The 4hOnline Volunteer

Enrollment Coordinator

Guide

Table of Contents

4hOnline software requirements:

Microsoft Internet Explorer 7.0 or newer (for Windows users)
Mozilla Firefox 1.5 or newer (for Windows and Apple users)
Netscape 8.0 or newer (for Windows and Apple users)
Mozilla Camino 1.5 or newer (for Apple users)
Apple's Safari is NOT supported
You must enable cookies and Javascript.

Terms and Concepts

To use this guide and to work with the program, it's important to learn some terms and concepts about the system.

Email

Electronic mail, often abbreviated as email or e-mail, is a method of exchanging digital messages. To setup a profile and enroll in California 4-H YDP an email address is required. janedoe@hotmail.com or johndoe@gmail.com are examples of email addresses.

Enrollment Status

When Members and Volunteers enroll there are various categories that we use including:
Active - All forms have been submitted, Club has approved and County office has approved.
Incomplete - Member or Volunteer has not completed the 4hOnline process.
Pending - Member or Volunteer profile is waiting to be approved by Club or County office.
Inactive - Member or Volunteer no longer active in the 4-H program.

Family Accounts

4hOnline groups enrollment within a "Family Account." One "Family Account" is created to enroll youth and adults within a family.

Filters

In many of the search and report functions are options called filters. These filters allow the user to instruct the system to concentrate on certain criteria such as male or female, member or volunteer. Since most clubs may have hundreds of members and volunteers, the filters allow users specific filters to find information faster.

Login

To obtain access to information, a user must log into the system to obtain access and then log out when the access is no longer needed. To log into the 4hOnline program the user will need an email address of record that was used during initial registration and the user password.

Roles

There are four roles that users can login to the 4hOnline system. Each role has different grades of authority. These roles include:
Family - the basic role that most users will have
County – County staff members and Volunteer Enrollment Coordinators II will login with this role
State – State Enrollment coordinators
Admin – Programming staff for administration of the 4hOnline system for California

Usernames and Passwords

The username is the family email address. In order to log into the system or create a new family account, a valid email address should be used. Each family account will require a unique email address. The unique email address will be registered into the state database. If the family should move to another county and wishes to register in 4-H with that county, the state admins will need to transfer the family account from the original county to the new county of residence for the family. Passwords may be changed once the user is logged into the system. Passwords are case sensitive and will need to be at least 8 characters minimum with at least one number.

Login for Club Volunteer Enrollment Coordinator/Community Leader

All Community Club leaders and Enrollment Coordinators will login as normal. The next screen will allow the user a choice to continue on to their family account or move to the Club Enrollment Screen. To access the Club Enrollment Screen they will need to be approved by the county office and are required to have the club password.

1) Select the user

Once a profile has been selected the club name will automatically appear

2) Enter in Club password

3) Click Login to Club

4

Dashboard

The dashboard is the term used to describe the blue area that sits atop the main page. The dashboard gives users quick access to the main functions of 4hOnline. The buttons are:

- **Confirm Members**
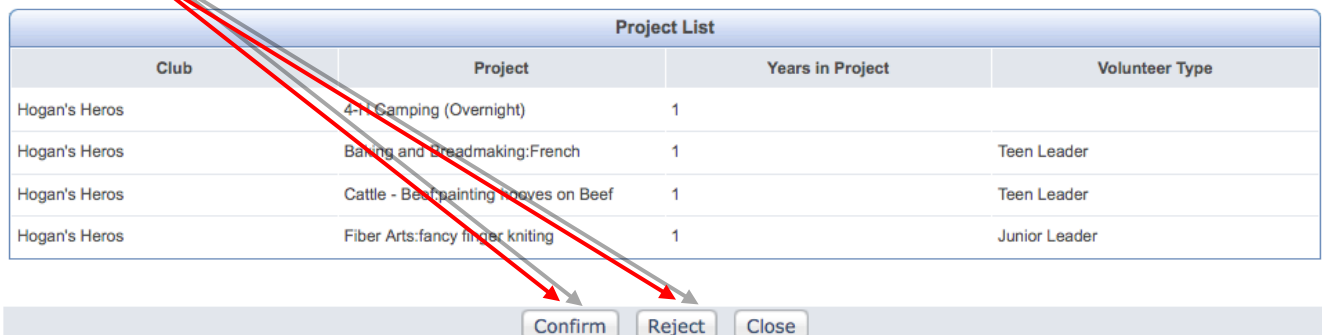- **Members**
- **Search**
- **Reports**

Dashboard is always visible while navigating the Enrollment Screens. Click on the icon to return to the screen the user wishes to work on.

How to Confirm a Member

To confirm a member click edit on the "Confirm Members" screen.

The next screen will be a summary of the member's profile. At the bottom of the summary will be listed the member's club and projects. If the information is correct the Enrollment Coordinator may confirm the member for county review or reject the profile and send back to the member for correction.

Members

The "Members" screen allows for a quick reference to view current members. Like the "Confirm Members" screen by clicking "Edit" Club Enrollment coordinator may view a summary of the member's profile.

Clicking Edit will bring up a summary of the member's information. Editing that information will not be possible from the "Members" screen. To edit member information the user will need to use the search tool.

In the "Search" screen the user will then be able to edit all information pertaining to the member.

Search

The Search screen has many useful features that users will find helpful. The main search window for Members/Volunteers is a robust system that allows for several methods to search for an individual member. These include: 4-H Age, Address, Birth date, Email, First Name, Preferred Name, Last Name, and Primary Phone. Further filters to narrow down the focus of the search are found below, in the various check boxes. The drop down menu to the left allows for searches in specific clubs and/or counties for state level access.

Located in the right corners of the search screens are excel export icons. These handy icons are clickable and will export the current list displayed in the search screen to an excel spread sheet.

Most users have difficulties when the user inadvertently checks a filter for one search but forgets to uncheck it when attempting another search. Before each attempt at a search it is a suggested that the user click the "Clear Filters" button.

Editing member profiles

Using the search screen the user will enter the search criteria then click search. Once the search information comes up click on the "Login" button to enter into the member's profile.

Once the user has clicked the Login button on the member they wish to edit, the family screen will appear. At the top of the screen the Edit Family is in blue and is bold underlined. Click on this to edit the address, contact email, and phone number of the family.

To add new members to the family click on the drop down menu under "Add A New Family Member".

To edit a member's profile click the "Edit" button at the end of the row which corresponds to their name.

The users screens are identical to the user's family screens. There will be the "Personal Information" screen, The "Additional Information" screen, and the "Participation" screen. Here are some tips to guide the user through managing the member's screens.

If the member is a volunteer in any capacity, it is important to click "Yes" on the Volunteer button in the "Personal Information" screen. By clicking "Yes" the volunteer's options for roles in the club such as community leader will be available for selection in the "Participation" screen. Members' options for officer positions in the club as well as teen and junior leader options will appear in the "Participation" section.

If your club and county allow crossovers, the member will need to select the club from the dropdown menu in the "Clubs" tab in the "Participation" screen. Once the club is selected, the projects will be available for selection in the "Projects" screen under that club.

"Groups" Tab is rarely used by club enrollment coordinators. Unless specifically directed by county staff, enrollment coordinators should disregard the use of "Groups" Tab.

Reports

"Reports" are a tool used for a variety of functions, including summarizing information, generating address labels, and helping the user quantify their participants' activities in 4-H. This section describes the numerous parts of and uses for reports in the 4honline system.

The first screen that loads is the "Custom" reports, which will look different for each user depending on what custom report has been created.
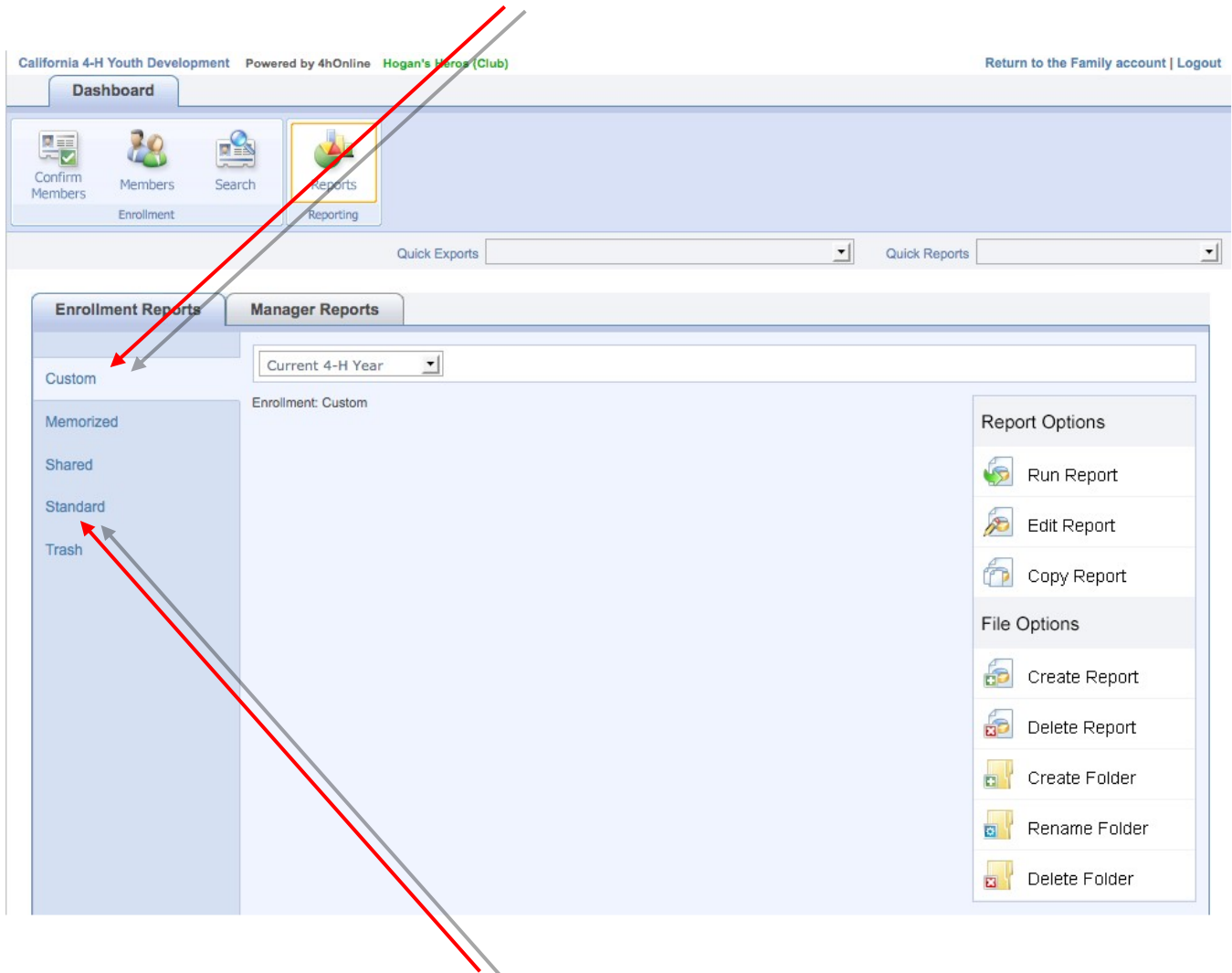
Navigate to "Standard" reports to learn the basics of reports in the 4hOnline system before working on "Custom" reports.

Report Options

Run Report: Opens up the selected report.

Edit Report: Takes the user to a menu that can be used to add different elements to your report.

Copy Report: If the user wishes to edit a report for more specific information without changing the master report, create a copy of the report and edit the copy instead. Using this option brings up a window asking for the name and description of the new report. To get out of this window, click anywhere outside of it to close it.

File Options

Create Report: If the user wishes to create a blank report, use this option. It opens a window similar to the "Copy Report" option.

Delete Report: Select the report the user wishes to delete, and then click "Delete Report."

Create Folder: If the user needs to organize the reports, create a folder to place them in. Make sure to think of a clear and self-explanatory title and put only the relevant reports into this folder.

Rename Folder: After creating a folder, if the user thinks of a better name for it, highlight that folder by clicking on it and then use the "Rename Folder" option.

Delete Folder: Using this option will delete the selected folder. The 4hOnline system will not allow the user to delete a folder with reports in it. To move a report out of the folder, drag and drop it out of the folder.