OVERVIEW

4HOnline offers three levels of access to adults.

- All adult family members have access to their family's enrollment data.
- Adults with club leader responsibilities can be granted “Club Manager” access.
- Adults with project leader responsibilities can be granted “Project Leader” access.

This document details the process of setting up Club Manager access.

SETTING UP VOLUNTEER STATUS

In order for an adult to be granted Club Manager access, they must first be a screened volunteer and have their [Are you a Volunteer?] question on the personal profile, marked [Yes].

This status will also appear on the Search screen results, indicated by a green “V”.

Once their volunteer status is set for their general enrollment, the leader must also be enrolled in the club AND have a specific [Volunteer Type] set for that club. This is found on the [Clubs] tab of the [Participation] enrollment data.

The club volunteer type can be set when a club is first selected or can be indicated later by clicking on the [Edit] button next to an adult volunteer’s enrollment for that club. Be
sure to click on the [Update] button if using this method, to finalize this designation.

ACCESS TO THE CLUB

Once the above settings have been put in place for an adult volunteer, the next step is to specifically grant them access to the club.

1. Click on the [Clubs] icon on the [Enrollment] tab.
2. Click on the [Edit] button (not the [Login] button) for the desired club.
3. Scroll down to view “eligible” adult volunteers and to set their Club Manager access
   • Click [Allow Login] to grant access to reports and searching capabilities. Be sure to click [Save] at the bottom of the screen to retain the setting.

The other piece of critical information on the screen is the “club password”. This password is initially set by the 4HOnline server, but can be reset to a more manageable password using the fields/tool farther down this screen.

When families log in, they see this screen (at right).

Under [Club Leader Login], if more than one adult in that family has Club Manager access, they would choose their name, then their club (if they have
access to more than one club). After entering the club password, they can then login to the club.

**At this point, to understand the capabilities of a Club Manager, refer to the guide [Club management for Organizational Leaders], available on the 4HOnline page:** [http://4h.uwex.edu/resources/mgt/4honline.cfm](http://4h.uwex.edu/resources/mgt/4honline.cfm).

Club Managers have the option of “confirming” new (applying) members. This action on their part does not ultimately confirm or accept applying members into active membership. It can however, serve as a guide for staff, indicating that the Club Manager has reviewed the member application. This shows up as follows:

- Either click on the [Confirm Members] icon, or click on the [Enrollments Pending] link to list all “Pending” members. There, in the [Club Status] column you will see [Confirmed] by members that have been confirmed by a Club Manager.

If at any point, you would like a report of which leaders have been granted Club Manager access, do the following, after logging in as a Manager:

1. Click on the [Clubs] icon
2. Choose the report [Club – Leaders Allowed Login] under either [Quick Exports] or [Quick Reports]