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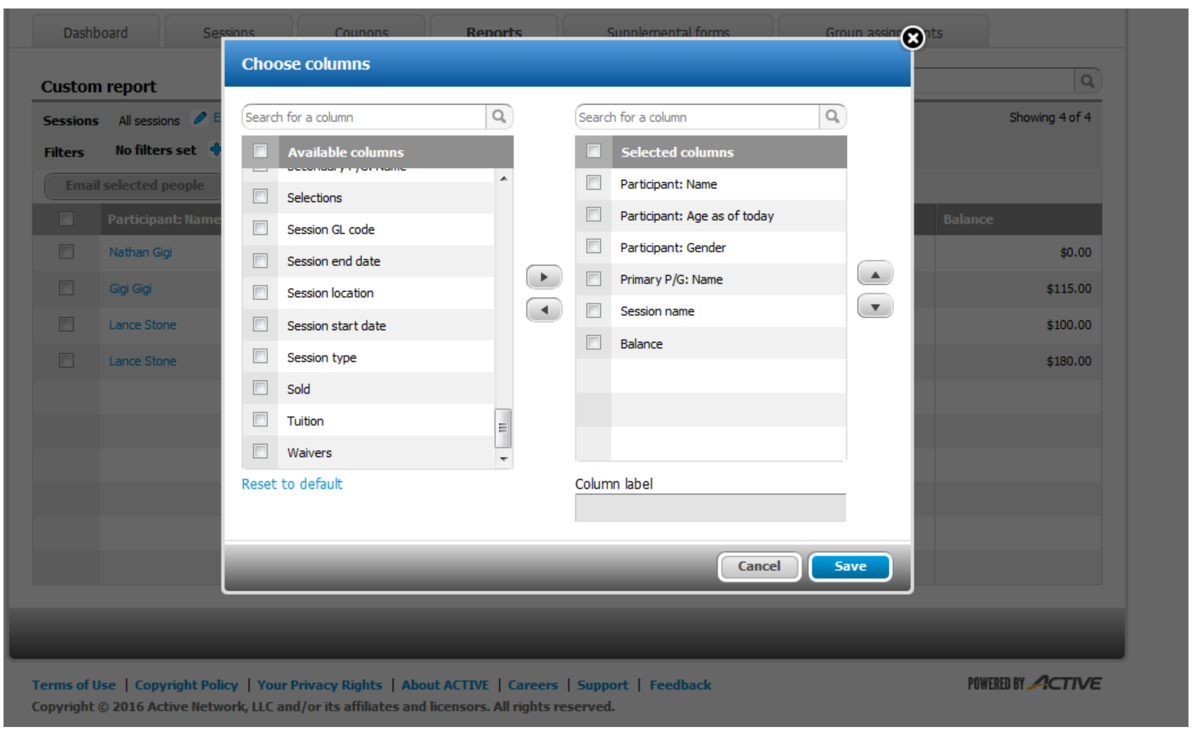
Custom Reports User Guide
August, 2016

Summary

Custom Reports are an invaluable resource when it comes to viewing specific information from your Season's registrations, including data fields from your registration forms, sessions, and customer accounts.

This guide will show you how to run a report to get the desired information by creating custom reports for a selected season. Custom reports can be modified at any time to ensure the data being pulled is specific to your needs.

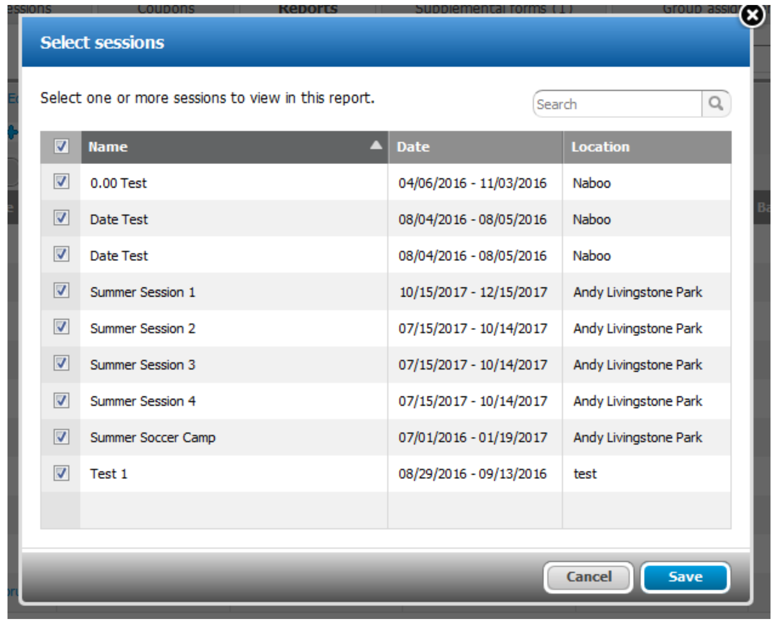
You can find more user guides and help articles about online accounts and many, many other topics in our Camps & Class Manager Help Center: http://support.activenetwork.com/camps



Create Custom Report

Custom Reports are specific to all registrations within a particular season

The first step in creating a custom report is to load registrations for your desired season. Each registration into a session will be an individual row, with information pertaining to that corresponding session. The report will come with a set of standard information columns which can be changed at a later step.



Load Season Registration

1. Select **Reports** under the desired season
2. Click **New custom report** under **Reports**

Select Session Filters

After loading season, you can add filters for your data. Session filters narrow down the results of the report to a specific session instead of the entire season.

1. Go to **Reports** and select **New custom report**
2. Click **Edit** next to **Sessions**
3. Check desired sessions
4. Click **Save**

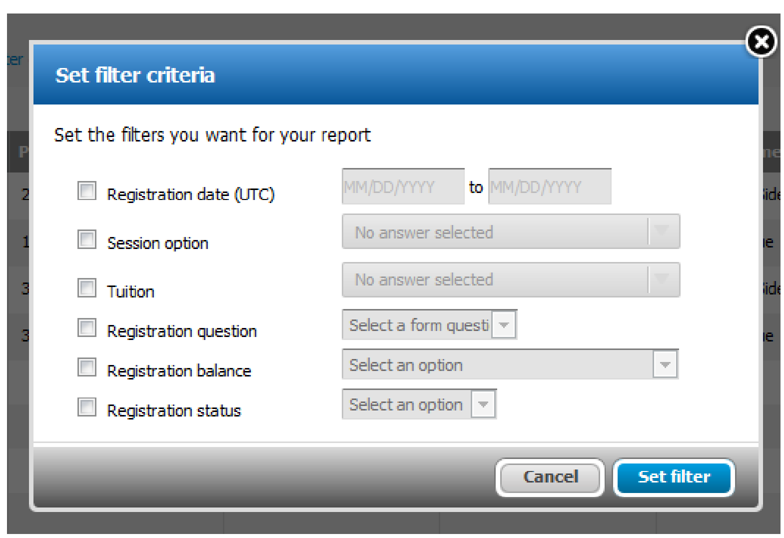
Filter Criteria

The filter criteria can be edited so that only certain registrants appear on the report. The available filters are:

- Registration Date Range
- Specific Session option selected
- Specific Tuition selected
- A Registration Question answered in a specific way
- Whether or not a registrant has an owing balance
- Whether a registrant is on a waitlist or confirmed for the class/camp

Add Filters

1. Beside **No filters set**, select **Edit filter criteria** in blue
2. Select checkboxes next to desired filters
3. Fill out boxes as prompted
4. Select **Set Filter**

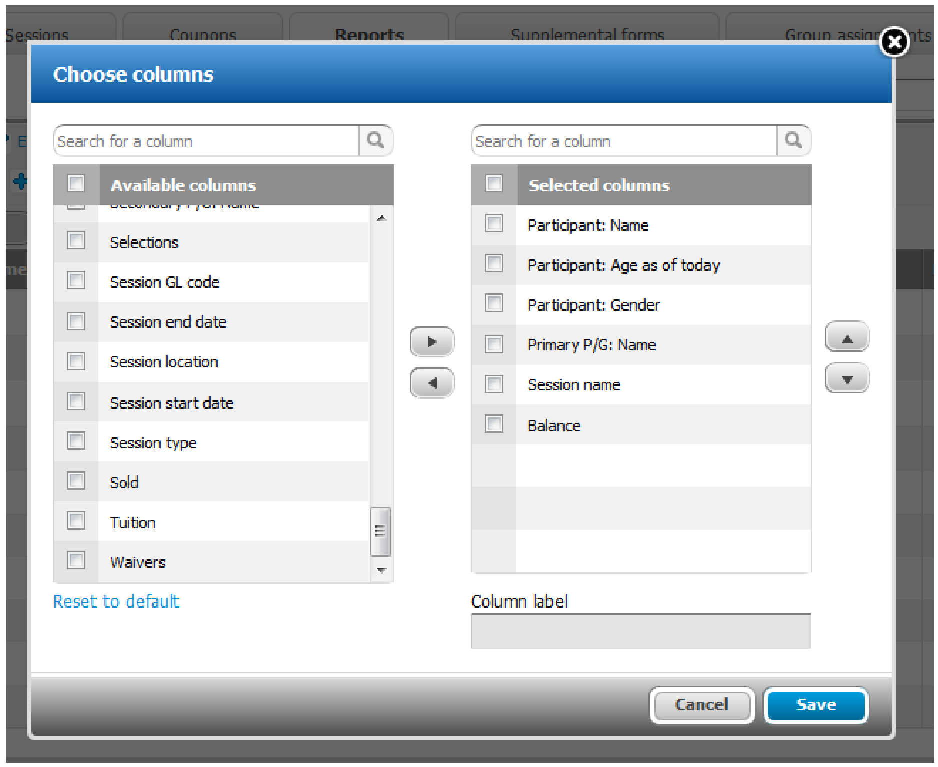


Select Columns

The columns in custom reports determine what information will appear for our selection of registrants. This will include anything from **Registration Form** answers, to **Waiver** statues, to the session name and options a customer selected.

Add Columns

1. Select **Customize** grey button
2. Select **Edit Columns**
    - ***Note: Choose columns*** *pop-up will appear with 2 lists. Left list includes all fields not currently in report. Right list include fields that are in report.*
3. Select check-boxes of desired fields under **Available columns** on left
4. Click right arrow in middle of columns to move under **Selected columns** on right
5. (Optional) Select checkboxes next to undesired fields on right under Selected columns then select left arrow in middle of columns to remove them from report
6. Select **Save**

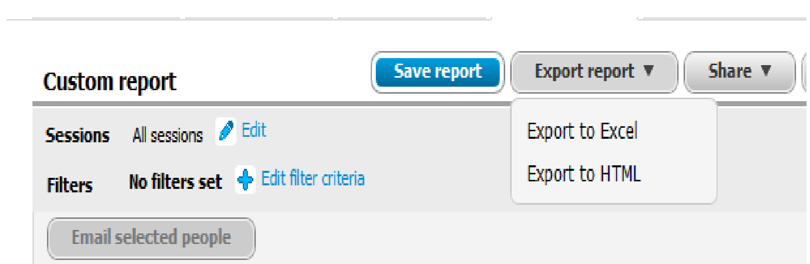


After Running Report

Export to Excel or HTML

Once we have generated the results for the report, we have the ability to export the data to Excel for further data manipulation. We also have the ability to export it into an HTML format:

1. Click **Export report** grey button
2. Select either **Export to Excel** or **Export to HTML**
3. File will be sent to computer to open

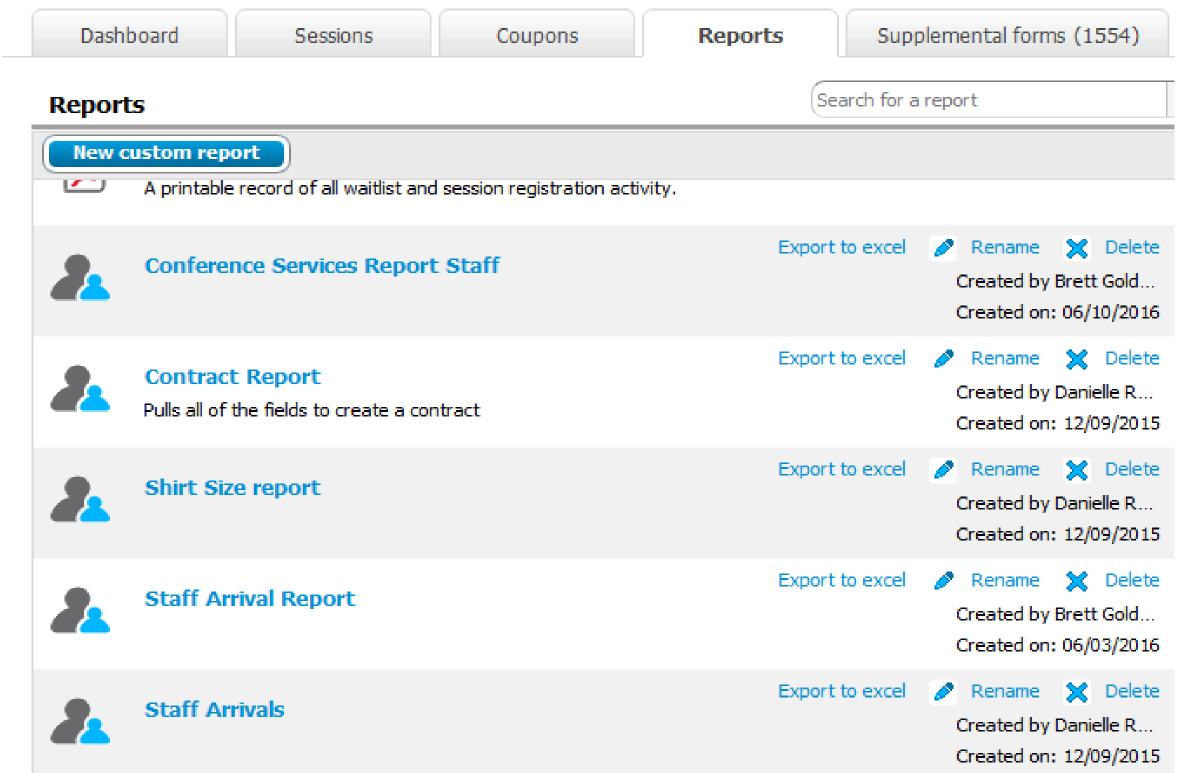


Export Reports without Loading Results

We have a new feature which allows us to export the results of a custom report, without having to load all of the individual results. This is very handy in situations where there are a lot of results which would normally require much time to load.

Please note: As with **Saving Custom Reports,** we are not able to save session filters. When using the export feature, keep in mind that no session filters will be added.

1. From **Home** page, select **Reports** under desired season
2. Scroll down to desired report.
3. Click **Export to excel.**
4. File will be sent to computer to open



Save Custom Reports

Once you have your desired columns and filters on the report, you can save it to be run/ edited at a later time. Custom reports appear in the list of reports on the main page of the reports tab.

***Note**: **Session** filters cannot currently be saved. Please make sure to re-select any appropriate **Session** filters when re-running a saved report*

1. Click **Save report**
2. Input **Name**
3. Select **Save**

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