



Utah State 4-H Office
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Running Custom Reports in 4-H Online

Utah 4-H Youth Development Powered by 4hOnline Utah State University Extension (County) Home | Logout

Enrollment Events Connect Finances Data

Search My Account Options Confirm Members Schools Clubs Project Aliases Activities Awards Groups Group Enrollment Payments Screening Reports Reporting

New Messages	Author	Sent
New State Forum Topics	Author	Posted

Queued Reports	Type	Status	Start Time	End Time
Queued Bulk Downloads	Type	Status	Start Time	End Time

Announcements & Newsletters

Demo Newsletter
Nov 01, 2012 Demo County

Items to Review

- 0 Enrollments Pending
- 0 Event Registrations Pending
- 0 State Forum Replies

Items to Order / Pay

- 0 Enrollment Checks Due
- 2 Event Checks Due

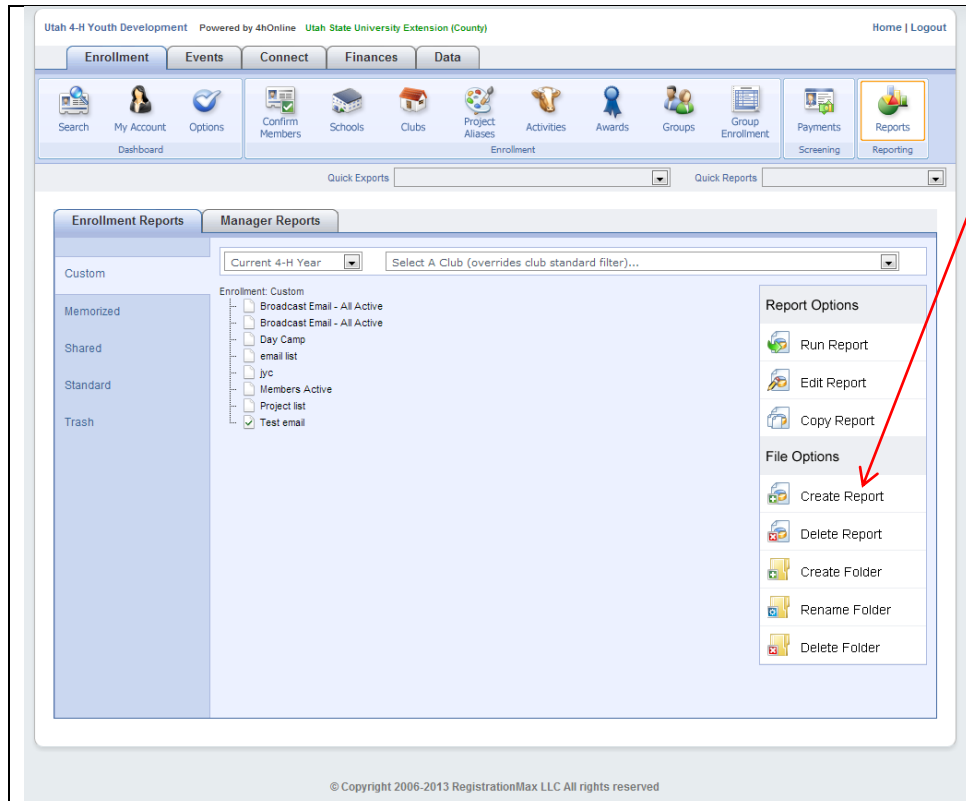
2012-2013 Enrollment Snapshot

Youth Club Enrollment	0
Adult Volunteer Enrollment	0
Youth Volunteer Enrollment	0
Group Youth Enrollment	0

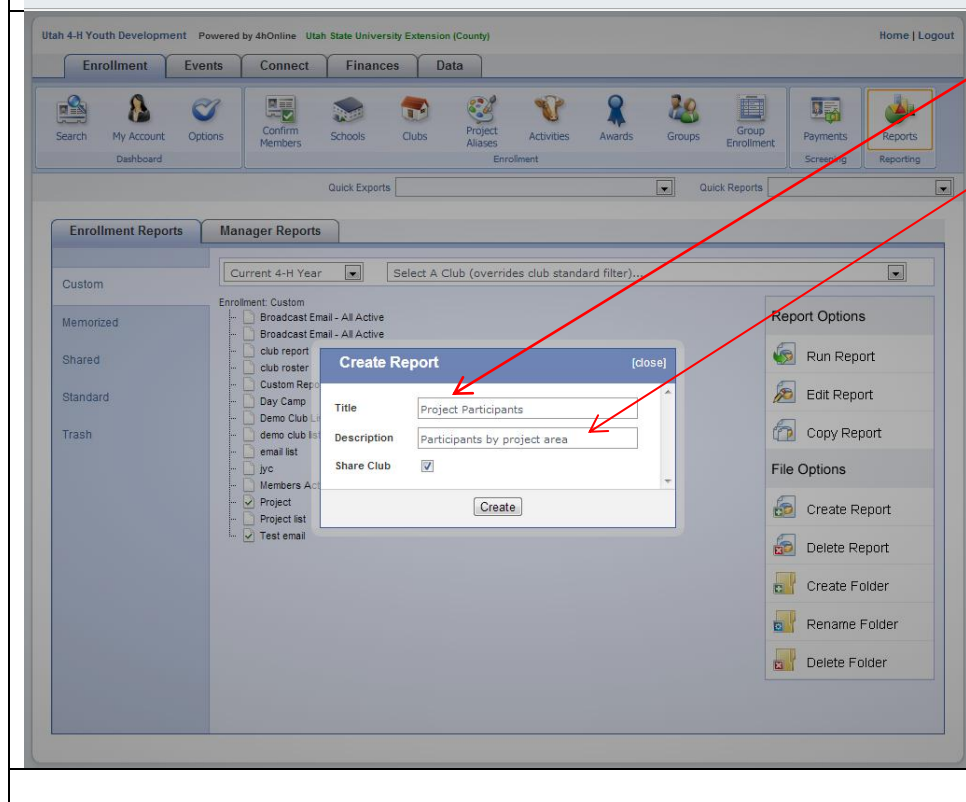
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1. Log into ut4honline.
2. Click on Reports





3. Click on Create Report



4. Type a name for your report.

5. Type a description that becomes the worksheet name in an Excel file.

6. Check the Share Club box if you want to share the report with club leaders.

7. Click the "Create" button.

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Enrollment Events Connect Finances Data

Search My Account Options Confirm Members Schools Clubs Project Alliances Activities Awards Groups Group Enrollment Payments Reports

Report Standard Filters Data & Format Options Grid View View Report Family Correspondence Member Correspondence

Report Project Participants

Description Participants by project area

Worksheet Name Participantsbyproject Excel Export (31 char. max)

Profile Additional Participation Animal Registration Payment

Authorization: Code of Conduct: Consent
 Authorization: General Release: Consent
 Authorization: Guardian Code of Conduct: Consent
 Authorization: Medical Release: Consent
 Authorization: Privacy Release: Consent
 Authorization: Publicity Release: Consent
 Authorization: Rodeo Waiver: Consent
 Authorization: Surveys and Evaluations Eligibility Impact: ()
 Authorization: Surveys and Evaluations Verbal Assent: Co
 Authorization: Surveys and Evaluations: Consent
 Authorization: Volunteer Confidential Self-Disclosure Form
 Enrollment: 4-H Year Date Range
 Enrollment: 4-H Year Range
 Enrollment: Approved
 Enrollment: Date Approved
 Enrollment: Date Created
 Enrollment: Datestamp
 Enrollment: Enrollment Status
 Enrollment: Ethnicity - Combined Summary

Label Options

Apply uppercase Include 'Or' Current Resident Include second family Remove comma between city and state Sort by zip code

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Quick Videos

Report: Project Participants (Participants by project area)

Custom Filters View Filter Logic

1) Project: Title = Equal To Leadership Skills Develop

Or

2) Project: Title = Equal To Volunteerism

Add New Filter Clear Filters

Grouping (Page View Only)

Family Grouping: Enable Page Break Exclude Columns

Member Grouping: Enable Page Break Exclude Columns

Grouping (Page View Only)

1) Select an item ... Count Records Page Break Hide Group Column

Sorting

1) Select an item ... Ascending

Calculations

Member: Full Name (First Last) None

Project: Project and Alias None

Project: Title None

Preferences

Hide Detail Landscape

Save Delete

8. In this ribbon the following options appear.

Report - select the 4honline fields you want to include in the report. You must select at least one field to populate a report.

Standard Filters includes Clubs, Groups, Events, Projects that can also be limited by *Family Flag, Member Flag, Primary Club, Role, Friend Role, Status, 4-H Age, Enrollment Date, Gender, Ethnicity, Race, Military Service, Residence, School Grade, and Volunteer filters.*

Data & Format Options – set custom filters for very detailed reports, grouping, sorting, and calculations

Grid View – displays report in grid (table) format. Includes icon to export data to an excel file.

View Report – displays report in 4-H online format.

Family Correspondence – creates family mailing labels.

Member Correspondence – creates member mailing labels.

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Report Project Participants

Description Participants by project area

Worksheet Name Participantsbyproject Excel Export (31 char. max)

Profile Additional Participation Animal Registration Payment

Authorization: Code of Conduct: Consent
 Authorization: General Release: Consent
 Authorization: Guardian Code of Conduct: Consent
 Authorization: Medical Release: Consent
 Authorization: Privacy Release: Consent
 Authorization: Publicity Release: Consent
 Authorization: Rodeo Waiver: Consent
 Authorization: Surveys and Evaluations Eligibility Impact: Consent
 Authorization: Surveys and Evaluations Verbal Assent: Consent
 Authorization: Surveys and Evaluations: Consent
 Authorization: Volunteer Confidential Self-Disclosure Form
 Enrollment: 4-H Year Date Range
 Enrollment: 4-H Year Range
 Enrollment: Approved
 Enrollment: Date Approved
 Enrollment: Date Created
 Enrollment: Datestamp
 Enrollment: Enrollment Status
 Enrollment: Ethnicity - Combined Summary

Label Options
 Apply uppercase Include 'Or Current Resident' Include second family Remove comma between city and state Sort by zip code

Correspondence Options
 Apply filter for correspondence preference *If checked, Labels will reflect the 'Mail' preference and the Email List quick export will reflect the 'Email' preference*

Include Second County
 Include Member Second County Designation

Sharing
 Club

Save Delete

9. These tab headings in the “Report” option corresponds to areas in 4H online. The default section is “**Profile**” which contains all profile data fields that are created from the enrollment record.

Participation contains fields from the activities, award, club, group, project, and training areas in 4H online.

Additional – N/A (Utah 4-H has not set up additional enrollment fields.)

Animal – N/A (Utah 4-H has not bought the animal module.)

Registration contains fields from the event, invoice, and registration areas in 4H online.

Payment information on members.

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Report Standard Filters Data & Format Options Grid View View Report Family Correspondence Member Correspondence

Report: Project Participants

Description: Participants by project area

Worksheet Name: Participantsbyproject Excel Export (31 char. max)

Profile Additional Participation Animal Registration Payment

Member: Emergency Contact Name
 Member: Emergency Contact Phone
 Member: Emergency Contact Relationship
 Member: Fax
 Member: First Name
 Members: Full Name (Last, First)
 Member: Grouping Title
 Member: Guardian1 Full Name (First Last)
 Member: Guardian2 Full Name (First Last)
 Member: Guardian2 Full Name (Last, First)
 Members: Id
 Member: Job Title
 Member: Last Active Year
 Member: Last Name
 Member: Mailing Address
 Member: Mailing Address 2
 Member: Membership Id
 Member: Middle Name

Project: Title
 Project: Project and Alias
 Member: Full Name (First Last)

Label Options

Apply uppercase Include Or Current Resident Include second family Remove comma between city and state Sort by zip code

Correspondence Options

Apply filter for correspondence preference If checked, Labels will reflect the 'Mail' preference and the Email List quick export will reflect the 'Email' preference

Include Second County

Include Member Second County Designation

Sharing

Club

Save Delete

10. Click on the item(s) you want in your report and use the >> icon to move them to the box on the right.

You can select items from different "tab" headings and combine them in one report. For example the *Project: Title* *Project: Project and Alias* items are in the "Participation" tab. The *Member: Full Name (First Last)* is in the "Profile" tab.

11. Select Grid View

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Quick Exports Export to MS Excel

Project Participants

Project: Title	Project: Project and Alias	Member: Full Name (First Last)
		Contact Guy
		Stan contact
Adventure/Challenge	Adventure/Challenge	Youth 1 Demo
Aerospace	Aerospace	TealYouth Guy
Animals	Animals	Harry Guy
Animals	Animals	lile demo demo family 4
Animals	Animals	Stan Guy
Animals	Animals	StanClubadvisorGuy
Animals	Animals	TanYouth Guy
Animals	Animals	youth2 Guy
Cats	Cats	Michael Guy
Cats	Cats	Ryan Guy
Ceramics	Ceramics	youth2 Guy
Leadership Skills Develop	Leadership Skills Develop	Stan Guy

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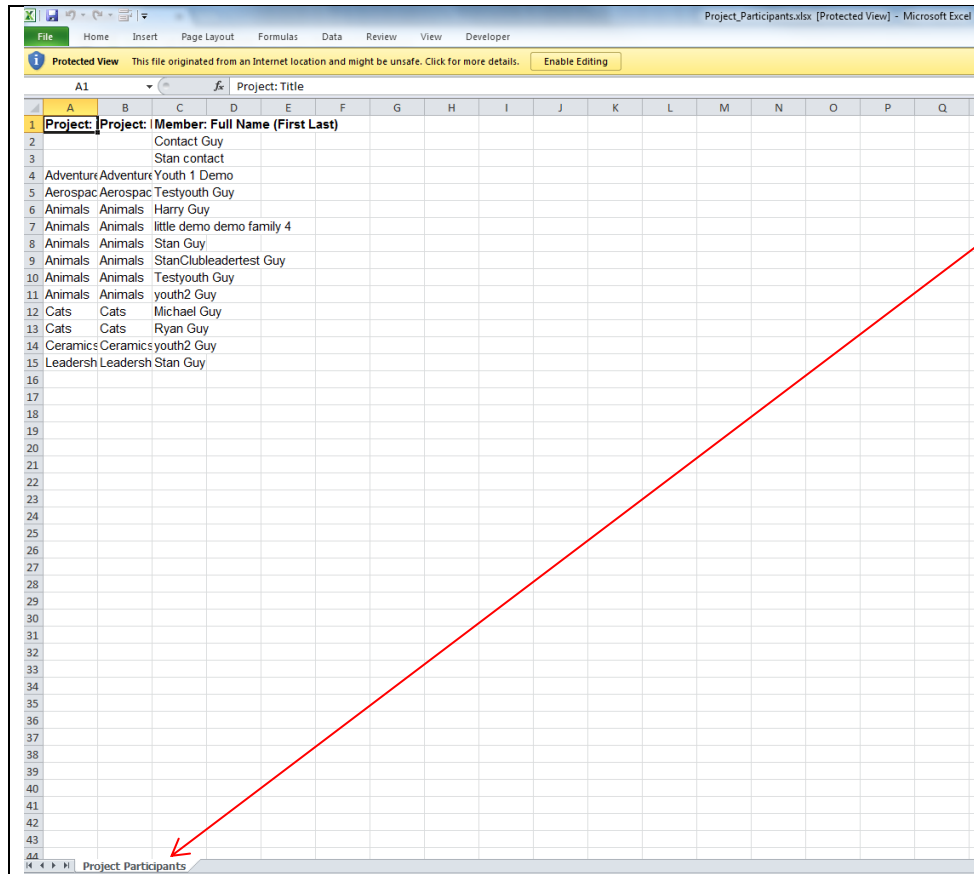
New Message New State Forum Topic

Project_Participants...xlsx

This is how the report looks in Grid View.

12. You can export the grid view to Excel using Quick Exports.

13. The excel file will be downloaded to your computer and appears here.



This is the Excel file for this report.

Here is the worksheet title you entered in step 6.