GETTING STARTED – 4HONLINE MANAGER ACCOUNTS (ROLES)

Staff accounts are referred to as “Manager” accounts in 4HOnline. These cannot be self-created, but must be created by someone at the State level.

<table>
<thead>
<tr>
<th>Manager account/login level</th>
<th>Access level</th>
<th>Functions and purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Access to all counties in the state.</td>
<td>• Statewide setup and configuration.</td>
</tr>
<tr>
<td>State</td>
<td>Access to all counties in the state.</td>
<td>• Setup and modify projects, send statewide communications, etc. \n• Create District or County manager accounts.</td>
</tr>
<tr>
<td>District (State Level –Reports Only)</td>
<td>Access to all counties assigned.</td>
<td>• Reports, data management and communications.</td>
</tr>
<tr>
<td>County</td>
<td>Access to one county only.</td>
<td>• Reports, data management and communications. \n• Set up activities, groups, and project “aliases” (sub-projects) \n• Create family logins and club manager accounts.</td>
</tr>
<tr>
<td>Club or Project Leader</td>
<td>Access to designated club(s) (or projects) only.</td>
<td>• Limited/specified reports, data management and communications.</td>
</tr>
<tr>
<td>Family</td>
<td>Access to youth and adult in one family.</td>
<td>• Data management.</td>
</tr>
</tbody>
</table>

LOGGING ON

When a new account is created, you should receive a server-generated email from 4HOnline with your initial password (your email address is your username/login ID). The message will not contain anything other than your password.

To login to your account:
1. Go to http://az.4honline.com (notice there’s no “www” in that address).
2. Enter your email address and the password that was emailed to you.
3. Select the role* that matches your responsibilities
4. Click on [Login]

* Some staff may have more than one login role available to them – generally you will log in to the “highest” role available to you. Once you are logged in at that higher role, you will be able to (and want to) access other levels of access for functions and operations only available at that level.

Sample: Your temporary password is: 75GuWvSt Note: Your password is case sensitive. You will be required to reset your password upon your next login. Thank You
ACCESSING OTHER MANAGER LEVELS

Because certain 4HOnline functions can only be done at certain levels, once you are logged in, staff will often find themselves moving between Manager levels through a process of “secondarily” logging in to a lower level, or “returning to” a higher level.

For example:
- Managers at all levels will need to secondarily log in at the Family level in order update and maintain individual member and volunteer data.

NOTE: Staff who also happen to be a 4-H Family or Club Leader will have a manager login and a family login – but their manager login will also give them access to manage their club or family data. (The same email address can be used for both.)

To move “down” from the County manager level to the Family level

1. Click on the Search icon to display/list/access all families in your region or county
2. Click on the [Login] button for the desired family
3. Click to add family members, or click on [Edit] to view and/or edit individual members, volunteers or contacts

To move back up from the Family level to the County manager level

1. Click on [Return to the County account]
2. Click on [Logout] to exit completely from 4HOnline

CREATING NEW MANAGER ACCOUNTS

Staff with State Accounts can create District Manager Accounts County Manager accounts, as follows:

1. Click on the [Managers] icon
2. Click on the drop down for [select manager type...]
3. Click on either [County] (or if present) the [District] to display the existing Managers at that level
4. Click on [Add Manager]
5. Enter requested information for Manager being added

NOTE: For [Organization Title], use the following convention:
- Countynname – Firstname Lastname
- Apache – Mary Smith

6. Click on [Save] to create the account and generate an email to the email address entered for this Manager
SPECIFIC STAFF ROLES AND FUNCTIONS
One of the benefits of 4HOnline is multi-user, multi-location web access, which makes it possible for staff at any location to both access and edit the enrollment data. However, just because this capability exists, does not mean that staff can, or should, take on data management tasks that fall outside of their current roles detailed below.

COUNTY SUPPORT STAFF (Tasks may be divided for those counties with multiple support staff)
- Have the critical role of managing youth member enrollment, including the data setup and configuration for each county
- Have the critical role of connecting directly with 4-H families and should be focused on communicating with families about their enrollment, making sure that new 4-H families feel welcome, get questions answered, get connected, etc.
- Should be data entering paper based enrollments for youth members and adult volunteers only when online access is not possible. Entry should be done within a reasonably short time after receiving them.
- Should be proficient at using 4HOnline for reporting and communicating with 4-H families
- Should be processing online youth member enrollments (reviewing and accepting Pending enrollments).
- Have the critical role of managing adult volunteer enrollment
- Should be processing online adult volunteer enrollments (reviewing and accepting Pending enrollments).

DISTRICT AND STATE SUPPORT STAFF
- Should not be entering youth member enrollment data and should not be approving youth members from Pending/Inactive to Active status

ALL 4-H STAFF
- Should be working together with other state and county team members to make sure the work is completed in a timely and efficient manner that best supports the 4-H families and the functions of the organization
- Should be communicating often with other team members about general operating processes as well as specific data details

Please note that the reason for these definitions is not related to skills, competence, or status within the organization. Rather, these role definitions reflect current agreements and expectations in place between Extension and our valuable county partners. These role definitions also support the goal of sustaining a reasonable level of consistency between counties, in order to better manage workloads and overhead.