4HOnline

Project Leader setup (guide for Extension staff)

Created: August 7, 2013

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 Project Leader access.

SETTING UP VOLUNTEER STATUS

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

Once their volunteer status is set for their general enrollment, the leader must also be enrolled in the project AND have a specific [Volunteer Type] set for that project. This is found on the [Projects] tab of the [Participation] enrollment data (see screen shot on next page).
The project volunteer type can be set when a project is first selected or can be indicated later by clicking on the [Edit] button next to an adult volunteer's enrollment for that project. Be sure to click on the [Update] button, if using this method, to finalize this designation.

**ACCESS TO THE PROJECT**

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

You must be logged in as a County Manager to complete these steps.

2. Click on the [Project Leaders] menu item.
This will then display all the adult members in this county who are:

- Designated as a volunteer.
- Enrolled in a project with a specified volunteer role.

**Project aliases are not listed, only the main project area.**

<table>
<thead>
<tr>
<th>Allow Login</th>
<th>County Wide</th>
<th>Project</th>
<th>Club</th>
<th>Volunteer</th>
<th>Volunteer Title</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Archery</td>
<td>Dava Dairy</td>
<td>Leader, Fruits</td>
<td>Key Leader</td>
<td>603ARC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fruits</td>
<td>Clifton Chickens</td>
<td>Ronconte, Christine</td>
<td>Project Leader</td>
<td>701FRU</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Woodworking</td>
<td>Langdon Lottery</td>
<td>Leader, Fruits</td>
<td>Project Leader</td>
<td>701FRU</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Newville, Patsy</td>
<td>Project Leader</td>
<td>500VWO</td>
</tr>
</tbody>
</table>

3. Locate the volunteer to grant access to and click on the checkbox for [Allow Login].
4. If this volunteer should have access to all members (in the county) who are enrolled in that project (as compared to just the members in their club who are enrolled in that project), click on the checkbox for [County Wide].

The other piece of critical information on the screen is the [Password] (far right column). This password is a statewide password for that project and cannot be changed. (You control access to the project through the [Allow Login] checkbox.)

When families log in, they see this screen:

If any adult in their family has been granted Project Leader access, the [Project Leader Login] panel will appear, where they can choose their name, project and enter the Project Password.

**At this point, to understand the capabilities of a Project Leader, refer to the guide [Project Leader’s Guide], available on the 4HOnline page:**

http://4h.uwex.edu/resources/mgt/4honline.cfm