

Custom Reports				
Before You Start				
<ol> <li>Custom Reports are designed to answer a question. Before setting up a report, you should first determine the question that you are trying to answer, and the criteria for which records should be included on a report.</li> </ol>				
Creating a Fo	older for Custom Reports			
Steps	Screenshots (Screen appearance may vary per state)			
the navigation pane.	Custom Reports			
2. Enter the name of your new folder and click the Add button.	Label: - EH Online's Member Reports     Add Foular       Add Foular     Add Foular       Editor - Standard - Eth Online's Member Reports     Edit Folder			
	Add Custom Report Folder ×			
	Report Folder Name			
	Cancel Add			
Creating a Cu	ustom Enrollment Report			
<ol> <li>Click on the Custom Reports tab in the navigation pane.</li> </ol>	Restiger			
<ol> <li>View the available list of folders.</li> <li>Click on the folder title in which you want to add your new report</li> </ol>	1     Marketine Name     Marketine Name       2     Som Name     Marketine Name       3     Som Name     Marketine Name       4     Som Name     Marketine Name       5     Som Name     Marketine Name       6     Som Name     Marketine Name       7     Som Name     Marketine Name			
<ul> <li>4. Click Add Report to create a new report in the selected folder.</li> </ul>	By any month Maria     By any month Maria of software     General Maria Maria Maria Maria Maria Maria     General Maria     General Maria Maria Maria Maria Maria     General Maria Maria Maria Maria Maria     General Maria Maria Maria Maria Maria			
5. Enter the name of your report.				
<ol> <li>Enter a description of the report.</li> <li>Enter the name of the Excel</li> </ol>	Add Custom Report ×			
Worksheet title.	Report Name			
8. Click the Add button.	Description			
	Excel Worksheet Title			
	Cancel Add			





<ul> <li>9. In the Report Detail section, you may edit the name and description of your report.</li> <li>NOTE: Please do not use any special characters or symbols in the report name to avoid report errors.</li> <li>10. The target area allows you to set the program year for the report data.</li> <li>11. The Hierarchy drop-down menu will let you choose the area of the hierarchy that the report applies to within the Manager's assigned hierarchy areas</li> </ul>	Renter Report Up Lieb - Instales Projects       Immerging       Immergin
<ul> <li>12. Click Edit on the Report Columns category to begin selecting the columns to be included on the report.</li> <li>13. Click on the Column Category to view the available fields to include on the report. You may select columns from as many column categories as needed.</li> <li>14. Click on the field name and click the right arrow to add it to the report.</li> <li>15. Repeat step 13 – 14 for each field you need to add to the report.</li> <li>16. Click Save.</li> <li>NOTE: The Additional category will be added with future development. The User Defined category consists of the custom fields setup for your Institution's enrollment process.</li> </ul>	Report Columns     No Columns Selected     Etter     Index me   Index me </th
<ul> <li>17. Click Edit next to Standard Filters to add filters based on the following criteria: <ul> <li>Include All Years**</li> <li>Enrollment Roles</li> <li>Member Participation Status</li> <li>Enrollment Start Date</li> <li>Enrollment End Date</li> <li>Member Flagged</li> <li>4-H Age</li> <li>School Grade</li> <li>Family County</li> <li>Enrollment County</li> <li>Primary Units Only</li> <li>Units** (County Managers only)</li> <li>Projects</li> </ul></li></ul>	Standard Filters       Edt         Induke All Years       No         Enrollment Relas          Participation Statuas          Enrollment Stat Date          Enrollment Stat Date          Member Flagged       No         4H Age          School Grade          Enrollment Counties          Enrollment Counties          Devolument Counties          Devolument Counties          Projects





- You may add additional filters not covered by the standard filters by clicking Edit next to the custom filters.
- 19. Click the Add group button.
- 20. Click the Add filter button.
- 21. Select the data field you would like to filter the report on.
- 22. Select the operator. Depending on the data field you are filtering on, the operator choices may change.
- 23. You may add more than one filter to the group if needed. If the records returned need to match all of the filters within a group, use the AND option between each data field. If the records need to match any one of the filters in the group, use the OR option between each data field.
- 24. For complex filtering, you may also add multiple groups of filters. Again, use the AND between groups if the records must meet the criteria of both groups of filters. Use the OR between groups of filters if the returned records need to only match the criteria of one of your filter groups.
- 25. Once you have entered all your custom filters, click Save.

NOTE: The standard filter for "Include All Years" behaves differently than in 1.0. This standard filter will give you a report that has multiple lines for the member if they have participated in more than one program year. Using this filter will remove all program year specific filters. The Member Participation Statuses are based on a specific program year. Therefore, do not use the Participation Statues filters if you are going to use the "Include All Years" standard filter.

- 26. To sort the report results based on specific columns, click the Edit button.
- 27. Click the Add Sort button.
- 28. Select the report column to use as the primary sort.
- 29. Select the radio button to sort the records in ascending or descending order for your selected column.



## **Custom Reports**

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		Save
Column Sorting		Edit
	No Sorting Selected	
	No Sorting Selected	



30. You may add additional sort columns	Edit Report Sorting x
if needed.	NOR .
31. Click Save.	Son Good
	Edit Report Sorting
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	hane Lat, Fint Finity Enal Pagict Nane
	Unit Name Even
32. To group records together, for page	
breaks or counting purposes, you can	
set the grouping fields. Click Edit to	Grouping
setup your groupings.	No Grouping Selected
33. Use the drop-down menu to change	
the grouping type (column grouping	Edit Report Grouping X
or row grouping).	techno develop for Caluer Georgia
34. Click the Add Group button.	Les Gent
35. Select the data field to use as the	
grouping.	Edd Report Grouping X
36. Check the Hide Column option if you	Chief Clare     Chief Clare
do not want to see the data for this	National Control Contr
option	Vasa ngd Untor
37 Check the Page Break ontion to insert	
a page break into the PDF format of	
the report after each unique grouping	
field.	
38. Check the Record Count option for the	
records within the group to be totaled	
on the report.	
39. You may add more grouping fields if	
needed by repeating steps 34 – 38.	
40. Click Save.	
41. If you have made changes to the	
report that are not reflected in the	sprend the tag prevalent in the optical structure. In device the optical structure of the gap with the optical structure of the sprend structure of th
The Browiew of the report will refresh	Badagembi: Batsi ({)
the returned results	Ren (ad./htt
42 Use the arrow buttons to preview	
additional returned records	
43. Return to the top of the screen to	
select the report output format. You	
may download the report to an Excel	🖸 Download Excel 🔰 Download Pdf 🚀 Broadcast
file, a PDF file, or may send a	
broadcast email to the member	
records returned on the report.	





## Editi

- 44. You may edit custom reports you ha created at any time.
- 45. Click on the folder that contains the report you wish to edit.
- 46. Click on the report title.
- 47. Select the 'Edit Report' option from the menu on the right side of the screen.
- 48. Once in edit mode, you may add or remove columns, change the standa and/or custom filters, sorting, and grouping as needed.
- 49. After saving changes, click the Refree option on the report preview for you changes to be displayed.

NOTE: Hidden Columns, Page Breaks and Record Groupoing and Counting totals a only displayed on the PDF format of the report. These options are not included in the report preview nor the Excel format.

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	Report Explorer		
	Construction Reports	Name: Norther Report In Club-Includes Projects	
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Copying Custom Reports			
50. You may copy an existing custom report to use as a starting report for	Lucition		
<ul> <li>additional reports.</li> <li>51. Select the folder that contains the report you wish to copy.</li> <li>52. Click on the name of the report you wish to copy.</li> <li>53. Click the Copy Report option from the</li> </ul>	•         •		
<ul> <li>53. Click the Copy Report option from the menu on the right side of the screen.</li> <li>54. Click on the report designated with the (Copy) appended to the report name.</li> <li>55. Select Edit Report from the menu on the right side of the screen.</li> </ul>			
56. Click the Edit button for the Report Detail to rename the report.	Peer baak		
sorting and grouping options as needed.	Kene (Monthinghing) (Sa - Monthinghing) (Sa - Monthinghinghinghinghinghinghinghinghinghing		
Se	nding Reports		
58. You may create a report and send it to another manager. The other manager			





will be able to modify the report as needed, as if they created it themself	Expert Explorer	Name: Nervine Reports y Cut Indedea Projects	
59 Click on the folder containing the	in the second seco	Description: Report of members by duit - with projects Geograp, Hamber	Di Add Folder
report you wish to send to another	Anne and Angeler     The and a final set of the and a final set of the angeler     The angeler and a final set of the angeler      The angeler and angeler angeler		D Gegy Report
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60 Click on the report you with to cond to	menter value     Properso statuto     Properso		Monting Labols     Monting Labols     Monting Labols
another manager	<ul> <li>Contro Falas</li> </ul>		
61 Click the Sond Bonort ontion in the			
or. Click the send kepoli option in the			
62 Enter the manager's email address or			
name, and select the account from			
the drop down manu	Select a Manager		×
62 Click the Select button			
NOTE: The receiving manager will have a	Email or Name		
folder created in their custom report area			
titled "Reports from X County" where X is			
the name of the county that sent the		s	elect Cancel
report. This folder will contain the report			
the receiving manager may now edit.			
	aring Daparts		
31	laring Reports		
64. Managers may share reports with			
other managers, while retaining	Bigot Explorer		
authorship of the report. Click on the	Section Methode Depotes     Appe 22 in results Mathematic Tabases     Gounds 25	Name: Manhor Report by Child-Includes Projects Description: Report of numbers by child-with projects Category: Hember	10 Add Pobler
name of the folder containing the	Treamer Ingentry Dia - Insolate Rejease     Total Service - Aurais and Yease     Total as in Region     Total as in Region		Copy/Neart
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65. Click on the name of the report you	<ul> <li>Governmen Face</li> <li>Present Place</li> <li>Property Station</li> </ul>		🕑 Doostaal Pal 🕐 Maling Labela
wish to share.	iii "roma na katay Tana basak 		C New To Trade
66. Select Share Report from the options			
menu on the right side of the screen.			
NOTES: Managers may share reports with			
other managers, while retaining authorship of			
the report. Shared reports may not be edited			
by receiving managers. The shared report may			
be copied and then edited, but the report will			
remain in the Shared folder.			
Shared reports are shared across and down			
the hierarchy. Reports shared by an Institution			
Manager will be shared with other Institution			
Managers and County Managers. Reports			
shared by County Managers will be shared			
with other managers in their county.			
It a shared report is modified by the creator,			
those changes will be reflected for all			
managers that have access to the report.			





Custom Rep	ports are not able to be shared with			
Club Leader	rs, as they do not have access to			
custom repo	orts.			
	Mailing Labels			
Managers m	nay print mailing labels for each		Edit Standard Deport Filter	
member or	family represented on a Custom			
Report.			Mailing Label Type required	
1. Clic	k on the title of a report.		Family	
2. Clic	k on "Mailing Labels."		Label Count To Skip	
3. Sele	ect to print mailing labels for the		Apply Upper Case	
Fam	nily or for the Member address. If		Include 'Or Current Resident'	
Fam	nily is selected, one mailing label		Remove Comma Between City And State	
will	print for each family represented		Sort By Zip	
on t	the report. If Member address is		· · · · · · · · · · · · · · · · · · ·	
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4. If yo	ou would like the mailing labels to			
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save	e or open the mailing labels			
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#### Tips

If an Institution manager is running a report that contains a large amount of data causing it to take longer than usual to load, the manager will receive a message that the report is being queued. The manager will receive an email when the queued report is ready and may download the completed report from the "Queued Reports" section at the top of the Custom Reports page.

