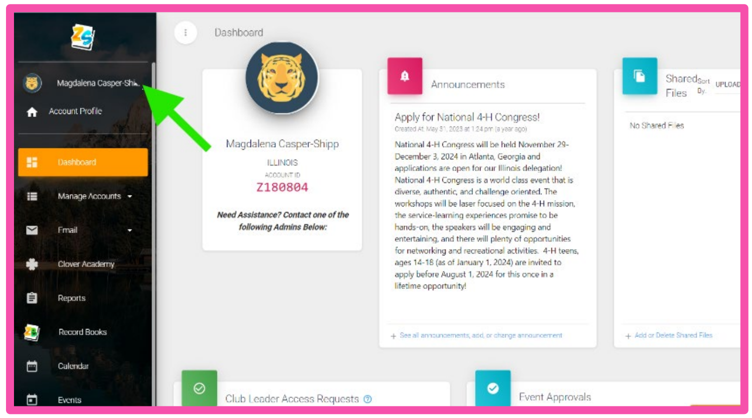
ZSuite Quick Start Guide

Welcome to 4-H! Here are some of the most common tasks you'll need to complete in ZSuite. This training is best done with two screens. You can find in depth training videos on the portal under ZSuite.

Open ZSuite by going to https://4h.zsuite.org/ . Here, you will log in with your username/email and your password.



The first screen you see is your dashboard. It shows you basic information and possible tasks to complete. Check with others in your county to know what on the dashboard is your responsibility and what is done by other people!

Something everyone needs to do when they first get their ZSuite account is go to Account profile by clicking on the down arrow by their name. Here, you will reset your password to something only you know by clicking on the blue change password button. If you have multiple logons, it's okay to use that same password for each, or maybe add a letter at the beginning or end to identify which county it is for.

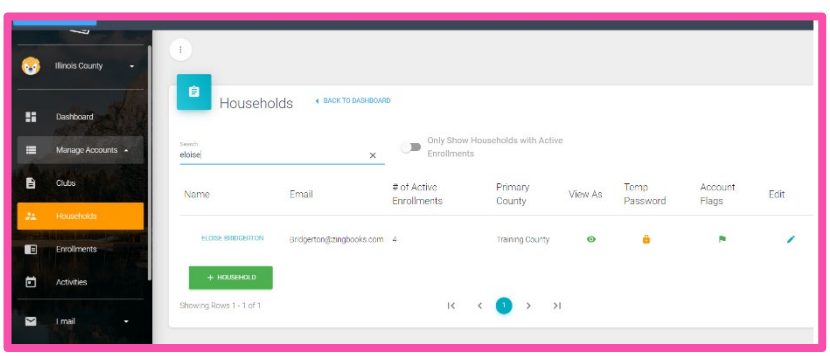
You can also add your phone number, confirm your contact email (if you log in with a netid-county "email" you should make sure your real email is listed here) and decide if you want to show up on the list of contacts with email, phone, both, or be hidden. You can also add something in the last name field to help families know your role in 4-H or when they would contact you, like the word Educator, or STEM.

Note: If you need to access more than one county, you may have a "district" account or multiple county level access accounts. If you have multiple accounts, they will be set up in this format netid-county@illinois.edu, and you'll need to repeat this step of changing your password and setting your visibility preferences for EACH county.

How to look up a youth/volunteer

Using Households:

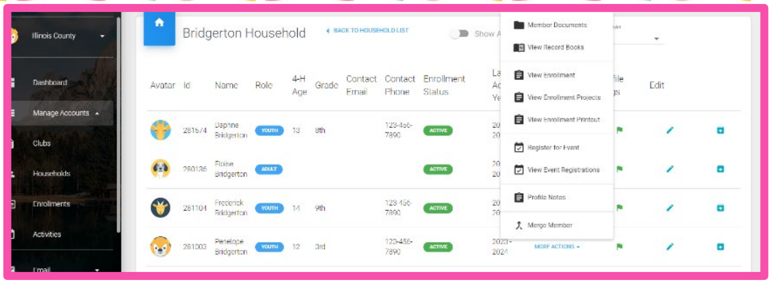
This is a great option for finding contact information, seeing family members and locating information on kids who are not yet enrolled for the year.

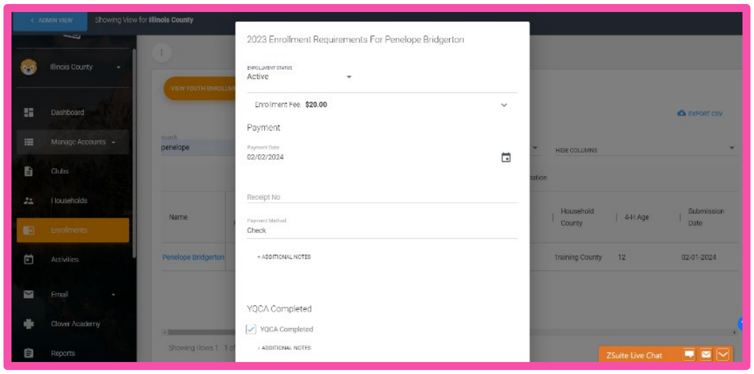


Click on Manage Accounts, then households. From here, type in the name (or email!) of the person you are looking for. Click on the household name (in blue on the left) to see all the members in that household. You can also click on the green eyeball to see what that family sees in ZSuite. Click on the Family Name to see the members.

Once inside the household page, click on the More Actions link. You can choose “View Enrollment” to find contact information for the member, as well as toggle to the Clubs tab to see clubs and projects.

Pro tip! You can also bypass a closed registration restriction to register a member for an event this way.





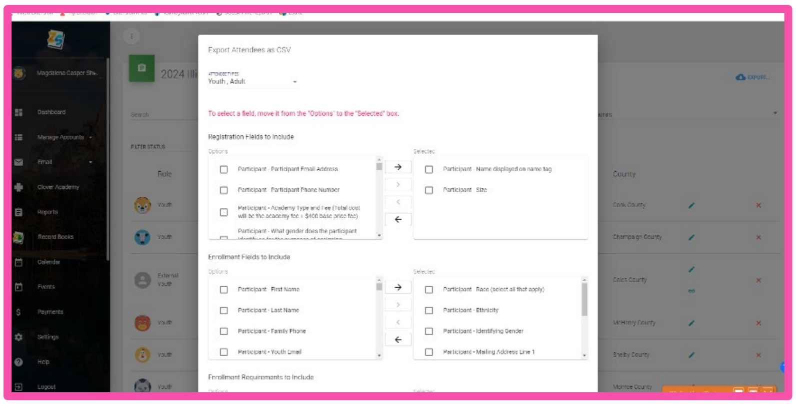
Using Enrollments:

Search for the youth or adult (toggle to the correct page at the top of the search area). Click on the name to go directly to their enrollment for the year. You can update youth’s animal care class certifications (YQCA and QAEC) by clicking on the pencil in the edit requirements column. You can also sort by each column on this screen.

Pro tip! The export as CSV button in the top right of the page you searched on exists on MANY pages in ZSuite!

Events

Finding registration information:

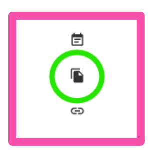


Looking up who is signed up for events is easy. Navigate to the events tab on the left and click on the blue registrations button. From here, you can look at each participant’s registration by clicking on the pencil, or export a report in the top right – if you select csv, you are presented with all the possible fields you can get about each participant. Move them to the right to include them or to the left to remove them from your report. Note that the big arrow moves all items in the category, but the small one moves only the selected items.

Pro tip: Find past events and statewide event by toggling off and on the respective buttons at the top.

Making a new event:

The easiest way to do this is to duplicate a similar event. You can do this with the “copy” icon on the main events page. Maybe it’s last year’s version of the event, or maybe it’s something else that happened earlier this year. By duplicating, you are likely to already have some of the important details included, and will just have to update things like:



- The date/time/location on the “Event” tab
- Any event-specific questions, like sandwich choice or what session the registrant wants to attend
    - *Pro tip: Things like county, name and family email are automatically accessible on the participant report! If it is asked during enrollment, you do NOT need to include it here.*
- Any registration confirmation email text – under email settings
- Remember to hit SAVE on each page!

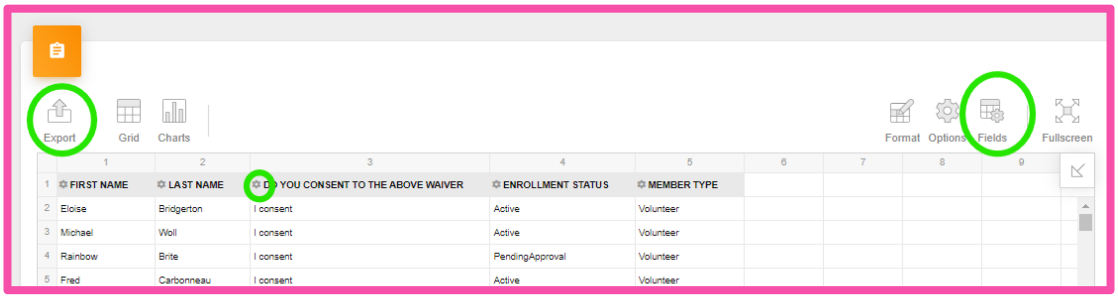
[Learn more about events here](#).

Payments

You may need to look up payments in your county. You can do this and export a report on the Payments tab. You can filter by date and search by keyword (like name of a youth or name of the event).

Reports

On the Reports tab on the left side, you can choose from an assortment of pre-built reports provided by ZSuite, or scroll to Custom Reports. Press load and you can choose from even more reports, created by others. Anything with an *asterisk at the beginning of the name was shared to your county by state staff. You can also create and save reports on most pieces of data that are collected in ZSuite – you are only limited by your imagination!



Choose load and then you can add/remove/reorder fields with the Fields icon (graph with a gear), filter or sort them by clicking on the gear in each column header, or export using the button in the top left – you will ONLY hover, not click, to get the list of file types! We recommend exporting as a csv file and opening in excel. Learn more about reports here.

Email lists

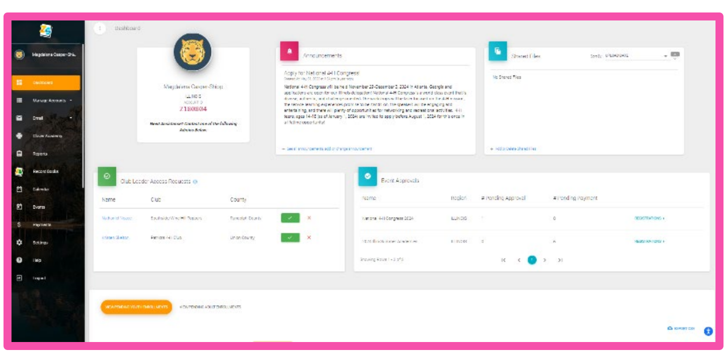
If you need to find a list of emails for families in your county, this is best done with a report. The built in email feature does not work well, and we recommend using Email+ in Webtools. See this instruction guide.

Newsletters

This tab on the left hand side allows you to upload a PDF of a newsletter OR add a link to an online newsletter.

Dashboard

Pro tip! Check with others in your unit to know what is your responsibility and what is done by other people!



Announcements and Shared Files:

Anything uploaded here is visible to all households in your county. Up to 3 announcements show up. If there are more, the box scrolls up and down.

Club Leader Access Requests:

These are screened volunteers who have been approved and now want to access the club dashboard and information about youth in their club. **Not all screened volunteers need this information,** so be sure anyone you approve is someone who needs access.

Event Approvals:

Most events don't use approvals, so you will likely see a list of events in your county with the number of people who have signed up and are still pending payment (if any).

Pending Enrollments:

You can see Youth and Adult pending enrollments. Find full information here for Youth and Adults.

Youth:

- Did the family pay for their club enrollment (if applicable)?
- Is an accurate number of "Years Participating in 4-H" entered?
- Did the family enroll the youth in appropriate clubs (clubs either in your county, or if allowed, in another county within the unit or a neighboring county/statewide)? Also check to make sure clubs are age appropriate.
- Is the youth enrolled in appropriate projects (ie family didn't sign up for two levels of the same project)?

REMEMBER! Youth can choose "I am NOT joining a club" and be active members without you approving them. This version of membership is typically for kids who are signing up for an event. **Do NOT return their enrollment just because you don't know who they are!**

Adults:

The most important thing is to make sure they are up to date on their screenings BEFORE they are approved! The screening process is being centralized but the basics remain the same.

- Did the volunteer digitally sign and date all 4 waivers (Risk Release, Code of Conduct, Volunteer Agreement, Photo Release) and complete the Sterling Background check, DCFS Child Abuse & Neglect check and ANCRA training, and has staff entered completion dates? **Volunteers need to be re-screened every 3 years.**
- Did the volunteer select the correct volunteer type(s), including if they are a certified shooting sports instructor?
- Is an accurate number of "Years Participating in 4-H" entered?
- Did the volunteer enroll in appropriate clubs & projects (if applicable)?

Great job!

Now you know the basics of ZSuite. You can find in depth training videos and guides on the portal under ZSuite. You can also join the weekly 4-H Enrollment System Call on Thursdays at 9am to hear more about what is going on in the world of 4-H and ZSuite!