Organizing Your (Custom) Reports Folder

There are lots of ways to organize your Custom reports—just as there are lots of ways to organize your “My Documents” folder or your S: drive. What makes sense to one person doesn’t work for another. The most important thing is to clearly and descriptively label not only the folders you create, but also the reports within the folder. On the following pages, you’ll see examples of what others are doing to organize their Custom Reports folder. Look through them, and note the features in each that look logical and valuable to you – that should help you get started with your own organization process.

Names of reports should include both the information (fields) that are going to print on the report, and the people who will be listed (filters). If a report is ONLY going to be used for its filter (the fields don’t matter if you’re printing labels or sending broadcast email), then it should be named for the filter, and stored in a folder named something like “Labels and Emails”.

To create a folder, click on the “Create Folder” option on the right side of the Custom reports folder.

To rename a folder (or report) right-click on that folder or report and select “Rename” to give it a descriptive name.

To move a report INTO a folder, click and drag the report to the folder. It will not “stick” in the folder until you see both a green check mark AND the teensy t-bar disappears.

Wrong – red “X” instead of green check mark

Wrong – look for the teeny black line under the folder name (shown inside the red box).

RIGHT – green checkmark, no teeny black line

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Examples of Folder Organization

Black Hawk County

- “Labels_I Need Labels” – everybody needs one report that is “dynamic”, meaning that you can go in and change filters on the fly. Nobody would expect the results of this report to be the same as they were the last time. I call mine “Test Filters”.

- “Projects_What has Who in it” and “Projects_Whos Doing What” – These are examples of “spending characters” to name your reports so that anybody can understand what they are. Don’t be afraid to use names that are a little bit longer if you need that for clarity.

- Starting every report with “Black Hawk” – I wouldn’t necessarily have done that. I’d have spent the characters on the descriptive name. But everybody has a different philosophy about naming.

- Broadcast Emails folder – this makes it very easy to find the group of people you want to email. Again, I might not have started every one with “Broadcast_” but that’s an individual decision. It was probably necessary before the reports were put into folders. It doesn’t matter what fields are included in those, so they’re just named by the people who will be included.

- Club Leaders – this folder contains reports that were shared out for club leaders to print.
Webster County

- **Lots of folders** – If these reports were not organized into folders, it would be impossible to find the report that you needed. Since they ARE in folders, you have more information about the reports than merely what’s on the name. For example, look at the Summer Aide’s Fair Folder. Those reports could be confusing if not included in that folder.

- **Sustainability** – These folders and reports ensure that someone else can come into the program, look at the custom reports folder and have a better-than-lucky chance of being able to print exactly what they need/want. They’re named very clearly.

- **Award lists** – another great example of “spending characters” for clarity. “use for invites” and “use for press release” – very user-friendly.

- **Lots of reports** – there are no doubt many reports on here that have the exact same fields included, and others that have the same filters applied. However, they’re named according to how they’re used. So the thought process included who was going to need to print the reports, and what they would be doing when they did that. As you look at this example, think of being a new employee in this county—could you successfully find/print reports & labels for your various tasks?
Polk County

- **Personal folders** – There are multiple people who use 4hOnline in this county. Having “Amy” and “Phil” and “Diana” folders lets the others know that these reports should be left alone—the filters have been set and the “owner” of the report would expect that they’d be the same today as they were yesterday. This can help eliminate a possible source of office stress.

- **Contact Information Folders** – The name of the folder tells you the information (fields) on the reports. So the name of the reports only contains the “who” (filter) for the report. Notice they’re broken down by departments, not all lumped together for all projects. That may or may not be the way you do it in your county, but at least they are very clearly labeled for ease of use. Since the main characteristic of the reports is the filter, these can be used as broadcast email reports, or for labels.

- **Shared Reports for Leaders** – these also should not have changes made to them, because doing so changes them for leaders as well. Having them in their own folder helps that process.

- **Report Names** – some reports have shorter names because the folder helps identify their use/contents, or because they’re “personal” and the owner knows what they are. Other reports, like the one at the bottom, have a longer and more descriptive name because it’s not contained in a folder.
• **Fair Reports** – Another example of grouping reports by use. Fair is a stressful time, so having the reports that you need created and labeled can help with that.

• **Groups and project reports** – Most of these are named by filter—who is on the report—and could be used for labels and broadcast emails. However, there is also a Broadcast Email Filters folder, which contains lists that are named descriptively for ease of use.

• **Sharing reports** – notice that in this example, MANY reports have the green checkmark beside them indicating that they have been shared with leaders. If you are sharing reports with leaders, be sure that the names of the reports are clear and descriptive. Shared reports bring their folders with them—so if you share a report in the FSQA Reports folder, the leaders will see that same folder with the reports included.
Cedar County

- **Folder names** – Another great example of naming the folders descriptively.

- **Report names** – this is another example of great sustainability—look in Fair Reports. “Youth for Wilton Advocate” is sure to be a hit with anyone who had to step into this and print all the reports that have come to be expected.

- **Sustainability** – most reports are named primarily by filter, but look at the user-friendly names “Youth Eligible for Camp Counselors” and “Youth Eligible for Conference”. We don’t know what the criteria for those are, they could be grades, or project enrollment, or whatever. But the names of those reports mean that you could print labels or lists, or could send broadcast emails to the right group of people WITHOUT knowing what the eligibility requirements are.