Instructional Manual for County Extension Offices

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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.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WELCOME TO 4HONLINE</td>
<td>2</td>
</tr>
<tr>
<td>GETTING STARTED</td>
<td>5</td>
</tr>
<tr>
<td>LOGGING INTO 4HONLINE</td>
<td>5</td>
</tr>
<tr>
<td>SEARCH FUNCTION</td>
<td>7</td>
</tr>
<tr>
<td>How to Search for a Member</td>
<td></td>
</tr>
<tr>
<td>How to View Pending Member/Adult Volunteer Enrollments</td>
<td></td>
</tr>
<tr>
<td>How to Search for Event Registrations</td>
<td></td>
</tr>
<tr>
<td>MY ACCOUNT FUNCTION</td>
<td>10</td>
</tr>
<tr>
<td>How to Edit Contact Information</td>
<td></td>
</tr>
<tr>
<td>OPTIONS FUNCTION</td>
<td>11</td>
</tr>
<tr>
<td>Family Record Options</td>
<td></td>
</tr>
<tr>
<td>Link Projects to Clubs</td>
<td></td>
</tr>
<tr>
<td>Hide State Groups</td>
<td></td>
</tr>
<tr>
<td>How to Grant Login Access to Project Volunteers</td>
<td></td>
</tr>
<tr>
<td>CONFIRM MEMBERS FUNCTION</td>
<td>12</td>
</tr>
<tr>
<td>How to Confirm Members</td>
<td></td>
</tr>
<tr>
<td>Members/Volunteers Needing County Approval</td>
<td></td>
</tr>
<tr>
<td>Members/Volunteers Awaiting Employee Approval</td>
<td></td>
</tr>
<tr>
<td>Members/Volunteers Awaiting Volunteer Screening Approval</td>
<td></td>
</tr>
<tr>
<td>VOLUNTEER SCREENING STATUS</td>
<td>13</td>
</tr>
<tr>
<td>Volunteer Screening Status</td>
<td></td>
</tr>
<tr>
<td>CLUBS FUNCTION</td>
<td>14</td>
</tr>
<tr>
<td>How to Edit Club Information</td>
<td></td>
</tr>
<tr>
<td>Adding a New Club to your County</td>
<td></td>
</tr>
<tr>
<td>How to Grant Login Access to Club Volunteers</td>
<td></td>
</tr>
<tr>
<td>GROUPS FUNCTION</td>
<td>17</td>
</tr>
<tr>
<td>How to Add a New County Group</td>
<td></td>
</tr>
<tr>
<td>How to Edit Group Information</td>
<td></td>
</tr>
</tbody>
</table>
# Table of Contents

## GROUP ENROLLMENT FUNCTION
- How to Add a Group Enrollment
- How to Edit a Group Enrollment
- How to Search for a Group Enrollment

## MANAGER PANELS
- How to Use the Manager Control Panel
- How to Use the Member Options Panel

## EVENTS FUNCTION
- How to Search for an Event
- How to Confirm Event Registrations
- How to Add an Event
- How to Create an Event Registration Form

## REPORTS FUNCTION
- How to Access the Reports Function
- How to Work with Standard Reports
- How to View a Standard Report
- How to Copy and Customize a Standard Report
- How to Create a Custom Record
- ES237 Report

## NEWSLETTERS
- How to Add a Newsletter

## BROADCAST E-MAILS
- How to Create a Broadcast E-mail

## RESOURCES & SUPPORT
- 4HOnline Support Websites
- 4HOnline Questions and Support
- How to Submit an Issue Ticket to ZenDesk
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.

Counting 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.
Using the Search Function

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
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.

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

#### 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.
Using the My Account Function

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.”

![My Account Function Image]

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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.

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.”
Project Volunteer Login

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

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.
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’.

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’
Using the Clubs Function

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.
Clubs (cont.)

**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.

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.
Using the Group Enrollments Function

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.
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.
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.”
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.”

![Edit button for group enrollment]

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.
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.
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.

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.
Using the Events Function (cont.)

**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.
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.
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.

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 downloaded to your computer as a .pdf.

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".
Reports (cont.)

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.
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.

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”
Using the Broadcast E-mails Function

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.
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.