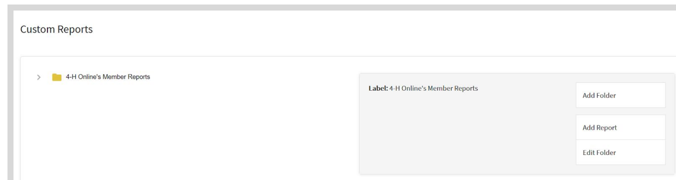
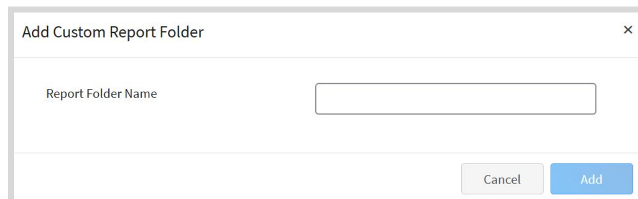
Custom Reports

The Custom Reports area allows the County Manager to create reports. Managers may determine the columns that will appear, filter, and sort the data. Custom Reports can be downloaded in PDF and Excel formats, and can be used to send a broadcast email to the members included in the report results.

Creating a Folder for Custom Reports

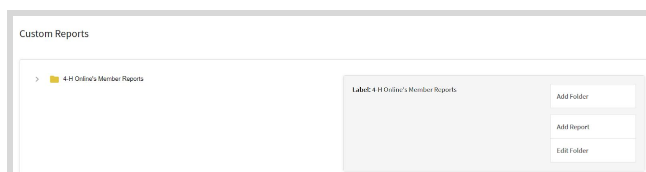
1. Click on the Custom Reports tab in the navigation pane.
2. Click the Add Folder button.
3. Enter the name of your new folder and click the Add button.



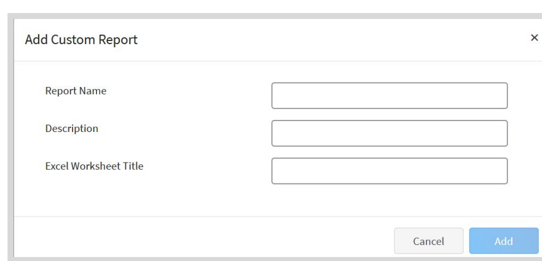


Creating a Custom Report

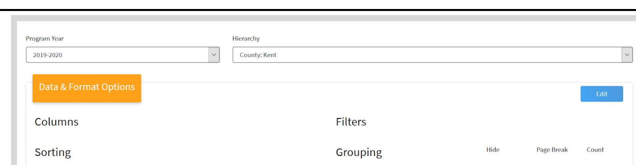
1. Click on the Custom Reports tab in the navigation pane.
2. View the available list of folders.
3. Click on the folder title for which you want to add a new report.
4. Click Add Report to create a new report in the selected folder.



5. Enter the Report Name.
6. Enter a description of the report.
7. Enter the Excel Worksheet Title.
8. Click the Add button.



9. To add columns to the report, click Edit next to the Data & Format Option heading.
10. Use the drop-down menu for the Available Columns Type to select the appropriate grouping of fields.



<table>
<tr>
<td>
A) Additional
B) Animal
C) Member
D) Participation
E) Payment
F) Registration
G) User Defined – Custom Questions asked of members when they enroll
11. Select the columns you need to add to the report by clicking the + symbol next to the field name.
12. You may change the Available Columns Type at any point to add columns from different areas to your custom report.
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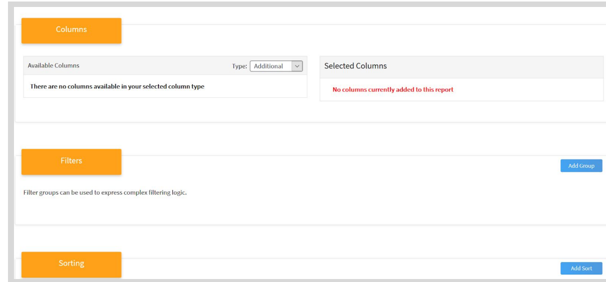
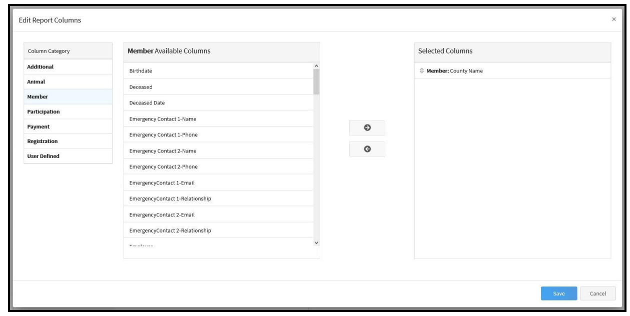
<td>




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<td>
13. To add filters to the report, click the + Add Group button to begin the process.
14. Click the Add Filter button.
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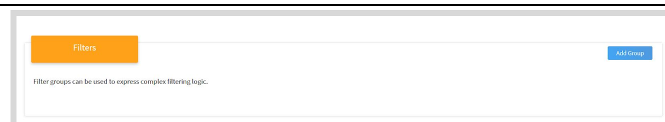

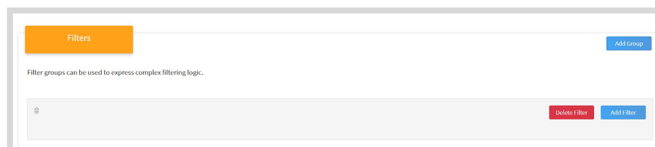

</td>
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<tr>
<td>
15. Use the first drop-down menu to select the field you want to use as a filter.
16. Use the second drop-down menu to select the operator (options will vary depending on the field selected).
17. Enter a number, text, or select an available option for the filter.
18. Continue adding filters and/or groups of filters as needed. Select the “AND/OR” option to indicate how the filters should interact.
19. Click on the arrow icon at the left and drag it to a different position to re-order the filters.
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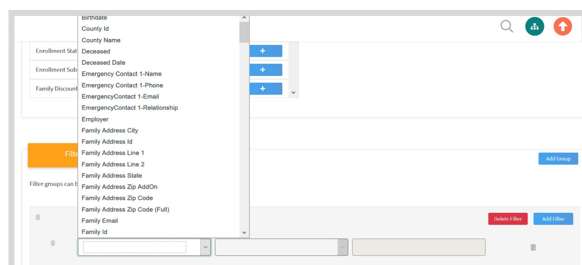

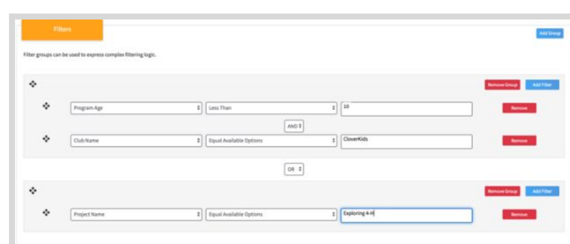
</td>
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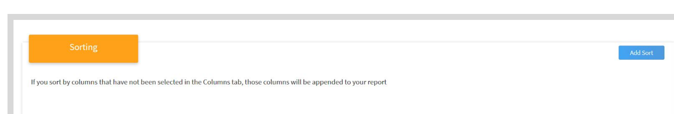
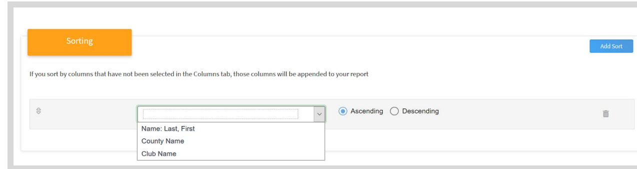
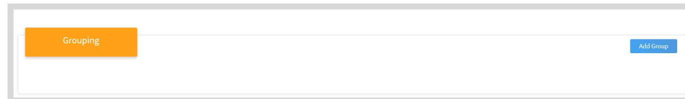
<tr>
<td>
20. To add a Sorting option, click the Add Sort button.Select the data field you want to use to sort the report results.
21. Select the radio button that corresponds to how you want the data sorted.
A) Ascending (A to Z, smallest to largest, etc.)
B) Descending (Z to A, largest to smallest, etc.)
</td>
<td>


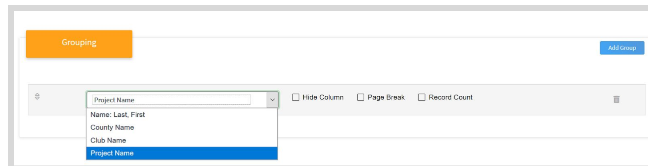
</td>
</tr>
</table>

22. You may add more than one sort variable. The report results will be sorted by the first variable, then the second, etc.

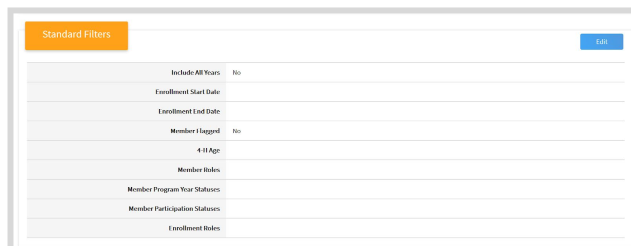


23. To add a Grouping option, click the + Group button.
24. Use the drop-down menu to select the variable you want to group records by, and then select whether to Hide Column, add a Page Break, and/or include a Record Count.

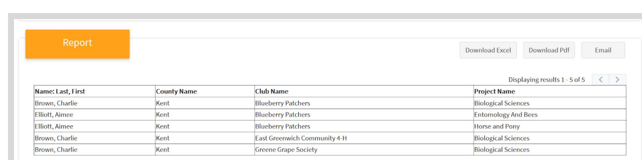




25. If needed, you may add Standard Filters to your report. Click the Edit button next to Standard Filters to begin adding one or more standard filters. The Standard Filters include:
    a) Include all years (Yes/No)
    b) Enrollment Start Date
    c) Enrollment End Date
    d) Member Flagged (Yes/No)
    e) 4-H Age
    f) Member Roles (Youth/Adult)
    g) Member Program Year Statuses
    h) Member Participation Statuses
    i) Enrollment Roles (Volunteer, Club member, Cloverbud, Participant) ** Names of enrollment roles may vary by state
26. Click the Save button at the top of the page after selecting your standard filter options.

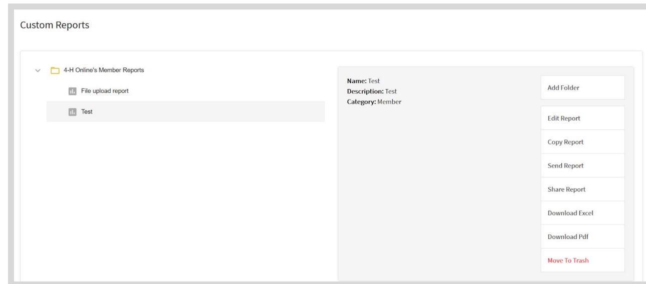


27. As you build the report, the column headings and data will populate at the bottom of page in the Report area.
28. Use the Download Excel button to view the Excel format or use the Download PDF button to view the data in a PDF file.
29. Your browser settings will determine if the files automatically download, or if you will have to option to Open or Save the file.
30. It is highly suggested that you view the results before sending an email to the members listed on the report results.
31. Click the Email button to send a broadcast email to the members listed on the report results.

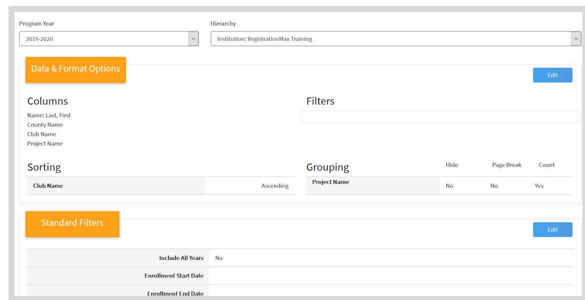


Modifying Custom Reports

1. Click on Custom Reports in the navigation pane.
2. Click on the name of the folder containing the report you need to modify.
3. Click on the name of the Report that you want to modify.
4. Click the Edit Report button.



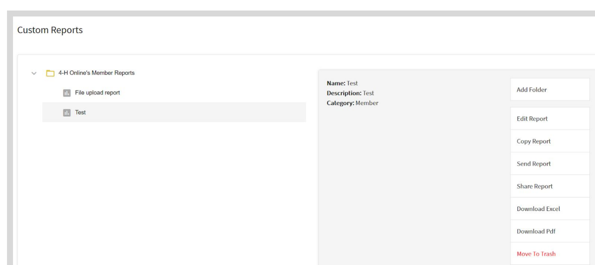
5. Modify the Columns, Custom Filters, Sorting, Grouping, and/or Standard Filters as need.
6. Save the changes.
7. View your report results before downloading the results or sending a broadcast email based on the report results.



Sharing Reports with other Managers

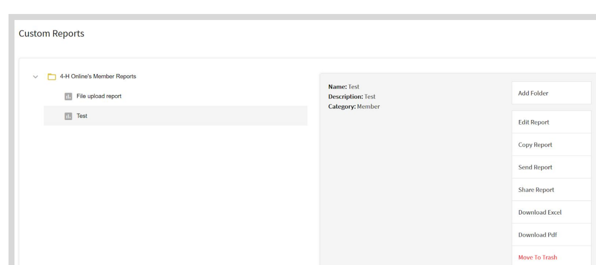
1. Click on Custom Reports in the navigation pane.
2. Click on the > symbol to the left of the folder name to expand the folder.
3. Click on the Report name that you want to share.
4. Click the Share Report button.

NOTE: The authorship of shared reports is retained by the original report creator.



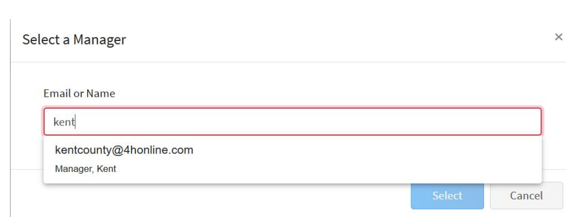
Sending Reports to Another Manager

1. Click on Custom Reports in the navigation pane.
2. Click on the folder that contains the report you want to send.
3. Click on the Report you want to send to another Manager.
4. Click the Send Report button.



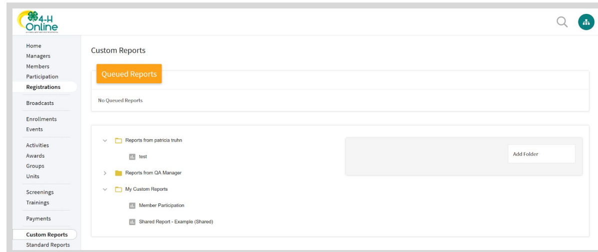
5. Enter in the Manager's email address or name.
6. Click on the appropriate account from the drop-down menu.
7. Click the Select button.

NOTE: When sending a report to another Manager, a folder will be created in the recipient's list of custom



report folders. The folder will contain the report and allow the recipient to modify the report as needed.	

Working with Reports Sent by Another Manager

1. Click on Custom Reports in the Navigation pane. 2. View the list of folders. 3. Locate the folder titled “Reports from ___”, with the ___ being the name of the manager that sent you the report. 4. Click the > arrow next to the folder name. 5. Click the name of the report. 6. You may run or edit the report as if you created it yourself.	

Suggested County Reports List

- County Consent Report