



## For Volunteers: Locating Unit Leader Reports

### Purpose:

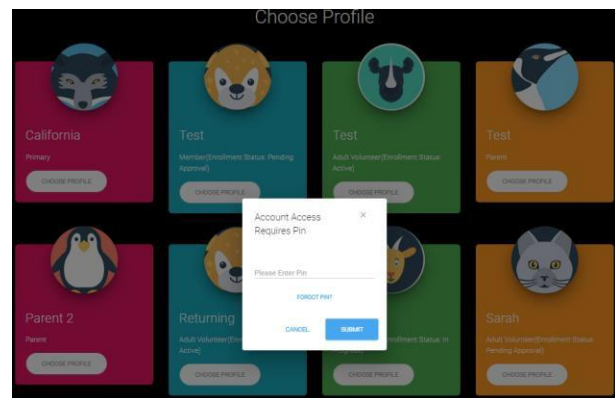
ZSuite provides the opportunity for unit leaders to view information about their unit and run reports. This helpsheet will explain the process for unit leaders to and run unit reports.

Before beginning make sure:

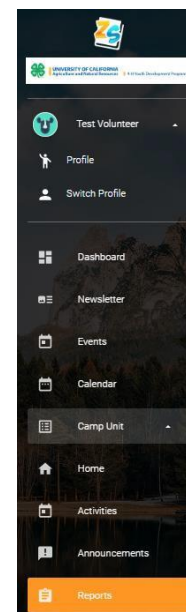
- Your unit volunteer role is one or more of the following:
  - Primary Community Leader
  - Assistant Community Leader
  - Co-Community Leader
  - Enrollment Coordinator
- Your enrollment has been approved and made Active in ZSuite.

### Running Unit Reports

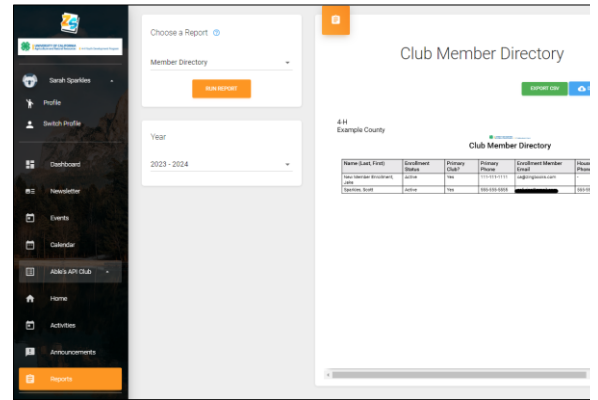
1. Login to your Household account
2. Select your Household member profile by clicking *CHOOSE PROFILE*.
3. Enter your ZSuite PIN.



4. In the Navigation Pane, click the sub-menu next to the name of the unit and select Reports.



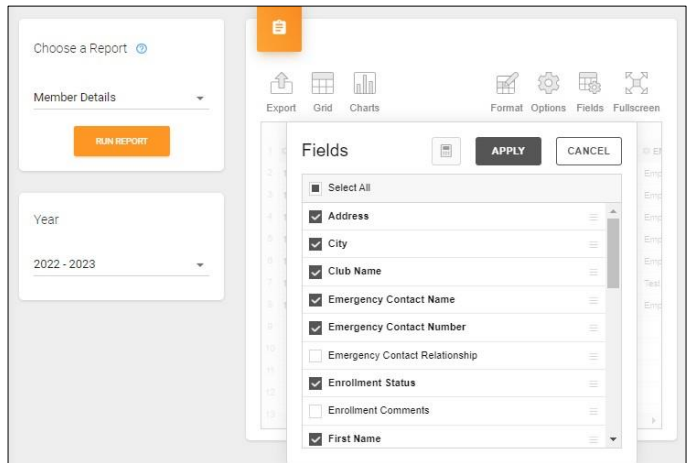
- In the Choose a Report section, select the desired report, and click RUN REPORT.



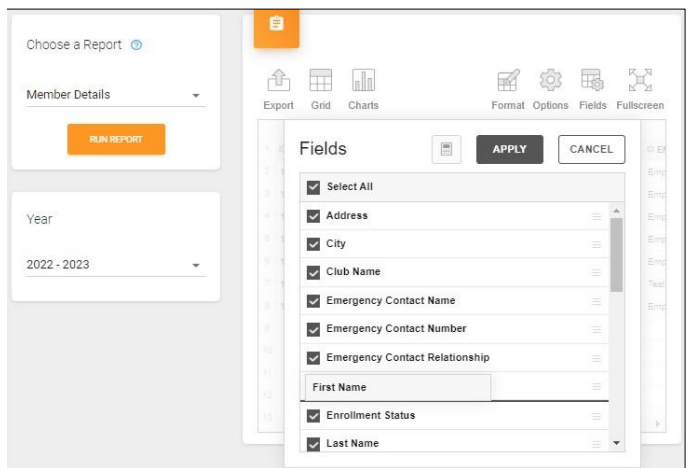
## Customizing Unit Reports

The *Member Details* and *Volunteer Details* reports are unique in that it allows Unit Leaders to customize the order and fields that appear in the report.

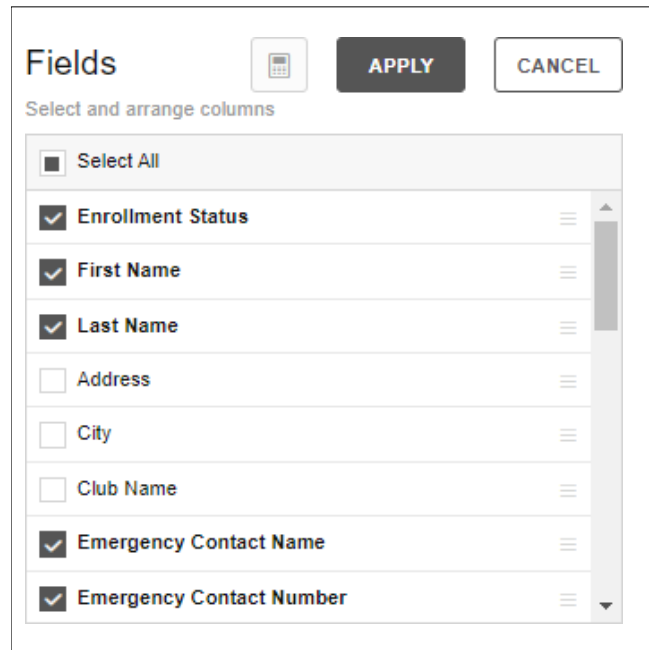
- In the Choose a Report section, select *Member Details* or *Volunteer Details*, and click RUN REPORT.
- Click *Fields* from the menu above the report.
- Select or unselect report fields.



- Click on a field and drag to the desired report order.



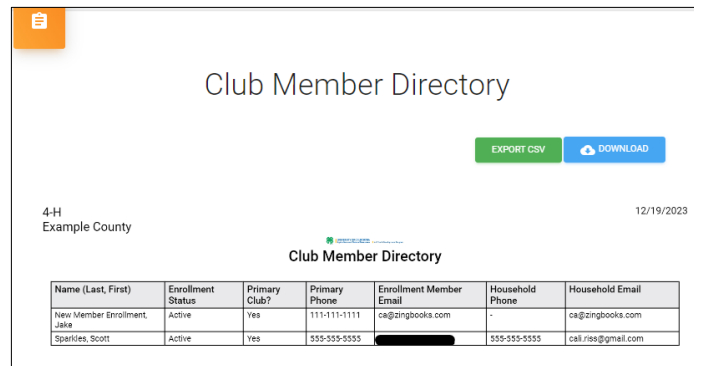
5. Once desired fields are selected and in the desired order, click *APPLY*.



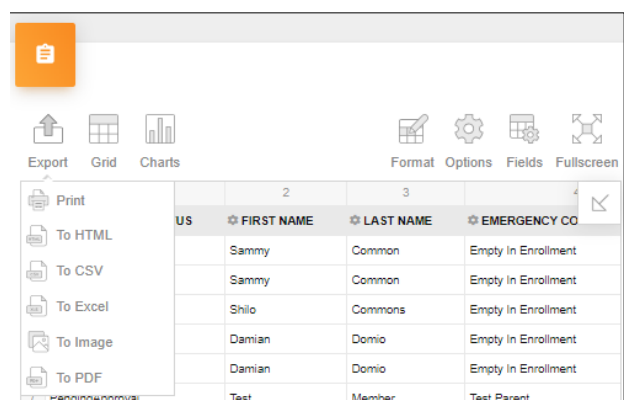
## Downloading Unit Reports

All Unit Reports can be downloaded as a PDF or CSV file. A CSV, or comma separated values, file can be opened with Excel or in Google Sheets.

1. To download a report as a CSV file, click *EXPORT CSV* from the menu above the report.
2. To download a report as a PDF file, click *DOWNLOAD* from the menu above the report.



3. The *Member Details* report has several file type export options:
  - a. Print
  - b. HTML
  - c. CSV
  - d. Excel
  - e. Image (PNF)
  - f. PDF
4. To download the *Member Details* report, click *Export* from the menu above the report and select the desired format.



## Available Unit Reports

Report Title	Report Fields	Fields Customizable	Filter Options	Export Files
<b>Health History &amp; Treatment Authorization</b>	Please see the <a href="#">Unit Leaders Download Comprehensive Health Forms</a> Helpsheet for more information about this report.			
<b>Member Details</b> <i>This is one of two Unit Report that allows customization of fields. See the <a href="#">Customizing Unit Reports</a> section of this helpsheet for more information.</i>	Address City Unit Name Emergency Contact Name Emergency Contact Number Emergency Contact Relationship Enrollment Comments Enrollment Status First Name Last Name Member Email Member Phone Parent Guardian1 Email Parent Guardian 1 First Name Parent Guardian Last Name Parent Guardian 1 Phone Number Parent Guardian 2 Email Parent Guardian 2 First Name Parent Guardian 2 Last Name Parent Guardian 2 Phone Number Project Type State Street 1 Address Street 2 Address Year Years in Project Zip	Yes	Program Year	HTML CSV Excel Image (PNG) PDF
<b>Member Directory</b> <i>This report shows youth members with an Active enrollment.</i>	Name (Last, First) Enrollment Status Primary Club Primary Phone Enrollment Member Email Household Phone Household Email	No	Program Year	CSV PDF
<b>Member Project Directory</b> <i>This report shows youth members with an Active enrollment.</i>	Project Type Name (Last, First) Enrollment Status Primary Club Primary Phone Enrollment Member Email Household Phone Household Email	No	Program Year Project	CSV PDF
<b>Member Project Types</b> <i>This report shows youth members with an Active enrollment.</i>	Name (Last, First) 4-H Age Enrollment Status Primary Club Household Email Household Phone Project Type: Primary/Sub-Type	No	Program Year Project	CSV PDF

<b>Member Project Types Summary</b> <i>This report shows youth members with an Active enrollment.</i>	Project Type Number of Projects	No	Program Year	CSV PDF
<b>Member Waivers</b>	Full Waiver signature information (if applicable) If you need Health Waiver please reference the <a href="#">Unit Leaders Download Comprehensive Health Forms</a> Helpsheet.	No	Program Year Project Waiver 4-H Age Range	PDF
<b>Member Per Project</b> <i>This report shows youth members with an Active enrollment.</i>	Project Type: Primary/SubType Member Name (Last, First)	No	Program Year	CSV PDF
<b>Membership Report</b> <i>This report shows youth members with an Active enrollment.</i>	Name (Last, First) Number of Projects Primary Club Enrollment Status	No	Program Year	CSV PDF
<b>Volunteer Details</b> <i>This is one of two Unit Report that allows customization of fields. See the <a href="#">Customizing Unit Reports</a> section of this helpsheet for more information.</i>	Address City Club Name Emergency Contact Name Emergency Contact Number Emergency Contact Relationship Enrollment Comments Enrollment Status First Name Last Name Project Type State Street 1 Address Street 2 Address Volunteer Email Volunteer Phone Year Years in Project Zip	Yes	Program Year	HTML CSV Excel Image (PNG) PDF
<b>Volunteer Directory</b> <i>This report shows adult volunteers with an Active enrollment.</i>	Name (Last, First) Enrollment Status Primary Club Primary Phone Enrollment Email Household Phone Household Email	No	Program Year	CSV PDF
<b>Volunteer Project Directory</b> <i>This report shows adult volunteers with an Active enrollment.</i>	Project Type Name (Last, First) Enrollment Status Primary Club Primary Phone Enrollment Member Email Household Phone Household Email	No	Program Year Project	CSV PDF
<b>Volunteer Project Types</b> <i>This report shows youth members adult volunteers with an Active enrollment.</i>	Name (Last, First) Enrollment Status Primary Club Email Phone Project Type: Primary/Sub-Type	No	Program Year Project	CSV PDF

<b>Volunteer Report</b> <i>This report shows adult volunteers with an Active enrollment.</i>	Name (Last, First) Number of Projects Primary Club Enrollment Status	No	Program Year	CSV PDF
<b>Volunteers Per Project</b> <i>This report shows adult volunteers with an Active enrollment.</i>	Project Type: Primary/Sub-Type Member Name (Last, First)	No	Program Year	CSV PDF
<b>Volunteer Project Types Summary</b> <i>This report shows adult volunteers with an Active enrollment.</i>	Project Type: Primary/Sub-Type Number of Projects	No	Program Year	CSV PDF

## FAQ

1. **Will Unit Leaders be able to create and save custom reports in the ZSuite enrollment system?**

No. ZSuite does not offer Unit Leaders the ability to create and save Custom Reports.

2. **Can my local county 4-H staff share custom reports with Unit Leaders?**

No. ZSuite does not offer 4-H staff the ability to share Custom Reports with Unit Leaders.

3. **I am a Unit Volunteer, but I do not see my Unit in my Navigation Pane. Why?**

Only certain unit volunteer roles have unit management permissions including seeing and running Unit Reports. These roles include:

- a. Primary Community Leader
- b. Assistant Community Leader
- c. Co-Community Leader
- d. Enrollment Coordinator

Additionally, your enrollment must be Active in the ZSuite system before unit management permissions are added to your profile.

For questions, please contact your [local county 4-H office](#).

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