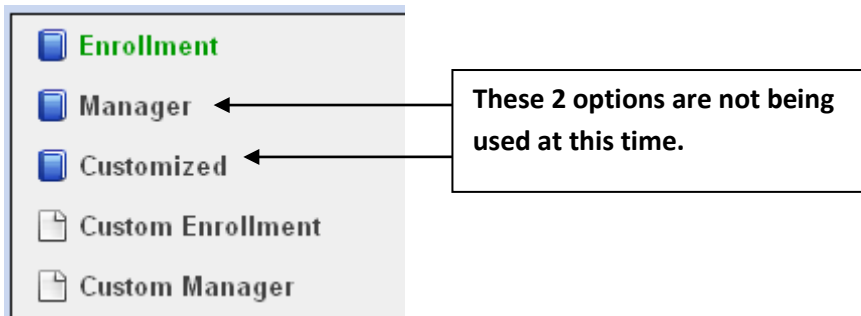


Understanding, Using and Creating Reports



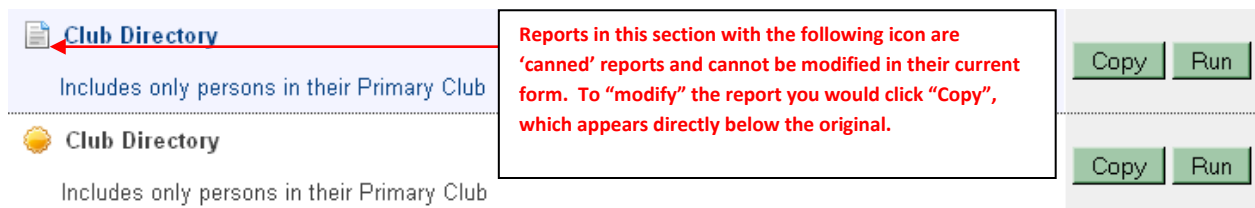
Click the **Reporting** icon located in the top right of the screen.


The 1st step in understanding Reports in 4HOnline is to know the difference between the “Listing” of report options to the left.



Enrollment = All canned reports that have been created by 4HOnline and look nice when printed. Limited “Filtering” options within this section, but some modifications can be performed. See example below:

How to create a specific “Club Directory” report.




Now click “Run” on the Club Directory that you have copied.  **Club Directory** It will run exactly as the report above but you have 2 additional options – Report and Standard Filters. Let’s click on “Report”



In this example I am going to “Filter” out my Happy Grazing Club to list separately so I will name the report accordingly. *Note: Please make sure you use good titles and descriptions when creating reports.*



Click “Save”

Report	Club Directory - Happy Grazing
Description	Includes only persons in their Primary Club

Now click on 'Standard Filters'. A listing of all clubs within the county will appear. For this example, I have selected "Happy Grazing", next click the  icon to move into the box on the right.

Clubs
Happy Grazing
Leisure Stroll

Now my screen indicates I have 1 club remaining and I am going to filter on the "Happy Grazing" club.

Report: Club Directory (Includes only persons in their Primary Club)			
<table border="1"> <thead> <tr> <th>Clubs</th> </tr> </thead> <tbody> <tr> <td>Leisure Stroll</td> </tr> </tbody> </table>	Clubs	Leisure Stroll	<p>Club: Happy Grazing</p> <div style="text-align: center;">   </div>
Clubs			
Leisure Stroll			

If you scroll down the page you will notice you have many additional filter options. Let's take a look at a few.

Primary Club – You have the option of listing "All Members" within a club by checking the box "Not Primary Club", this is good so Club Leaders know everyone enrolled in their club.

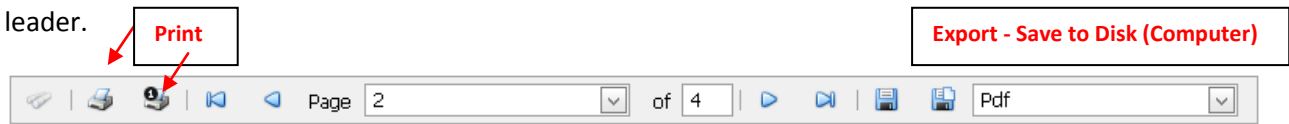
Primary Club
<input checked="" type="checkbox"/> Primary Club Only <input type="checkbox"/> Not Primary Club

Status – You have several options to select from but a common report need would be "Active" Members, so let's check "Active"

Status
<input checked="" type="checkbox"/> Active <input type="checkbox"/> Archived <input type="checkbox"/> Inactive <input type="checkbox"/> Incomplete <input type="checkbox"/> Not Participating <input type="checkbox"/> Pending

Scroll to the bottom of the screen and click "Save" so your report will update your filter selections.

When you click “Page View” it will only print the ‘Active Members’ with the ‘Happy Grazing’ club. This report can then be printed, saved to a location on your computer and then emailed directly to a club leader.



Options for Exporting data are: Image - Most common and recommended options are “Pdf”, “Rtf” or “Xls”.

Let’s return to the main reports section. Click on the “Reports” icon again at the top.

Custom Enrollment = Reports that have been created by the State office or by each County office and while extremely useful they aren’t quite as ‘pretty’ when printed. However the “Filtering” options are wonderful! So any report under this section where (Shared) is after the report title is one that has been ‘passed’ down from the State office. Let’s walk through a few examples. *Remember “Copy” – creates an exact replica of the existing report and “Run” generates the report selected.*

Here’s a report that I have created and passed to all county accounts for viewing:



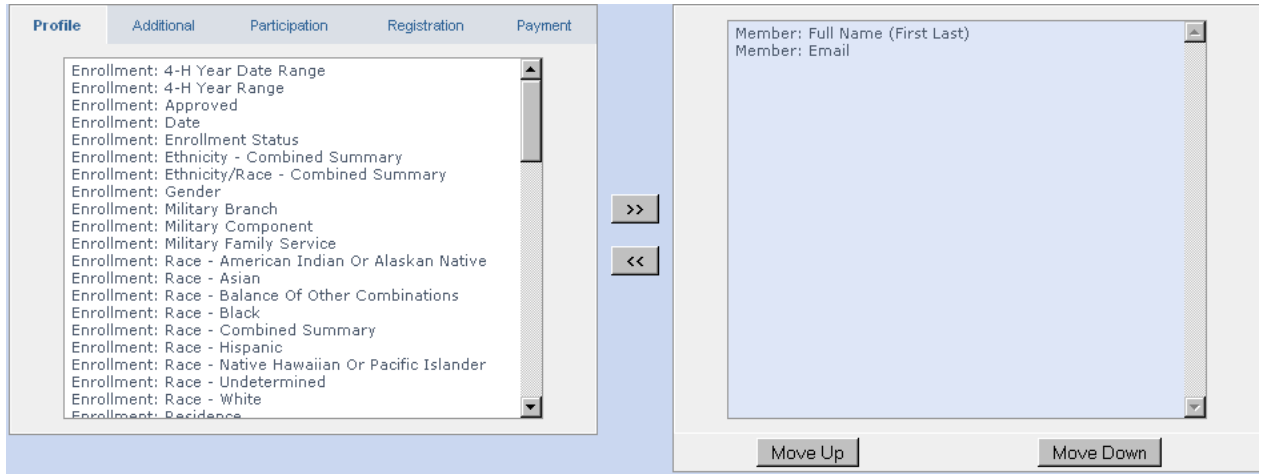
Let’s click “Copy” so we can modify for more specific needs in the County. Here’s a portion of the screen that will appear after copy is clicked.



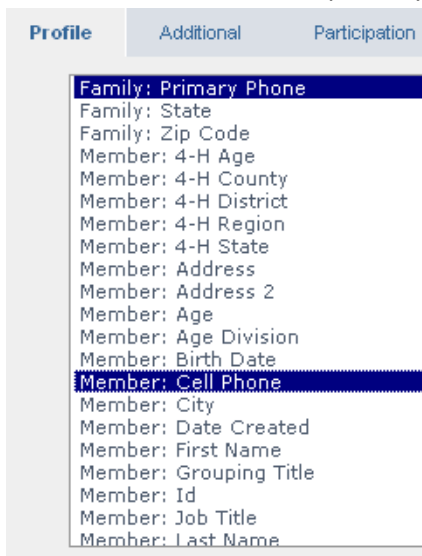
Notice the Report Title is exactly as the one listed above, except for (copy) is added to the end.

Now let's have some fun! Follow the step by step instructions to assist you in creating your own reports.

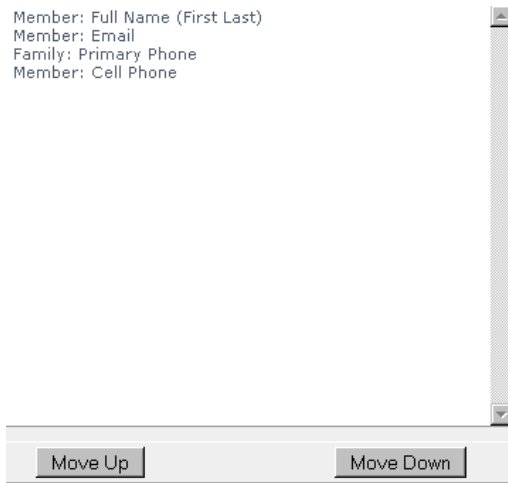
- 1) Change the title of your report, click on "Report" to the far left, next to "Standard Filters".
- 2) The title for this example is "Email Listing of Active Swine Members" – the description can be the same or you can provide greater detail or leave blank it is up to you.
- 3) Scroll down and "SAVE" the report!!! – **This is very important to save often or errors will occur!**
- 4) Options are the limit here, but we'll begin with a simple example. Notice that on the right hand side we are showing the Members full name and email. Let's add their family phone and member cell phone as well.



- 5) Using the scroll bar, locate Family: Primary Phone and Member: Cell Phone within the list. You can select more than one option by holding the 'ctrl' down while clicking the mouse.



- 6) Click the “arrows” **>>** pointing to the right text box. The options will now appear in the box on the right. If you want to change the order of what is listed, highlight the selection you want to move and click “Move Up” or “Move Down”.

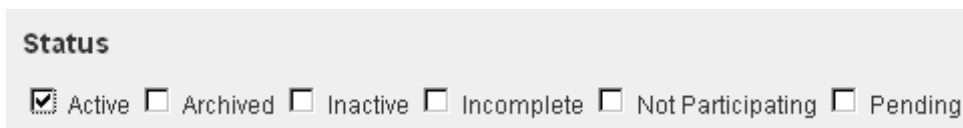


- 7) Scroll down and click “SAVE”!!! – **Important!**
8) Let’s say we want their “Club Title” to appear, click on “Participation”, just to the right of “Additional”. As we did in steps 5 & 6, find “Club: Title”, select and click on arrows **>>**

Member: Full Name (First Last)
Member: Email
Family: Primary Phone
Member: Cell Phone
Club: Title

pointing to the right text box. Now our list contains:

- 9) Click “SAVE”
10) Let’s go back to “Standard Filters” and refresh our memory of what criteria we want to produce. In this case we will want all the “Active” members in the “Swine” projects. So let’s make our final selections.
11) Scroll down and look for “Status” and check the box “Active”

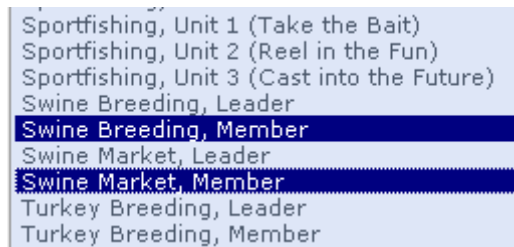


- 12) Scroll down and Click “SAVE”.

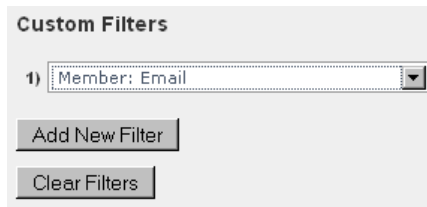
- 13) Select “Projects” to the right of “Events”. This will bring up a list of all the Projects that you are using in your County.



- 14) Scroll down and locate the “Swine” Projects. Click the arrows and move them to the right text box.



- 15) Scroll down and click “SAVE”.
- 16) Now select “Custom Filters, Grouping & Sorting” to ‘filter’ down to give us **only** the members that have an email address.
- 17) Under “Custom Filter” click the drop down arrow and select “Member: Email”



- 18) When ‘Member: Email’ is selected a new drop down selection appears to the right

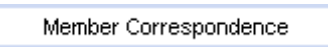


which indicates that we are looking for all member email addresses that are in the present in the “Member/Youth Profile Information”. We do not want to have a “Blank” record appear in our search.

- 19) For this example we won’t be filtering on the “Grouping” selection this will be covered in another example.

- 20) Under sorting, select the drop down arrow and we will 'sort' our records by "Club: Title" – "Ascending (which means from A – Z)". If further sorts are desired, select from the list as appropriate.

Sorting	
1)	Club: Title [v] Ascending [v]
2)	Member: Full Name (First Last) [v] Ascending [v]
3)	Select an item ... [v] Ascending [v]

- 21) Click **"SAVE"** .
- 22) Let's view our results. Click on "Page View". *Remember: The 1st page is a 'Title' page, go to page 2 to see your new report.* You now have the option to print or to save a copy to a location on your computer.
- 23) Since of course this is an "Email" listing the best option would be able to 'copy' and 'paste' the emails into your email program.
- 24) The quickest and easiest way to perform this task is to select "Member Correspondence" located in the top right hand corner. 
- 25) This provides a label report for mailing label purposes but also if you notice there are 2 "Quick" options directly above the report. The "Quick Exports" option allows you to quickly export a listing of member email addresses. Let's go ahead and select "Member Email List".

Quick Exports [v]
Member Email List

- 26) The following prompt will appear. Keep the default and "Open with" and click "OK".

Opening Member_Email_List.xls

You have chosen to open

Member_Email_List.xls
which is a: Microsoft Excel Worksheet
from: https://colorado.4honline.com

What should Firefox do with this file?

Open with: Microsoft Office Excel (default) [v]

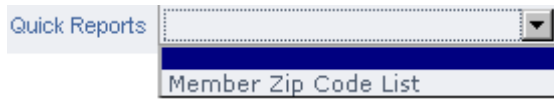
Save File

Do this automatically for files like this from now on.

OK Cancel

- 27) An excel report will automatically open and it will display all the emails and the name within the report. The emails can then be copied and you can paste into an email program. *Remember: It is best practice to use "BCC" as not to reveal any email addresses to everyone in the list.*

28) Under “Quick Reports” is a zip code report list for those that need to keep track of this information.



29) Notice, if you select “Family Correspondence” [Family Correspondence](#) this will perform exactly as the member BUT will provide “Family Information” not individual member data.