

**DEFINITION OF TERMS**

**COPY REPORT**

Copying an original report, giving the copied version (new report) a name and will allow editing the new report.

**CREATE FOLDER**

Creating a folder to organize reports in.

**CREATE REPORT**

Creating a report from scratch using various filters.

**DASHBOARD**

The dashboard is seen only by those with access to club information. The dashboard is the blue area that sits atop the main page. It gives users quick access to the main functions of 4hOnline:

1. **Confirm Members**: All members and adult volunteers that have done their online enrollment correctly will have achieved an enrollment status of pending and will appear here. Club Leaders or the club Enrollment Specialist will have to come here to approve each member and adult volunteer after they review the forms received with fees and prior to submitting the forms to the County 4-H office.
2. **Members**: All members and adult volunteers that have been confirmed by the Club Leader or the club Enrollment Specialist will now appear here. In the past, there has been a glitch in the system that prevented the member/volunteer from appearing here after the Club Leader or the club Enrollment Specialist confirmed them. They did appear as soon as the County 4-H office confirmed them at the county level. The member/volunteer can still be found at the club level via the search screen at any time.
3. **Search**: Allows you to search for members and adult volunteers by various filters.
4. **Reports**: Many different types of reports may be generated using various filters.

**DELETE FOLDER**

Selecting a folder and using the delete folder option will delete the folder as long as it does not contain any reports. The user must first either move the reports elsewhere in the report list or into another folder. 4hOnline will not allow a folder to be deleted as long as it contains reports.

**DELETE REPORT**

Selecting a report and using the delete report option will delete the report.

**EDIT REPORT**

Opens a menu that allows you to add, modify or remove elements of your report.

**ENROLL**

Enrolling and Re-enrolling is more than completing the enrollment paperwork or completing the online enrollment process. Prior to new members and adult volunteers enrolling in 4-H, the member family or adult volunteer will want to talk with several clubs within the county to find the one that best fits for them. To enroll or re-enroll is to;

1. Complete a New Adult Volunteer Certification process (**new** adults **or** adults that have had a break in service ONLY.)
2. Obtain the enrollment paperwork from your Club Leader or club Enrollment Specialist.
3. Complete the required paperwork.
4. Complete the required online enrollment (you will have a “Pending” status when you finish).
5. Submit the required paperwork to your Club Leader or club Enrollment Specialist with the fees.
6. Receive Club approval in the online system.
7. Receive County approval in the online system (you will have an “Active” status).

**ENROLLMENT SPECIALIST (ENROLLMENT COORDINATOR)**

The Club Leader is the club Enrollment Specialist (Enrollment Coordinator) for the club unless a certified volunteer in the club notifies the Club Leader that they would like to be the club Enrollment Specialist.

The Enrollment Specialist learns the enrollment procedures, trains the club members/volunteers on the process and informs them of the deadlines. They also learn the 4hOnline system and adhere to the deadlines, policies, procedures set by the State 4-H office and County 4-H office.

The Enrollment Specialist plans the club enrollment process in order to meet the county deadlines. For information on the responsibilities of the Enrollment Specialist see the “Club Enrollment Specialist Responsibilities” information.

ALL Club Leaders are required to learn and adhere to all aspects of enrollments even if their club has an Enrollment Specialist.

**ENROLLMENT STATUS**

There are four types of enrollment status’ used in 4hOnline.

1. **Active**: All enrollment forms for the member/volunteer have been submitted to the County 4-H office via the Club Leader or the club Enrollment Specialist. The Club Leader or club Enrollment Specialist and the County 4-H office have approved and confirmed the member/volunteer in 4hOnline.
2. **Incomplete**: The member/volunteer has not completed the 4hOnline process. Most often they did not click the Submit Enrollment button after they completed all the pages of the online enrollment.
3. **Pending**: The member/volunteer profile is waiting to be approved by the Club Leader or club Enrollment Specialist and then the County 4-H Office.
4. **Inactive**: The member/volunteer has dropped from the 4-H program.

**FAMILY ACCOUNT**

4hOnline groups enrollments within a “Family Account”. One family account is created to enroll youth and adults within that family.

4hOnline cannot have duplicate Family Accounts. Returning members/volunteers need to Re-enroll with “I have a profile” to avoid duplicate records and to avoid having to re-do their re-enrollments due to duplicate records. All duplicate records will be deleted.

**FILTERS**

In many of the search and report functions are options called filters. The filters allow the user to instruct the system to concentrate on certain criteria such as male or female, member or volunteer. The filters also allow users specific commands to find information faster.

**LOGIN**

To obtain access to information, a user must log into the system. To log into the 4hOnline system the user will need their e-mail address of record and their password.

**MEMBER**

4hOnline uses the term for both members and adult volunteers.

**MEMORIZE REPORT**

Memorizing a report is basically copying a report with the exception that the memorized report will now appear under the Memorized Report type list.

**PASSWORD**

Passwords may be changed once you are logged into the system. Passwords are case sensitive and MUST CONTAIN;

1. A minimum of 8 characters.
2. At least 1 number.
3. At least 1 letter.

**RE-ENROLL**

See ENROLL.

**RENAME FOLDER**

Selecting a folder and using the rename folder option allows the user to rename a folder when they feel a better name applies.

**ROLES**

There are four roles that users can log into the 4hOnline system as. Each role has a different grade of authority.

1. **Family**: The basic role that all youth members and adult volunteers will have. This will allow them to set up a profile with general demographic information and enter youth and/or adult volunteer enrollments for their family only.
2. **County**: All county 4-H YDP staff members will use this role. They will have access to their county profiles, clubs and groups.
3. **State**: State 4-H office staff will use this role designation and will have full access to all information for each county.
4. **Admin**: This role is designated for the 4hOnline designers and programmers.

Other (self-explanatory) roles that are found within the 4hOnline system are;

1. Adult
2. Contact
3. Custom: *Uncertain what 4hOnline defines this one to be.*
4. Youth

**RUN REPORT**

Opens up the selected report in a new window where you can then print or save the report.

**USERNAME**

The username is the family e-mail address of record. Usernames are case sensitive. In order to log into the system or create a new family account, a valid e-mail address must be used. Each family account must have a unique e-mail address; they cannot be shared with any other family accounts.