4HOnline

USING AND CREATING REPORTS

Created: October 14, 2013

OVERVIEW

4HOnline has a powerful report system that allows you to take an existing report, customize it to suit your needs, and then save it to use again.

This document details how to to take existing reports and customize them, as well as create custom reports from scratch.

TOP THREE REMINDERS

- Printing labels (from any report format) will only work correctly if you remember to change Page Scaling to "none" on the printer setup dialog box.
- If you change filters/groups/sorts, you have to SAVE before you go on to a preview/grid screen.
- Choosing "Run Report" should bring up a PDF preview screen. If it doesn't, it's a browser issue. Firefox allows these pop-ups, IE seems not to (even when you tell it that it's OK). Use Firefox. The other issue may involve Adobe Reader, but is less common.

## UNDERSTANDING & NAVIGATING THE REPORTS SCREEN

- The directories listed on the left side of the screen contain different types & formats for reports, with different user options for each.
- Standard & Shared directories contain reports that were created by an admin, and the options on those are not directly editable. You can only edit options on reports that you "own"… Memorized & Custom.

Standard report formats contain multiple lines sometimes, and are designed by 4HOnline. Unless you "Memorize" them, you cannot change the filter or sort—all you can do is preview/print.
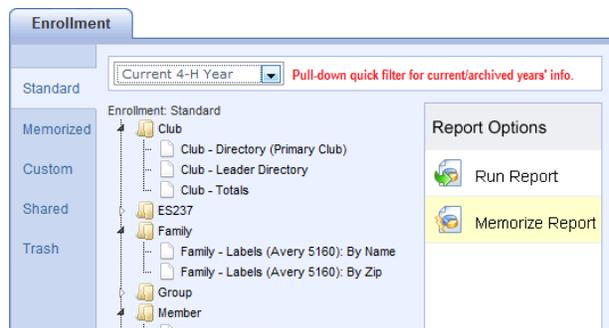
How to use them: Choose one that looks like it'd be useful to you, and "Run Report". Look at the preview and see if you want to use that format, but want to be able to filter for only a specific club/project. If you do want to be able to filter, choose "Memorize Report". The memorized report will be listed in the "Memorized" folder.
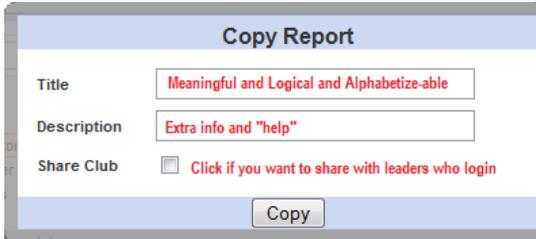
See the helpful reminders at left. If you share with leaders, they will automatically ONLY get the report populated with their own club members.

Once you memorize the report, you will have standard filter options available to apply to the report.

Memorized report formats are exactly the same as their original "Standard" report format, with the exception that you can edit the standard filters. They magically appear in a folder that's named the same as their original location in the Standard reports.
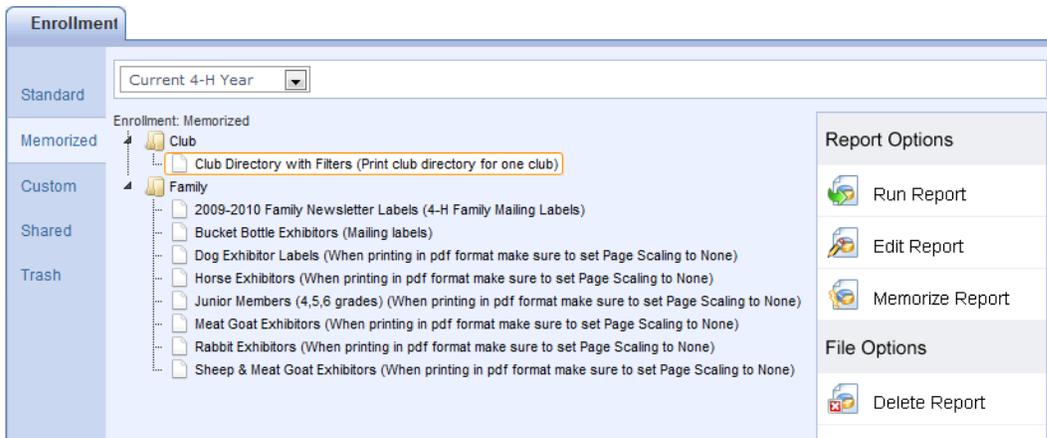
How to use them:

- **Run Report**: brings up Page View, using exactly the same filters as you used last time.
- **Edit Report**: brings up the Standard filters report options to change and SAVE before printing.
- **Memorize Report**: Allows you to make a copy of this report format (in Memorized).
  - o *Use this only when you want to make a separate report for every club/group/project instead of just editing (changing filters) each time you run it. So you'd have "Club Directory – Super Sunshiners", "Club Directory – Happy Hallelujahs", etc. This may or MAY NOT be a good use of time.*
- **Delete Report**: This does NOT move the report format to the Trash. It deletes the format. Permanently. But you can always resurrect it by going to the original and re-memorizing!

Shared report formats are one-line report formats, created at the state level. Unless you "Memorize" them, you cannot change the filter or sort—all you can do is preview/print. (See list on next page).

How to use them: Choose one that looks like it'd be useful to you, and "Run Report". Look at the preview and see if you want to use that format, but want to be able to filter/group/sort. Basically, all you're concerned about is whether the fields (information) in the report is what you want. The actual

list of people and sort order can be changed when you memorize the report. The reports are (supposedly) named descriptively, and include some "help" in the Description. As new report formats are requested & created, you'll see them appear in the list.

- **Run Report**: brings up Page View, using exactly the same filters as set (minimal).
  - **Member List formats:** typically the filter is set for Youth-Active.
  - **Leader lists:** filters set for leaders as designated in report title.
  - **Projects & Activities:** also typically filtered Youth-Active.
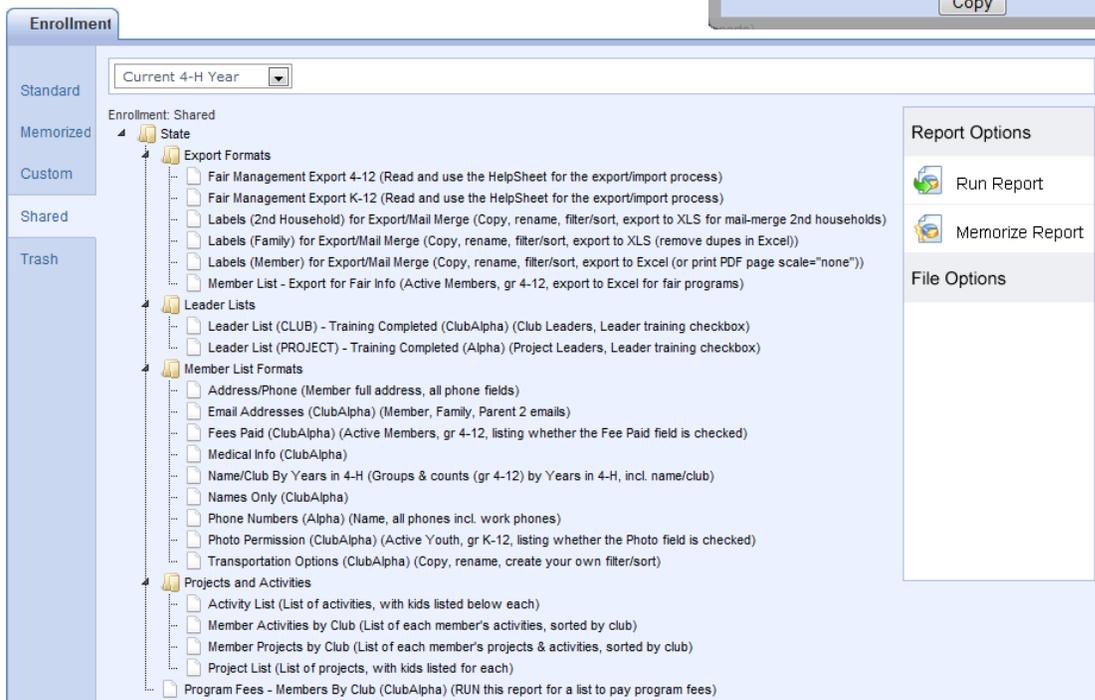
- **Memorize Report**: Allows you to make a copy of selected report format. This time the memorized report will show up in the "Custom" report folder, though.


Custom report formats start out exactly the same as their original "Shared" report format, with the exception that you can edit all filters, grouping, sorting—and you can add/delete/change order on included fields. When you memorize a Shared report, it will appear in Custom reports, but you have to create your own folders if you wish to organize your report formats that way.
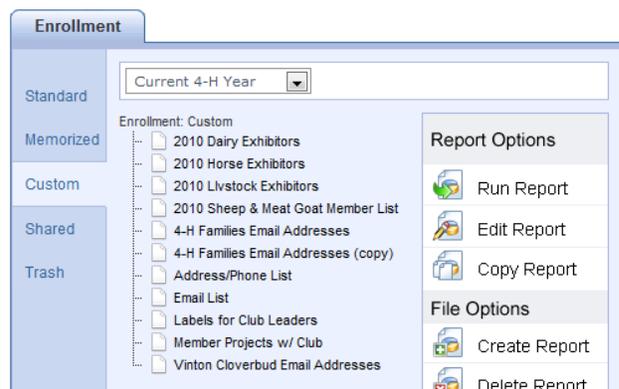
REPORT OPTIONS

- **Run Report**: brings up Page View, using exactly the same filters as you used last time.
- **Edit Report**: brings up all report options (Fields, Filters, Group/Sort, Grid View) to use before printing/exporting.
- **Copy Report**: makes a copy of the selected report in the Custom directory.
  - *Use this only when you want to make a separate report for every club/group/project* *instead of just editing (changing filters) each time you run it. So you'd have "Email List – Super Sunshiners", "Email List – Beef Project", etc. This may or MAY NOT be a good use of time.*
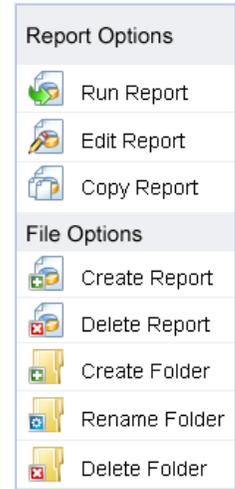
FILE OPTIONS

- **Create Report**: you can build a new report format "from scratch", choosing fields, filters, grouping/sorting.
- **Delete Report**: sometimes you find you need to get rid of duplicate formats—highlight & choose Delete.
- **Create Folder**: just like any directory, you can create folders to help you organize your report formats. Once the folders are created, you can click and drag listed report formats into the appropriate folder.
- **Rename Folder**: again, the same as any other directory, you can rename folders you create if you discover that the name is not meaningful, doesn't alphabetize well, whatever.
- **Delete Folder**: you cannot delete a folder while it still contains report formats. That's a good thing. You'll be asked to remove all reports from the folder before deleting—click and drag them to a new "home".

CREATING A NEW REPORT

If you need a new report format, you can create one using the "Custom Enrollment" option in Reports. Before you begin, ask two questions:

What fields do you want on your report?

- This is really the only thing you're "creating". All filters (beef project members, for example) and sorts (alphabetically by club, for example) can be applied to any report format. So the ONLY reason to create a new report format is because none of the existing report formats contain the fields that you want. If one of the existing custom enrollment report formats is CLOSE to the format that you want, it'll be faster to COPY that report, rename it and edit it by adding/deleting fields, changing field order, etc.
- If the report format is one that you think would be useful for others, email me and I'll create it and share it statewide.

How do you want your information sorted and/or grouped?

- You can only sort or group by fields that are included on the report, so be sure to include those. Later, you'll see an option to "hide" the fields that are your group headers.

Create the report and add fields
Click on the Report icon, then on "Custom", and finally the "Create Report" button on the right.

Choose the "Reports" link across the top.
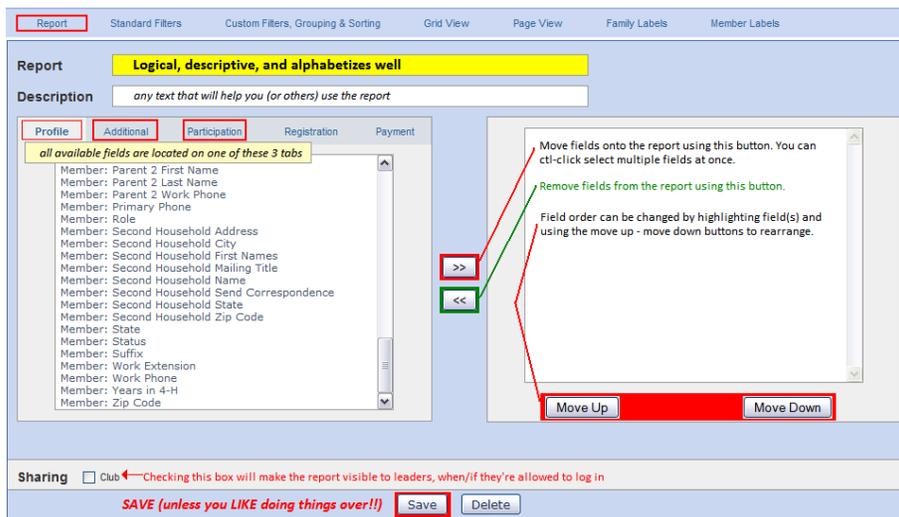
1. Name your report something logical and descriptive. Remember that it's going to show up in the Custom Enrollment list alphabetically, so think about how that might affect the name.
2. Add text to the Description field that would help you (or others) know something about the purpose of the list or how to use it.
3. Locate the fields that you wish to include in your report.
   a. Remember that this is going to be a "one-line" report, so if you pick 35 fields, you're going to have 35 columns. The only way that will be even remotely useful is to export it from Page View to Excel.
   b. Three tabs on the left side that contain all the fields for enrollment: Profile, Additional, and Participation. Profile contains the Enrollment, Family, and Member tables. Additional contains only Iowa-defined additional fields. Participation contains the Activity, Award, Club, Group, and Project tables. (See the "4HOnline Tables & Fields" Excel document for a list of all fields in each table.)
   c. Move selected fields to the right list by using the ">>" button. You can CTL-click highlight more than one field from the list and move them all at once.
   d. Rearrange the order of the fields by highlighting them in the right-side list and then using the "Move up" and "Move down" buttons.
   e. When you're satisfied with the fields and their order, CLICK THE SAVE BUTTON. All changes made on this screen are temporary until saved.

Select the Standard Filters link.

1. REMEMBER that filters can be set differently each time you run (print) the report, so you only need to set the filters that you believe will be used EACH TIME the report is printed. Typically, that includes checking the "Youth" and "Active" boxes.

2. When you edit the report, you can set many common filters using the Standard Filters option, including clubs, projects, and groups. Select those by using the tabs on the left-side list, moving selected criteria to the right-side list using the ">>" button.

3. It's important to know how combining more than one filter option will work:
   a. Any criteria set within ONE option will be "or". For example, choosing two clubs on the Clubs tab   (or a club and a group) will result in all youth who belong to either club/group. Projects—selecting Swine and Beef will result in a list of all youth who are enrolled in either project.
   b. Criteria set in separate field options will be "and". So if you select two clubs as above, and Swine & Beef projects, the resulting list will be only the youth in those two clubs who are in either swine or beef. Selecting a club above and a grade level below will result in the kids who are in that club AND in that grade level.

4. When you're satisfied with the selection, CLICK THE SAVE BUTTON. All changes made on this screen are temporary until saved.
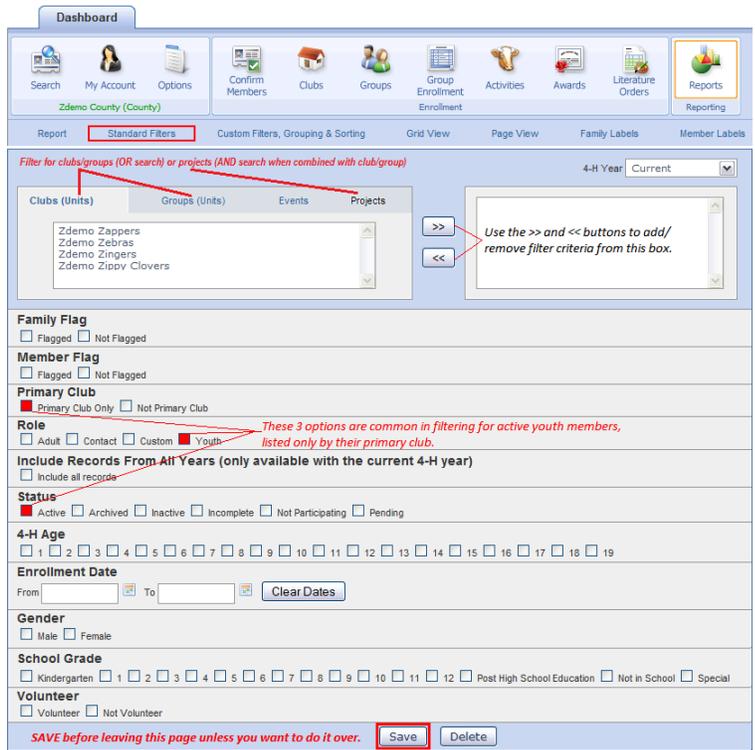
Select the Custom Filters, Grouping & Sorting link.
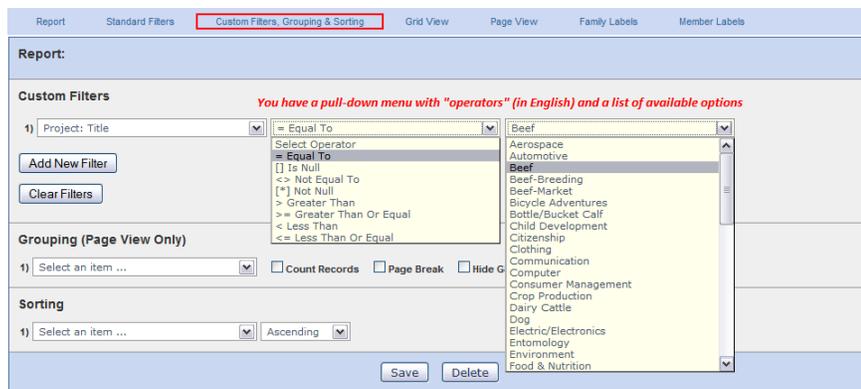
Filters: REMEMBER that filters can be set differently each time you run (print) the report, so you will probably only be setting the grouping and sorting options when you create the layout originally. However, the instructions below will help you whenever you run a report and need to set filters.

1. If a field exists, you should be able to filter on the contents of that field. In the Custom Filters section, the left pull-down list contains all fields available for filter.
    a. Pull down the list to locate your first search field.
    b. After you have selected a field, you can pull down the "Select Operator" list. Notice that they're all listed, in English.
    c. After you select the operator, you will have a list of all the available options FOR THAT FIELD. That's really nice, because you don't have to worry about spelling, format, etc.
2. You can add more search criteria AND decide if you want an "And" link or an "Or" link. If you choose "And", both criteria must be true for the record to be listed. If you choose "Or", either one (or both) of the criteria must be true and the record will be listed.

Some useful filters*:

Search for…	Field	Operator	Match
Families w/o email addresses	Family: Email	[] is null	
First-year members	Member:Years in 4H	= Equal to	1
Specific school	Additional: School	= Equal to	(list of available— NICE)

NOTE: "Grade" must be specified from the "standard filters" screen because it's a text field, and as text, "2" is greater than "10". Not a good thing.

Grouping: This creates subsummaries and headers. So, for instance, if you choose to group by "School", all records for youth in that school will be listed together under a header, sorted within that group by your sort criteria. If you group by "School" and "School Grade", the first header is the school, with sub-headers for each grade, youth listed under the appropriate sub-header, again sorted by your sort criteria. The first grouping listed is the top header, the second one is the subheaders below that.

Changing the order of "School" and "School Grade" completely changes the report format, even though the same information would be listed.

1. "Count Records" puts a total of the listed records for each heading into that header.
2. "Hide Group Column" means that the selected field will ONLY print in the header, not in each record.
3. "Page Break" begins a new page with each change in the selected header.
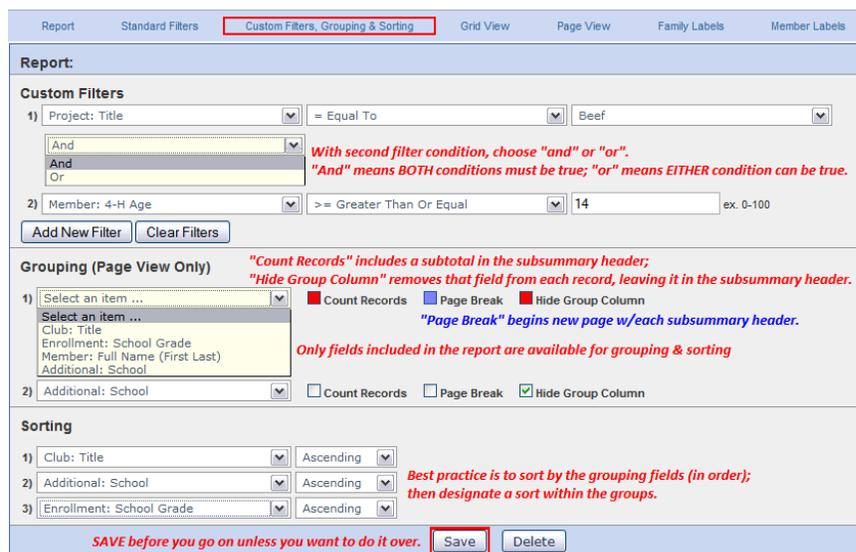
Sort: Best practice with any database system is to first sort by your grouping criteria, in order, then sort additionally in the order you want the records to appear within the groups.

When you're satisfied with the selection, **CLICK THE SAVE BUTTON. All changes made on this screen are temporary until saved.**
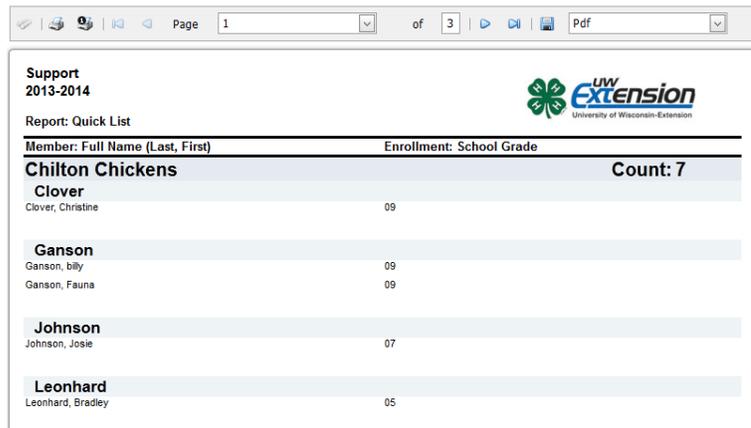
Grid View

Lists all records according to the filters and sort criteria you specified, on screen, no headers. *Quick Exports at the top (Grid List) gets your these records in a "plain" Excel file, which is very useful.*

Address/Phone List											
Member: First Name	Member: Last Name	Member: Address	Member: Address 2	Member: City	Member: State	Member: Zip Code	Family: Primary Phone	Member: Cell Phone	Member: Work Phone	Member: Parent 1 Cell Phone	Member: Parent 2 Cell Phone
Abby	Mason	1188 Y Avenue		Amana	IA	52203-8089	319-846-8039				
Abby	Pailthorpe	3332 280 Street		Elberon	IA	52225	319-439-5327				

View Report PDF document, complete format, opens in a new browser window.

1. Page 1 is always a title page.
2. Use the forward & back triangle buttons to view pages, or type in the page number.
3. Print or Save.

It's easiest to choose the Save button. There doesn't seem to be a way to designate the name of the document when using "Save", but you can immediately choose Save As and rename/relocate the document.

Save as Excel

It appears much like the PDF, but the columns are good. You'll have to delete unnecessary rows and columns, but the data is there. The simpler the report (no grouping), the easier it will be to clean up in Excel. Only use this option if you need the grouping preserved… otherwise, use Quick Exports from Grid View.

Save as RTF (Rich Text Format)
Rich Text Format is a file structure that will open in Microsoft Word and other word processing programs. However, all text is contained in text fields, not in plain text. It still makes the report editable, however.

Member Correspondence
Displays PDF of 5160 member mailing labels in a new window. One label for each record.

Family Correspondence
Displays PDF of 5160 family mailing labels in a new window. One label for each family of the records listed.