GETTING STARTED – REQUESTING A COUNTY MANAGER ACCOUNT

Staff accounts are referred to as “Manager” accounts in 4HOnline. These cannot be self-created, they must be requested from your State Support staff, or by sending an email to CALS-AZ4HOnline@email.arizona.edu.

State Support Staff who are working on County setup data must log in to a County Manager account to complete the steps in this document. They can use any existing County Manager account (they do not need a County Manager account in their own name).

For more information about accounts, refer to the helpsheet [Staff Roles Related to Enrollment].

LOGGING IN AS A COUNTY MANAGER

1. Go to http://az.4honline.com (notice there’s no “www” in that URL).
2. Enter your email address and 4honline password.

If you are a County Manager:
1. Select the [County] role and click on [Login]
   -- or --

If you are a District Manager (State Support Staff):
1. Select the [District] role and click on [Login]
2. Click on the [Managers] icon
3. Click on the drop down for [select manager type…]
4. Click on [County] to display the County Managers available
5. Click on the [Login] button for any Manager in the desired county

The login account and “level/role” will be displayed near the top of the screen.
ADDING CLUBS
1. Click on [Clubs]
2. Then click on [Add Club]
3. Enter club information as requested by the form. (see below for more info)

EDITING CLUBS
1. Click on [Clubs].
2. Click on [Edit] next to the desired club.

PROJECT ALIASES
If your county offers “sub-projects” or projects other than the state projects, those are now called Project “Aliases”, which must be set up by a County Manager as follows:

2. Then click on [Add Project Alias].
3. Enter the desired alias [Title].
4. Select the appropriate state project to connect the project alias.
5. Click Save.
6. Repeat as necessary.

NOTE – When naming Project Aliases, the State Project title will precede your alias title.

Project alias setup:
Project aliases display as:

![Image of project aliases]

**SETTING UP PROJECTS**
Projects need to be linked to each club. You can select all projects that are available on the state level or just specific projects.

1. Click on Options.

![Image of options]

2. Then click on link projects to clubs.

![Image of link projects to clubs]

3. Select the club name and then the projects that you want linked to this club. Once all projects have been selected – click update.

![Image of projects in club]

Page 3 of 6
SETTING UP ACTIVITIES
If desired, counties can setup county-specific activities.

1. Click on [Activities].
2. Click on [Add Activity].
3. Enter information as requested.

AWARDS AND GROUPS ARE SET UP THE SAME AS ACTIVITIES

ADDITION ACTIVITIES, AWARDS AND GROUPS TO MEMBERS RECORD

You can add (and delete) activities, groups, and awards to member records, regardless of the current status of that member (active, inactive, incomplete, pending).

On the search screen, all names are clickable links. Clicking on a member’s name is NOT the same as clicking Login on the right side of their record, however.

Login takes you to the family/member record, allowing you to edit all information.

Clicking the name brings up a mini-screen with only that specific member, allowing you to specify if you wish to add an activity, award, or group. Notice that there is a [close] and Cancel option to return you to the previous screen.

When you click a link, you will see a screen with the member name at the top, and options to add an activity, award, or group to that member’s record. You can switch between the 3 tabs without “losing” the member—the find is “sticky” until you either go back to the search screen or click the “Remove Filter” button.

Please Note:
On the Search screen, if you click directly on the Activities tab (without first clicking a member) ONLY records that have activities associated with them will show up on the Activities Search screen—same for awards & groups. You won’t see a list of people who don’t have any awards or groups.
DECIDING BETWEEN PROJECT ALIASES, ACTIVITIES, AND GROUPS
Deciding how to set up a counties “participation” options is flexible, but the following is being suggested:

- **Projects** - actual commitment to a learning experience - counts towards the ES-237
- **Activities** - for member and leader participation in various activities. Activities might include: various committees, club officers, demonstration day, quality assurance training, leadership training, etc.
- **Groups** - for non-project activities where members actually do commit to participate, but doesn’t count on the ES-237. This is different than the group enrollment. This might include committees or boards, or groups little educational experience.

The final decision on some of these will vary somewhat between counties. These things will fall on a continuum - some are clearly one or the other - some are fuzzier. The beauty of 4HOnline is that you have the flexibility. The cautionary note might be to guard against creating too much complexity or variations between counties.

CLUB DATA REPORTS
Reports containing club data can be printed at whatever level you are logged in as (a County Manager would print a report containing clubs in their county, a District Manager would see clubs in their district, etc.)

1. Click on the [Enrollment] tab.
2. Click on the [Reports] icon.
3. Click on the [Manager Reports] tab.

   The FIRST time through, unless you want to create your own report, you will need to locate the shared report and copy/memorize it to your account.  
   Steps a) through d) will accomplish that.

   a) Click on the [Shared] reports folder.
   b) Under the [State] folder, click on the shared [Club report...].
   c) Click on [Memorize Report].
   d) Give a name to the report and then click [Copy].

   This will land you in a funky spot inside a partially functional report. To proceed, repeat steps 2 and 3 above.
To proceed using the copied (memorized) shared report:

1. Click on the [Reports] icon.
2. Click on the [Manager Reports] tab.
3. The [Custom] folder should be highlighted, if not, click on it.
4. Click on [Edit Report]

Once inside the report, click on [Grid View] or [View Report] to access the data and export or print data as desired. No [Standard Filters] are available on a club/manager report. To apply filters, use Custom Filters as found under [Data and Format Options].