



University of Idaho
Extension



Instructional Manual for County Extension Offices

2018

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Welcome to 4HOnline

4HOnline has served as the Idaho 4-H enrollment data system since 2012. Features of 4HOnline include:

- Ability to monitor 4-H club enrollment numbers by generating real-time ES-237 enrollment reports.
- All members (youth and adults) are issued a life-time membership identification number that can be used for 4-H management procedures (enrollment, event registration, etc).
- Members will have the opportunity to sign up for multiple 4-H clubs, with membership and project participation being approved by club managers and/or county Extension office.
- Event registrations for state, district, and county events.
- Animal identification/records
- Communications within the system facilitated through broadcast emails, text messaging and newsletters

Features of the Club Managers/Project Leader Reporting

- Club manager and project leader login to access club and project member participation lists
- Club managers can also create labels and access club enrollment information (phone/project/email lists)

4HOnline is a vital part of the University of Idaho 4-H Youth Development Program. Our society is more reliant on the use of technology for everyday transactions and interactions. As a result, Idaho 4-H's ongoing use of 4HOnline demonstrates our commitment to providing current technologies for use by our clientele. As the Idaho 4-H Youth Development Program continues to develop this broad based 4-H management system, we ask for your support and your feedback on how the system can be improved to meet county management needs for the ultimate benefit of the youth of Idaho. Policy information regarding 4HOnline can be found in the County Operations Handbook.

4HOnline is administered by Erika Jeffries, 4-H program specialist and the 4HOnline District Support Team (see page 33 for further information). For more information or to provide feedback, please contact Erika Jeffries at ethiel@uidaho.edu or 208-263-8511.

Idaho 4-H would like to acknowledge Texas A&M University for granting permission to utilize their original *Instructional Manual for County Extension Offices* as a template for this document. Special thanks is given to Texas 4-H and the design team of Toby Lepley and Misty Cathey. This publication may be reprinted if no endorsement of a commercial product, service, or company is stated or implied, and if appropriate credit is given to the authors and the Texas AgriLife Extension Service.

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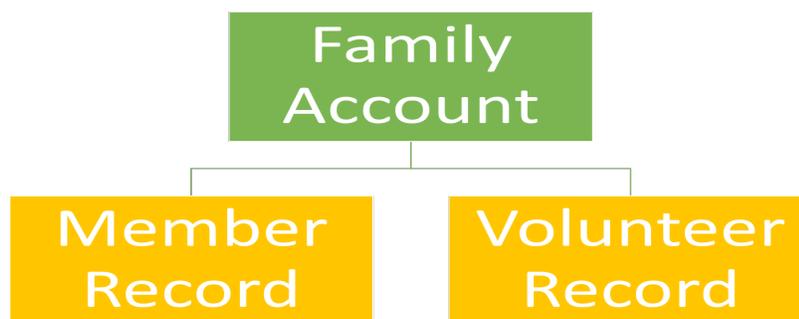
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Getting Started



Family Accounts

4HOnline groups enrollments within a “Family Account” **4-H youth member and Adult 4-H Volunteer records** are housed within the family account. Parents should not create an individual record.

Usernames & Passwords

The gateway for families to login/use 4HOnline is through the family email address. Each family account must have a unique, valid (working) email address. Email addresses can not be shared with any other family accounts.

County manager login information is not to be shared. If a University of Idaho 4-H professional (staff, faculty or new employees) needs a 4HOnline county manager account established, please email Erika Jeffries at ethiel@uidaho.edu

Internet Browser

For best results using 4HOnline, the recommended internet browsers to use are Firefox or Google Chrome. Do not use Internet Explorer.

Roles

There are four roles that users can use to log in to the 4HOnline system.

- Family - The basic role that most users will have. This will allow them to set up a profile with general demographic information and enter youth or adult 4-H volunteer enrollments.
- County - All University of Idaho 4-H professionals and/or staff members will likely use this role. They will have access to their county profiles, clubs, and groups.
- State - Full access to all county information.
- Admin - Full system/all level access

Dashboard

The dashboard is the term used to describe the area where the various functions that sit atop the main page. This provides quick access to the main functions of 4HOnline.

Logging In To 4HOnline

1. Go to <https://id.4honline.com> and add the website to your bookmarks.
2. Click "I have a profile."
3. Type your e-mail address in the "Email" field.
4. Use the password you created.
5. Select "County" on the Role drop down menu.
6. Click "Login" at the bottom of the screen to access the system.

University of Idaho Extension | Idaho 4-H Youth Development

Welcome to 4-H Online

Welcome to Idaho 4-H

New Families	Returning Families	Spanish Language
<p>Please visit your County Extension Office before enrolling to find out about all the great things your county 4-H Program has to offer.</p> <p>NEED HELP??</p> <p><i>For questions or problems with 4hOnline please refer to our on-line Help page</i></p> <p><i>If you are experiencing issues with 4hOnline please click here to submit a ticket</i></p> <p><i>Be sure to visit Idaho 4-H website</i></p>	<p>If you have enrolled using 4hOnline DO NOT create a new profile. If you do not remember what email address you furnished the county, please contact your County Extension Office</p> <p>Enrollment Fees must be submitted to the county before the enrollment process is considered complete. Members may enroll in 4-H year round however, counties may have deadlines for participation in county fairs.</p> <p>Please be sure to set your spam filter (in your email) to accept messages from 4honline!</p>	<p>Haga clic aquí para información en Español.</p> <p>Por favor, visite a su Oficina de Extensión del Condado si tiene preguntas o necesita ayuda. Haga clic aquí para encontrar su oficina de Extensión.</p>

Please read all information carefully, especially county selection. Unless you are a resident of Idaho county PLEASE do not select Idaho County.

For best results please use Firefox or Google Chrome as your browser

I have a profile
 I need to setup a profile
 I forgot my password

Email:

Password:

Role:

Using the Search Function



Search

The “Search” function is the first icon shown on the “Dashboard,” your navigation through the 4HOnline system. This function enables you to find enrollments and event registrations and to find any youth, family, or volunteer registered in 4HOnline.

How to Search for a Member

1. In the “Keyword” field, type the first, last, or full name of the member or family. Make sure you are on the “Members/Volunteers” tab.
2. Select a particular club from the next drop down menu to search a particular club. Otherwise, leave this field blank.
3. If you have a large number of enrollment records, you may want to search a particular enrollment date by specifying a beginning and end enrollment date. Otherwise, leave the “Enrollment Date” field blank.
4. You may specify the member’s role as an “Adult,” “Contact,” “Youth,” or “Custom” group. Simply check the field you wish to search.
5. You may search the status of “Active,” “Archived,” “Inactive,” “Incomplete,” “Not Participating,” “Short-Term”, or “Pending” members. Simply check the field(s) you wish to search.
6. You may also specify the “Gender” or “Volunteer” status of the member by checking the appropriate field. Otherwise, leave these blank.
7. Click “Search.”

Tips:

- Be sure to spell/key in information correctly, any errors in name or email address will impact search results
- To search for members enrolled in a certain project, select the projects tab then select the project.
- To search for a family, select the “Families” tab and follow above steps 1, 2, and 4.
- Be sure to clear filters before your new search
- You may need to scroll down, in order for records to appear depending on browser and viewing settings

Enrollment | Event Registration | Animals | Connect | Stats | Data

Search | My Account | Managers | Literature | Clubs | Projects | Activities | Awards | Groups | Reports

Quick Exports | Quick Reports

Members/Volunteers | Families | Projects | Activities | Awards | Groups

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

Select a county ...

Enrollment Date: From [] To [] Clear Dates

Flagged: Yes No

Gender: Male Female

Role: Adult Contact Custom Youth

Status: Active Archived Inactive Incomplete Not Participating Pending Short-Term

Volunteer: Yes No

1 - 250 of 5058 records returned

Using the Search Function (cont.)

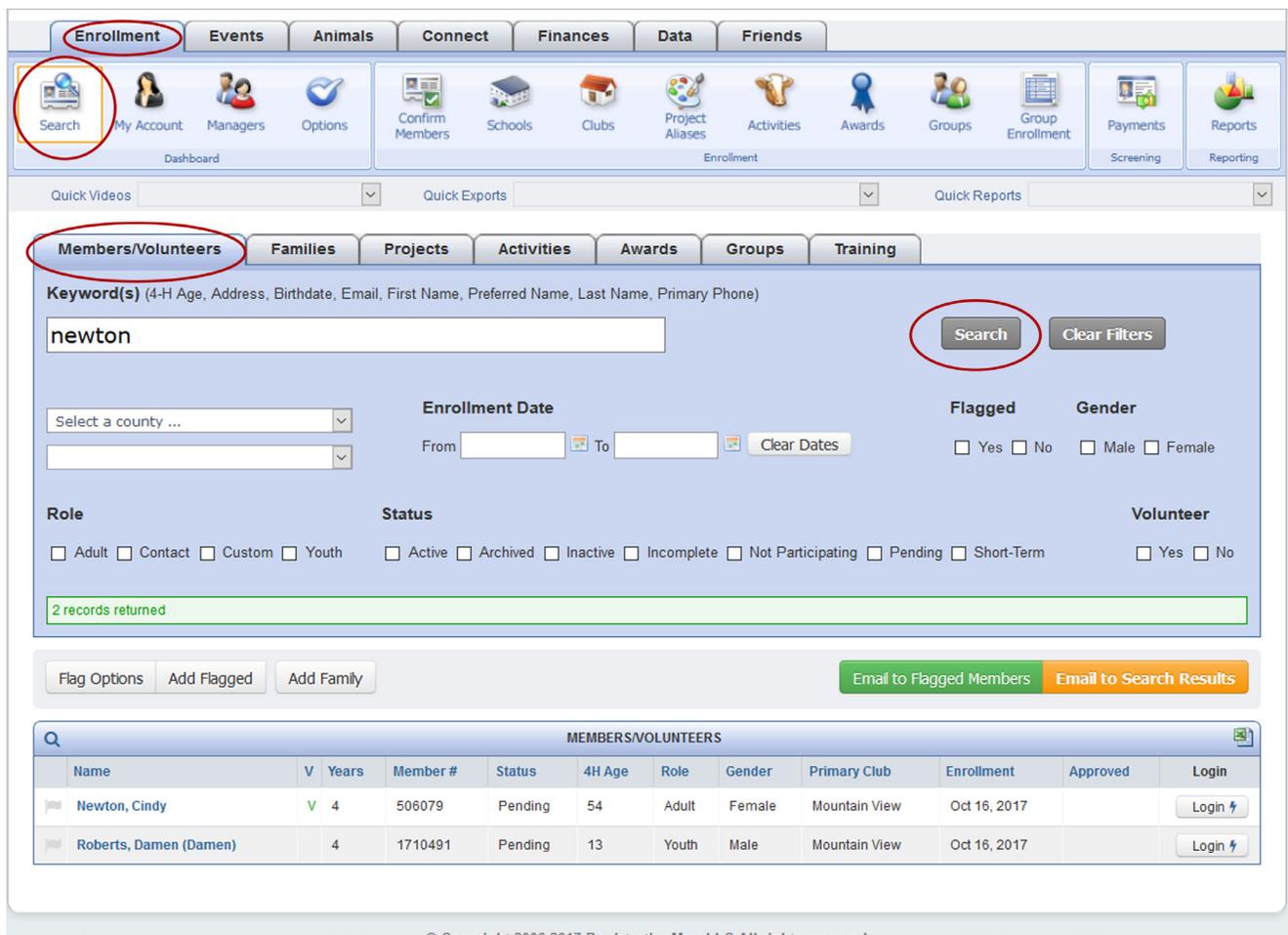


How to View Pending Member/Adult Volunteer Enrollments

1. On the “Member/Volunteer” tab, leave all fields blank.
2. In the “Status” section, select “Pending” and “Incomplete.”
3. Click “Search.”

This search will return all members who have started their application for enrollment or may need follow up from your county office.

Tip: If you are working with a family that says they have enrolled and you can't locate their record from the Members/Volunteers tab do a search from the families tab by last name or email address used. A family record may have been created but member/volunteer records were not created.



Enrollment Events Animals Connect Finances Data Friends

Search My Account Managers Options Confirm Members Schools Clubs Project Aliases Activities Awards Groups Group Enrollment Payments Reports

Quick Videos Quick Exports Quick Reports

Members/Volunteers Families Projects Activities Awards Groups Training

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

newton Search Clear Filters

Select a county ... Enrollment Date From To Clear Dates Flagged Gender Yes No Male Female

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

2 records returned

Flag Options Add Flagged Add Family Email to Flagged Members Email to Search Results

MEMBERS/VOLUNTEERS											
Name	V	Years	Member #	Status	4H Age	Role	Gender	Primary Club	Enrollment	Approved	Login
Newton, Cindy	V	4	506079	Pending	54	Adult	Female	Mountain View	Oct 16, 2017		Login
Roberts, Damen (Damen)		4	1710491	Pending	13	Youth	Male	Mountain View	Oct 16, 2017		Login

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Adding a Family to 4HOnline at the County Level

1. By clicking the “Add Family” button on the Members/Volunteers search screen a county office can add a family. It will ask for the name of the family to add, family email, address, phone number and correspondence preference. Click Confirm add new family.. Once entered, click “Add Family.” The rest of the process for adding family information and individual profiles is the same for the county office as for a 4-H family.

Using the Search Function in Events



Search

How to Search for Event Registrations

1. On the dashboard select the “Events” tab, type in the name of the member you are searching for in the “Keywords” field. If you are looking for all participants, leave this field blank.
2. Select the event from the drop down menu. If you would like a view of all events and participants, leave this field blank.
3. You may specify a registration time frame by filling in the “Registration Date” field. Otherwise, leave this field blank.
4. You may search for “Adults,” “Youth,” or conduct a “Custom” search by checking the appropriate field.
5. Choose what “Registration Status” you are searching for by selecting “Approved,” “Confirmed,” “Incomplete,” “Pending,” or “Resubmit.”
6. Click “Search.”
7. To see the status of the registration, click “Edit” to the right side of the individual.

Tip: Clear filters after doing searches as the system will remember your selections.

The screenshot displays the 'Idaho 4-H Youth Development' web application interface. The top navigation bar includes tabs for Enrollment, Events (highlighted with a red circle), Animals, Connect, Finances, Data, Friends, and Quiz Bowl. Below the navigation bar is a dashboard with icons for Search (circled in red), Confirm Registrations, Events, Calendar, Locations, Views, and Reports. The main content area is titled 'Event Registrations' and features a search form with the following fields and options:

- Keyword(s)**: A text input field with 'Search' and 'Clear Filters' buttons.
- Registration Date**: A date range selector with 'From' and 'To' fields.
- Certified Date**: A date range selector with 'From' and 'To' fields.
- Role**: Radio buttons for Adult, Youth, and Custom.
- Registration Status**: Checkboxes for Approved, Confirmed, Incomplete, Pending, and ReSubmit.
- Gender**: Radio buttons for Male and Female.
- Age/Grade Division**: A dropdown menu.

A green bar indicates '26 records returned'. Below the search form is a 'Download Uploaded Files' button and a 'Send Email to Search Results' button. At the bottom, a table titled 'EVENT REGISTRATIONS' displays the following data:

Name	County	Event	Registration Type	Status	Stage	Reg. No.	Reg. Date	Login	Edit
Anderson, Shelby	Kootenai	4-H Ambassador Summit	Youth Steering Committee Member or 4-H State Officer	Pending	County	13191	Oct 30, 2017	Login	Edit
Bates- Orgill, Tracie	Jefferson	4-H Ambassador Summit	Youth Delegates	Pending	State	13166	Oct 19, 2017	Login	Edit
		4-H Ambassador	Adult Champions or Steering Committee				Oct 31		

Using the My Account Function



My Account

The “My Account” function keeps record of your county office contact information and allows you to manage your password. 4HOnline login information should NOT be shared, if you need an account created please email Erika Jeffries at ethiel@uidaho.edu

How to Edit County Contact Information

1. After logging in to 4HOnline, click the “My Account” icon on the “Dashboard.”
2. View the information listed regarding e-mail address, your name, county, address, and phone number. If any information is incorrect, change it and click “Save.”

Idaho 4-H Youth Development Powered by 4hOnline State Office (State)

Enrollment	Event Registration	Animals	Connect	Stats	Data				
Search	My Account Dashboard	Managers	Literature	Clubs	Projects	Activities	Awards	Groups	Reports
			Enrollment			Reporting			

Profile Information

Email	<input type="text" value="ethiel@uidaho.edu"/>	joe@gmail.com
First Name	<input type="text" value="Erika"/>	
Last Name	<input type="text" value="Thiel"/>	
Organization Title	<input type="text" value="State Office"/>	
Mailing Address	<input type="text" value="PO Box 443015"/>	
City	<input type="text" value="Moscow"/>	
State	<input type="text" value="Idaho"/>	
Zip Code	<input type="text" value="83844-3015"/>	12345
Primary Phone	<input type="text" value="208-885-6498"/>	555-555-1234
4-H State	<input type="text" value="ID"/>	

Password Management

Current Password:

New Password:

Confirm New Password:

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Using the Options Function



The “Options” function allows you to manage what your county’s members and families can and cannot do when they log in to 4HOnline. These options include allowing families to create and edit their record and the last date for member project selection. You may also edit the project list offered in your county.

Options

How to Block Families from Creating their Record

1. After logging in to 4HOnline, click the “Options” icon on the “Dashboard.”
2. Check the box marked “Do Not Allow New Families to Create Their Record.” If you check this, you will be responsible for entering new family information into the 4-H Connect System. Click “Save.”

How to Block Families from Editing their Record

1. After logging in to 4HOnline, click the “Options” icon on the “Dashboard.”
2. Check the box marked “Do Not Allow Existing Families to Edit Their Record.” If you check this, you will be responsible for making any corrections existing 4-H families require. Click “Save.”

How to Link Projects to Clubs

1. After logging in to 4HOnline, click the “Options” icon on the “Dashboard.”
2. Click the “Link Projects” link below the dashboard.
3. Select the appropriate “Club” from the dropdown menu
4. This will open a new screen that lists all 4-H projects offered in the state (and project aliases). Check the boxes beside the projects this club will offer (or simply click the select all button and deselect projects that are not relevant).

Note: The state project list is updated annually, you will need to link any new projects. Also, if your county offers county-based projects you will need to create a project alias and link those projects for them to appear for members.

5. Click “Update.”

Enrollment | Event Registration | Animals | Connect

Search | My Account | Managers | Options | Confirm Members | Schools | Clubs | Project Aliases | Activities | Awards | Groups | Group Enrollment | Reports

Dashboard | Enrollment | Reporting

Link Projects to Clubs | Hide State Groups

Options

For Families

Do Not Allow New Families to Create Their Record:

Do Not Allow Existing Families to Edit Their Record:

For Members

Month and Day of Last Project Selection Date

Last Month for Member Project Selection: May

Last Day for Member Project Selection: 1

Reports

Fair Registration Form

Project Volunteer Login



From the "Options" function, you can allow project volunteers to login to 4HOnline to access participant lists for projects.

Options

How to Allow Project Volunteer Login

After logging in to 4HOnline, click the "Options" icon on the "Dashboard."

1. Click the "Project Leaders" link below the dashboard.
2. Add a check mark under the 'Allow Login' column for the volunteer. Note: This screen can not be sorted by volunteer name or project title.
3. If the project club serves the whole county (members from different clubs participate in this project) add a check mark under the 'County Wide' column.
4. Project passwords are automatically generated by the system (first three characters are numeric, last three characters are capitalized alpha).

Note: Volunteers must be in active status, enrolled in the project, and have clicked the 'I am a volunteer' radio button in the personal information section of their record.

Idaho 4-H Youth Development [2017-2018] Latah (County) Home | State |

Enrollment
Events
Animals
Connect
Finances
Data
Friends

Search

My Account

Managers

Options

Confirm Members

Schools

Clubs

Project Aliases

Activities

Awards

Groups

Group Enrollment

Payments

Re...

Dashboard Enrollment Screening Rep

Project Leaders						
Allow Login	County Wide	Project	Club	Volunteer	Volunteer Title	Password
<input type="checkbox"/>	<input type="checkbox"/>	Birds - Poultry	Mountain View	Richmond, Nancy	Project Leader	200BIR
<input type="checkbox"/>	<input type="checkbox"/>	Cat	Mountain View	Richmond, Nancy	Project Leader	600CAT
<input type="checkbox"/>	<input type="checkbox"/>	Cavy	Mountain View	Richmond, Nancy	Project Leader	700CAV
<input type="checkbox"/>	<input type="checkbox"/>	Clothing - STEAM Clothing 1 Fundamentals	Mountain View	Craig, Mary Jean	Project Leader	295CLO
<input type="checkbox"/>	<input type="checkbox"/>	Cloverbuds	Mountain View	Craig, Mary Jean	Project Leader	500CLO
<input type="checkbox"/>	<input type="checkbox"/>	Dog	Mountain View	Richmond, Nancy	Project Leader	278DOG
<input type="checkbox"/>	<input type="checkbox"/>	LEADER - Small Animal Projects	Mountain View	Richmond, Nancy	Project Leader	810LEA
<input type="checkbox"/>	<input type="checkbox"/>	Pocket Pets and Other Animals	Mountain View	Richmond, Nancy	Project Leader	640POC
<input type="checkbox"/>	<input type="checkbox"/>	Rabbit	Mountain View	Richmond, Nancy	Project Leader	210RAB
<input type="checkbox"/>	<input type="checkbox"/>	Sheep - Market	Country Kids	Fletcher, Stephanie	Project Leader	200SHE
<input type="checkbox"/>	<input type="checkbox"/>	Swine - Market	Country Kids	Ashmead, Jennifer	Project Leader	230SWI
<input type="checkbox"/>	<input type="checkbox"/>	Swine - Market	Mountain View	Johnson, Carrie	Project Leader	230SWI

Using the Confirm Members Function



The “Confirm Members” function is a shortcut to view the members whose enrollment applications have not been approved yet. You can also approve members by using the “Search” function. Effective 2017-2018 4-H Year - Volunteer screening is required every three years. Volunteers who were active status for 2016-17 will need to be re-screened in 2020. Returning volunteers will need to complete the Protecting Minors Training and any other certification elements your county requires.

Member Approval Categories Pending member records fall under three categories:

- Members/Volunteers Needing County Approval - These are pending members/volunteer records. Approval should only occur if member enrollment fees have been paid and in the case of volunteers, all volunteer screening/certification requirements have been fulfilled
- Members/Volunteers Awaiting Employee Approval - Employees are approved at the state level, once approved these members will appear in the Members/Volunteers Needing County Approval list.
- Members/Volunteers Awaiting Volunteer Screening Approval - These members have pending components to their volunteer screening record. If all screening elements are completed, approve the screening record and then the enrollment record will appear in the Members/Volunteers Needing County Approval list. To approve volunteer screening records: click ‘Search’ icon, search for member, click on member name, from member options popup click ‘Profile’, on Volunteer Screening record click ‘Edit’, enter/verify dates for Protecting minors training, and screening information. Select ‘Approved’ from form status dropdown, make sure 4-H year is correct, and no restrictions, and click ‘Submit’.

Name	4-H Age	Type	Gender	Primary Club Title	Club Status	Enrollment Status	Enrollment Date	Login
Madderson, Lynn	51	Adult	Female	Barnyard Brigades 4-H Club	Pending	Pending	Oct 20, 2017	Login #
Sodin, Madelon	16	Youth	Female	Animal House 4-H Club	Pending	Pending	Oct 19, 2017	Login #
Sodin, Suzanne	34	Adult	Female	Animal House 4-H Club	Pending	Pending	Oct 31, 2017	Login #
Steele, Jennifer	46	Adult	Female	Independent Study	Pending	Pending	Oct 26, 2017	Login #

How to Confirm Members

1. After logging in to 4HOnline, click the “Confirm Members” icon on the “Dashboard.”
2. If any names are listed, click “Login” to the right of that name.
3. The system will put you into the Personal Information Section - you can scroll and click through the record screens OR click on County Review
4. READ the information carefully. First, scan the Personal Information Section - check contact information, birthdate (members age 5-7 can only participate in the Cloverbuds project), click ‘Continue’
5. Review the additional information section (authorizations, code of conduct, privacy release, etc.), scroll down and review T-shirt size indicated. A lot of folks do not update T-shirt sizes as the child ages, click ‘Continue’
6. Review the Health Form, Click ‘Continue’
7. Review Participation - Clubs and Projects - every member should be in a club and be involved in a project.
8. From the ‘County Review’ section, scroll to the bottom:
 - **If the information is correct AND the member has paid** enrollment fees and in the case of volunteers screening/certification elements are completed (and if applicable fees are paid), click ‘Accept Member’. An email will be automatically sent to the new member to notify them of their approval.
 - **If information is wrong or additional information is needed** from the member, a message can be typed in the “Message to Member” box and click ‘Send Back to Member’.
 - **If the member was added by accident or is a duplicate**, click ‘Delete Enrollment’ and the record is deleted from the system.

Note:

- “Adult” record is designed for Adult Volunteers NOT adult parents. Parents should not create an individual record within the family.
- Complete the Confirm Members process daily.

Volunteer Screening Status

If pending volunteer records are in the 'Awaiting Volunteer Screening Approval' stage the volunteer screening record needs to be approved.

1. From the search screen click on the volunteer's name
2. From the member options popup window select 'Profile'
3. Click 'Edit' on the Volunteer Screening record
4. Verify the Protecting Minors Training has been completed (Check trainings in the profile)
5. Enter the date that the Public Record Review was completed - note volunteers enter in the date that it was submitted
6. If the volunteer has fulfilled all components change form status to 'Approved' from dropdown menu.
7. Keep restrictions set to No Restrictions
8. Click 'Submit'

Name	4-H Age	Type	Gender	Primary Club Title	Club Status	Enrollment Status	Enrollment Date	Login
Croft, Jennifer	38	Adult	Female	Country Kids	Pending	Pending	Oct 19, 2017	Login
Poessy, Logan	10	Youth	Male	F.M.B.E.	Pending	Pending	Oct 23, 2017	Login
Rickett (Egan), Gus	12	Youth	Male	Country Kids	Pending	Pending	Oct 27, 2017	Login
Roberts, Damen	13	Youth	Male	Mountain View	Confirmed	Pending	Oct 16, 2017	Login
Schumaker, Signe	48	Adult	Female	Mountain View	Confirmed	Pending	Oct 12, 2017	Login
Simons, Chester	13	Youth	Male	F.M.B.E.	Pending	Pending	Oct 30, 2017	Login
Simons, Edith	49	Adult	Female	F.M.B.E.	Pending	Pending	Oct 30, 2017	Login
Vincent, Alle	9	Youth	Female	Country Kids	Pending	Pending	Oct 17, 2017	Login
Vincent, Wyatt	11	Youth	Male	Country Kids	Pending	Pending	Oct 17, 2017	Login
Vowels, Elena	9	Youth	Female	F.M.B.E.	Pending	Pending	Oct 22, 2017	Login
Vowels, Jaxon	11	Youth	Male	F.M.B.E.	Pending	Pending	Oct 22, 2017	Login
Wetzel, Joshua	13	Youth	Male	Mountain View	Confirmed	Pending	Oct 28, 2017	Login
Yager, Nial	51	Adult	Male	Mountain View	Confirmed	Pending	Oct 27, 2017	Login
Yager, Zachary	13	Youth	Male	Mountain View	Confirmed	Pending	Oct 27, 2017	Login
Yager, Zole	16	Youth	Female	Mountain View	Confirmed	Pending	Oct 27, 2017	Login

MEMBERS/VOLUNTEERS AWAITING EMPLOYEE APPROVAL

There are no records

Name	4-H Age	Type	Gender	Primary Club Title	Club Status	Enrollment Date
Bovard, Heather	41	Adult	Female	Country Kids	Pending	Oct 30, 2017
Workman, Haley	22	Adult	Female	Country Kids	Pending	Oct 19, 2017

MEMBERS/VOLUNTEERS AWAITING VOLUNTEER SCREENING APPROVAL

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

Select a county ... Enrollment Date: From To Clear Dates

Flagged: Yes No Gender: Male Female

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

5 records returned

MEMBERS/VOLUNTEERS

Name	V	Years	Member #	Status	4H Age	Role	Gender	Primary Club	Enrollment	Approved	Login
Bovard, Connor		4	1588797	Pending	12	Youth	Male	Country Kids	Oct 18, 2017		Login
Bovard, Dawson		4	1588798	Pending	11	Youth	Male	Country Kids	Oct 18, 2017		Login
Bovard, Emily		3	1588799	Pending	8	Youth	Female	Country Kids	Oct 18, 2017		Login
Bovard, Heather	V	1	0	Pending	41	Adult	Female	Country Kids	Oct 30, 2017		Login
Bovard, Kort		3	1588800	Pending	9	Youth	Female	Country Kids	Oct 18, 2017		Login

Heather Bovard - Latah

Member/Volunteer Information

Full Name: Heather Bovard
 Membership ID: 0
 Address: 1093 Nica Mountain Rd
 City: Cleary
 State: ID
 Zip Code: 83823-9138

Volunteer Screening Information

Initial Year:
 Last Approved Year:
 Restrictions:

Year	Form Number	Screening Status	Fee	Bill	Export	Export Date	Comment	Edit
2017-2018	116514	Pending	NA	NA	NA	NA		Edit

Heather Bovard - Latah

Please make accurate date selections. Dates can not be altered once this form has been submitted (please submit this form and submit your enrollment form then complete the training or data will be lost).

Please enter the date you completed the UI Protecting Minors Training: mm/dd/yyyy

How did you complete the Protecting Minors Training?:

Please enter the date that you submitted your Public Record Review: mm/dd/yyyy

Please enter the date that the Public Record Review was completed/cleared:

Number of years as a 4-H Volunteer? If this is your 1st year select 1:

Form Status:

4-H Year:

Restrictions:

Comments:

Submit Cancel

Using the Clubs Function



Clubs

The “Clubs” function displays a list of 4-H clubs in your county and contact information for the club managers. Logging in to an individual club displays a list of members whose enrollment applications are pending approval. You can also edit the password, contact information, meeting times and charter information for each club.

How to Edit Club Information

1. After logging in to 4HOnline, select the “Clubs” icon on the “Dashboard.”
2. Select a club and click “Edit” at the right side of the screen. This will display the club password, contact information, meeting date and location and charter information for that club. If you make any changes, click “Save” at the bottom of that screen. **See page 16 for details on allowing Club Volunteer Login, Adding New Clubs, Archiving Clubs**

Enrollment | Event Registration | Animals | Connect

Search | My Account | Managers | Options | Confirm Members | Schools | Clubs | Project Alliances | Activities | Awards | Groups | Group Enrollment | Reports

Dashboard | Enrollment | Reporting

Add Club | Quick Exports | Quick Reports

CLUBS				
Title	Status	Delivery Mode	Login	Edit
Barnyard Brigade	Active	Organized 4-H Community Club	Login	Edit
Bruneau Canyon 4-H	Active	Organized 4-H Community Club	Login	Edit
Bruneau Sage Riders	Active	Organized 4-H Community Club	Login	Edit
Country Kids	Active	Organized 4-H Community Club	Login	Edit
Desert Runners	Inactive	Organized 4-H Community Club	Login	Edit

Clubs (cont.)



Clubs

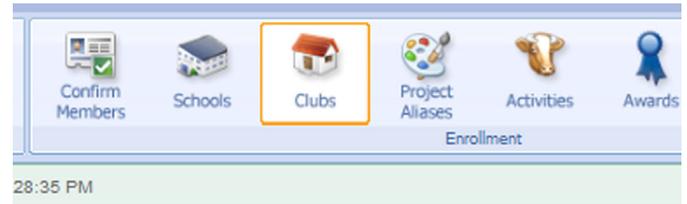
Adding a New Club to your county

1. Visit the Employee Resources page and Click on Club Chartering and Taxation link. The necessary paperwork and chartering process needs to be completed before you can add a new club to your county. For questions regarding chartering and taxation please contact Angela Eide at aeide@uidaho.edu
2. Once the club has gone through the chartering process click the Clubs button on the dashboard and click “Add Club” link in upper left corner (just under the search button on the dashboard).
3. Enter in the club information and click Save when complete and you will be returned to the Clubs screen. A club password will generate automatically. You can edit the password to make it easier for volunteers to remember.
4. If a club needs to be archived simply scroll to the bottom of the page and click ‘Archive’.

Club Volunteer Login

After logging in to 4HOnline, select the “Clubs” icon on the “Dashboard.”

5. Locate the club to which you wish to grant club volunteer access, then click “Edit” to the right of the club name.
6. Once an adult volunteer has been approved in the system and they have indicated they are a volunteer (clicking radio button in personal information) they will be listed under the volunteer section. A county office can then assign login rights to that volunteer for the purpose of printing club/project lists, printing labels, and entering meeting/project attendance reports. Access can be changed as needed by the county office. If you check the ‘allowing member management’ access that volunteer can change member project enrollment (not recommended).
7. Select the appropriate club volunteer to be given access. Click “Save.” If the volunteer’s name is missing from the list, the volunteer needs to edit their profile and/or be activated within 4HOnline.



Club Information	
Club Title:	Sassy Spurs
Description:	not required but useful
Delivery Mode:	1a) Organized 4-H Community Club
Report Method:	Individual
Number of Members:	Unlimited
Club Password:	TcIfTdB1
County:	Demo

Details	
Contact:	Betty Boop
Address Line 1:	123 Just Say Woah Lane
Address Line 2:	
City:	Bonnors Ferry
State:	Idaho
Zip Code:	83805
Phone Number:	208-267-1345
Fax:	
Email:	ridenslide@horsecrazylady.com
Web Site:	
Newsletter Site:	
Meeting Location:	
Meeting Time:	
Comments:	

Tip: Edit this list seasonally to grant or limit access to leaders when they actually need access. For example, if a leader only needs administrative access during the spring, “uncheck” their name during rest of year.

Using the Groups Function



The “Groups” function displays a list of groups that meet in your county. This function is also used for short term events where we want to capture educational experiences. For example - youth doing enrichment activities at a summer reading program ran by the library.

How to Add a New County Group

1. After logging in to 4HOnline, select the “Groups” icon on the “Dashboard.”
2. Click “Add Group” on the top left bar below the “Dashboard.” This will display a series of fields to collect pertinent information for the new group.
3. Click “Save” when you are finished.

How to Edit Group Information

1. After logging in to 4HOnline, select the “Groups” icon on the “Dashboard.”
2. Select a group and click “Edit” at the right side of the screen. This will display the group type, meeting date and location, group leader and contact information. If you make any changes, click “Save” at the bottom of the screen.
3. If you are starting a new 4-H year and a group is no longer active or existing, click “Delete” to remove the group.

The screenshot shows the 4HOnline dashboard with the 'Groups' icon circled in red. Below the dashboard is an 'Add Group' button. A table titled 'GROUPS' is displayed with the following data:

Level	Group Type	Title	Delivery Mode	Description	Edit
County	Camp	Demo	4-H Day Camping Program		Edit

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Using the Group Enrollments Function



Group Enrollment

The ES237 report is the Youth Extension Report. All Extension youth programming needs to be reported to CALSPlan and in 4HOnline (through group enrollments). The Group Enrollment function captures participant numbers we do not capture through member enrollment in 4HOnline such as school enrichment, special interest, camps, afterschool programs conducted in your county. Additional information on Reporting Guidelines and ES237 definitions can be found at <https://www.uidaho.edu/extension/4h/4honline/help-for-staff>

How to Add a Group Enrollment

1. After logging in to "4HOnline," click the "Group Enrollment" icon on the "Dashboard."
2. Click "Add Group Enrollment" on the left side of the bar below the "Dashboard." This will display the first of three steps to create and distribute the group enrollment form.
3. The first step, "Program," outlines the group name and type. Complete all fields in bold (required). Make sure that each group enrollment has at least one project associated with it - this is required or you will receive an error message.

These are delivery methods options:

- **4-H Special Interest/Short Term Programs**
 - Weekends, Summer, Out-of-School days
- **4-H Overnight Camping Program**
 - Educational experience of group living in the outdoors that includes an overnight stay
- **4-H Day Camping Program**
 - Day camps are usually theme based and may consist of multi-day programs with the youth returning home each evening.
- **4-H School Enrichment Program**
 - Programs/activities that take place IN school during the school day. They may take place at public or private school or for a home-school association.
- **4-H Individual Study/Mentoring/Family Learning**
 - Single child doing project or activity working independently, not in a club. One-to-one training may take place. May include working with a single family doing a specific activity.
- **School Aged-Child Care Education Program**
 - This category is referred to as 4-H Afterschool and include programs that take place after school, early release days, fifth-day or when school is not in session during academic year.
- **Instructional TV/Video Program**
 - Programs, events, that are not face-to-face instruction. May be done via a variety of media such as pod-casts, web-based, etc.

4. Click "Continue."

Tip: Counties can now add school groups as they are entering group enrollment numbers by clicking the "Add Group" button beside the group field. All groups added here will also appear under the "Groups" icon once saved. This feature allows county offices to set up individual records for each educational outreach effort.

4-H Year	Program Date	Program Name	Description	Club/Group	Delivery Mode	Submit Date
2011-2012	Jul 11, 2012	New Program	test	Demo	4-H Day Camping Program	

Group Enrollment - Step 1 (Program Details)

- 1 Program
- 2 Member Distribution
- 3 Volunteer Distribution

Project	Remove
Cloverbuds	Remove

Group Enrollments (cont.)

5. The second step, "Member Distribution," allows you to specify demographic information for group enrollment distribution. You will enter Gender, Race, Ethnicity, Residence, and Grade information in this section. "Duplicates" are youth who have already been counted - either they have an individual record (club members) or they have been entered on a prior group enrollment record.

Group Enrollment - Step 2 (Member Distribution)

- 1 Program
2 Member Distribution
3 Volunteer Distribution

Gender Distribution

Gender (Duplicates are current 4-H participants)	Total	Duplicates
Male:	2	0
Female:	2	0
Sub-Total	4	0
Total (Duplicates removed)	4	

Racial Distribution Please remove current 4-H participants (duplicates)

Please indicate the race and ethnicity of participants	Ethnicity	
Racial Groups	Hispanic	Non-Hispanic
(1) White Only:	4	0
(2) Black or African American Only:	0	0
(3) American Indian or Alaska Native Only:	0	0
(4) Asian Only:	0	0
(5) Native Hawaiian/Other Pacific Islander Only:	0	0
(10) Balance (other combinations):	0	0
Sub-Total	4	0
Total	4	

Residence Distribution Please remove current 4-H participants (duplicates)

Where do the participants live?	
Farm:	4
Rural (under 10,000):	0
Town (10,000 - 50,000):	0
Suburb of Cities (less than 50,000):	0
Central Cities (Greater than 50,000):	0
Total	4

Grade Distribution Please remove current 4-H participants (duplicates)

Grade Level

Group Enrollments (cont.)

6. Click "Continue."
7. The third step, "Volunteer Distribution," allows you to specify information for the volunteer enrollment distribution according to race, ethnicity, volunteer classification, and training types.
8. Check the box on the bottom left of the screen "Submit Form for Approval." Submitted forms may be edited at any time.
9. Click "Save Form."

Group Enrollment - Step 3 (Volunteer Distribution)

- 1 **Program**
 2 **Member Distribution**
 3 **Volunteer Distribution**

Racial Distribution				
New Volunteers Only	Adult Volunteers		Youth Volunteers	
	Ethnicity		Ethnicity	
Racial Groups	Hispanic	Non-Hispanic	Hispanic	Non-Hispanic
(1) White Only:	0	5	0	5
(2) Black or African American Only:	0	0	0	0
(3) American Indian or Alaska Native Only:	0	0	0	0
(4) Asian Only:	0	0	0	0
(5) Native Hawaiian/Other Pacific Islander Only:	0	0	0	0
(10) Balance (other combinations):	0	0	0	0
Sub-Total	0	5	0	5
Total	5		5	

Adult Classification Distribution		
Classification of Volunteers	Adult Volunteers	
	Male	Female
Direct:	1	4
Indirect:	0	0
Sub-Total	1	4
Total	5	

Using the Group Enrollment Function (cont.)

How to Edit a Group Enrollment

After logging into 4HOnline, click “Group Enrollment” from the “Dashboard.”

1. Click “Edit” at the far right of the group enrollment you wish to change. This will display the three steps described in the previous instruction set, “How to Add a Group Enrollment.”
2. Follow instructions on pages 18-20 (steps 3 to 9) of “How to Add a Group Enrollment.”

GROUP ENROLLMENT FORMS							
4-H Year	Program Date	Program Name	Description	Club/Group	Delivery Mode	Submit Date	Edit
2011-2012	Jul 11, 2012	New Program	test	Demo	4-H Day Camping Program		Edit
2011-2012	Aug 2, 2012	Camp Cloverbud	Cloverbud Day Camp	Country Critters	4-H Day Camping Program	Aug 02, 2012	Edit

How to Search for Group Enrollment

The group enrollment search function allows you to search previously created enrollment forms. The forms can be filtered by year, program date, specific groups, and by forms submitted or unsubmitted.

1. After logging into 4HOnline, click “Group Enrollment” from the “Dashboard.”
2. Select the year the form was created from the “Year” drop down menu.
3. Complete the “Program Date” “From” and “To” fields to narrow by specific date.
4. Select a group from the “Group” drop down menu.
5. Click “Search.”

Tip: If your search does not return what you are searching for, widen your search by clicking “Clear Filters” and entering less data.

The dashboard features a navigation bar with tabs for Enrollment, Event Registration, Animals, and Connect. Below this is a row of icons for various functions: Search, My Account, Options, Confirm Members, Schools, Clubs, Project Aliases, Activities, Awards, Groups, Group Enrollment (highlighted with a red box), and Reports. Below the icons are buttons for 'Add Group Enrollment' and 'Quick Exports'.

The search filter section includes a '4-H Year' dropdown menu set to 'All 4-H Years', a 'Program Date' section with 'From' and 'To' date pickers and a 'Clear Dates' button, a 'Group' dropdown menu set to 'All Groups', and an 'Additional Options' section with checkboxes for 'Show Submitted Forms' and 'Show Unsubmitted Forms'. A green bar at the bottom of the filter section indicates '2 Records Returned'. There are 'Search' and 'Clear Filters' buttons.

GROUP ENROLLMENT FORMS							
4-H Year	Program Date	Program Name	Description	Club/Group	Delivery Mode	Submit Date	Edit
2011-2012	Jul 11, 2012	New Program	test	Demo	4-H Day Camping Program		Edit
2011-2012	Aug 2, 2012	Camp Cloverbud	Cloverbud Day Camp	Country Critters	4-H Day Camping Program	Aug 02, 2012	Edit

Using the Manager Control Panel

The "Manager Control Panel" is a shortcut to member and family records.

How to Use the Manager Control Panel

1. After logging into 4HOnline, login a member's name via the "Search" icon on the "Dashboard."
2. The "Manager Control Panel" will appear to the left of the Member list for the selected family. It allows you to quickly view records (includes active records, incomplete records, records waiting approval, records from last year not renewed or all records), find members, find family, add youth or add adults in families. Clicking any of the buttons on the "Manager Control Panel" will direct you to the usual screen to complete the command.

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

Select a county ... From To

Flagged Yes No Gender Male Female

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

3 Records Returned

Name	V	Years	Member #	Status	4-H Age	Role	Gender	Primary Club	Enrollment	Approved	Login
<input type="checkbox"/> Demo, Adult		2	294905	Incomplete		Adult	Female	Demo Club	Jul 11, 2012		<input type="button" value="Login"/>

Manager Control Panel

View

Find Member

Find Family

Create New Family (enter family name)

Member	Flag
Avi Boop (11)	<input type="checkbox"/>
* Betsy Boop (23)	<input type="checkbox"/>
* Betty Boop (42)	<input checked="" type="checkbox"/>
Kat Boop	<input type="checkbox"/>
* Liz Boop (19)	<input type="checkbox"/>
* Spurs Boop (52)	<input type="checkbox"/>

Idaho 4-H Youth Development

Logged in as Boop (County)

Member List

If your enrollment status is **Inactive** or **Incomplete**, click the **Edit** button to review, update (or correct) and submit your record for approval. If your status is **Pending**, your record is complete and waiting for county Extension approval.

Volunteers must have a successful background screen, completed the Protecting Minors Training, and remit enrollment fees (to county Extension Office) for an enrollment to be considered complete.

Boop Family

853 Black Mountain Rd
Bonners Ferry, ID 83805-5705

Address is Verified

208-267-1345
skichic12001@yahoo.com [send mail]
There is a problem with your email address. [more info]
Demonstration County [contact info]

Add A New Family Member
select a member type...

ReActivate An Archived Family Member
select a member...

YOU CAN NOT REGISTER FOR AN EVENT UNTIL YOUR ENROLLMENT HAS BEEN ACCEPTED AND YOUR STATUS IS SET TO ACTIVE
If your enrollment status is "inactive" or "incomplete", click the "Edit" button to review and submit your record for approval

Member/Volunteer List						
	Name	Role	Membership ID	Enrollment Status	Last Active Year	Edit
1)	Avi Boop	Youth	467991	Active	2017-2018	<input type="button" value="Edit"/>
Event Registrations 10/01/2014-09/30/2015						
2)	Betsy Boop	Adult		Inactive		<input type="button" value="Edit"/>
3)	Betty Boop	Adult	457888	Inactive	2016-2017	<input type="button" value="Edit"/>
Event Registrations 10/01/2014-09/30/2015						
Event Registrations 10/01/2015-09/30/2016						
4)	Kat Boop	Contact		Active		<input type="button" value="Edit"/>

Acting On Behalf Of:
Boop Family
853 Black Mountain Rd
Bonners Ferry, ID 83805
208-267-1345

Recent Profiles

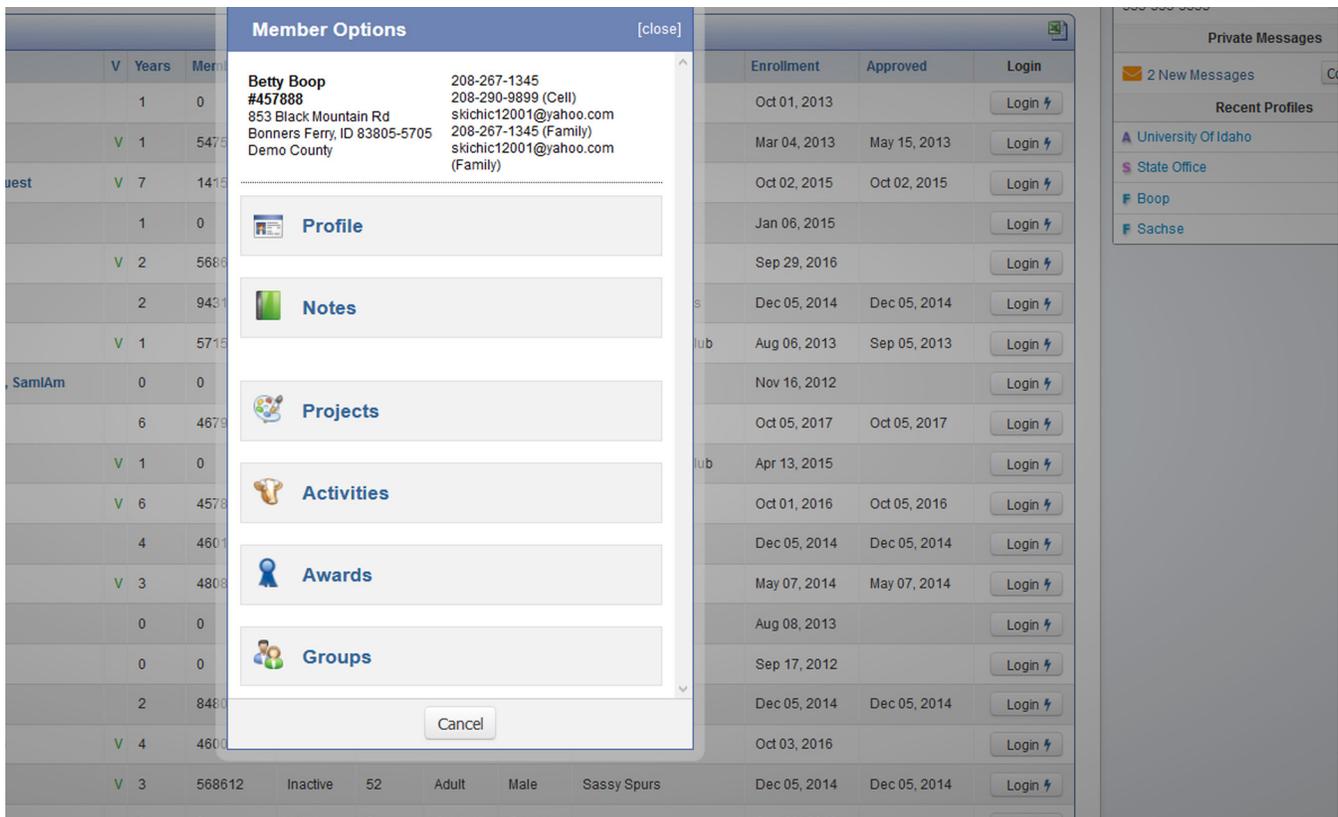
- University Of Idaho
- State Office
- Demonstration
- Sachse

Using the Member Options Panel

The “Member Options Panel” is a shortcut to member and family information including notes, files, projects etc.

How to Use the Member Options Panel

1. After logging into 4HOnline, click on any member’s name via the “Search” or “Confirm Members” buttons on the “Dashboard.”
2. The “Member Options Panel” will pop up. It allows you to quickly access profile information (click that to access the Volunteer Screening information), contact information, notes, projects etc. Clicking any of the buttons on the “Member Options Panel” will direct you to the usual screen to complete the command.
3. Notes can be viewed or searched for in the connect section. These are often created in enrollment section and are tied to individual profiles. The notes function can be used to send email messages to individuals or create a note for manager use only.



Using the Events Function



The “Events” function allows you to post county-specific events and activities, create registration forms, and manage registration approvals as well as create event specific reports.

Events

Using the Search Icon in the Events Dashboard

This allows you to search for members and their registration status for various events. You can also access member’s personal information or their event registration information.

Confirm Registrations icon in the Events Dashboard

Depending on how the event is created, you may need to approve members before they can participate in an event. If this is an event you are not hosting (i.e. state event), your approval, in a timely manner is required for the member’s registration to advance and be accepted.

To confirm an event registration

1. Click on the Events Tab
2. Click on the ‘Confirm Registrations’ Tab
3. Locate the event in the list entitled ‘Events With Pending Registrations’ click ‘Edit’
4. Click on the member’s name
5. Read the registration form in its entirety, very carefully
6. If all information is correct, click ‘Accept Registration’. If information is incomplete or wrong enter in a message in the comments box instructing the member on what needs to be changed and click ‘Send Back to Member’. Delete and Block Registration will block a member’s registration for that event.

The screenshot shows the Idaho 4-H Youth Development [2017-2018] Demonstration (County) dashboard. The 'Events' tab is selected and circled in red. Below the navigation bar, the 'Confirm Registration' icon is also circled in red. The main content area displays a table titled 'EVENTS WITH PENDING REGISTRATIONS' with the following data:

4-H Year	Begins	Title	Status	Pending Registrations	Edit
2015-2016	Sep 23, 2016	4-H Reimbursement Scholarship Application	Testing	1	Edit
2014-2015	Sep 8, 2015	VI Rexford Scholarship Application **For State Volunteers Forum Only**	Active	1	Edit

Using the Events Function (cont.)



Events

How to Add an Event

1. Click on the 'Events' tab.
2. Click on the 'Events' icon.
3. Click 'Add Event' in gray ribbon below the dashboard.
4. Add in event information, starting with event title. You do not need to change type or calendar settings.
5. General settings: recommend "entry based registrations" if you will have a registration form included.
6. Open/restrict: limits who can participate. Normal = your county, county selection = specific counties, unrestricted= open to whole state.
7. Restrict by project: blank = all members, or can limit to members enrolled in specific projects.
8. School grade: blank = open to all or can restrict as desired.
9. Levels certifying: County level will need to confirm registration or no confirmation, completed registration will automatically be approved.
10. Youth Validation: only use if you need to double check age or there are limited gender based spots (i.e. sleeping capacity) at an event.
11. Animal/Livestock: only use if there are animals being registered into the event as well and you are linking to Animal ID information.
12. Date & Time: Date and time information for the event. Will be included with event invoice, etc.
13. Repeat: only use if you have a regular repeating event
14. Invoice instructions: complete if you have additional, event specific information that needs to be included on the invoice.
15. Comments: use if you have additional comments or notes on the event.
16. Event Contact: complete with contact information that you want on invoices, etc.
17. Save – at this point you can leave it as event information or create an event registration form.

Type in a name for the event, then select a calendar(s) and group(s)

Event Title:

Account:

Publish:

Type:

Calendar:

Date Closed:

General Settings

Enable Administrative / Cost Recovery Fee:

Enable Deposits:

Entry Based Registrations:

Final Approval By Member's Unit: Gives other counties and districts final approval

Manager Only Registration: Only managers can register members

Not Visible to Members: Members can be registered but see nothing about the event

Open / Restrict Event by County

Normal Hierarchy Restriction:

Restrict by County Selection: Members from selected counties can register

Unrestricted: Members from all counties can register

Restrict Event by Project

Restrict by Project Selection: Youth from selected projects can register

Selected Projects

Restrict Event by School Grade

Restrict by School Grade Selection: Youth from selected grades can register

Selected Grades

Levels Certifying Registrations

County:

Using the Events Function (cont.)

Creating an Event Registration Form

1. An event must be created first (see page 23).
2. To edit an event or create a registration form the event must be in "Testing" status
3. The options that appear below the Events icon (see image below) walk you through the event building process.
4. Location - where the event will be held
5. Apply template you can use information and formatting from prior events. NOTE: Be sure to update dates to current year.
6. Registration types - set classifications like youth or adult. This is where you specify the registration time frame (be sure to allocate for testing time and if the registration is fee based).
7. Custom Fields - create/edit "form" fields here:
 - Title - Text in the form
 - Type - Format the form will use. Group is the root of your form and creates headers. Other formats include radio buttons, check boxes, dropdown menus etc.
 - Registration types - who can see what information. You can specify certain elements to be visible for only certain registrants
 - Using the arrow up and arrow down you can change the priority/order of the fields.
8. Additional items - can be a page 2 or additional items for registration form
9. Upload docs - upload information specific to your event like maps, flyers, rules, schedule, pre-event items. These items are .pdf files and can be downloaded by registrants at the time of registration.
10. Transmit funds: not functional at this time
11. Preview - preview what your form will look like. Select the view per registration type from the dropdown menu

The screenshot displays the 'Idaho 4-H Youth Development [2017-2018] State Office (State)' interface. The top navigation bar includes 'Home', 'Admin', and 'Logout'. Below this is a menu with tabs for 'Enrollment', 'Events', 'Animals', 'Connect', 'Finances', 'Data', 'Friends', and 'Quiz Bowl'. The 'Events' tab is active, showing a sub-menu with 'Search', 'Confirm Registrations', 'Events', 'Calendar', 'Locations', 'Views', and 'Reports'. A red box highlights the 'Event' sub-menu, which includes 'Event', 'Locations', 'Apply Template', 'Registration Types', 'Custom Fields', 'Additional Items', 'Upload Docs', and 'Transmit Funds'. The 'Event' sub-menu is further divided into 'Event' and 'Funds'.

The main content area is titled 'Type in a name for the event, then select a calendar(s) and group(s)'. It contains the following fields:

- Event Title: 2017 National Congress Application
- Account: [Dropdown]
- Publish:
- Type: Standard [Dropdown]
- Calendar: Idaho 4-H Youth Development [Dropdown]
- Status: Testing [Dropdown]
- Date Closed: [Date Picker]

Below this is the 'General Settings' section:

- Enable Administrative / Cost Recovery Fee:
- Enable Deposits:
- Entry Based Registrations:
- Final Approval By Member's Unit: Gives other counties and districts final approval
- Manager Only Registration: Only managers can register members
- Not Visible to Members: Members can be registerd but see nothing about the event

At the bottom is the 'Open / Restrict Event by County' section:

- Normal Hierarchy Restriction:
- Restrict by County Selection: Members from selected counties can register

Using the Reports Function



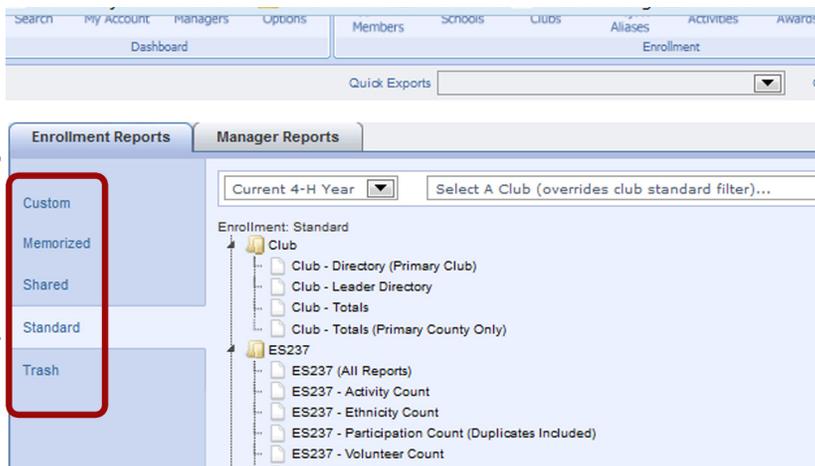
Reports can be developed from all information in the 4HOnline system. Some of these reports are standard reports that have been integrated to work with every level of management and events. Some reports are custom and have been developed by the user of the system. Custom reports can be shared with other lower-level administration levels (i.e. county can share a report with club manager) within the system. The report sharing process allows different levels to take advantage of unique reporting options.

How to Access the Reporting Function

1. After logging into 4HOnline, click “Reports” from the “Dashboard.”
2. Click on the Enrollment Reports Tab. The reports listed contain different types and formats of reports, with different user options for each. Standard and Shared directories contain reports that were created by an admin, options on these reports are not editable. You can edit options that “you” own in the Memorized and Custom Directories.

Report Directories

- Custom - Customized reports, includes copies of shared reports, new reports, all filters, auto labels
- Memorized - Your memorized standard reports, limited standard filter options, no auto labels
- Shared - Reports shared by state to district/county/club, must memorize (to custom) to edit options
- Standard - Reports created by 4HOnline, multi-line, non-edit, no auto labels
- Trash - Less drastic (and permanent) than “delete report”. Clean this out periodically



How to Work with Standard Reports

In standard reports, the county can run a standard report or copy the report and customize it to certain items needed at that particular time. A copied report can be saved and viewed at other times. Both standard enrollment and standard event reports work in the same way.

How to View a Standard Report

1. Select the report you wish to view and click the “Run” button located to the right of the report name OR highlight the report name, and right click and select either ‘Export to Excel’ or ‘Export to PDF’



Reports (cont.)



Once a report has been created, you can view your report in many different formats, such as .pdf or .xls files.

Reports

1. Click run report a separate window will open showing the report in Quick view as a .pdf.
2. To print the report in .pdf format simply select print from the browser tool bar. To export and save the .pdf, click the blue disk icon located to the immediate left of the pull down menu indicating “.pdf.” The report will then be download to your computer as a .pdf.

Owyhee 2011-2012
Report: Club - Totals
Filters: Status=Active;

Owyhee

Total Clubs: 22
 Total Adults (Primary Club Only): 68
 Total Youth (Primary Club Only): 289
 Total Adults (All Members) 70
 Total Youth (All Members) 315

Delivery Mode	Primary Club Only		All Members	
	Adults	Youth	Adults	Youth
Organized 4-H Community Club	68	274	69	300
Organized 4-H In-School Club	0	0	0	0
Organized 4-H After-School Club	0	15	1	15
Organized Military 4-H Club	0	0	0	0

3. If you have a large report with many headings, or wish to have the data to conduct a mail merge, it is recommended that you export the data to Excel. To create an Excel spreadsheet, select the “.xls” option (Excel version) from the drop down menu on the right side.

4. Once “.xls” has been selected, click on the blue disk icon located to the immediate left of the drop down menu indicating “.xls.” By clicking this, the computer will open another window asking you to save the report, or automatically open the report in Excel (depends on your computer’s operating system).

5. Once the report is open or saved you can edit the information in any way you need. The formatting will appear the same as the .pdf. If you need to sort or do extended functions with the file in this format you will want to delete the unnecessary formatting so you can filter and sort the data. On group reports you may need to add columns to preserve the “grouping”.

Member: 4-H District	Member: 4-H County	Member: Last Name	Member: First Name	Member: Birth Date	Family: Address	Family: Email	Member: Membership Id
Southern	Owyhee	Aberasturi	Kelly	N/A	2504 Northside Rd		0
Southern	Owyhee	Aberasturi	Makayla	Apr 15, 1998	1652 Hwy 19	wendyaberasturi@yaho.com	296308
Southern	Owyhee	Aevermann	Kelsey	Oct 16, 1995	17771 Locust Lane	kaevermann@hotmail.com	301027
Southern	Owyhee	Albor	Elizabeth	Jan 16, 1995	P O Box 1165	elliea209@gmail.com	272726
Southern	Owyhee	albor	Graviela	Sep 17, 1994	P O Box 1091	ellie_albor@yahoo.com	296638
Southern	Owyhee	Albor	Leslie	May 12, 1996	P O Box 1165	elliea209@gmail.com	296634
Southern	Owyhee	Allen	Amber	Mar 24, 2002	23576 Homerdale Rd	fjallegend@gmail.com	389659
Southern	Owyhee	Allen	Tracy	N/A	23576 Homerdale Rd	fjallegend@gmail.com	389667
Southern	Owyhee	Allen	Wilma	N/A	20659 Hillcrest	mosews83626@msn.com	294474
Southern	Owyhee	Aman	Bindget	N/A	P. o. Box 715	bridgeta@uidaho.edu	389309
Southern	Owyhee	Aman	Lydia	Apr 21, 1996	P. o. Box 715	bridgeta@uidaho.edu	303326
Southern	Owyhee	Aman	Megan	Apr 05, 1998	P. o. Box 715	bridgeta@uidaho.edu	303327

Reports (cont.)



Reports

How to Copy and Customize a Standard Report

1. Select the report that you need to customize and duplicate for your particular purpose (i.e. you want to create family labels for each of your 4-H clubs/groups in your county).
2. Click the “Copy” button located beside the standard report entitled “Enrolled Family Labels – (Avery 5160).”
3. Once clicked, you will see the various options available to customize the report (i.e. the club, project, family flag, member flag, primary club, etc.)
4. Select the desired report customizing options by moving the item from the box on the left to the right, or by clicking the particular item on the bottom portion of the screen.
5. Click “Save” at the bottom of the screen. Note the “Delete” button at the bottom of the screen. Any time you wish to delete a report, you can do so by opening the report and clicking “Delete.”
6. Click on the “Report” link located above the Clubs and Project boxes.
7. Name and describe customized report for easy identification.
8. Click “Page View” to see the results of your customizing.
9. You can modify, update, and edit your report at any time by clicking “Run” beside the report and then changing your “Standard Filters” settings.

How to Work with Custom Reports

Custom reports work in the same format as the standard reports, except that the user has the option of selecting countless information for an event, person, family, etc. Reports can be created to include demographic information, contact information, screening, event, project, club, event payment, etc.

How to Create a Custom Report

1. Select “Enrollment” by clicking that option depending on the type of custom report you wish to create.
2. For “Custom Enrollment,” click “Add Report” at the top of the report list, then click “Add Report.”
3. Provide a name and description to your report. This will help you manage your reports for future uses.
4. Choose information from the “Profile,” “Additional,” “Participation,” “Registration,” and/or “Payment” sections of the system to develop your report. Each of these areas are related to the following information:
 - Profile: race, gender, family name/e-mail, school, grade, address, city, date enrolled, additional contact information.
 - Additional: volunteer screening, offices held, emergency contact, permission consents, school name and type, alumni information.
 - Participation: club and project involvement
 - Registration: information pertaining to events such as status, confirmation dates, title of events, and specifics about events (custom events).
 - Payment: amounts, check numbers, date payment received, payment status.

Reports - ES237



ES237 reports can be ran at any time on 4HOnline. ES237 reports are listed under “Standard” reports. The “All Reports” compiles all of the counts and you have the option of printing standalone reports for the different counts that are used to compile ES237 data (Activity, Ethnicity, Participation, Volunteer, and Youth).

How to run ES237 Report (All Reports)

1. Login to 4HOnline
2. Click the “Reports” icon on the Dashboard
3. Select “Standard” under the Enrollment Reports tab
4. Select the standard report entitled “ES237 (All Reports).”
5. Click “Run Report” under Report Options
6. A new screen will pop up showing the report in a .pdf view.

Tip: Data entry(group information, enrollments etc.) needs to be completed by September 30 as 4HOnline automatically rolls into the new year October 1.

Note: Counties do not need to submit separate county ES237 Reports. The ES237 is submitted through the State 4-H Office.

Report Quick View

Page 1 of 9 Pdf

Owyhee
2011-2012
Thursday, August 23, 2012
Page

Report: ES237 (All Reports)
Filters:

(a)	(b)	(c)	(d)	(e)
Youth Members of Organized 4-H Community Clubs	Youth Members of Organized 4-H In-School Clubs	Youth Members of Organized 4-H After School Clubs	Youth Members of Military 4-H Clubs	Total 4-H Club Membershi
302	0	15	0	317
(f)	(g)	(h)	(i)	
Youth Participating in 4-H Special Interest / Short-Term Programs	Youth Participating in 4-H Overnight Camping Programs	Youth Participating in 4-H Day Camping Programs	Total Youth Participating in 4-H Camping Programs	
93	0	0	0	
(j)	(k)	(l)	(m)	
Youth Participating in School Enrichment Programs	Youth Participating in Individual Study / Mentoring / Family Learning Programs	Youth Participating in After-School Programs Using 4-H Curricula / Staff Training	Youth Participating in Instructional TV/Video/Web Programs	
638	2	0	0	
Total (with duplications included)				
1050				

Using the Newsletters Function



4HOnline can help reduce postage expenses and facilitate communication with 4-H Volunteers and members. Managers can upload newsletters, brochures/flyers, etc.

Newsletters

How to Add a Newsletter

1. Click on the “Connect” tab then the “Newsletters” icon.
2. Click on “Add Newsletter”
3. Enter a title for the document
4. Click “Create”
5. You have the option to enter a date. Items that are date specific post in upcoming to past order. If a date is not indicated it will be listed at the bottom of the document/newsletter list
6. Select your share with option (share with members shows on family home page, share with managers shows on manager home page)
7. Click “Browse” to select the file you wish to upload. Files must be in a .pdf format
8. Navigate to select the file you wish to upload, then click “Open” on the popup window
9. After a moment, another panel will appear giving you the option to add a file description, then click “Upload File”

The screenshot shows the top navigation bar with tabs for Enrollment, Event Registration, Animals, and Connect. The 'Connect' tab is selected and circled in red. Below the navigation bar is a 'Communication' section with icons for Messages, Notes, State Forum, Newsletters, Broadcast Emails, and Schedules. The 'Newsletters' icon is circled in red. Below this section is an 'Add Newsletter' button, also circled in red.

NEWSLETTERS		
Date	Title	Share With
	Test	No

This screenshot is similar to the previous one, but the 'Newsletters' icon in the 'Communication' section is highlighted with a yellow border.

Newsletter Information

Title:

Date:

Share With Members: Shows on family home page

Share With Managers: Shows on manager home page

Select a document:

Uploaded Newsletter:

Using the Broadcast E-mails Function



Broadcast
Emails

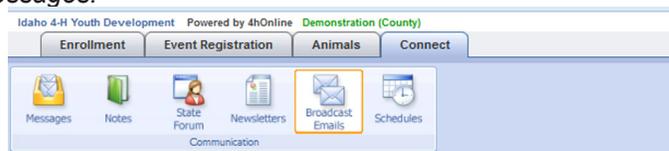
4HOnline provides several tools to help facilitate communication with 4-H Volunteers and members. You are able to send group e-mail and text messages.

How to Create a Broadcast E-mail

1. Login to 4HOnline
2. Create a custom report that contains the e-mail addresses of the desired recipients.

It is recommended to include Member: E-mail AND Family: E-mail in the report

3. Click on the “Connect” tab then the “Broadcast E-mails” icon.
4. Enter a title for the e-mail (this is for your purposes only). If you have sent a similar e-mail in the past, you can select a former email to use as an “Email template”
5. Select who you want the e-mail to go to
6. Click “Continue”
7. Enter Subject for your e-mail and check the box that you want your e-mail address used at the reply-to
8. Click “Continue”
9. Build your email in the body section.
Note: There is NO spell check and you need to use the CTRL key functions. Press the CTRL key and the v key(to paste) or c key(to copy). If you leave this page and don't click forward or save, your e-mail will not be saved.
10. To “attach” documents they must be first saved as a newsletter. To embed the newsletter, click on the Merge/Field Docs button and click on Newsletter. Be sure your mouse is in the correct spot in the e-mail where you want the URL to embed. Double click on the newsletter in the merge field and it will appear in the body of the e-mail.
11. If you elected to send a text message, you can add your text message (box is located below the email/body section). You may need to scroll down; text messages are limited to 160 characters.
12. Click “Continue”
13. Select the appropriate report you created for this mailing and you can also select recipients. If you initially built your email to send to members, you can select send to family e-mails as well as second house hold or flagged profiles at this point
14. Click “Continue”
15. Check the “Send Now” box under email status and click “Finish”. If you leave an e-mail at this point before you hit finish it will be saved as a draft in your email list.
16. When you click “Finish”, you will receive a confirmation letter once your e-mail has been sent.



Emails: Info

Exit Delete

Enter an Email Title

Email Title: Newsletter Alert

This title doesn't display in your emails. It's to help you identify each unique email.

Send to Members Send to Families

Sends an email to each unique member email

Send To Family

Send To Second Parent/Guardian

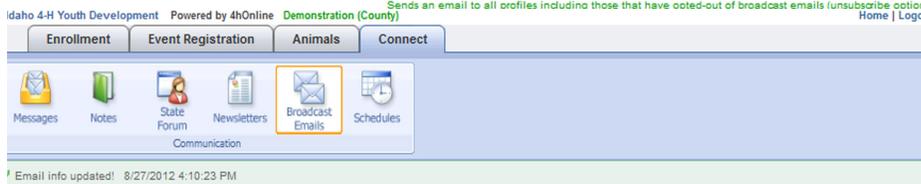
Send To Second Household

Send To Emergency Contact

Send To Unsubscribed

Sends an email to all profiles including those that have opted-out of broadcast emails (unsubscribe action)

Home | Logout



Emails: Message Settings

Exit Delete

< Previous

Save

Continue >

Email Message Settings

Subject: August Focus Newsletter

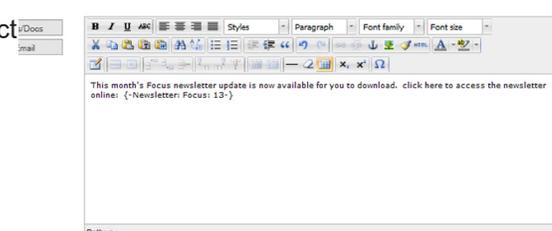
Appears as your email subject line.

Use My Email As Reply-To

Email will be sent out using your email address as the reply-to email address

present Powered by 4HOnline Demonstration (County)

Home | Logout



Resources

4HOnline Support Websites -

Staff Helpsheets page houses of tip sheets, videos for county managers.

- <https://www.uidaho.edu/extension/4h/4honline/help-for-staff>

There is also a website that provides tip sheets for families and volunteers (designed for end-user view vs. county manager view)

- <https://www.uidaho.edu/extension/4h/4honline/help>

Questions/Support

Erika Jeffries, ethiel@uidaho.edu or 208.263.8511

Northern District - Sharla Wilson, swilson@uidaho.edu or 208.446.1687

Southern District - Michelle Tate, mtate@uidaho.edu or 208.414.0415

Central District - Teresa Tverdy, ttverdy@uidaho.edu or 208.734.9590

Eastern District - Lisa Barfuss, lbarfuss@uidaho.edu or 208.547.3205

How to submit an issue ticket to ZenDesk

If you are experiencing issues with 4HOnline please email (submit a ticket) to support@idaho4honline.zendesk.com

Be sure to be very detailed - include county, member full name, email address and/or detailed description about the issue.