



REPORTS: COPY, DELETE, EDIT, MEMORIZE, MOVE, RUN

To see the REPORTS screen:

1. Log into 4hOnline.
2. Log into your Club Login. The system will take you to the “Dashboard” “Confirm Members” screen.
3. Click on the “Reports” icon.

The system defaults to the:

1. Enrollment Reports tab.
 - a. Custom tab of the report types. This screen will look different for each club as it will contain the reports the Club Leader and/or Enrollment Specialist created for their club.

COPY REPORT

Copying a report will enable you to edit and save it with a new name without changing the original report.

1. Click on the report title to highlight.
2. Click on “Copy Report” from the “Report Options” list.
The Copy Report box will appear with two fields (Title and Description) and two options (Close (in case you change your mind) and Copy).
3. Click in the “Title” field;
 - a. Type a clear, self-explanatory title.
4. Click in the “Description” (this field is optional) field;
 - a. Type a very brief clear description of the report.
5. Click on “Copy”. The report will appear in a new window.
6. Click on the “Report” tab.
7. Follow “Edit Report” steps 3 through 6.

DELETE REPORT

Once you are certain that you do not have a need for a specific report, you can delete it.

1. Click on the report title to highlight it.
2. Click on “Delete Report” from the “Report Options” list.

EDIT REPORT

Anytime you want to add, change or remove criteria/filters from a report you can.

1. Click on the report title to highlight it.
2. Click on “Edit Report” from the “Report Options” list.
3. The system defaults to the “Report” tab screen. The system defaults to the “Profile” tab.
 - a. Make all the changes you need to.

- b. Click on the “Additional” tab. Make all the changes you need to.
 - c. Click on the “Participation” tab. Make all the changes you need to.
 - d. California doesn’t use the:
 - i. “Animal” tab.
 - ii. “Registration” tab.
 - iii. “Payment” tab.
 - e. Click on “Save”.
4. Click on the “Standard Filters” tab. The system defaults to the “Counties” tab. Ventura should be the only county listed.
- a. Make all the changes you need to.
 - b. Click on the “Clubs (Units)” tab. Make all the changes you need to.
 - c. Click on the “Groups (Units)” tab. Make all the changes you need to.
 - d. California doesn’t use the:
 - i. “Events” tab.
 - e. Click on the “Projects” tab. Make all the changes you need to.
 - f. Click on “Save”.
5. Click on the “Date & Format Options” tab.
- a. Make all the changes you need to.
 - b. Click on “Save”.

MEMORIZE REPORT

The Memorize Report option functions the same way as the Copy Report option with one exception. The report will automatically be sent to the Memorized report type tab.

1. Follow the “Copy Report” steps 3 through 7.

MOVE A REPORT

Eventually you may find that you need to create report folders with clear, self-explanatory titles to assist in finding your reports more easily as the list of report titles have grown so long. You’ll want to choose a name for each folder that will match the subjects of the reports you will be moving into the folder.

1. Find the report title you want to move into the folder.
2. Click & Hold the report title.
3. Drag the report title to the folder you want to place it into.
4. Release the mouse button.
Your report is now in the folder you moved it into.
5. Repeat steps 1 through 4 for each report title you want to move.

To create folders see the Create section of the “Reports: Folders: Create, Delete, Rename” instructions.

RUN REPORT

Running a report will enable you to view the report on your monitor, print the report (such as the Club Directory before the general club meeting to have each family and volunteer review their information and write corrections) or save it to your computer (such as a project report to attach to an e-mail to the project leader for the projects they lead/assist) then immediately delete the

report from your computer after you have e-mailed it to the appropriate project leader and project co- &/or assistant leader.

1. Click on the report title to highlight.
2. Click on "Run Report" from the "Report Options" list.

OR

1. Right click on the report title to access the menu.
2. Click on "Run". The Report will appear in a new window.

To Logout:

When you have completed everything you logged in to do and are ready to logout;

1. Click on the bold "Logout" found in the upper right corner of your screen.