Generating printed reports and data export files

Created: July 1, 2013

OVERVIEW

The Reports tool in 4-H Online is complex but once the concepts are mastered, a wide array of reports and data export are possible.

The general process is to either start with an existing report template and adapt it for your own use, or to create a report template of your own.

Managers at every level will be able to report on data within their level. (RP level staff will be able to report on data from their counties).

QUICK REPORTS AND OPTIONS

In various views and locations, relevant "quick" reports and options are available. Both are offered because they either cannot be produced or accomplished in any other way, or because they are commonly needed. Be sure to notice these options, they may be just what you need:
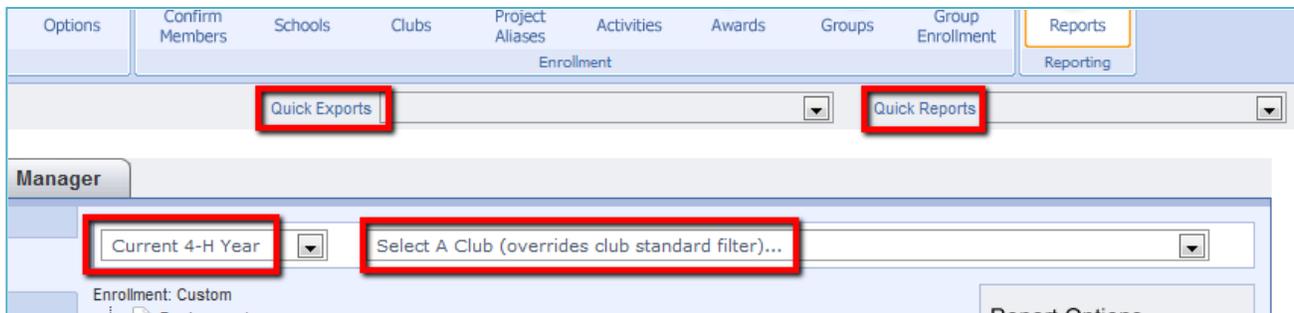
REPORT DIRECTORIES

After clicking on the [Reports] icon, in the [Enrollment] tab, the next place to look is the Report "Directories" that will appear on the left side of the screen.
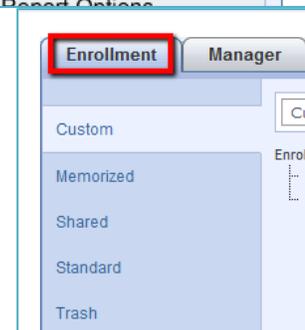
[Custom]

This is the directory you will use most often and will contain reports that you have either created yourself or have adapted from other 4-H Online managers (via [Shared] reports – see below).

[Memorized]

This directory contains reports that you have adapted for your own use, but are based on [Standard] reports (see below).

[Shared]

This directory contains reports that another Manager has created and is making available to you. (These reports appear in their [Custom] folder.) If you want to run one of these shared reports, you just run it. If you want adapt and edit a report, you must first "Memorize/Copy" it.

[Standard]

This directory contains reports that were created by the programmers of 4-H Online and contain unique report elements or layouts that are not available to managers. You can adapt these report templates for your own use, at which time they will appear in your [Memorized] directory.

[Trash]

This directory is where deleted reports end up.

REPORT TEMPLATE ORGANIZATION, STORAGE AND NAVIGATION

The middle part of the [Reports] screen will change contents depending upon the directory selected on the left. The folders and sub-folders on this screen (for the Custom, and Memorized directories) are editable by you, and will only appear for your Manager account.

With time, you will find the folder structure and names that will best fit your report template usage and needs.
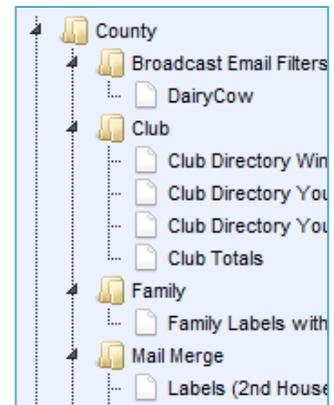
REPORT TEMPLATE AND FOLDER OPTIONS

The far right side of the [Reports] screen will display options for report templates and folders that are applicable to the currently selected directory.

[Run Report]
By running a report, you can display the report as a PDF – ready to print (or save or attach to an email, etc.)

[Edit Report]
This will be a likely first step in using any existing report. You will be able to change the data included, the members or leaders reported on, the filtering, layout and several other options. It will also allow you to choose your output, to include labels and data export files.

[Copy Report] or [Memorize Report]
These two commands work very similar to each other, and in fact there is some "crossover" in terms of which command will do what. In both cases, you will be prompted with a "copy" window, where you will to name your new copied/memorized report.

The use of these commands will depend on the source of the original report:

- **Standard and Shared Reports** – adaptations to standard and shared reports cannot be "saved", therefore you would use this option first memorize (or make a copy of) standard and shared reports in order to save your adaptations.

- **Custom or Memorized Reports** – because your adaptations to custom (build-it-yourself) and memorized reports CAN be saved, you would use these commands to use an existing report as the basis or "source" of another, separate report. Generally this would be for a different report "structure" (different fields, groupings, sorting, etc.) On the other hand, if you want to create a separate member list (report) for every club, a more logical approach would be to have one report and simply change the filters for each club.
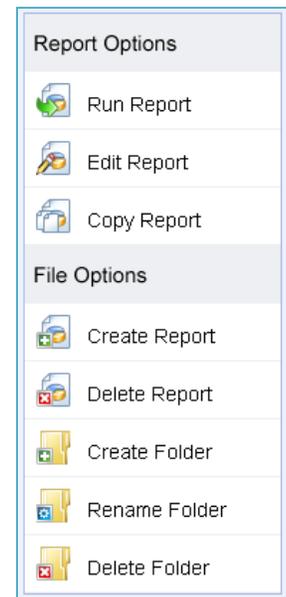
[Create Report]
This command allows you to create a new report from scratch. With time, you will likely use this option less and less. Instead, you'll use existing reports, adapting and adjusting them to meet a slightly different need.

[Delete Report]
Deleted reports end up in the [Trash] directory

[Create, Delete and Rename Folder]
These commands allow you to manage the storage and organization of your reports. These options will only appear on screens where you are allowed to manage the report folder structure.

REPORT BUILDING TOOLS

If you choose to either build adapt a report, you will need to use the report building "toolbar" (indicated in the red box below). You will also use the toolbar if you want to create a data export file.   If you just want to print a report, you can use the command [Run Report].
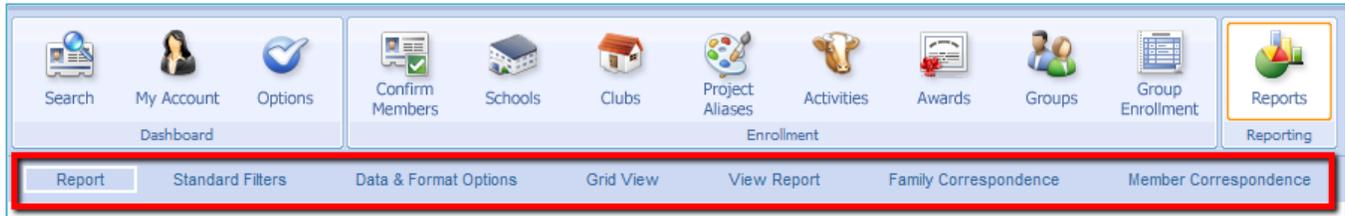
- To display the report toolbar, click on either [Edit Report] or [Create Report].
- To exit the report toolbar and go back to the report directories, click on the [Reports] icon

Note that standard reports (see above) have fewer toolbar options
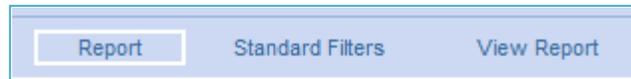
NOTE!! IMPORTANT!!! You can navigate between the menu commands on this toolbar simply by clicking on them. However, YOU WILL LOSE any changes you've made to the report if you do not FIRST CLICK SAVE. The [Save] button is found at the bottom of any page that needs to be saved, along with a button that will Delete the entire report – powerful buttons!!

The reports toolbar offers the follow options and functionality

[Report]
This is "home base" for a report and provides overall and basic options

- You can rename and describe a report (this will become very powerful and helpful!)

- Field selection (for non-Standard reports only) is done on this screen. In other words, use this screen to decide which information will appear on the report. By clicking on the various tabs (Profile, Additional, Participation, etc.), you have access to every single possible field. However, note that some of these are not going to be logical or all that helpful. (A guide is being developed to provide assistance in selecting fields).

  o To include or remove a field in your report, click on the desired field on either side, and then use the buttons in the middle to add or remove the field. (The fields on the right list box will be included in the report)

  o You can change the order that the fields will be displayed (left to right across the report on the report) by using the [Move Up and Down] buttons on the bottom of the right list box.
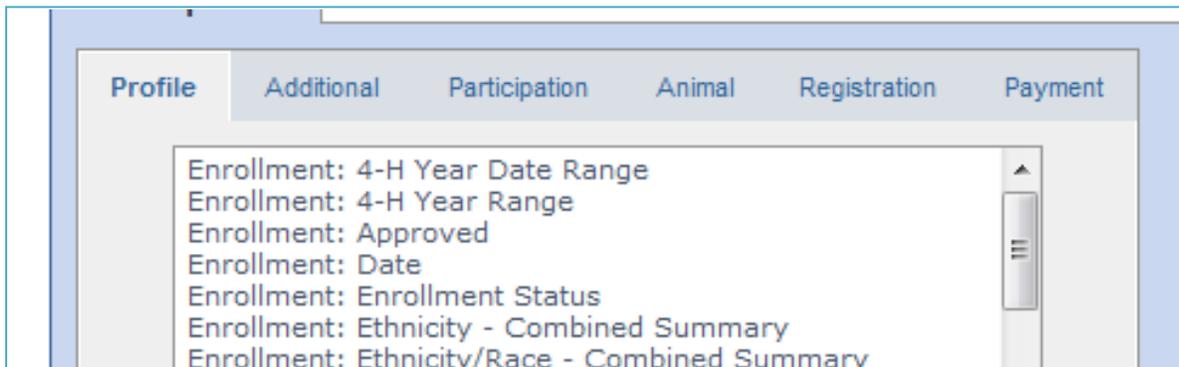
Member: Full Name (First Last)	Enrol Iment: Schoo l Grade	Famil y: Addr ess	Famil y: Emai l	Famil y: Prim ary Phon e	Famil y: City	Enrol Iment: Enrol Iment Statu s	Club: Title	Mem ber: Date Creat ed	M b P m C P e
A Lannin g	Kinder garten	POB	lann00 24@u mn.ed u	320- 523- 3707	Olivia	Active	Busy as Beaver s	02/22/ 2011	

- [Label Options] are applicable for all reports, because all reports can be the basis for generating labels.
- The [Correspondence Option] filter should only be checked in specific situations
- The [Sharing] section will allow you to share this report with levels "below" you (work is being done to be able to share a report with peer levels).

[Standard Filters]
This set of filters is your first step in determining which youth or volunteers will be included in a report.

The top section allows you to easily choose one or more of several common filters. To include members with the selected Club, Project, etc., move the item to the right list box. This list currently connects the selected filter items with [OR]. A future option will allow connecting with [AND].

The [Family and Member Flag] options refer to the check boxes to the left of each family/youth/volunteer/contact on the Manager Search screen.

Note that Adults, Contacts, and Youth can be included in any report.
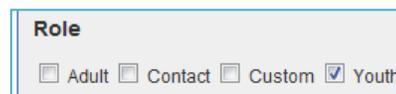
The remainder of the Filter options on that page are fairly self-explanatory, but note that leaving all options in a section UN-checked is the same as checking all options.

[Date and Format Options]
This screen offers "advanced" features that affect both the content and the format of the content.

- [Custom Filters] will allow you to build a very specific list of individuals. You begin by selecting the field you want to filter on, and then construct the filter logic. You can add up to 9 custom filters. You must click [Save] at the bottom of the page before the [View Filter Logic] link will reflect filters displayed on the screen.

- [Grouping] is a powerful option that allows you to create "sections" within your report. The [Hide Group Column] option removes the grouping data from the report, and is helpful because in most cases it would be redundant and waste report "width" to repeat the Grouping data in each line. On the next page, the first example below demonstrates grouping, plus the [Count Records] option). The second example demonstrates the [Count Records] option coupled with the [Hide Detail] option.

Note that if you delete a field on the Report tab that had a grouping associated with it on the Data/Format Options tab, that grouping will look like it's gone on the Data/Format Options tab. However, a blank line may show on your report with no grouping name. You need to go back into the Data/Format Options tab to be sure none of the boxes behind the grouping name were checked (Count Records, Page Break or Hide Group Column).

- [Sorting] options will determine the order in which the records (youth, volunteers, etc.) are listed.

- [Calculations] will have limited use, but some fields can have math operations applied (summing the fields would be most common).

- [Preferences] give you the option of landscape format, especially helpful for reports that contain several fields. The option to [Hide Detail] is valuable when creating a report that counts items.

[Grid View]
This view is provides a "quick preview" of the data, to see if the report is headed the right direction. It's also the best way to view the selected data if a printed report or data export is not needed.

[View Report]
Clicking in [View Report] will be the last stop in many cases for printed reports or data export files – it provides nearly all the "output" options (except for printing mailing labels or mailing label merge files).

The view of the report on this screen is a very close approximation of the final printed report – a "Print Preview" for all practical purposes.

The left and center portions of the toolbar provide printing and navigation options

The right side of the toolbar provides export and output options:
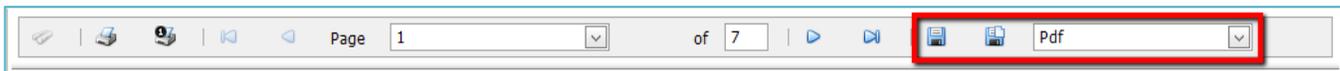
First choose the desired output from the dropdown, and then click on one of the two "export" icons. The various options can be used as follows:

- [PDF] – use for emailing a final report
- [XLS] – use for formatting a report in Excel or creating a data export/mail merge file
- [RTF] – use for editing/formatting the report in Word
- [MHT] – use for opening the report as a web page
- [Text] – use for capturing the raw, plain text
- [Image] – use generating one .png file of the report

Note that clicking the two export icons will sometimes have the same results and sometimes different results, depending on the browser being used, the output selected, and the configuration/setup of the individual computer.

[Family Correspondence and Member Correspondence]
These two options are used to generate mailing labels and mailing label (addressing) mail merge files for any 4-H Online report (even if the address fields are not included in the report setup).

- Family correspondence will look at Family address data
- Member Correspondence will look at individual Youth, Volunteer or Contact address data

There are no label setup options – just the Avery 5160 as presented. Even exporting as an RTF (and editing in Word) will not offer an option to change the label Avery number or much about the formatting. If other label options are needed, the best approach is to export the mailing label data and build your own Mail Merge document.

There are no "first line" options – 4-H Online simply looks at the [Last Name] field from the Family Profile.

Keep in mind the [Label Options] found on the [Report Screen] (see above).

QUEUING REPORTS

Some reports will take a very long time to display. This can happen, for example, because a report is very long or that it requires a lot of processing (for example printing a multiple health or re-enrollment forms can require a large amount of server processing time).

As an option to waiting for a report to display, you can instead submit a "queue request" and have the 4-H Online server notify you when your report is complete.

1. If the report folders are not currently visible, click on the [Report] icon in the [Enrollment] tab.

2. Locate your desired report.

3. Instead of clicking on [Run Report], do a right-click on the report name.

4. Choose to start either the Excel or PDF output job.
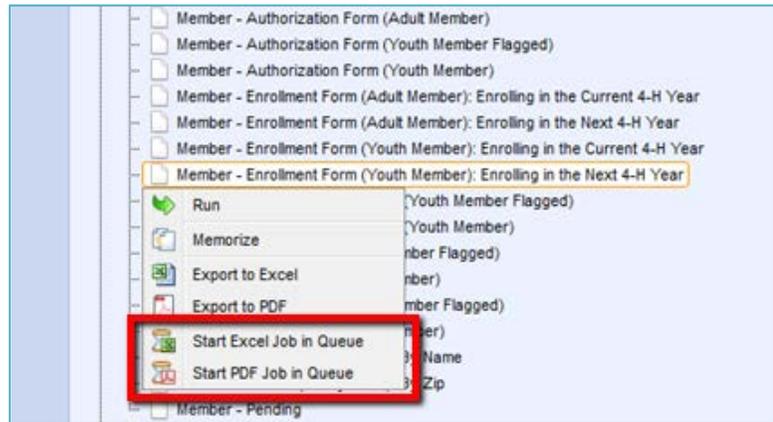
4-H Online will then generate your report.

Go to your Manager dashboard to track and access your queued job (click on [Home] in the upper right corner of screen.)

There you will see:

• A [New Message] when your report is completed.

• A link to access your PDF or Excel file in the [Queued Reports] section.

You will also receive an email that the report is complete.