Basic Navigation & Searching as a Manager

BACKGROUND

Once you are logged in as a Manager, you can navigate using the “Tabs” at the top, and then using the icon bar unique to each Tab.

Your view will depend on the role and account you are logged in with, and it is helpful to glance at your logged in as state:

MANAGER DASHBOARD

Upon logging in to 4HOnline, the Dashboard will be displayed.

With time, this dashboard will contain helpful “at a glance” information

Click on [Home] in the upper right corner at any time to return to the Dashboard.
SEARCH SCREEN

Clicking on the [Search] icon will at any time, return you to the Search screen—a good place to access any of the member, volunteer, or contact data.

The records listed in the lower part of this screen WILL REFLECT whatever Search parameters are displayed in the upper part (blue section) of the screen.

And... the Blue Section will display whatever search parameters were in place the last time YOU viewed this screen.

USING THE SEARCH SCREEN

(The numbers below are referenced on the next page)
1. **[Keyword]**
   - This search field is for “quick and simple” searches, generally looking for a specific member or volunteer. Advanced (multi-level searches) are better done in Reports.
   - You cannot search for “ranges” of data – only specific data points (i.e. you can search for Members with a last name beginning with A, but not members with a last name beginning with A to G).
   - You can use the asterisk as a wild card – for example, the search “john**” returns John Smith, Steve Johnston, Alicia Johnsen, and surprisingly enough, Bob Weinstein (if he lives on Johnson Avenue).

2. **[County]** pull down menu will include only your county.

3. **[Primary Club]** pull-down menu will only list clubs after a county is selected (and then will only list the clubs in the selected county.

4. **[Enrollment Date]** will reflect the date that an enrollment was first submitted (for new enrollees). For re-enrollees the enrollment date will reflect their re-enrollment (moving to Active status) for the current year.

5. **[Flagged]** (yes/no) references the small check boxes next to each listed member (this is useful if you want to print a quick list of a selected group of members). (See below for information about printing quick lists.)

6. **[* Gender]** (self-explanatory)

7. **[* Role]**
   - Youth (4-H’ers) – all youth with individual records, regardless of grade.
   - Adult - certified volunteers
   - Contacts - Informally screened, volunteers and stakeholders
   - Contacts – can also be stakeholders, people that need mailing labels or other lists, but who are not members or volunteers (i.e. other staff, County Commissioners, community partners, etc.)
   - Custom – not used in Arizona at this time

   **Non-volunteering parents are not given a record of their own – their contact information is listed in the youth member’s enrollment record.**

8. **[* Status]**
   - Active – these are members or volunteers this year
   - Archived – these were members in some previous year, but definitely not this year
   - Inactive – these have not had their record reactivated for the current year (they have not yet re-enrolled)
   - Incomplete – these are missing required information is missing from their record
   - Not participating – these joined in the current year, but then dropped out
   - Pending – these have applied online, but are waiting for Manager approval
   - Short term – these are members who are Group participants, but are not enrolled in a club (and do not have as many “required fields” during data entry)

9. **[* Volunteer]** status refers to both Members and Volunteers – and reflects the check-box status in their enrollment data where they are asked “if they serve as a volunteer”.

   **Select "Yes" if you serve in a leadership capacity in 4-H.**
   **Examples for youth: Junior Leader, Club Officer, etc.**
   **Examples for adult: Community Club Leader, Project Leader, etc.**

   **Are you a Volunteer?: No. ☐ Yes: ☑

   **ALL adult members in 4HOnline should be (or eventually will be) certified volunteers, therefore this question should be checked [Yes] for all.**
*IMPORTANT! Leaving any set of checkboxes un-checked is the same as having them all checked. So, for example, if you want to include both Male and Female, you would leave the check boxes un-checked (because that would be the same as checking them all). If you check just one box, or leave one box un-checked, then the results are different.

CLEARING THE SEARCH PARAMETERS

To clear all Search Parameters and return to a full listing, click on the [Clear Filters] button. The values and selections that you make on this screen will persist. That is, if you check a few boxes, do some work, log out or exit 4HOnline then come back later, your search values and selections will still be there. This is great for example, because you are maybe routinely looking for the “Active” or “Pending” statuses. But it can also be tricky, because if you forget that are limiting the displayed results with some search criteria, you won’t see all your members and volunteers listed (you’ll maybe see less members listed than you expected).

MEMBER OPTIONS “POPUP”

Clicking on a displayed member’s name, will result in a quick options popup:

The top section is a quick and easy way to display basic contact information about the member.

[Notes] – allows you to both record notes for your own record AND allows you to send either an email or a text message to the member. More info is available in the document [Email - sending broadcast emails and text messages], as found on the 4HOnline support page.

[Files] – will be more relevant when members are able to upload documents related to animals, etc.

[Projects], [Activities], [Awards], and [Groups] will take you to a screen that lists all the corresponding enrollments for this selected member, plus giving you the option of adding additional items.
OTHER TABS - OPTIONS

The [Members/Volunteers] and [Families] tabs both function in similar ways:

- They both provide easy access (the main access route) into any Member, Leader or record through the [Login] button. Note that clicking [Login] on either tab will land the [Member List] (Family) page.

- They both offer the option of printing a [Quick Report] list search results as listed.

The main difference is that the [Members/Volunteers] tab offers more search options

The [Projects] [Activities] [Awards] and [Groups] tabs offer functions somewhat different than the [Members/Volunteers] and [Families] tabs

- They provide the ability to search by specific Projects, Activities, etc. (however, to search for more than one Project, Activity, etc. you’ll need to use the Reports tool).

- They provide a quick way to add Projects, Activities, etc. to members and volunteers – click on [Select] to proceed and add/delete as desired

- Once complete, click on [Remove Filter] to return to the main listing.