to assess what is/is not needed
• What counties will be participating?
• Does registration need to be restricted by project?
• Are youth, who are in a certain grade only eligible to participate?
• What are the event start/end dates?
• Will money be charged?
  o Are there special invoice instructions?
• It is absolutely critical to have event contact information listed. Who is the primary person responsible for this event?
  o Is there a website for further information that people can visit?

Table of Contents for this Tip Sheet Packet on EVENTS
Event Dashboard   2-4
Steps to create Events  5
Locations  7
Registration Types  8
Custom Fields  9
Upload Docs  12
Preview  13
Types of Custom Fields  14
Upload Docs (event info download)  15
Testing/Going Active  15
Registering  16
Editing & Reports  16
Events Dashboard

Search

- The ‘Search’ icon is where you can look up registrations for events. You can set a variety of filters i.e. county, specific event, and registration status. Depending on the event you can also download uploaded files.
- Be sure to clear your filters after searching.
Confirm Registrations

- On your home screen you will see this icon “Event Registrations Pending”.

- To confirm registrations click the “Confirm Registrations” icon. Events with pending registrations will populate in the area below.

- Click ‘Edit’ on the event with the registration(s) to approve.

- Select your County from the drop down list

- Registrant names will appear (in the example Rochelle Vine)

- Depending on how long the registration form is you may have multiple pages. Review information – READ carefully to ensure information entered matches what is needed.

- If there are no errors, click “Accept Registration” If there are errors or questions were not answered make a note in the comments section above then click “Send Back to Member”. The form will go back to the registrant for resubmission. To delete a registration click “Delete and Block Registration”
Events

- Clicking on this icon will display events that you have created
- As this list populates you will have the ability to search for events by 4-H year and other filters

County/Club Checks

For Idaho, the Finances Feature has not been turned on this does not have any real functionality for the events that we do.

Calendar

In Idaho, the calendar is linked to the Idaho 4-H Youth Development Calendar. Events created will default to this calendar as well.

Locations

See page 6

Views

Idaho utilizes the same calendar, therefore views are not necessary

Reports

See page
Steps to create an event(s):

- Login to your account on 4-H Online at https://idaho.4honline.com
- From the Dashboard click on the ‘Events’ Tab
- Click on the ‘Events’ icon
- Click ‘Add Event’ listed under the dashboard

- A window should appear where you can enter details about your event.
- Enter in initial information first
  - Event title
  - Event dates
  - Event contact information
Once this information has been entered be sure to click ‘Save’ – scroll all the way to the bottom of the page.

Once the initial save has been done you can enter in grade/project restrictions etc.

After adding additional information be sure to click ‘Save’

You are now ready to get into the set up components for the event. To move forward with your event setup click ‘Add Registration’
You should now see a line of text under the dashboard with different items that you may (or for some events) may not use for events.

- Your event will now have a status – in order to view the options your event needs to be in ‘Testing’ mode.

- Once your event goes ‘Active’ it is live and will accept entries. I strongly suggest restricting county registration to Demo on your initial setup. You can do set up of your event in testing then go ‘Active’ for Demo county participants only. This way you can experiment with the entries and make sure things are working properly. If your event has a set number of participants you may need to add those numbers of Demo county registrations back into your total head count.

**Locations**

- Click on ‘Location’ in the blue tool bar. Here is where you would click to add your location for your event.
- If your location is not listed on the list of where your event will be held, you may have to add the location to the list by clicking the ‘Locations’ icon in the dashboard.
• Once you have clicked the ‘Locations’ icon click ‘Add Location’ located under the dashboard.
• A popup window should appear, enter the location name in the ‘Location Title’.
• Click Save.
• You will need to click on the ‘Events’ icon, locate your event, click ‘Edit’ to resume set up.

• The next section is “Apply Template”. For a new event, you will not have an event to work off of. Once the event is created, you can select the event, from the drop down list. This will import/embed the formatting etc. from the prior year’s event. That said, be careful to review dates, contact information and registration specifics such as costs and paperwork as there may be changes to that information.

Registration Types
If your event requires registrations, you will need to set up registration types, typically these will be youth and adults.

To add registration types:
• Click ‘Registration Types’
• Click ‘Add Registration Type’

• Add in a title (name) for your Registrant Type
• Select Role Type from the drop down list
• Depending on your event you have some options such as limiting the number of registrations. You also have the option of enabling age divisions – this is a very handy feature when you get to custom field setup.

• Registration date is a very important section. If you need to test your event then this date should be wider than your actual registration timeline. These dates maybe adjusted several times during testing so it is critical that you double check this before an event goes active.

• If your event has a registration fee for participants you can specify that here as well as early and late registration fees.

• Once you have made your selections click ‘Save’. Repeat steps until you have set up all registration types, as necessary.

Custom Fields
This is where you build your “Registration” form if you will. If you have a copy of an existing registration form to work off of, have it handy. This will help ensure that you are capturing all pertinent information.

Before you begin setting up Custom Fields...
A lot of information that has been historically captured on paper registration forms is captured during the enrollment process in 4-H Online such as: health information, birth date, 4-H age, contact information, emergency contact information, and T-shirt sizes. If your registration form has that information on it, use a red pen and put an X through it. This information can be pulled in event reports, it is not necessary to add those custom fields for your online registration form. What should remain are questions particular to the event.
To add Custom Fields

The first custom field that needs to be added is a group. This creates a header and “groups” common fields.

- Type in the ‘Item Title’ field Please answer the following questions: or what you would like to have as your lead statement/item to show first at the top of your page.
- Select “Group” from the ‘Type’ drop-down list
- For this example I clicked use age divisions, see how this example has populated with age division information. There will be elements that may be specific just to a particular registration type but for this initial setup you want this visible for everyone.
  - Off means it will not show
  - Visible means it is visible on the form
  - Required means you have to answer (need to be careful with radio button or check box answers as the system will require every option to be answered)

- Click Save
This sample is of a drop down list.

- When you initially create your Custom Field and get down to the group, click Save.
- You will then get the opportunity to add options.
- For each option that you want to appear in the drop down list, enter those items in separately.
- Determine who this information needs to appear for – is it something you want to be required or can it be visible?
- When finished click “Save and Close”
As information populates in the custom fields list you can update the priority. What priority means is the order in which items will appear on the form.

- To change the order, change the number in the priority column
- Click the double arrows.

**Upload Docs – Custom Field**

If your event requires an upload that isn’t already asked for in 4-H Online enrollment you can create a field where documents can be uploaded. Uploaded files can only be in a .pdf or .jpg format.
From the blue line of text you can click ‘Preview’ at any point in building your event (as long as it is still in test mode) to preview the worksheet for registrants

- Select what each registrant sees by selecting the registrant type from the drop down list
- Clicking ‘Worksheet’ will show you an example of the paper form
- The darker gray band is a GROUP
- The lighter gray band is a TITLE
- The questions listed in the sample are as follows:
  - Dropdown list
  - Radio Button
  - Single line of Text
  - Dropdown list
  - Dropdown list
# Types of Custom Fields

*(adapted from Todd Mehrkens University of Minnesota)*

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check box</td>
<td>Collects “all that apply” types of data. However, these individual entries show up on reports as yes/no NOT the specific data type (Erika will be sharing this at the 2015 users’ conference)</td>
</tr>
<tr>
<td>Date</td>
<td>Forces a mm/dd/yyyy response</td>
</tr>
<tr>
<td>Decimal</td>
<td>Accepts two places decimal, numerical data. Allows math operations to be done on the data (see ‘number’ field)</td>
</tr>
<tr>
<td>Drop Down List</td>
<td>One option for collecting those “choose one” types of data. Radio button is another option. Must click save after initial setup to add drop down options</td>
</tr>
<tr>
<td>Email</td>
<td>Forces email format (remember all emails are supplied as part of enrollment and are available in reports)</td>
</tr>
<tr>
<td>File Upload</td>
<td>Forces a request where .pdf or .jpg can be uploaded as part of the registration form</td>
</tr>
<tr>
<td>Group</td>
<td>Creates a header and also groups common fields. I.e. Health/Demographic/Special Interest etc.</td>
</tr>
<tr>
<td>Multi-Line Text</td>
<td>Creates a text field/box that can accommodate larger amounts of text (i.e. short essay questions)</td>
</tr>
<tr>
<td>Number</td>
<td>Will only accept numbers. The big advantage is you can do math operations with this field in reports (i.e. adding a total)</td>
</tr>
<tr>
<td>Phone</td>
<td>Forces phone number (remember phone numbers are supplied as part of enrollment and are available in reports)</td>
</tr>
<tr>
<td>Radio Button</td>
<td>One option for collection “choose one” type of data (Drop Down List is the other). Must click save after initial setup to add in drop-down options.</td>
</tr>
<tr>
<td>Random</td>
<td>Creates a randomly assigned number that is only visible and accessible though the reports tool. Does not show up on the screen.</td>
</tr>
<tr>
<td>Single Line Text</td>
<td>Creates a text field for entering simple strings (one or few words) of text.</td>
</tr>
<tr>
<td>Social Security #</td>
<td>Do not use!</td>
</tr>
<tr>
<td>Title Bar</td>
<td>Like the Group option – you can use this element to provide helpful information and break up the form into sections</td>
</tr>
<tr>
<td>Zip</td>
<td>Forces zip code (this information is collected at initial enrollment) available in reports</td>
</tr>
</tbody>
</table>
Upload Docs
This section is where you can upload documents i.e. event registration instructions and/or program flyers. This information are items that registrants can download BEFORE they start the registration process. I have found it is very handy to create step by step instructions on how to navigate the registration process (also include specifically a list ensure they download all materials). In addition I post this information as a newsletter just to have bases covered.

Testing
Test your events in the Demo County before going live
- Do a registration for a youth, go through all the steps of submission to approval. Does everything work?
- Repeat this step for an adult registration

Going ACTIVE
Once all of the setup for an event is complete, the form is ready for use.
- However, it will not be available until you go back into the Event setup screen and change the status from ‘Testing’ to ‘Active’.
  - Don’t forget to check to see that the correct county/counties are selected (not just Demo County)
  - Scroll down and click ‘Save’.
- If you made changes to registration dates to accommodate testing be sure to change those dates by revisiting your registration types section.

Registering for an Event
After an event has been set up and is at an “Active” status participants can register. Registration is done from the Member list page.

If an event does not show up:
- Have any items changed during testing i.e. registration dates?
- If an event is project restricted, the member must be enrolled in the project to have that appear in the list
- If an event is grade restricted, you may need to check to see if the window is wide enough to capture all youth (check age)
- Event status must be Active
- Check registration dates under Registrant types

Once registrations are submitted they will remain pending until confirmed at all levels
Editing Existing Registrations

Once a registration has been submitted, it is only possible for staff to make edits.

- Click on the Events Tab
- Click on the Search Icon
- Locate the desired registration
- Click Edit
- Under the Entries section click the green link to access the registration

If the link is not live (green) it means the registration is incomplete

Event Reports

To generate event reports be sure to click on the Events tab first. There are standard reports but they are event specific, you need to select the specific event from the dropdown list first before getting desired report to generate.

Custom reports are event specific. To create custom event reports, follow the same steps as you would for custom report setup. Tip sheets on reports can be accessed at http://web.cals.uidaho.edu/4hreporting/4h-online/staff-helpsheets/

If you have questions or need further information do not hesitate to contact Erika Thiel at ethiel@uidaho.edu

If you are experiencing an issue with 4-H Online please submit a support ticket to support@idaho4honline.zendesk.com