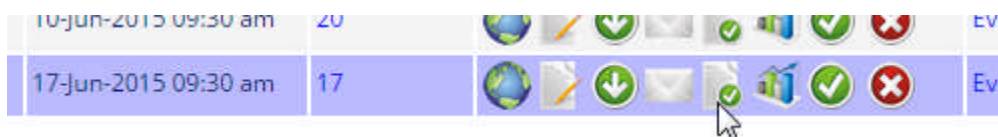


## User-Guide: Karelo.com Event Reporting

<b>1</b>	<b>ACCESS TO EVENT REPORTING .....</b>	<b>1</b>
<b>2</b>	<b>THE REPORTING SCREENS .....</b>	<b>1</b>
2.1	THE REPORTING OVERVIEW .....	1
2.2	MANAGING FOLDERS .....	2
2.3	CUSTOM REPORTS .....	3
2.3.1	<i>Fields</i> .....	4
2.3.2	<i>Filter</i> .....	5
2.3.3	<i>Sort</i> .....	8
2.3.4	<i>Save a Custom Report</i> .....	8
<b>3</b>	<b>RUNNING A REPORT AND REPORT RESULTS.....</b>	<b>9</b>
3.1	NEW REPORT.....	10
3.2	CHANGE THE REPORT.....	10
3.3	DELETE THE REPORT.....	10
3.4	STATISTICS.....	10
3.5	DOWNLOAD TO EXCEL .....	12
<b>4</b>	<b>ADVANCED REPORTING &amp; EXAMPLES .....</b>	<b>13</b>
4.1	LOGICAL AND / OR OPERATOR.....	13
4.2	BRACKETS .....	13
4.3	EXAMPLES.....	13
<b>5</b>	<b>MAIL CHIMP.....</b>	<b>14</b>
<b>6</b>	<b>QUESTIONS?.....</b>	<b>15</b>

## 1 ACCESS TO EVENT REPORTING

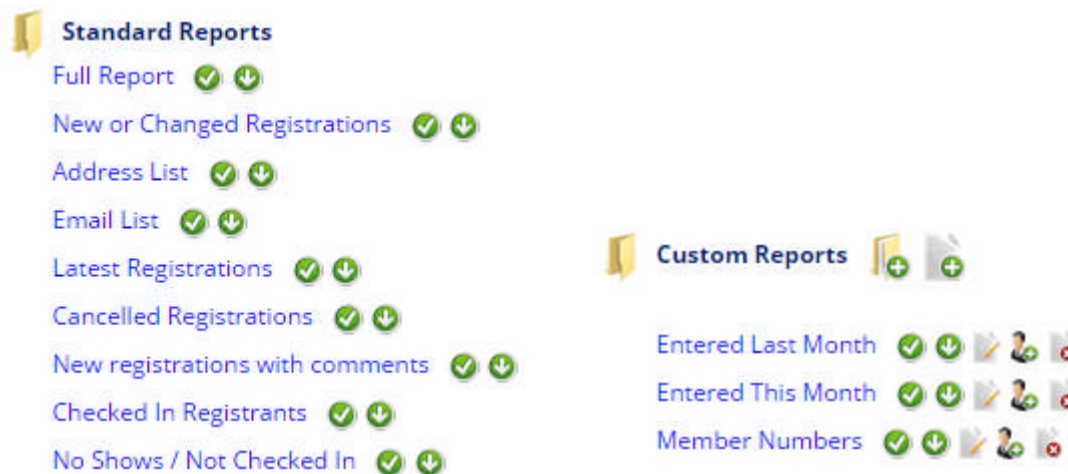
To access the reporting module go to Manage Events, then click the reporting icon for the desired event:



## 2 THE REPORTING SCREENS

### 2.1 The Reporting Overview











The Reporting Overview Screens lists **Standard Reports** (Full, New or Changed Registrations, Address List, Email List) as well as all your **Custom reports** (saved reports):





The following **standard reports** are available:

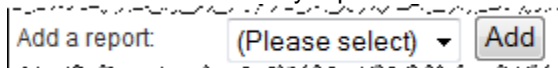
- **Full report**  
*Shows all fields for all registrations ordered by registration number*
- **New or changed registrations**  
*Shows all fields for all new or changed registrations since the last full download, ordered by registration number*
- **Address List**  
*Shows names and the mailing address for all registrants, ordered by last name and first name*
- **Email List**  
*Shows names and email address for all registrants, ordered by last name and first name*
- **Latest Registrations**  
*Shows all registrations from starting with the most recent*
- **Cancelled Registrations**  
*Shows registrations that have been cancelled*
- **New Registrations with comments**  
*Shows any registrations where registrants have left comments for the organizer*
- **Checked In Registrants**  
*Shows registrants who have been checked into the event using the Check In Functionality*
- **No Shows/Not Checked In**  
*Shows registrants who have not been checked into the event using the Check In Functionality*


Depending on your access level and the type of report the following actions are available by clicking on the icon:

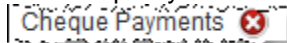
-  Run the report (you can also click the report name)
-  Download the report result into Excel;
-  Change a report; see chapter [3.2 Change a Report](#)
-  Delete a report: removes the report definition (but not the data)
-  Create new report; see chapter [2.3 Custom Reports](#)
-  Create a folder: folders allow you to group reports, makes managing reports easier; see chapter [2.2 Managing Folders](#)
-  Change a folder: add or remove a report from the folder or rename the folder.
-  Delete a folder: removes the folder but does not delete the reports; they will be unassigned.
-  Open a folder: show all reports in the folder (only available for folders in the Custom Reports section)
-  Close a folder: hide all reports in the folder (only available for folders in the Custom Reports section)

## 2.2 Managing Folders




- To **create** a new folder, click  from the reporting overview screen, enter a folder name and click 'Create'
- To **add** a report to a folder, click  from the reporting screen; then select a report from the drop-down and click Add. Only reports that have not been assigned to a folder can be added.



- To **remove** a report from a folder, click  from the reporting screen; then click the remove icon for the report you want to remove:



Note: this does not delete the report; it will be shown on the reporting overview

- To **rename** a folder, click  from the reporting screen; then enter a new name and click 'Rename'
- To return to the reporting overview, click 
- To **delete** a folder, click  on the reporting overview

## 2.3 Custom Reports

With custom reports, you are able to create your own reports: you can define which fields to display in the result, create your own filter and sort criteria.

To **create a custom report**, click  from the reporting overview screen.

### CUSTOM REPORTS

Define a new Custom Report here:

Show these fields:

Confirmation Nr	▼	+	-
First Name	▼	+	-
Last Name	▼	+	-

For all registrations which meet these criteria:

Confirmation Nr	▼	Is Not Empty	▼	+
-----------------	---	--------------	---	---

Order the result using these fields:

Confirmation Nr	▼	Ascending	▼	+
-----------------	---	-----------	---	---

If you would like to save the report for later use, please enter a report name:

Save report as:

**RUN REPORT**

### TIP:

Your saved custom reports are **specific to the registration form** assigned to the event, not just to the event. This means that saved custom reports will be available for reporting for all other events with the same registration form.

Example:

If you have a registration form called 'Monthly Events' and you defined a custom report 'Registration List' for an event to which the registration form has been assigned, then you will be able to run the report 'Registration List' for all monthly events.

## 2.3.1 Fields

In the first section, you define which fields should be displayed for each record in the report result. These are the **column names** of the resulting spreadsheet.


The drop-down will show all name and address fields as well as fields in the registration form assigned to this event. In addition, a number of administrative fields can be displayed, such as:

- **Status:** *shows if the registration is New, Downloaded or Changed. Note: the download status for registrations only changes if the standard reports 'Full Report' or 'New and Changed registrations are downloaded.'*
- **Entered On:** *shows the date when the registration was initially entered*
- **Last Changed On:** *shows the date of the last change to the registration (if any)*
- **Payment type:** *shows Credit Card, Cheque or No Payment; if this field does not appear in your selection, then the registration form requires credit card payment, i.e. all registrations are paid by credit card*
- **Fee:** *shows the amount paid for the person in this registration (i.e. the amount per person, not necessarily for the entire registration as there may be multiple persons registered per confirmation number)*
- **Organizer Note:** *shows your notes in the Organizer Note field, which cannot be seen by the registrant.*


When you create a new report, the system will automatically include **Confirmation Number, First Name and Last Name**. It is recommended that these fields are included in any custom report so that you can identify the registrant.

If you want to show all registration fields, then select the first option '**(All Fields)**' in the field drop-down and delete all other fields.



To **add additional fields** in the report result, click the  button in the line after which you would like to insert the additional field. In the above example, a new field will be added after the Confirmation Nr field. Then change the drop-down to the desired field in the new line.

To remove a field, simply click the  button.

**Note:** at least one field is required for custom reports; if only one field is selected, then the  button is not available.

### 2.3.2 Filter

For all registrations which meet these criteria:

Confirmation Nr	▼	Is Not Empty	▼	<input type="text"/>	
-----------------	---	--------------	---	----------------------	---

In this section, you define the filter criteria for the report. This determines which registrants are shown in the report result.

For each filter criteria you need to **select a field name and an operator** (second drop-down). Most operators also require a value to be entered into the **input field**.

The drop-down for fields includes the same fields and administrative fields as in the 'Show fields' section.

If you change the field, then the operator options and the input field may change depending on the type of field selected.

Examples:

If the field is a date field:

If the field is checkbox:  I have downloaded, printed and...

If the field is a Yes/No field:  Yes  No

If the field is drop-down:   (drop-down is displayed)

The following **operators** are available:

- < Smaller than
- <= Smaller or equal
- > Bigger than
- >= Bigger or equal
- <> Is unequal to, differs from
- IS EMPTY Field is empty
- IS NOT EMPTY Field is not empty
- STARTS WITH The text in this field starts with a certain letter or sequence of letters
- CONTAINS The text contains a certain letter or sequence of letters anywhere in the text
- IS SELECTED For check boxes: the checkbox is checked off
- IS NOT SELECTED For check boxes: the checkbox is not selected

If you are creating a new custom report then the standard filter criterion defaults to 'Confirmation Nr Is Not Empty', i.e. all registrations are included in the results because all registrations have a confirmation number. At least one filter criterion is needed, so if you do not want to restrict the search result, then do not change the default filter.

Examples:

- 1) Show only registrants who registered after June 15, 2015

Entered On > 15 Jun 2015 

- 2) Show only registrants from BC

Province = BC

- 3) Show registrants whose last name starts with 'Mi'

Last Name Starts with Mi

- 4) Show registrants whose phone numbers includes 899

Home Phone Contains 899

Show registrants who did not select the checkbox (here: if the waiver field is not selected; the available fields depend on your registration form)

I have read and agre... Is Selected  I have read and agree with the...

Multiple Filter Criteria

It is possible to use more than one filter criteria. To add another criterion, click the + button. The new line is inserted after the line for which you clicked the button.

If you have more than one filter criterion, then you can use the - button to remove the line.

If more than one criterion line is present, then a AND / OR drop-down is available to connect the criteria. If AND is used, then both criteria must be met for the registrants in the result. If OR is used, then one or the other criteria must be met to include a registrant in the result. If a new line is added then this drop-down defaults to AND.

Examples:

5) Show all registrants who are male and from BC

Gender = Male Female And + -  
Province = BC + -

6) Show all registrants who are either not from BC or whose license has been suspended (available fields depend on your registration form)

Province <> BC Or + -  
Suspended = Yes No + -

It is possible to include more than 2 filter criteria in your report. If you use a combination of ANDs and ORs then it will be necessary to use brackets to define the filter logic correctly. See chapter 4 ADVANCED REPORTING AND EXAMPLES (page Error! Bookmark not defined.)




### 2.3.3 Sort


Order the result using these fields:

Confirmation Nr ▼ Ascending ▼ +

In this section you specify how the result is sorted. Typical sort orders are ‘Sort by the confirmation number’ or ‘Sort by last name and first name’. If you are creating a new custom report then the sorting defaults to ‘Sort by Confirmation Number Ascending’.

Use the first drop-down to specify which field is used for sorting. The second drop-down lets you specify if you want to sort [Ascending](#) or [Descending](#).

It is possible to use more than one sort criterion. To add another criterion, click the  button. The new line is inserted after the line for which you pushed the button.

If you have more than one sort criterion, then you can use the  button to remove the line.

Examples:

- 7) Sort the result to show the newest registrations first, i.e. sort by Confirmation Nr descending

Confirmation Nr ▼ Descending ▼ +

- 8) Sort the result using Last Name; if Last Name is identical then use the First Name to sort further

Last Name ▼ Ascending ▼ + -  
First Name ▼ Ascending ▼ + -

### 2.3.4 Save a Custom Report

If you would like to save the report for later use, please enter a report name:

Save report as:



If you want to re-use the report definition later, then enter a **descriptive name** for the report in the field ‘Save report as’, e.g. ‘Start List by Category’, ‘Email List’

Once the report is run, the definition of your report (i.e. the fields, filter and sort criteria) is saved with the given name. This report will then appear in the Reporting Overview screen and can be used for your event later or for other events that use the same registration form.

**Note:** this will not save the data of the report. If you would like to save a snapshot of your report, then download the result and save it to your computer (see [Download to Excel](#) on page **Error! Bookmark not defined.**). When a custom report is run, then the result will always be based on the latest registrations.

### 3 RUNNING A REPORT AND REPORT RESULTS


To run a report (ie. to retrieve the registration data), either:
















- Click  or click the report name on the Reporting Overview Screen (see page **Error! Bookmark not defined.**)
- Click  if you created a custom report (see page **Error! Bookmark not defined.**)

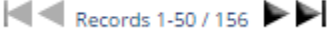
The result will be displayed on screen:

Report: **Email**

Result: 17 records



Row	Confirmation Nr	First Name	Last Name	Email	Entered On	Actions
1	587078	Terrance	McLellan	terrancecl@hotmai.com	11-Feb-2015	  
2	587126	Brock	May	Brookside_Exp@telus.net	12-Feb-2015	  
3	587220	Linda	Wilson	lin123@msn.com	12-Feb-2015	  
4	588028	Lynn	Best	lbest@shaw.ca	18-Feb-2015	  
5	588252	Carole	Christopher	carol@christopher@msn.com	20-Feb-2015	  

If the result includes more than 50 registrants then you will see navigation options above and below the results table: 

**TIP:**

If the Confirmation Nr is included in the fields of the report, then the confirmation number is 'clickable' and you can go directly to Change Registrations by clicking on the confirmation number


The following further navigation options are available:

-  [The Reporting Overview](#)
-  [New Report](#)
-  [Change the Report](#)
-  [Delete the Report](#)
-  [Statistics](#)
-  [Download to Excel](#)
-  [Mail Chimp Transfer](#)
-  [Email to all registrants in the report \(See \[Karelo How-To Guide\]\(#\)\)](#)

### 3.1 New Report

Click 'New Report' if you would like to create a new [custom report](#). This will bring you to the custom reporting screen (see page **Error! Bookmark not defined.**).

### 3.2 Change the Report

Click the change icon  on the Reporting Overview screen to return to the [custom reporting screen](#). There you will be able change your field selection, modify the filter criteria or change the sort order (see page **Error! Bookmark not defined.**).

You can also run the report  or delete the report  from this screen

To return to the Reporting Overview, click 



Rename report to:

Assign to folder:

To [assign the report to a folder](#) or to change the assignment, select from the drop-down.

To [change the report name](#), enter a new name in field 'Rename report to'

Always click 'Save' or 'Save & Run' if you made changes to the report.

### 3.3 Delete the Report

Click the delete icon to delete the report. This does not delete the report data, only the report definition. You will be returned to the reporting overview screen.

### 3.4 Statistics

Click 'Stats' to retrieve [statistics for the current report](#), i.e. the statistics only include those registrants selected by your report (which may or may not include all registrants, depending on your filter criteria).

Example:



Statistics for report: **Member Nr Family Memberships**

Gender:

Gender	Count
Male	73
Female	33

Which fields produce a statistical value is defined for the registration form and you cannot change this yourself. Contact [Karelo Customer Service](#) if you would like certain fields to be included in the statistics.

Generally, only the following field types can have statistics:

- Numeric fields (such as Age, quantity fields etc)
- Yes/No & radio button fields (e.g. gender)
- Drop-downs
- Checkbox fields

**TIP:**

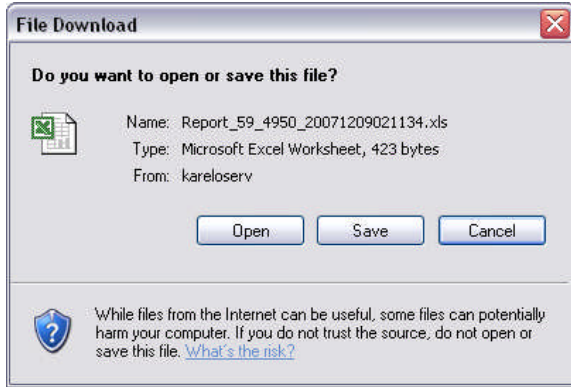
If you require statistics for the full report (i.e. for all registrants) then you do not need to run a report first but you can call up the statistics from Maintain Events directly: click on Statistics for your event:



Date	Online Regs	Actions
01-Jan-2015 12:00 am	106	

### 3.5 Download to Excel

Click 'Download to Excel' icon to save or open your report results in Microsoft Excel.  
This will open a dialog and you can either click Open Or Save:



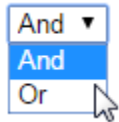
**TIP:**

To [print your reports](#), it is recommended to download the report into Excel first, then adjust the columns in Excel as required and print from Excel.

#### 4 ADVANCED REPORTING & EXAMPLES

This section deals with complex filter criteria. See chapter **Error! Reference source not found. Error! Reference source not found.** (page **Error! Bookmark not defined.**) for basic reporting instructions.

##### 4.1 Logical AND / OR operator



If **two or more filter criteria** are specified then a logical AND / OR operator must be used to connect the two filters. The logical operator defaults to AND.

##### 4.2 Brackets



If **more than two filter criteria** are specified then brackets drop-downs are available to logically group your filter criteria. Brackets should be used if both AND and OR operators are mixed in your filter criteria. Brackets are not needed if you are using only the AND operator or only the OR operator in your filter criteria.

The number of opening brackets must always equal the number of closing brackets, otherwise an error message will be displayed and the report cannot run.

##### 4.3 Examples

9) Show all registrants who live in BC who either had a license suspended or refused in the past:

<input type="text" value="Province"/>	<input type="text" value="="/>	<input type="text" value="BC"/>	<input type="text" value="And"/>
<input type="text" value="( Suspended"/>	<input type="text" value="="/>	<input type="text" value="Yes"/> Yes <input type="text" value="No"/> No	<input type="text" value="Or"/>
<input type="text" value="Mship or license ref..."/>	<input type="text" value="="/>	<input type="text" value="Yes"/> Yes <input type="text" value="No"/> No	<input type="text" value=")"/>

Note here that brackets are set to group the last two criteria: each registrant in the result must have the field 'Suspended' or 'License refused' set to Yes and reside in BC.

If the brackets were not set then the system would include all registrants in the result who are from BC and had their license suspended OR registrants (from BC or outside BC) who had a license refused in the past.

**TIP:** If you are unsure if brackets are required then always set brackets to group the filter criteria logically. In most cases this is achieved by grouping the OR criteria.

10) Show all new or changed registrations for which more than \$200 was paid by a member (i.e. a membership number was entered)

( [ Status ] = [ New ] Or [ ]  
 [ Status ] = [ Changed ] ) [ And ]  
 ( [ Fee ] > [ 200 ] [ And ]  
 [ Member Number ] [ Is Not Empty ] ) [ ]

Note here that the first two lines are grouped with brackets and the OR operator is used, ie. show all new or changed registrations. At the same time (AND operator), the fee for the registration must be greater than \$200 and a membership number must be entered. The brackets which group line 3 and 4 could be omitted as only AND operators are used after the first closing brackets.

If no brackets were used here, then all new registrations would be part of the result irrespective if the other criteria (fee, membership number) are met.

## 5 MAIL CHIMP



MailChimp is a web-based mailing list service, which is free for up to 2000 list members. It allows you to **design newsletter and email campaigns with easy-to-use tools and templates.**

To use Mail Chimp for the first time, you will need to create an account [here](#). Once your account is created, you will need to enter your API key into Karelo. To create or find your API Key, [please follow these instructions](#).

This functionality is **report specific**; this allows you to transfer email addresses for all registrants (Full report) or a specific subset (as defined in your custom report) to a MailChimp list.

If you use a general mailing list for all members/participants, then transfer all email addresses after an event is closed (only new email addresses will be added)

To use this functionality after it is set up, you can either:

- Go to Manage Events
- Click on the Reporting icon for an event
- Select a report
- Click on the Mail Chimp icon

If you want to send a MailChimp email only to the event participants, then create a new list first in MailChimp or remove all subscribers from an existing mailing list first.

## 6 QUESTIONS?

If you did not find the information that you were looking for in this manual, please send us an email to [service@karelo.com](mailto:service@karelo.com), or contact us by phone at (604) 608-2774 or toll free at +1 (888) 484-3052.