



## REPORTS: CREATE

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.

### **To CREATE a report:**

1. Click on “Create Report”. Found on the;
  - a. Far right side of your screen.
  - b. Under “File Options” found below “Report Options”.

The Create Report box will appear with two fields (Title and Description) and two options (Close (in case you changed your mind) and Create).
2. Click in the “Title” field;
  - a. Type a clear, self-explanatory title.
3. Click in the “Description” field (this field is optional);
  - a. Type a very brief description of the report.
4. Click “Create”.

The screen changes to include a list of additional tabs below the Confirm Members, Members, Search, and Reports icons.

The additional tabs you now see are: Report, Standard Filters, Date & Format Options, Grid View, View Report, Family Correspondence, and Member Correspondence.

The system defaults to the Reports Tab. Under this tab you have several fields and selections to work with in creating your report.

### **FIELDS:**

**Report:** This is populated with the clear, self-explanatory title that you typed in the “Create Report” box.

**Description (this is optional):** This is populated with the very brief, clear description of the report that you typed in the “Create Report” box.

**Worksheet Name:** You can name the worksheet the report opens in Excel when you export the report to Excel.

## SELECTIONS:

Profile Tab

Additional Tab

Participation Tab

Animal Tab

Registration Tab

Payment Tab

Label Options

Correspondence Options

Include Second County

You can choose as many selections under each of these tabs and checkmark as many of the options in each of the sections that you want to appear on your report. The system defaults to the "Profile" Tab.

5. Click the selection that you want for your report (if none, continue to step 8 below).
6. Click the double right arrows (>>) button.  
Your selection has now moved into the box to the right.
7. Repeat steps 5 and 6 above until you have selected all the selections that you want for your report.

If you find that the selections you have placed into the box to the right are not in the order that you would like for them to appear in the report, you can move them up or down, to do this;

- A. Click the selection you want to move.
- B. Click the "Move Up" button or the "Move Down" button depending on the direction you want the selection to move in the list.

If you realize that you placed a selection in the box on the right that you do not want or need, you can remove it, to do this;

- A. Click the selection you want to remove.
- B. Click the double left arrows (<<) button.

Your selection has now moved back into the box to the left.

8. Click the box(es) under "Label Options" that you want for your report (if none, continue to step 9 below).
9. Click the box under "Correspondence Options" if you want it for your report (if none, continue to step 10 below).
10. Click the box under "Include Second County" if you want it for your report (if none, continue to step 11 below).
11. Click the "Additional" tab.
12. Repeat steps 5 through 7 above.
13. Click the "Participation" tab.
14. Repeat steps 5 through 7 above.
15. Click the "Animal" tab.
16. Repeat steps 5 through 7 above.
17. Click on "Save".

The REGISTRATION and PAYMENT tabs are not being used by California at this time. The 4hOnline system is being used by many states. Some of the features being used in some states will appear for all states but will not function for those states not utilizing the feature.

18. Click the “Standard Filters” tab. Under this tab you have several selections to work with in creating your report.

The system defaults to the “Counties” Tab; the only choice available is our own county.

SELECTIONS:

Counties Tab	Status
Clubs (Units) Tab	4-H Age
Groups (Units) Tab	Enrollment Date
Events Tab	Gender
Projects Tab	Ethnicity
Family Flag	Race
Member Flag	Military Service
Primary Club	Residence
Role	School Grade
Include Records From All Years (only available with the current 4-H year)	Volunteer

You can highlight as many selections under each of these tabs and check as many of the options in each of the sections that you want to appear on your report.

19. Click the “Clubs (Units)” tab.

20. Click the selection you want for your report.

21. Click the double right arrows (>>) button.

22. Repeat steps 25 and 26 above until you have selected all the selections you want for your report.

23. Click the box(es) under the following options that you want for your report (if none, continue to step 29 below);

- a. Family Flag
- b. Member Flag
- c. Primary Club
- d. Role
- e. Include Records From All Years (only available with the current 4-H year)
- f. Status
- g. 4-H Age
- h. Enrollment Date
- i. Gender
- j. Ethnicity
- k. Race
- l. Military Service
- m. Residence
- n. School Grade
- o. Volunteer

24. Click “Save”.

25. Click the “Projects” tab.

26. Repeat steps 5 through 7 above.

27. Click on “Save”.

28. Click on the “Date & Format Options” tab.

The Date & Format Options tab is an advanced filtering page. Under this tab you have several filter selections to work with in creating your report. All the filters are optional and are used at your discretion.

#### FILTER SELECTIONS:

##### Custom Filters:

Produce a logic string. By following the logic string you are able to produce more detailed reports.

##### Grouping (Page View Only):

Grouping a report by the items that you have selected for your report can keep it organized and easier to use. There is also a feature called “Count Records”. This shows at the top of each section of the report, how many records it contains.

Grouping (Page View Only) – *the system has the selection title listed twice with different choices under each*

##### Sorting:

You can sort each section of the report by Ascending or Descending.

##### Calculations:

You can run calculations on certain numerical data fields in your report. Your choices are Average or Sum.

##### Preferences:

Hide Detail

Landscape

You can choose as many choices and checkmark as many of the boxes under as many of the selections that you want to appear on your report.

29. Click the drop-down arrows and box(es) under the following options that you want for your report;

- a. Custom Filters
- b. Grouping (Page View Only)
- c. Grouping (Page View Only) – *the system has the selection title listed twice with different choices under each*
- d. Sorting
- e. Calculations
- f. Preferences

30. Click “Save”.

Your report will now be listed under the “Custom” report type.

You have now completed creating your Custom Report. You can view it in;

1. Grid View:

In grid view you can see a grid of the various filters that were chosen for the report and can run a quick export of the report to Excel. No other options are available under this view.

2. View Report:

In view report you see the report as it looks on paper. You also have the option to print directly from the system or export the report in various formats then print from there or save the report to your computer to facilitate e-mailing it as an attachment (e-mailing a report would be to send it to a project leader only. Immediately delete it from your computer after you have e-mailed it). The various formats are;

- a. PDF: Portable Document Format
- b. Xls: Excel
- c. Xls: Excel 2007 & newer
- d. Rtf: Rich Text Format

Or you can generate labels from your report in Standard Avery 5160 Address Label format for;

1. Family Correspondence
2. Member Correspondence

For assistance with;

1. Memorized reports
2. Shared reports
3. Standard reports
4. Printing reports
5. Copying reports
6. Editing reports
7. Folders

Please see the instructions titled the same for those topics.