Custom Reports Quick Reference Guide

This quick reference guide briefly explains how to create a custom report in WingateWeb Conference. Additionally, this document includes tips for working with columns, filters, counts, totals, and graphs. It also explains how to save or export a report. Finally, it gives examples of several custom reports you can create.

NOTE
For detailed step-by-step instructions, see the *Custom Reports Guide*.

This guide includes these major sections:

Creating a Report

1. Log in to the Conference Administrator Tool.
2. From the top menu bar, choose **Reports > Create Custom Report**.
3. Choose the type of report you want to create: **User**, **Content**, or **Exhibitor**.

   The report type determines which columns you can add to a report.

   The security role on your user account controls the report types you can choose from. If you can't see the type of report you want, talk to your system administrator.
4. Choose the **columns** to display on the report.

   NOTE
   To show unique records, you will usually want to choose the appropriate ID field (User ID, Session ID, or Exhibitor ID).
5. Click **Save Column Choices**.

   The Report Design View tab displays.
6. Review the **Sample** report at the bottom of the tab.
7. If desired, modify the report in one or more of the following ways:
   - Change the columns. (For details, see Columns on page 2.)
   - Filter the **rows**. (For details, see Filters on page 4.)
   - Show **counts**, **sub-totals**, or **totals**. (For details, see Counts and Totals on page 6.)
   - Save as a graph. (For details, see Graphs on page 6.)
8. **Save** or **export** the finished report. (For details, see Save or Export on page 7.)

Columns

This section answers these questions about columns:

- **What do columns and rows represent?**
- **How do I add or remove columns?**
- **How do I change the order of columns?**
- **How do I change a column name?**
- **How do I change the date format for a column?**
- **How do I add custom fields or values as columns?**

What do columns and rows represent?

In most cases, each column heading is a field in the Conference database. If so, the rows in a column display the field data for an individual record. (For example, if the column is Session Type, the row displays the specific session type assigned to a session record.)

In some cases, a column heading is a field value. In this case, the rows in the column display a Yes or No to indicate whether the record has that particular value. (For example, if the column heading is Registered, the row displays a Yes or a No to indicate whether the user is registered.)

How do I add or remove columns?

To remove a single column	To add or remove multiple columns
1. On the Report Design View tab, go to the sample report area. **2.** Point to the name of the column you want to remove, and choose **Remove Column**.	**1.** On the Report Design View tab, choose **Report Setup > Add/ Remove Columns**. **2.** Mark the boxes next to the fields or field values that you want to display as columns. If you want to display custom fields, see **How do I add custom fields or values as columns?** on page 3. **3.** Unmark the boxes next to the columns you want to remove. **4.** Click **Save Column Choices**.

How do I change the order of columns?

To move a single column	To move multiple columns
1. On the Report Design View tab, go to the sample report area. **2.** Click one of the arrows next to the column name (< or >). The arrow moves the column either to the right or the left, depending on which arrow you clicked.	**1.** On the Report Design View tab, choose **Report Setup > Change Column Display Order**. **2.** In the **Display Order** column, choose a new display order next to each column you want to change. **3.** Click **Save Display Order**.

How do I change a column name?

1. On the Report Design View tab, choose **Report Setup > Change Column Names**.
2. Enter the new column name next to each heading you want to change.
3. Click **Save Column Names**.

How do I change the date format for a column?

If you plan to filter by a date and you want to change the date format, you must change the date format before you create the filter.

1. On the Report Design View tab, click on the heading for the column that displays the date.
2. Choose **Change date format**.
3. Choose the new format from the **Date Format** drop-down list.
4. Click **Save Date Formats**.

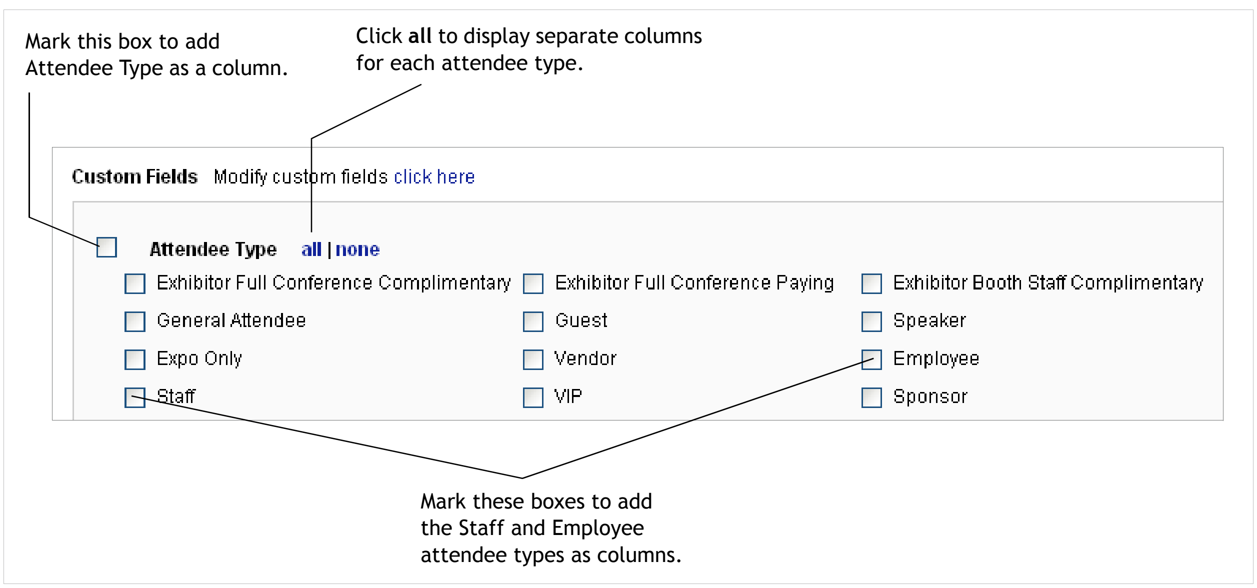
NOTE
If you have already created a filter for this date column, you may not be able to change the date format. If an message says "You performed an illegal operation . . ." you need to remove the filter, change the date format, and then re-create the filter.

How do I add custom fields or values as columns?

1. If you are on the Report Design View tab, choose **Report Setup > Add/ Remove Columns** to go to the Choose Columns page.
2. Scroll down to the **Custom Fields** area on the Choose Columns page, and choose the **click here** link.
3. Add the custom fields to the **Assigned Fields** list and click **Finish**.
4. Do one of the following:

To do this	Do this
Add a column for a custom field	Mark the box next to the custom field name.
Add a column for a custom field value (or response)	Mark the box next to the value name.
Add separate columns for all custom field values (responses)	Choose **all**.

Below is an example:



5. Choose any other additional columns you want to display on the report.
6. Click **Save Column Choices**.

Filters

Filters let you limit the rows that display on a report.

This section answers these questions about filters:

- **How do I create a basic filter?**
- **How do I use several filters together?**
- **Which operator should I choose?**

How do I create a basic filter?

1. On the Report Design View tab, go to the **Build Filter Area**.
2. Choose the **Field** that you want to filter.

   In the Field drop-down list, the **Selected Fields** are the columns that you chose to display on your report. In many cases, you can choose to filter by other fields which do not currently display as columns.
3. Choose the **Operator** you want to use in filtering.

   (For details, see **Which operator should I choose?** on page 5.)
4. At the **Value** field, choose or enter a value.

   To choose multiple values, hold down the **CTRL** key and click each value. If no values are listed, see **Counts and Totals** on page 6.
5. Click **View Changes**.

   The sample report shows only those rows of data that match your filter criteria.

How do I use several filters together?

1. Create each filter individually, as explained in steps 1 through 4 in **How do I create a basic filter?** on page 4.
2. To add another filter row, click the plus (+) sign next to your latest filter. You can create up to 10 filters.
3. Do one of the following:
   - If you want to use all of the filters, continue with step 4. (By default all filters are added together, as shown by the "AND" operator at the end of each filter.)
   - If you want to define rules that determine how the filters are used together, follow these steps to complete the **Advanced Expression** field:

To create an Advanced Expression
1. Enter the **number** of the filter that you want to use. The left side of each filter shows the number of the filter. 2. Between the numbers, enter "AND" or "OR" as the operator. 3. If you want to associate two or more operators together, enclose the filter numbers and the relevant operator within parentheses ( ). For example, an advanced expression might look like this: (1 or 2) and 3 In this case, the report would include rows of data that meet the criteria specified in either filter 1 or filter 2, and also meet the criteria specified in filter 3.

4. Click **View Changes**.

   The sample report shows only those rows of data that match your filter criteria.

Which operator should I choose?

The operator controls how the system filters the data. These are some examples of how to use operators:

<table>
<tr><th>Use this Operator</th><th>To filter for this</th><th>Sample filter</th></tr>
<tr><td>equals</td><td>An exact value.</td><td>To find all attendees with the abc123 registration code
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Flag</td><td>equals</td><td>abc123</td></tr></table></td></tr>
<tr><td>greater than</td><td>A number larger than a specified value.</td><td>To find all attendees who registered after May 15, 2007
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Registration Date</td><td>greater than</td><td>May 15, 2007</td></tr></table>
NOTE: The date must be entered in the format shown in the date column.</td></tr>
<tr><td>greater than or equal to</td><td>An exact number or a number larger than the specified value.</td><td>To find all attendees who have paid $100 or more
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Amount Paid</td><td>greater than or equal to</td><td>100</td></tr></table></td></tr>
<tr><td>less than</td><td>A number smaller than a specified value.</td><td>To find all sessions scheduled to start before 9:00 am on October 06, 2007
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Start Time</td><td>less than</td><td>2007-10-06 9:00</td></tr></table>
NOTE: The date must be entered in the format shown in the date column.</td></tr>
<tr><td>less than or equal to</td><td>An exact number or a number smaller than the specified value.</td><td>To find exhibitors who have paid exactly $5000 or less
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Amount Paid</td><td>less than or equal to</td><td>5000</td></tr></table></td></tr>
<tr><td>not equal to</td><td>Any value that does not equal the specified value</td><td>To find attendees who do NOT have the Employee attendee type
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Attendee Type</td><td>not equal to</td><td>Employee</td></tr></table></td></tr>
<tr><td>is not null</td><td>Records for which the field has already been completed.</td><td>To find attendees who have been assigned an attendee type
<table><tr><th>Field</th><th>Operator</th></tr><tr><td>Attendee Type</td><td>is not null</td></tr></table></td></tr>
<tr><td>is null</td><td>Records for which the field has not already been completed.</td><td>To find attendees who have not paid the full registration amount
<table><tr><th>Field</th><th>Operator</th></tr><tr><td>Paid In Full</td><td>is null</td></tr></table></td></tr>
<tr><td>is like</td><td>A value similar to the value specified.</td><td>To find attendees who have been assigned an attendee type
<table><tr><th>Field</th><th>Operator</th><th>Value</th></tr><tr><td>Last Name</td><td>is like</td><td>M%</td></tr></table>
NOTE: In this example, the percent sign (%) allows the system to find values that begin with the characters you enter.</td></tr>
</table>

Counts and Totals

This section answers these questions about counts and totals:

- How do I show a count on a row?
- How do I calculate sub-totals and totals for a column?

How do I show a count on a row?

You can count the number of a certain item (such as the number of sessions for a session type or the number of exhibitors for an exhibitor type).

1. When you create the basic report, choose an ID number as one of the columns.
2. On the Report Design View tab, go to the sample report area.
3. Point to the name of the column you want to count, and choose **Count repeated values** from the drop-down list.
4. If you want to all the counts together, point to the counted column heading and choose **Add total**.

How do I calculate sub-totals and totals for a column?

1. When you create the basic report, choose an ID number as one of the columns.
2. On the Report Design View tab, go to the sample report area.
3. To calculate sub-totals for a column, point to the column name, and choose **Sum repeated values**.
4. To calculate totals, click the name of the column, and choose **Add total**.

Graphs

This section answers these questions about graphs:

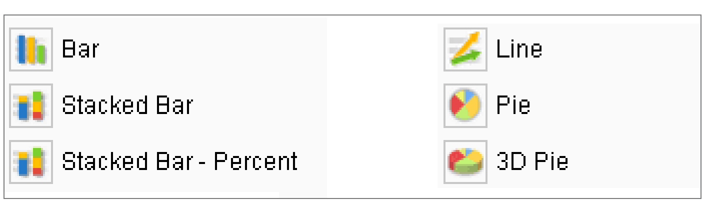
- How do I view a report as a graph?
- What types of graphs can I create?

How do I view a report as a graph?

1. Create the report and modify it as desired.
2. Choose the **Graph Design View** tab.
3. In the **X Series** list, choose the column you want to show on the horizontal axis.
4. In the **Y Series** list, choose up to 3 columns you want to show on the vertical axis. (On a pie graph, multiple Y series choices display as sections of the circle.)
5. Click **View Changes**.

What types of graphs can I create?

You can create these types of graphs:



Save or Export

This section answers these questions about saving or exporting reports:

- **How do I save a report?**
- **How do I export a report?**
- **How do I modify a saved custom report?**
- **How do I change where a saved report is located in the navigation?**
- **How do I choose which users are allowed to view a custom report?**
- **How do I schedule a report to be e-mailed?**
- **How do I stop a report from being e-mailed?**
- **How do I delete a saved custom report?**

How do I save a report?

1. Create the report and modify it as desired.
2. Click the **Save Report** button.
3. Enter a **Name** and a **Description**.
4. If you want the system to automatically archive this report each time it is viewed, choose **Yes** at the **Auto Archive** field, and in the **Days Since Last Archive** field enter the number of days to wait between each saved archive.
5. If you want to let other users view the report, mark the **Viewable** box.
6. Choose the **Navigation Level** where you want the report to display under the Reports tab. If you want to, you can add a sub menu.
7. If you want the system to email this report according to a set schedule, mark the **Scheduled** box, choose the **Frequency**, mark the **Days**, and choose the **Time**. In the **Scheduled Recipients** field, enter the email addresses of each person who should receive this report; separate the addresses with commas.
8. Choose the **Security Roles** that are allowed to view this report.
9. Click **Save Report**.

How do I export a report?

1. Create the report and modify it as desired.
2. Choose the **Report Output View** tab.
3. Click **Report Actions**, and choose one of the **Export** options.

   You can save it to one of these formats: Microsoft Excel spreadsheet, Comma Separated Value (CSV) file, or OpenOffice.
4. Follow the screen prompts to save the exported report.

How do I modify a saved custom report?

1. On the top menu-bar in the Conference Administrator tool, choose **Reports**, then choose the name of your saved report.
2. Choose **Report Actions > Switch To Design View**.
3. Modify the report as desired.
4. Click **Save Report**.

How do I change where a saved report is located in the navigation?

Reports are always located on the Reports tab. You can choose which menu or sub-menu the report appears under.

1. On the top menu-bar in the Conference Administrator tool, choose **Reports > Edit Report List**.
2. Find and choose the report.
3. In the **Location in Navigation** area, update these settings as desired:
   - **Nav Level Two.** Choose a menu, or click **Add Sub Menu** and enter a name for the new level 2 menu.
   - **Nav Level Three.** If you want to display the report under a third menu, choose a menu, or click **Add Sub Menu to *Your Level Two Menu Name*** and enter a name for the new level 3 menu.
4. Complete or update other fields, as necessary.
5. Click **Save Report**.

How do I choose which users are allowed to view a custom report?

You can always view any custom reports that you create. If you want to, you can allow other users to view the report as well. You can allow all users with a certain security role to view the report, as explained in the following steps. You can also email the report to specific users, as explained in **How do I schedule a report to be e-mailed?** on page 8.

1. Do one of the following:
   - For a new report, create the report and click the **Save Report** button.
   - For a previously saved report, choose **Reports > Edit Report List**, and choose the report.
2. Mark the **Viewable** box.
3. In the **Security Roles** section, mark the box next to each security role for which this report should be viewable.
4. Complete or update other fields, as necessary.
5. Click **Save Report**.

How do I schedule a report to be e-mailed?

1. Do one of the following:
   - For a new report, create the report and click the **Save Report** button.
   - For a previously saved report, choose **Reports > Edit Report List**, and choose the report you want to schedule.
2. In the **Scheduled Report Emails** area, mark the **Scheduled** box.
3. Choose these options:
   - **Frequency.** Choose how often you want the report to be e-mailed.
   - **Days.** Choose the day or days of the week when the email should be sent.
   - **Time.** Choose the time of day the email should be sent.
   - **Scheduled Recipients.** Enter the email addresses of the people who should receive the e-mailed report. Separate each address with commas.
4. Complete or update other fields, as necessary.
5. Click **Save Report**.

How do I stop a report from being e-mailed?

1. Choose **Reports > Edit Report List**, and choose the report.
2. Do one of the following:
   - To stop the email from being sent to a specific person, remove that person's email address from the **Scheduled Recipients** field.
   - To un-schedule the report so it will no longer be e-mailed to anyone, click the **Scheduled** box to remove the check mark.
3. Click **Save Report**.

How do I delete a saved custom report?

1. On the top menu-bar in the Conference Administrator tool, choose **Reports > Edit Report List**.
2. If necessary, choose the menu in which you saved the report.
3. Click the red "X" delete icon next to the report.
4. Choose **OK** to confirm the deletion.

Sample Reports

This section explains how to combine Custom Report features to create reports. This section answers these questions:

- **How do I view a count of attendees by attendee type?**
- **How do I report on everyone who registered after a certain date?**

How do I view a count of attendees by attendee type?

These instructions explain how to create an Attendee Type report, similar to this example:

Attendee Type (comma delimited)	# of Attendees
Exhibitor Booth Staff Complimentary	30
Exhibitor Booth Staff Paying	15
Exhibitor Full Conference Complimentary	29
Exhibitor Full Conference Complimentary, General Attendee	2
Exhibitor Full Conference Paying	15
General Attendee	391
General Attendee, Speaker, Staff	3
Speaker	20
Grand Total:	
	505

Before You Begin

Some attendees have several attendee types. Viewing a column as "comma-delimited" lets you see all the attendee types for a single attendee (as shown in the sample above).

If you want to, you can combine several attendees into a group, and report only on that group. (For more information, see "Grouping Attendee Types into Attendee Report Groups" in the "Registration Setup" chapter in the *Registration Guide*.)

To view a count of records by type

1. In the Conference Administrator, go to **Reports > Create Custom Report**.
2. Choose **User** as the Report Type.
3. Choose these fields as columns:

Contact Info: User ID	**Custom Fields:** Attendee Type **NOTE:** Do not mark individual attendee types.

4. Click **Save Column Choices**.
5. Point to the **User ID** column heading and choose **Count repeated values**.
6. Point to the **User ID (counted)** column heading and choose **Add total**.
7. If desired, change the User ID (counted) column heading.

   To do this, point to the **User ID (counted)** column heading and choose **Change column name**. Change the name of the **User ID (counted)** column to something more descriptive (such as # of Attendees). Click **Save Column Names**.
8. Click the left arrow next to the **Attendee Type** column heading to move the column to the left.
9. Save the report as explained in **How do I save a report?** on page 7.

How do I report on everyone who registered after a certain date?

1. In the Conference Administrator, go to **Reports > Create Custom Report**.
2. Choose **User** as the Report Type.
3. Choose these fields as columns:

Contact Info: User ID First Name Last Name	**Registration:** Registration Date

4. Click **Save Column Choices**.
5. If desired, change the date format.

   To do this, click on the **Registration Date** column heading and choose **Change date format.** Choose the new format from the **Date Format** drop-down list. Click **Save Date Formats**.
6. Build this **Filter**:

Field	Operator	Value
Registration Date	greater than	**NOTE:** Enter the date in the same format shown in the Registration Date column.

   For example, suppose you chose "July 1, 1980" as the date format. If you want to view everyone who registered after May 15, 2007, you would build this filter:

   Registration Date greater than May 15, 2007
7. Click **View Changes**.
8. Save the report as explained in **How do I save a report?** on page 7.