

## Getting Started

Club Leaders must first contact the County Extension Office to obtain club log-in permissions and obtain your log-in information.

Go to the website: <https://ca.4honline.com>

## To Log in

- Select “I have a profile”.
- **Remember all login information is CASE SENSITIVE!**
- Enter the FAMILY email address you have provided to your county extension office.
- Enter the temporary FAMILY password provided to you by your county extension office.
- The Role field should be set to “Family”.
- This will take you to your family “Home” screen. From here you can:
  - Reset your **Family** password to one you can remember
  - Continue to your Family account
  - Log in to your club records

The screenshot shows the user interface of the 4-H online system. At the top, there is a navigation bar with the University of California logo and the text 'California 4-H Youth Development' and 'Logout'. Below this, a status bar indicates 'Logged in as bell' and a 'Change Password' link. The main content area includes a welcome message, a section for the '4-H Online Record Book', and a 'Continue to Family' button. Two arrows point to the 'Continue to Family' button and the 'Club Leader Login' section, with labels 'Family records here' and 'Club records here' respectively.

- **After logging in to your Family account, to log-in to your CLUB account:**
  - Select profile from drop down box
  - Select club name from drop down box
  - Insert **Club** password (AGAIN CASE SENSITIVE)
  - Click login to Club

You are successfully logged in! Do not panic on the first screen IF it says “There are no records”. You are on the “Confirm Members” Tab by default. They will show up if you select “Members” or “Search”.

## Navigating the Software from the “Dashboard”

- There are four Icons on the dashboard
  - Confirm Members
  - Members
  - Search
  - Reports
- **Confirm Members**
  - This is a list of members still pending enrollment with the county office. Confirming members will inform your County office that you acknowledge they have joined your club but does not activate their records.



- **Members**
  - This is a list of all club members that have submitted enrollments and been approved/activated by your county office. If a member does not appear, contact enrollment information has not been entered/approved at the county level.
  - EDIT BUTTON will take you into that member’s record. This information is READ ONLY, not for corrections. To exit back to the club list, click on the “close” button.



- **Search Tab**
  - Keyword field
    - Can search by any field (phone number, e-mail, name, etc.)
    - Must have the correct role/status/volunteer in order to search. If you do not select any of the checkboxes, it will search all of the records associated with your clubs.
- **Reporting**

## Using and Creating Reports

### Reminders:

1. Printing labels (from any report format) will only work correctly if you remember to change Page Scaling to “none” on the printer setup dialog box.

- a. That means you have to SAVE AS PDF on the label preview screen, then print from the PDF.
2. If you change filters/groups/sorts, you have to SAVE before you go on to a preview/grid screen.

## Understanding & navigating the reports screen



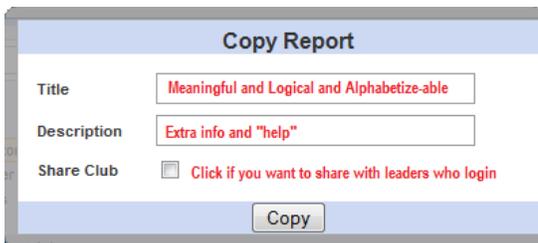
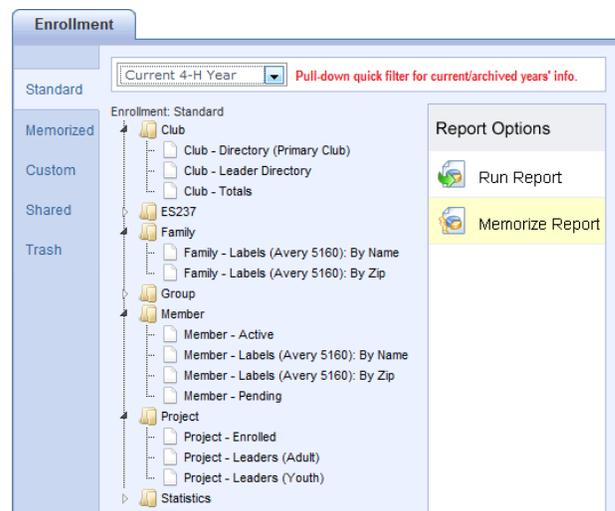
The directories listed on the left side of the screen contain different types & formats for reports, with different user options for each.

Standard & Shared directories contain reports that were created by an admin, and the options on those are not directly editable. You can only edit options on reports that you "own"... Memorized & Custom.

**Standard** report formats contain multiple lines sometimes, and are designed by 4hOnline. Unless you "Memorize" them, you cannot change the filter or sort—all you can do is preview/print. In fact, many of those reports are not at all useful if memorized because you can't change enough options.

**How to use them:** Choose one that looks like it'd be useful to you, and "Run Report". Look at the preview and see if you want to use that format, but want to be able to filter for only a specific club/project. If you do want to be able to filter, choose "Memorize Report".

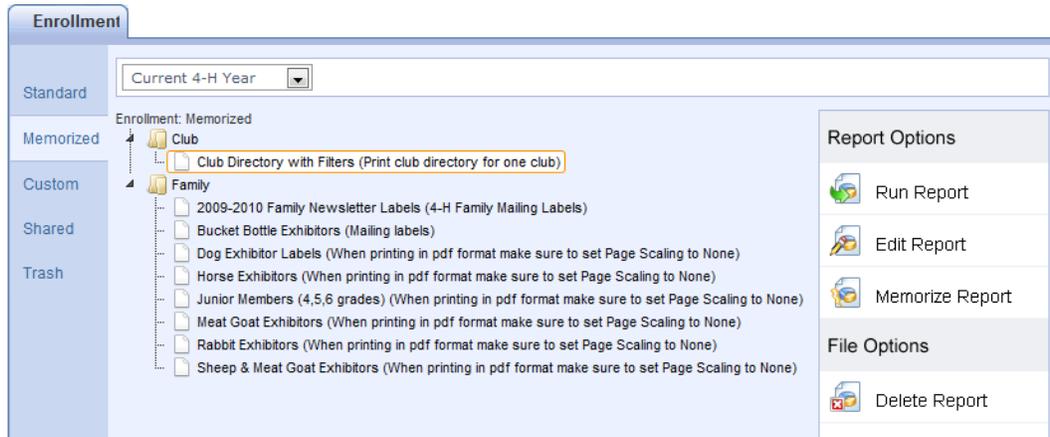
The memorized report will be listed in the "Memorized" folder.



See the helpful reminders at left. If you share with leaders, they will automatically ONLY get the report populated with their own club members.

Once you memorize the report, you MAY have standard filter options available to apply to the report.

**Memorized** report formats are exactly the same as their original “Standard” report format, with the exception that sometimes you can edit the standard filters. They magically appear in a folder that’s named the same as their original location in the Standard reports.



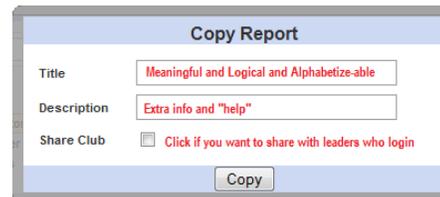
**How to use them:**

- **Run Report:** brings up Report Quick View, using exactly the same filters as you used last time.
- **Edit Report:** brings up the Standard filters report options to change and SAVE before printing.
- **Delete Report:** This does NOT move the report format to the Trash. It deletes the format. Permanently. But you can always resurrect it by going to the original and re-memorizing!

**Shared** report formats are one-line report formats, created at the state level (me). Unless you “Memorize” them, you cannot change the filter or sort—all you can do is preview/print.

**How to use them:** Choose one that looks like it’d be useful to you, and “Run Report”. Look at the preview and see if you want to use that format, but want to be able to filter/group/sort. Basically, all you’re concerned about is whether the fields (information) in the report are what you want. The actual list of people and sort order can be changed when you memorize the report. The reports are (supposedly) named descriptively, and include some “help” in the Description. As new report formats are requested & created, you’ll see them in the list.

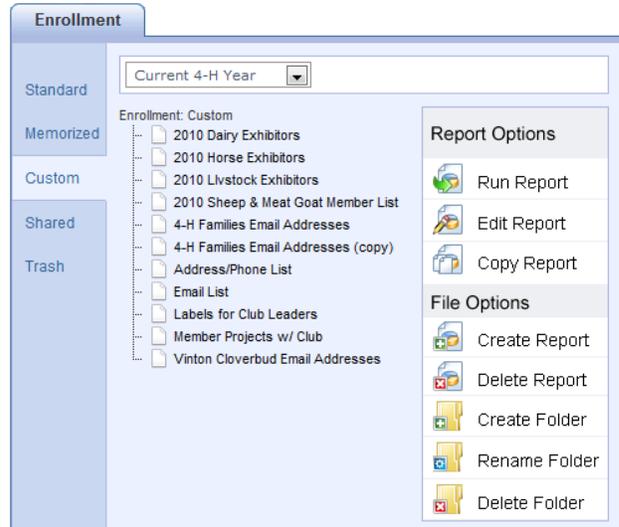
- **Run Report:** brings up Report Quick View, using exactly the same filters that I set (minimal).
- **Memorize Report:** Allows you to make a copy of selected report format.



**Custom** report formats start out exactly the same as their original “Shared” report format, with the exception that you can edit all filters, grouping, sorting—and you can add/delete/change order on included fields. When you memorize a Shared report, it will be stored and appear in the Memorized report format.

### Report Options

- **Run Report:** brings up Report Quick View, using exactly the same filters as you used last time.
- **Edit Report:** brings up all report options (Fields, Filters, Group/Sort, Grid View) to use before printing/exporting.
- **Copy Report:** makes a copy of the selected report in the Custom directory.
  - **Use this only when you want to make a separate report for every club/group/project instead of just editing (changing filters) each time you run it. So you’d have “Email List – Super Sunshiners”, “Email List – Beef Project”, etc. This may or **MAY NOT** be a good use of time.**



## Report Options

- **Create Report:** you can build a new report format “from scratch”, choosing fields, filters, grouping/sorting.
- **Delete Report:** sometimes you find you need to get rid of duplicate formats—highlight & choose Delete.
- **Create Folder:** just like any directory, you can create folders to help you organize your report formats. Once the folders are created, you can click and drag listed report formats into the appropriate folder.
- **Rename Folder:** again, the same as any other directory, you can rename folders you create if you discover that the name is not meaningful, doesn’t alphabetize well, whatever.
- **Delete Folder:** you cannot delete a folder while it still contains report formats. That’s a good thing. You’ll be asked to remove all reports from the folder before deleting—click and drag them to a new “home”.

## Creating a new report

If you need a new report format, you can create one using the “Custom Enrollment” option in Reports. Before you begin, ask two questions:

### What fields do you want on your report?

- This is really the only thing you’re “creating”. All filters (beef project members, for example) and sorts (alphabetically by club, for example) can be applied to any report format. So the ONLY reason to create a new report format is because none of the existing report formats contain the fields that you want. If one of the existing custom enrollment report formats is CLOSE to the format that you want, it’ll be faster to COPY that report, rename it and edit it by adding/deleting fields, changing field order, etc.
- If the report format is one that you think would be useful for others, email me for review to determine if it needs to be shared statewide.

### How do you want your information sorted and/or grouped?

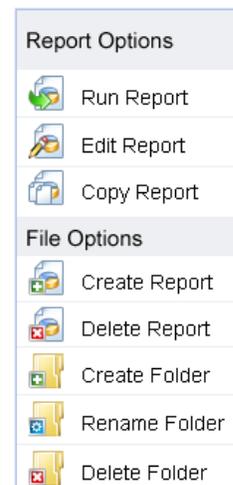
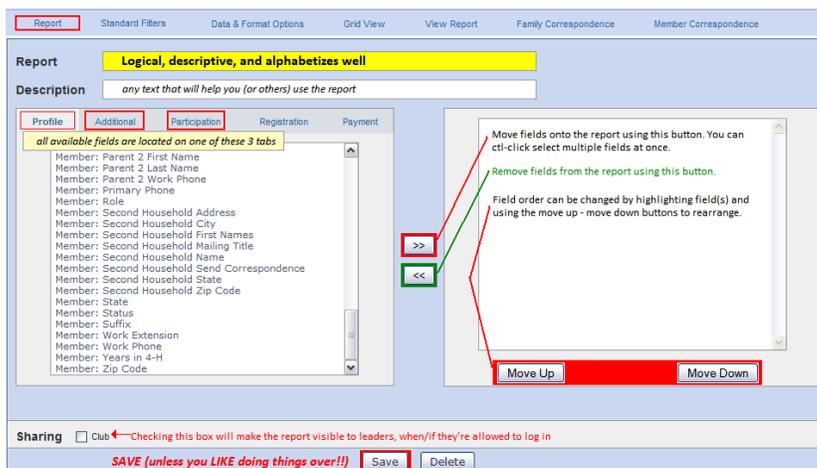
- You can only sort or group by fields that are included on the report, so be sure to include those. Later, you’ll see an option to “hide” the fields that are your group headers.

### Create the report and add fields

Click on the Report icon, then on “Custom”, then “Create Report” button on the right.

1. Name your report something logical and descriptive. Remember that it’s going to show up in the Custom Enrollment list alphabetically, so think about how that might affect the name.
2. Add text to the Description field that would help you (or others) know something about the purpose of the list or how to use it.

Choose the “Reports” link across the top.



3. Locate the fields that you wish to include in your report.
  - a. Remember that this is going to be a “one-line” report, so if you pick 35 fields, you’re going to have 35 columns. The only way that will be even remotely useful is to export it from Report Quick View to Excel.
  - b. Three tabs on the left side that contain all the fields for enrollment: Profile, Additional, and Participation. Profile contains the Enrollment, Family, and Member tables. Additional contains only California - defined additional fields. Participation contains the Activity, Award, Club, Group, and Project tables.
  - c. Move selected fields to the right list by using the “>>” button. You can CTL-click highlight more than one field from the list and move them all at once.
  - d. Rearrange the order of the fields by highlighting them in the right-side list and then using the “Move up” and “Move down” buttons.
  - e. When you’re satisfied with the fields and their order, **CLICK THE SAVE BUTTON. All changes made on this screen are temporary until saved.**

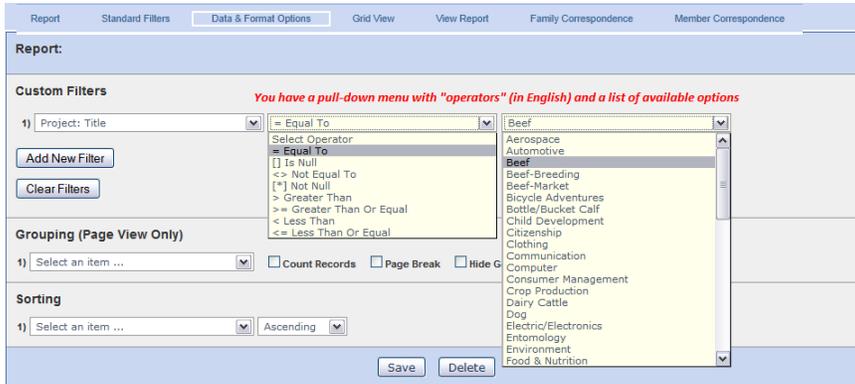
**Select the Standard Filters link.**

1. REMEMBER that filters can be set differently each time you run (print) the report, so you only need to set the filters that you believe will be used EACH TIME the report is printed. Typically, that includes checking the “Youth” and “Active” boxes.
2. When you edit the report, you can set many common filters using the Standard Filters option, including clubs, projects, and groups. Select those by using the tabs on the left-side list, moving selected criteria to the right-side list using the “>>” button.
3. It’s important to know how combining more than one filter option will work:
  - a. Any criteria set within ONE option will be “or”. For example, choosing two clubs on the Clubs tab (or a club and a group) will result in all youth who belong to either club/group. Projects—selecting Swine and Beef will result in a list of all youth who are enrolled in either project.

The screenshot shows the 'Standard Filters' interface. At the top, there are navigation icons for Search, My Account, Options, Confirm Members, Clubs, Groups, Group Enrollment, Activities, Awards, Literature Orders, and Reports. Below these are tabs for Report, Standard Filters, Data & Format Options, Grid View, View Report, Family Correspondence, and Member Correspondence. The main area is titled 'Filter for clubs/groups (OR search) or projects (AND search when combined with club/group)'. It features four tabs: Clubs (Units), Groups (Units), Events, and Projects. The Clubs (Units) tab is selected, showing a list of clubs: Zdemo Zappers, Zdemo Zebras, Zdemo Zingers, and Zdemo Zippy Clovers. To the right of this list are '>>' and '<<' buttons. A text box on the right says 'Use the >> and << buttons to add/remove filter criteria from this box.' Below the tabs are several filter sections: Family Flag (Flagged/Not Flagged), Member Flag (Flagged/Not Flagged), Primary Club (Primary Club Only/Not Primary Club), Role (Adult, Contact, Custom, Youth), Include Records From All Years (Include all records), Status (Active, Archived, Inactive, Incomplete, Not Participating, Pending), 4-H Age (checkboxes 1-19), Enrollment Date (From/To fields, Clear Dates), Gender (Male/Female), School Grade (checkboxes 1-12, Post High School Education, Not in School, Special), and Volunteer (Volunteer/Not Volunteer). At the bottom, there is a 'SAVE before leaving this page unless you want to do it over.' message and 'Save' and 'Delete' buttons.

- b. Criteria set in separate field options will be “and”. So if you select two clubs as above, and Swine & Beef projects, the resulting list will be only the youth in those two clubs who are in either swine or beef. Selecting a club above and a grade level below will result in the kids who are in that club AND in that grade level.
- 2. When you’re satisfied with the selection, **CLICK THE SAVE BUTTON. All changes made on this screen are temporary until saved.**

**Select the Custom Filters, Grouping & Sorting link.**



**Filters:** REMEMBER that filters can be set differently each time you run (print) the report, so you will probably only be setting the grouping and sorting options when you create the layout originally. However, the instructions below will help you whenever you run a report and need to set filters.

1. If a field exists, you should be able to filter on the contents of that field. In the Custom Filters section, the left pull-down list contains all fields available for filter.
  - a. Pull down the list to locate your first search field.
  - b. After you have selected a field, you can pull down the “Select Operator” list.
  - c. After you select the operator, you will have a list of all the available options FOR THAT FIELD. That’s really nice, because you don’t have to worry about spelling, format, etc.
2. You can add more search criteria AND decide if you want an “And” link or an “Or” link. If you choose “And”, both criteria must be true for the record to be listed. If you choose “Or”, either one (or both) of the criteria must be true and the record will be listed.

**Some useful filters** (if you have additions or questions, let me know)

Search for...	Field	Operator	Match
Families w/o email addresses	Family: Email	[] is null	
First-year members	Member:Years in 4H	= Equal to	1

**\*NOTE: “Grade” must be specified from the “standard filters” screen because it’s a text field, and as text, “2” is greater than “10”. Not a good thing.**

**Grouping:** This creates subsummaries and headers. So, for instance, if you choose to group by “School”, all records for youth in that school will be listed together under a header, sorted within that group by your sort criteria. If you group by “School” and “School Grade”, the first header is the school, with sub-headers for each grade, youth listed under the appropriate sub-header, again sorted by your sort criteria. The first grouping listed is the top header, the second one is 5/8/2012

## 4hOnline Club Leaders Login & Reports Help Sheet

the subheaders below that. Changing the order of "School" and "School Grade" completely changes the report format, even though the same information would be listed.

1. "Count Records" puts a total of the listed records for each heading into that header.
2. "Hide Group Column" means that the selected field will ONLY print in the header, not in each record.
3. "Page Break" begins a new page with each change in the selected header.

**Sort:** Best practice with any database system is to first sort by your grouping criteria, in order, then sort additionally in the order you want the records to appear within the groups.

When you're satisfied with the selection, **CLICK THE SAVE BUTTON**. All changes made on this screen are temporary until saved.

**Report** Standard Filters **Custom Filters, Grouping & Sorting** Grid View Page View Family Labels Member Labels

**Report:** Standard Filters **Data & Format Options** Grid View View Report Family Correspondence Member Correspondence

1) Project: Title = Equal To Beef

And

2) Member: 4-H Age >= Greater Than Or Equal 14 ex. 0-100

Add New Filter Clear Filters

**Grouping (Page View Only)**

Select an item ...

Club: Title

Enrollment: School Grade

Member: Full Name (First Last)

Additional: School

Count Records Page Break Hide Group Column

Additional: School Count Records Page Break Hide Group Column

**Sorting**

1) Club: Title Ascending

2) Additional: School Ascending

3) Enrollment: School Grade Ascending

SAVE before you go on unless you want to do it over. Save Delete

### Grid View

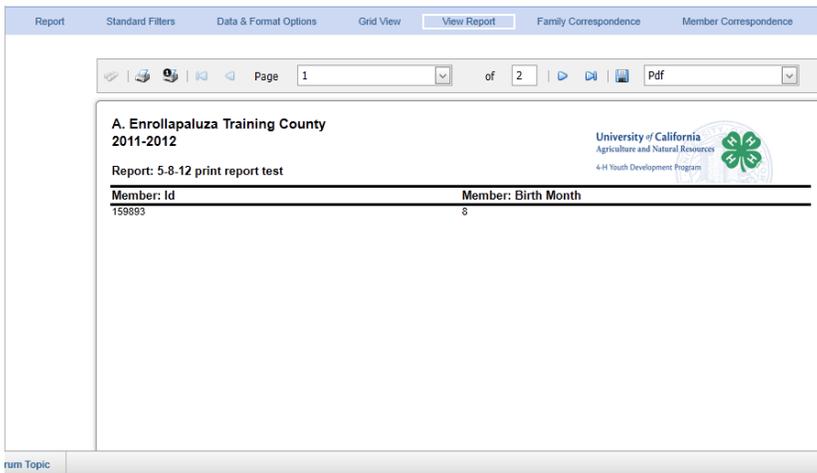
Lists all records according to the filters and sort criteria you specified, on screen, no headers. **Quick Exports at the top (Grid List) gets you these records in a "plain" Excel file, which is very useful.**

Address/Phone List											
Member: First Name	Member: Last Name	Member: Address	Member: Address 2	Member: City	Member: State	Member: Zip Code	Family: Primary Phone	Member: Cell Phone	Member: Work Phone	Member: Parent 1 Cell Phone	Member: Parent 2 Cell Phone
Abby	Mason	1188 Y Avenue		Amana	IA	52203-8089	319-846-8039				
Abby	Pailthorpe	3332 280 Street		Elberon	IA	52225	319-439-5327				

**View Report** – will open up a preview of the report.

**\*\*Please Note:** The printer icon and print current page icons appearing in the top report row are not fully functional and should NOT be used. If you wish to print the report you have created, look to the top right of the report row, and select the format you wish from the drop-down menu. Pdf, Excel, and RTF are the current options. Click the Save (disk icon) and you will save this report to a desired storage location on your computer. From the saved location you choose, open the report in its new format, and then you may print.

1. To navigate the report, use the forward & back triangle buttons to view pages, or type in the page number.



The sample below provides another example of how the criteria you choose when creating or editing an existing report will determine the layout of the report.

Member: Full Name (First Last)	Enrollment: School Grade	
<b>Amaqua Warriors</b>	<i>First Grouping Selection</i>	<i>"Count" was checked</i> <b>Count: 5</b>
<b>Home</b>	<i>Second Grouping Selection</i>	
Mattea Doran	7	
<b>Ogden</b>		<i>"Hide Columns" was checked on both grouping selections, leaving only the other two fields to print on report.</i>
Ian Meister	10	
Marissa Elsberry	10	
Chelsie McCool	5	
Haley Meister	8	
<b>Bluff Creek Wranglers</b>		<b>Count: 11</b>

Save in Excel format

It appears much like the PDF, but the columns are good. You'll have to delete unnecessary rows and columns, but the data is there. The simpler the report (no grouping), the easier it will be to clean up in Excel. Only use this option if you need the grouping preserved. Otherwise, you can use the Quick Exports from Grid View.

**Save in RTF (Rich Text Format)**

Rich Text Format is a file structure that will open in Microsoft Word and other word processing programs. However, all text is contained in text fields, not in plain text. It still makes the report edit-able, however.

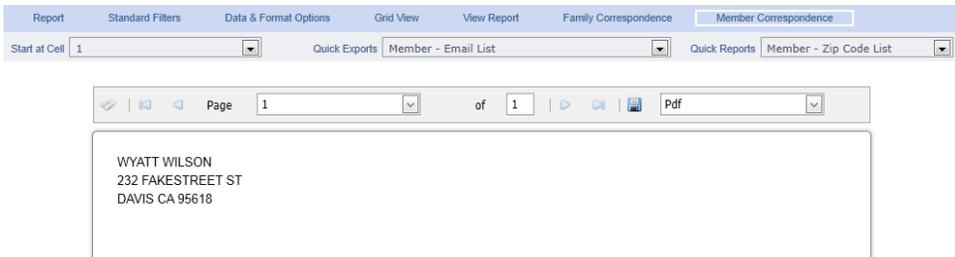
### Member Correspondence

Displays for Avery 5160 member mailing labels. One label for each record. **SAVE AS PDF** before printing. Select page scaling = none on the printer dialog box.

Start at Cell field– sometimes a list doesn't need to be fully printed, so you can use the drop down arrow and select which cell you want to begin printing from.

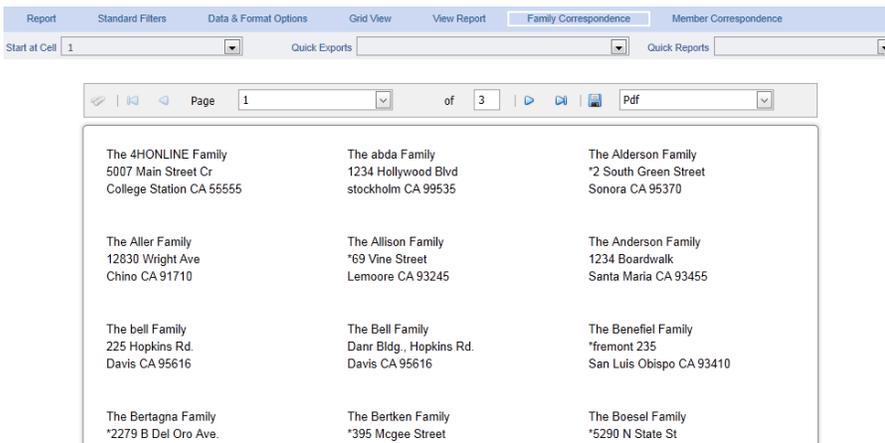
Quick Exports – will provide you a list of member emails in an Excel format you can save.

Quick Reports – will provide you with a list of member zip codes in a PDF format you can save.



### Family Correspondence

Displays for Avery 5160 family mailing labels. One label for each family of the records listed. **SAVE AS PDF** before printing. Select page scaling = none on the printer dialog box.



Quick Exports – will provide you a list of family profile emails in an Excel format you can save.

Quick Reports – will provide you with a list of family profile zip codes in a PDF format you can save.

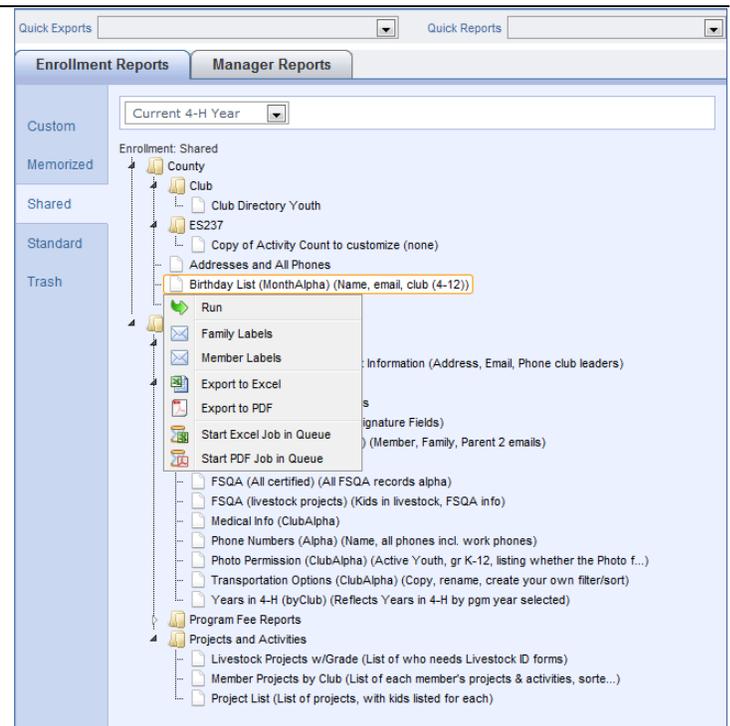
- Notice that there are report folders for formats that have been shared with you by the County, and by State. You may find the report format you want in either of those.
- RIGHT-CLICK on the format that you wish to use, and you will have the options shown at right:

**RUN:** Opens the report quickview, and you can save the PDF from there. A saved PDF will not change even if the info in 4hOnline changes.

**LABELS:** Prints labels (either family or member) for everyone that's included on the list. PDF—save as PDF, then open and print. **Set page scaling=none on the PDF print screen for 5160 labels.**

**Export:** to Excel (unformatted, list only) or PDF (formatted)

**Start in Queue:** should not be necessary, given that you will be working with few records—it's in there for larger, more time-consuming reports at the county/state level.



## Frequently Asked Questions

### Passwords and E-mail Addresses

Q: I forgot my password, how can I get it?

A: On the login page, click on "I forgot my password" and then click "Send My Password"

Q: I forgot the e-mail address that I used, how can I get it?

A: You will need to contact your County Extension office and ask us to look at your profile for the correct e-mail address.

Q: I requested my password to be sent, but it never came, what can I do?

A: Contact your County Extension office and ask for your password to be reset. ALSO, check your "junk mail". Some email servers filter out messages from "no-reply@4honline.com". Set your email preferences to accept those messages so that you can receive them.

Q: If I forgot my e-mail and/or password, can I just set up another profile?

A: NO! If you do that it duplicates the enrollment numbers in the system and creates multiple profiles for families and 4-H members and does not allow you to create an accurate history of all your 4-H information.

Q: I was given/e-mailed a password but when I typed it in, it did not work?

A: Because of the sensitivity of the passwords it is recommended that you "cut and paste" the password into the password field. Then once you are logged into the system, you can reset it.

### Pop Up Settings

Q: I'm having pop-up blocker issues, even though I set it to allow pop-ups.

A: All browser issues can be resolved by switching to Firefox instead of Internet Explorer. Go to

<http://www.mozilla.com> to download Firefox. When it's finished downloading, double-click on it to install it on your computer.