Creating Custom Reports

Before You Start

Creating a custom report follows a logical flow if you have a good understanding of why you need the report ahead of time.

What question does the report answer?

Can you write down the information you need to have in the form of a question? Reports are designed to answer a question, whether it's how many youth are in the beef project, or which members have birthdays in January. Write down what you want to know in the form of a question if possible.

What are you going to do with the answer?

Are you going to email the people on the list, share it with club leaders, print the list, or print mailing labels? The answer to that question will influence the answers to the "Three Steps" to creating a report.

Step 1: What fields (information) do you want on your report?

- Do you need the member's name, birthdate, email address, grade? If you are going to filter (see step 2) for only fourth graders, you probably want the grade included, if for no other reason than double-checking to see that you're getting the right results.

*****Event Reports and Enrollment Reports***

Creating a report based on information from an event registration may be confusing—there is a reporting module both in Events and Enrollment. If you need fields on the report that were contained on the event registration (example: which class they entered), use Event Reports. If the information you need is all contained in the member's profile (example: address, parent, health info, animal info), use Enrollment Reports with an Event standard filter.

Step 2: Who do you want listed on the report?

- All members, only fourth graders, only those who have identified market beef? Determine what field(s) in the program contain information that will include (or exclude) certain records.

Step 3: 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 if you didn't already list them in Step 1.
- Different questions may include the same fields and the same youth, but require different sorts. An example: Who is enrolled in the beef project? What projects are my youth enrolled in? Both questions would include the members' names, the project title, and possibly the club or grade, depending on how you wanted to use the information. But the first question would involve sorting/grouping by project title, and the second one would require sorting by member name.
- Questions that start with the words "How many" instead of "Who" will need to have Grouping and Count enabled, and will also utilize the "Hide Details" function.

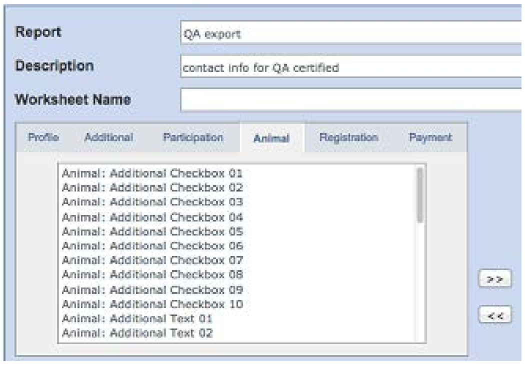
When you have answers to the questions above, click on Reports, then on "Custom", and finally the "Create Report" button.

Report Screen (Fields)

1. Report : logical and descriptive, may include the fields or members included, or both: “Email Addresses 12th graders”. Report names alphabetize in lists.
2. Description: Add text to help others know something about the purpose of the report. This is particularly important if you are sharing the report with others.
3. Worksheet Name: If exporting to Excel™, names the worksheet. (optional)

Screenshots

(Screen appearance may vary per state)

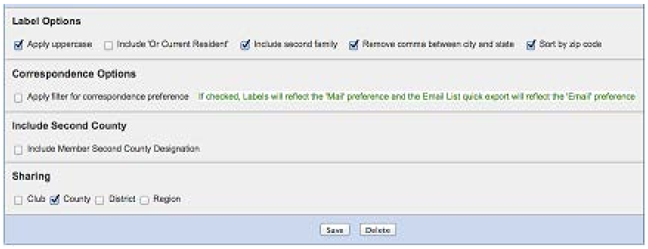


4. Locate the fields to be included. This is a “one-line” report - each field is a column. With many fields, the report will only be useful if exported from either Grid View or Page View to Excel™.
5. Four tabs contain all the enrollment fields: Profile, Additional, Participation, and Animal.
   a. Profile: Authorization, Enrollment, Family, Member, Screening, and Health/Medical tables.
   b. Additional: state custom fields.
   c. Participation: Activity, Award, Club, Group, and Project tables.
   d. Animal: Animal and Quality Assurance tables.
6. Move fields to the right list by using the “>>” button. CTL-click to highlight more than one field from the list and move them all at once.
7. Rearrange the field order by highlighting and using the “Move up” or “Move down” buttons.

Report Screen (Options)

If you are going to use this report for printing mailing labels or sending email, set your preferences in the bottom Options section.

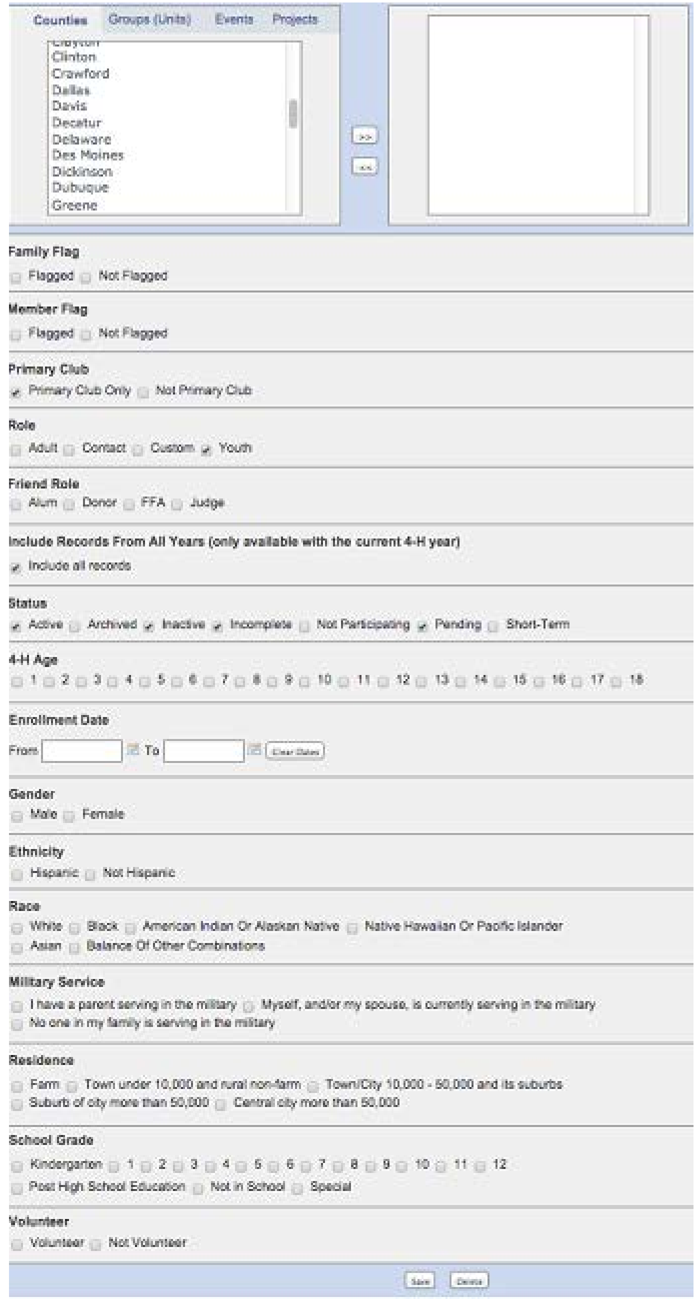
1. Label Options: appearance, sort order, and whether the Second Household will be included.
2. Correspondence Options: as noted.
3. Include Second County: For the second county to designate whether the youth who have a different primary 4-H county designated will be listed.
4. Sharing: Reports can be shared down the hierarchy. It will appear in the Shared folder for those managers.



When you’re satisfied with the fields and their order, as well as the options, **CLICK THE SAVE BUTTON**. All changes made on this screen are temporary until saved.

Standard Filters Screen

1. Many common filters can be set using the Standard Filters interface, including Counties (for District/State managers only), clubs, groups, and projects. Select and move selected criteria by using the “>>” button.
2. It’s important to know how combining more than one filter option will work:
3. Multiple criteria set within ONE option results in an “or” search.
   Example 1: selecting two clubs on the Clubs tab results in a list of all youth who belong to either club.
   Example 2: selecting 2 projects will result in a list of all youth who are enrolled in either project.
4. Clubs and groups relate as one option (“or”), so selecting a club and a group will result in all records from both.
5. Multiple criteria set in separate options results in an “and” search.
   Example 1: Selecting 1 club and 1 project—results include the youth who are members of that club, enrolled in that project.
   Example 2: Selecting 2 clubs and 2 projects—results include only youth in either of the two clubs, who are in either of the two projects.
   Example 3: Selecting a club and a grade—results include the members who are in that club and in that grade level.
6. Common mistakes using Standard Filters:
   a. Selecting age or grade while selecting/including Adults
   b. Selecting an age range when you meant a grade range (or vice versa)
   c. Forgetting to click “Include All Years” when selecting the Inactive status.

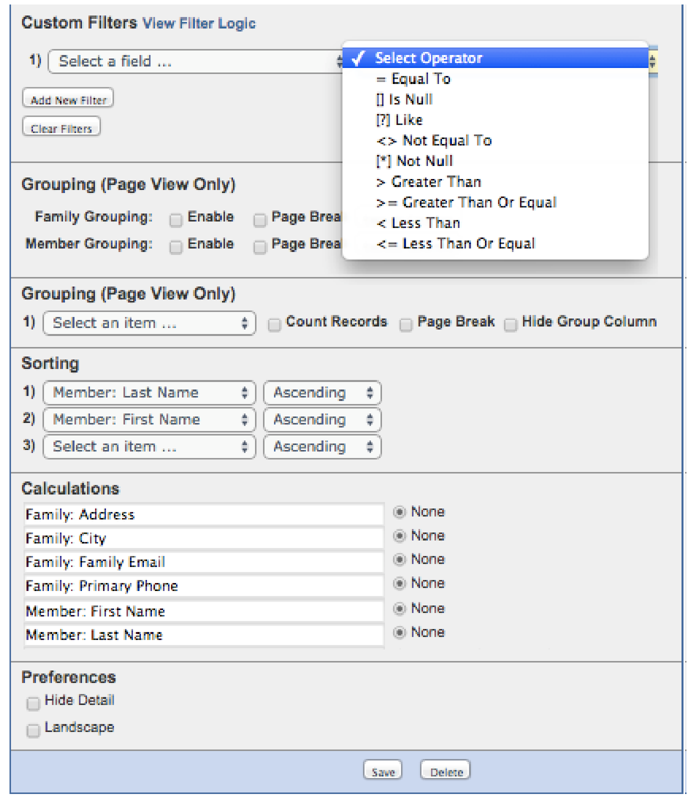


When you’re satisfied with the selection, **CLICK THE SAVE BUTTON**. All changes made on this screen are temporary until saved.

Data & Format Options Screen

If a field exists, you can filter on the contents of that field.

1. In the Custom Filters section, the pull-down list contains all fields available for filter. *(See "4HOnline Tables & Fields" for a list of tables/fields.)* The list is alpha by table EXCEPT for Additional and Health/Medical, which are at the bottom of the list.
   a. Pull down the list for first search field.
   b. After selecting a field, pull down the "Select Operator" list (shown at right).
   c. After selecting the operator, pull down the list of all the available options for that field. The only options that appear are the ones currently at use on a record.
2. Add more search criteria, selecting "And" or "Or" between the criteria. 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 for the record to be listed.



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

3. Grouping (Page View Only): Creates a summary above the records, using a field that is included in the report. Example: Selecting "Club: Title" creates a title (summary) line above the list of members in that club.
   a. Count Records: Adds a total of the records included in each summary line.
   b. Page Break: Inserts a page break for each summary group.
   c. Hide Group Column: The summary field does not appear as a column in the body listing.
4. Multiple levels of summaries can be created. Example: "Club: Title" followed by "Enrollment: School Grade" results in members listed/summarized by club, then by grade within each club.
5. Sorting: Best practice is to begin the sort with the same fields used in the Grouping. In Page View, the records will automatically sort by the Grouping (in order) and then by other fields used in Sorting. But in Grid View, the order is totally controlled by the settings in Sorting.
6. Preferences: Hide Detail leaves only the Summary line, no details listed below. Landscape is only important for Page View, when the report will be printed, not exported to Excel™.

Output Options

Grid View

1. Lists all records according to the filters and sort criteria you specified, on screen, no headers, one column per field.
2. Grouping headers are not shown, nor will they be included if you save or print, but the fields included in the grouping header will be on screen, even if you checked "Hide Group Column" on the Grouping options.
3. Useful for exporting all data to Excel™ in plain ("clean") format—Row 1 is field names, data begins in Row 2.

Page View

1. Includes all Grouping options and is a PDF-style preview. Page 1 is always a title page. Use the forward & back triangle buttons to view pages, or type in the page number.
2. Save Options
    a. Save as PDF: creates and opens a PDF file to print, using Adobe Acrobat's™ printer dialog box. *It may be important to communicate that saving the PDF creates a "static" file of the data. You have to run the report again to get any updated data included.*
    b. Save as Excel™: saves the data, exactly as it looks on screen, to Excel™. The Excel™ file will have certain cells merged to accommodate headers and footers, but the data is in columns. It may be necessary for the user to manipulate the spreadsheet to get it to look the way they want. ***This is the option to use when the Grouping option "Count" needs to be included in the output data.***
    c. Save as RTF (Rich Text Format): RTF 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. The report is editable, but it isn't necessarily simple. *Use this option when you need a word-processing document, but the edits to be made are minimal.*

Member/Family Correspondence

1. Displays PDF of 5160 member mailing labels. One label for each record (or each family), but the sort reverts to alpha.
2. Save as PDF, and print using Adobe Acrobat™ printer dialog. ***In order to print correctly, the option for "no scaling" or "print actual size" must be checked, as the default Adobe Acrobat™ printer setting is to shrink the text to fit within half-inch margins. That will result in the bottom 3 rows of labels not aligning correctly.***

Top Two Reminders

Printing labels (from any report format) will only work correctly if you remember to change Page Scaling to "none" (or Print Size = "full size") on the Adobe Acrobat™ printer setup dialog box.

If you make changes after previewing, you have to SAVE those changes before previewing again.