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Purpose

The purpose of this guide is to provide instructions and tips for creating custom reports via the Capturepoint Administrator tool. Capturepoint provides a wide range of standard reports which are included in your subscription. With Report Builder, you can build your own reports to access the exact information your organization needs. This tool provides the ability to filter and group data to create lists, summaries or labels which can be displayed online or printed.

Creating New Reports

To begin, log onto the Administrator site (http://admin.communitypass.net) using your user name and password provided. Click on the **Reporting** button at the top of the page. Click on the **Report Builder** link to open up the homepage.

Add Folder – To create a folder, click on the **New Folder** button at the top left of the page in the "Report Folders" list. Type in a name or category such as "Class Lists" or "Payment Reports" and then click **Save**. The folder will be displayed on the Report Builder homepage in the "Report Folders" list.

New Report – To build a new report, click **New Report** at the top center of the page and follow the steps outlined below.

Creating a Report - Overview

1. ***Report Types*** – Select the type of data that you would like to use for the report from the dropdown list. The following column options are available:

    a. *Programs & Payments*

        i. *Family information* – family name, address, phone numbers, etc.

        ii. *Individual information* – individual name, birth date, email, etc.

        iii. *Organization information* – activity name, season name, season start/end dates, etc.

        iv. *Payment information* – payment amount, payment type, payment date, etc.

        v. *Program information* – program name, program start/end date, price, charge code, etc.

vi. *Transaction information* – line item type, transaction date, refund description, etc.

vii. *Form Questions* – registrant responses to form questions as set up by your organization

b. *Programs & Charges*

i. *Charges* – amount due, transaction description, date created, etc.

ii. *Family information* – family name, address, phone numbers, etc.

iii. *Individual information* – individual name, birth date, email, etc.

iv. *Organization information* – activity name, season name, season start/end dates, etc.

v. *Program information* – program name, program start/end date, price, charge code, etc.

vi. *Transaction information* – line item type, transaction date, refund description, etc.

vii. *Form Questions* – registrant responses to form questions as set up by your organization

c. *Program Registrations*

i. *Family information* – family name, address, phone numbers, etc.

ii. *Individual information* – individual name, birth date, email, etc.

iii. *Organization information* – activity name, season name, season start/end dates, etc.

iv. *Program information* – program name, program start/end date, price, charge code, etc.

v. *Transaction information* – line item type, transaction date, refund description, etc.

vi. *Form Questions* – registrant responses to form questions as set up by your organization

d. *Facility Reservations*

i. *Facility information* – facility name, facility description, facility address, etc.

ii. *Family information* – family name, address, phone numbers, etc.
iii. *Individual information* – individual name, birth date, email, etc.
iv. *Organization information* – activity name, season name, season start/end dates, etc.
v. *Program information* – program name, program start/end date, price, charge code, etc.
vi. *Reservation information* – reservation dates, recurrence frequency, schedule description, etc.
vii. *Transaction information* – line item type, transaction date, refund description, etc.
viii. *Form questions* – registrant responses to form questions as set up by your organization

e. *Programs*

i. *Eligibility Rules* – grade range, birthdate range, age at program start/end, gender, registrant type, schools, classes, etc.
ii. *Organization information* – activity name, season name, season start/end dates, etc.
iii. *Program information* – program name, program start/end date, price, charge code, etc.
iv. *Season information* – season name, season start/end date, family max, etc.
v. *Statistics* – amount due, amount paid, number registered, number waitlisted, and number withdrawn

f. *Payments*

i. *Family information* – family name, address, phone numbers, etc.
ii. *Organization information* – activity name, season name, season start/end dates, etc.
iii. *Payment information* – amount, payment billing address, authorizations, etc.

g. *Families & Seasons*

i. *Family information* – family name, address, phone numbers, etc.

    ii. *Organization information* – activity name, season name, season start/end dates, etc.
    iii. *Season information* – season name, season start/end date, family max, etc.
    iv. *Transaction information* – line item type, transaction date, refund description, etc.

h. *Teams*

    i. *Family information* – family name, address, phone numbers, etc.
    ii. *Organization information* – activity name, season name, season start/end dates, etc.
    iii. *Program information* – program name, program start/end date, price, charge code, etc.
    iv. *Team Members information* – birthdate, email, fname, lname, phone, gender, etc.
    v. *Teams information* – Team Datecreated, Team Dateupdated, Team Desc
    vi. *Form Questions* – registrant responses to form questions as set up by your organization.

i. *Product Sales*

    i. *Family information* – family name, address, phone numbers, etc.
    ii. *Individual information* – individual name, birth date, email, etc.
    iii. *Transaction information* – line item type, transaction date, refund description, etc.

j. *Product Sales Details*

    i. *Family information* – family name, address, phone numbers, etc.
    ii. *Individual information* – individual name, birth date, email, etc.
    iii. *Payment information* – amount, payment billing address, authorizations, etc.
    iv. *Product information* – amount charged, product name, quantity, price, etc.
    v. *Transaction information* – catalog session information, billing name, credit authorization, etc.

k. *Activity Registrations*

i. *Family information* – family name, address, phone numbers, etc.
ii. *Individual information* – individual name, birth date, email, etc.
iii. *Organization information* – activity name, season name, season start/end dates, etc.
iv. *Program information* – program name, program start/end date, price, charge code, etc.
v. *Transaction information*– line item type, transaction date, refund description, etc.

l. *Activity Registrations Payments*

i. *Family information* – family name, address, phone numbers, etc.
ii. *Individual information* – individual name, birth date, email, etc.
iii. *Organization information* – activity name, season name, season start/end dates, etc.
iv. *Payment information* – amount, payment billing address, authorizations, etc.
v. *Program information* – program name, program start/end date, price, charge code, etc.
vi. *Transaction information* – line item type, transaction date, refund description, etc.

m. *Students*

i. *Family information* – family name, address, phone numbers, etc.
ii. *Individual information* – individual name, birth date, email, etc.

2. ***Activity*** – Select the organization activity that you want to report on from the dropdown list. (Payments, Product Sales, Product Sales Details, Activity Registrations, Activity Registrations Payments and Students report types do not require an Activity selection). Click **Next** to continue.

Step 1: Select Report Format

Report Formats – Select the type of report that you would like to build from the dropdown list. The following options are available:

a. *Tabular Report* – Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total.

b. *Summary Report* – Summary reports are similar to tabular reports, but also allow users to group rows of data and view subtotals. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all registrants for a season subtotaled by program and payment type.

c. *Matrix Report* – Matrix reports are similar to summary reports, but allow you to group and summarize data by both rows and columns. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields. This report will allow you to look at data broken down by, for example, date *and* program and registrant *and* grade.

d. *Labels* – Labels allow you to create a list of registrants based on the criteria you select and print the results into either Avery 5160 or Avert 5263 label format. Labels include First Name, Last Name, Address, City, State and Zip. (Facility Reservations, Payments, Teams, Product Sales, Product Sales Details, Activity Registrations, and Students do not have Label Report Format)

e. *Printer Formatted* – Printer Format allows you to design your report in our Report Builder Designer how you want it to appear when printed. You can select fields that were checked during report creation and place them on the printed report in the locations you want them to print. You can also add your own text or images to the report.

To explain creation of reports within Report Builder we will use the Tabular Report format for the basic example.

Tabular Report Format

Step 2: Select Columns

The information on this page is broken down into categories to help you determine the appropriate fields to include on your report. Choose the fields by which you want to group and sub–total the data by clicking on the checkbox next to the name of each field. Or click on the **Check All** box to select all fields from the category (such as "Families", "Individuals", etc.). When finished making your selections, click **Next**.

Step 3: Select Total

Choose the types of summary information to display on your report for numeric fields.

1. ***Summary Fields*** – The following options are available for most reports:
    a. *Record Count* – Total number of records included in report set
    b. *Price* – Price of program, class or permit
    c. *Max Capacity* – Maximum number of registrants allowed for a class
    d. *Min Capacity* – Minimum number of registrants allowed for a class
    e. *Amount Due* – Total amount due for class
    f. *Amount Paid* – Total amount paid for class
    g. *Age* – Age of individual registrants
2. ***Calculations*** – For each summary field selected above, determine the calculation that you would like performed. The following options are available:
    a. *Sum* – Total sum value of selected field
    b. *Average* – Average/mean value of field
    c. *Largest Value* – Maximum value
    d. *Smallest Value* – Minimum value

Step 4: Order Columns

Select the order for displaying the chosen fields. Click and drag columns up or down to change the order displayed.

Step 5: Define Filters

Use the filter options to limit the report to records with specific data.

1. ***Date Filters*** – To limit your result set to specific time period, perform the following steps:

    a. *Column* – Under the column area, select from the dropdown list a filter date such as "Payment Date Created", "Season Start Date", "Registration Start Date", etc.

    b. *Duration* – Select the time period from the options available in the dropdown list to pre-fill the **Start Date** and **End Date** values or select "Custom" to define your own time period. If "Custom" is selected, type in a **Start Date** and **End Date**.

2. ***Custom Filters*** – To add additional filters, click **Add Filter** then follow the steps below:

    a. *Column* – Under the column area, select from the dropdown list the field to filter. Fields are grouped by category (such as Families, Individuals, etc.)

    b. *Operators* – In the next dropdown list, select the operator. Each operator is defined as follows:

        i. *Equals* – Use for an exact match; for example, "Payment Type equals Credit Card."

        ii. *Less than* – Use for results that are less than the value you enter; for example, "Amount Paid less than 100" returns records where the amount paid field ranges from $0 to $99.99.

        iii. *Greater than* – Use when you want results that exceed the value you enter; for example, "Amount Paid greater than 100" returns records where the amount paid field begins at $100.01.

        iv. *Less or equal* – Use for results that match or are less than the value you enter.

        v. *Greater or equal* – Use for results that match or exceed the value you enter.

        vi. *Not equal to* – Shows records that don't have the value you enter. This is especially useful for eliminating empty fields; for example, "Grade not equal to K".

vii. *Contains* – Use for fields that include your search string but might also include other information. For example, "Phone contains 973" would find all phone numbers where any part of the number contains 973, such as an area code.

viii. *Does not contain* – Eliminates records that do not contain the value you enter; for example, "School does not contain Washington."

ix. *Starts with* – Use when you know what your value starts with, but not the exact text. This is a narrower search term than "contains." For example, if you enter "Phone starts with 973" you would find phone numbers with a 973 area code only.

x. *Includes* – Available when you choose a multi–select pick list as the selected field. Use this operator to find records that include one or more of the values you enter. For example, if you enter "Program Group includes hockey, football, baseball" you would find records that only have hockey selected as well as those that have two or three of the values entered. Results do not include partial matches of values.

xi. *Excludes* – Available when you choose a multi–select pick list as the selected field. Use this operator to find records that do not contain any values that match the ones entered. For example, if you enter "Program Group exclude hockey" your report lists records that contain any other values from that pick list, including those that are blank. Results do not include partial matches of values.

c. *Matching Value* – In the third field, enter the value to match.

3. ***Add Filter*** – To add more than one filter, click on the **Add Filter** link and follow the steps above.

4. ***Remove Filter*** – To remove a filter, click on the **Remove** link.

Step 6: Report Results

Displays results in the format selected. Other options on this page include the following:

1. ***Run*** – You can make modifications to the report filter criteria as first set in Step 5 and then regenerate the report with the new criteria

2. ***Customize*** – Click **Customize** to make modifications to your report criteria. Editing begins back at Step 1.

3. ***Save*** – Enter the report **Name** and **Description** and select the folder where you would like to save the report

4. ***Delete*** – Removes the report

5. ***Export*** – Saves the results into Excel where you can then edit the report, save or print

6. ***Filters Edit*** – Click on the **Edit** link to change the filters and criteria defined in Step 5

7. ***Jump to Page*** – Available on all steps (except the Run Report Step) select from the dropdown list the step (1 through 6) that you would like to modify. After making changes, click **Run** to produce the report in Step 6.

Summary Report Format

Follow Steps 1 through 5 from above. Then proceed as follows:

Step 6: Select Report Groups

Choose the fields by which you want to group and subtotal the data. In a summary report, choosing more than one sort field allows you to sub sort your data. In the **Summarize information by** box, select the first field for sub-grouping. You can pick up to three sub-groups. For example, you may want to group registration data by location, then grade. If you choose a date sub-group, select "Day", "Week", "Month", "Quarter" or "Year" from the **Group dates by** dropdown list.

Step 7: Report Results

Follow Step 6 from the Tabular Reports section above. You may click on any of the column headers to sort the report results in ascending or descending order by that column.

Export Options for Summary Report

Click **Export** to open the *Export Options* popup window.

- The report data can be saved in two types, as report "Details" or a report "Summary"
    - **Details** – a listing of all the data records and columns present in the report
    - **Summary** – Excel export of the same rows, columns, totals and setup as seen on the "Run Report" screen
- Check the **Include Headers** box to include a First Row of the Column Names with the data

Matrix Report Format

Follow Steps 1 through 2 from the Tabular Report section as explained above. Then proceed as follows:

Step 3: Set Up Report

Select summary fields for both the row labels and column headings.

1. ***Drop Column Fields Here*** – To add a summary field for a column, click and drag the field from the right side into the pink box. You can add up to 3 items. To remove a field from the column summary box, click and drag it from the pink box into the list on the right.

2. ***Drop Row Fields Here*** – To add a summary field for a row, click and drag the field from the right side into the blue box. You can add up to 3 items. To remove a field from the row summary box, click and drag it from the blue box into the list on the right.

3. ***Drop Aggregate Fields Here*** – Click and drag the aggregate field(s) from the right side into the grey box. Depending on the field selected, results will tabulate differently. For example, numeric fields are averaged whereas non–numeric fields will appear as record counts. To remove a field from the aggregate field box, click and drag it from the grey box into the list on the right.

   When dragging a date type field into the **Row** or **Column** boxes a popup message will request how to group the resulting matrix data.
   You may group by "Day", "Week", "Month", "Quarter" or "Year". To change the grouping at any time, click on the **Clock Icon** in the top right corner of the date type field.

   When dragging a numeric type field into the **Aggregate** box a popup message will request the type of aggregation(s) to perform. There must be at least one aggregate function selected for the report to run. More than one function can be selected.
   Available functions are "Count", "Sum", "Average", "Largest Value" and "Smallest Value". The values will be aggregated for each row and each column. Grand totals are generated at the bottom of each column and the far right of each row. To change the aggregate function at any time, click on the **Window Icon** in the top right corner of the numeric type field.

Step 4: Define Filters

Follow Step 5 from the Tabular Reports section as explained above.

Step 5: Report Results

You may export a **Summary** or a **Detail** version of the generated report.

> ***Summary*** – The Summary version of the Matrix Report creates an Excel document with the same rows, columns, totals and setup as seen on the "Run Report" screen
>
> ***Detail*** – The Detail version of the Matrix Report creates an Excel document listing all the records and all the column values selected in Step 2.
>
> ***Print*** – Clicking on the **Printer** icon will open your browser's *Print Preview* window so you may print the current webpage.

Label Report Format

Follow Steps 1 through 2 from the Tabular Report section as explained above. Then proceed as follows:

Step 3: Select Label Format

Choose either Avery 5160 or Avery 5263 and then click **Next**.

Step 4: Define Filters

Follow Step 5 from the Tabular Reports section as explained above.

Step 5: Report Results

To print the results displayed, click **Print Labels**. This will generate a PDF version of the report in the label format previously selected.

Managing Existing Reports

After you create a custom report type, you can edit, rename, delete, export or run it. Click **Report Builder** from the Reporting tool to display a list of existing customized reports. Reports are organized and saved into folders. To run the report and view results from the Report Builder homepage, click on the name of the report. Otherwise, click **Action** next to the report you would like to modify. Select from the following options:

- ***Edit*** – Opens Step 1 of the Create Report tool. From here you can jump to any report step from the **Jump to Page** dropdown list or you can proceed through each step of the report generation process by clicking **Next**
- ***Rename*** – Opens up the *Save Report* page which allows you to type in a new report name or description and save to a new folder if desired
- ***Delete*** – Displays a confirmation message. Click **Delete** to permanently delete the report or **Cancel** to return back to the Report Builder homepage.
- ***Export*** – Opens up the *File Download* page where you can either open up the report in Excel or save to your desktop or network for future editing