How to Create a Custom Event Report

Article Number: 32 | Rating: 1/5 from 1 votes | Last Updated: Mon, Nov 26, 2012 at 1:06 PM

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Report creation can be tricky. Before attempting to create your own report, be sure to have read the article on Understanding a Detailed Event Report.

Before to creating a custom report is to have a clear understanding of what you want to use the report for. This may sound obvious, but it is an important step toward building a tool you can use.

Ask yourself the following questions before you begin.

What time range do I want the report to cover?
Is this a report about the past, present or future?
Do I want to know about specific events or types of events?
Am I primarily concerned with patron information (how many attended and their demographic information) or am I more concerned with the programs themselves (when they started, who led them, ect.)?
What do I really need to know from this report?

There are obviously, an infinite number of defining questions you can ask yourself, but writing a few down ahead of time can help you focus as you begin report creation. The Event Information Report Filter is a powerful tool, but it can be cumbersome. Clear thinking can help you master it.

As we move through the report filter from top to bottom, ask yourself the following questions to help you create the report you want:

1. What time frame do you want the report to cover?

Are you looking for data about the past year? The coming week? Yesterday? Next year? You can compile information about events as far back or far ahead as you have entered in the system. Remember that reports on current and future events won't have attendance data associated with them, but you can find out if people are registered for the events.

Knowing what time frame you want to research is indispensable for building your report.

2. What internal classifications do you want to consider?

Internal classifications are invaluable for creating a well-rounded event calendar, but they can be confusing when it comes time to create reports. Make sure you have a clear understanding of the terms "Ongoing", "Archived", "Unpublished", "Featured", and "Shared Attendance" before attacking this section.

3. Are you concerned with the age statistics?

If you want to analyze attendance or registration numbers broken down by age, simply chose the age categories relevant to your needs. If you aren't interested in that data, just leave the field blank.

4. Are you in all branch mode?

If so, choose which branch or branches you want to see data from.

5. Are you concerned with analyzing data by event type?

Event types are classifications that you set to help group similar events together. Running reports by event type can be a great way to analyze what kinds of events are popular with your patrons.

Perhaps you want to compare the popularity of toddler events versus the popularity of preschool events. Creating appropriate event types then allows you to track the two categories. The data can then be used to decide what kind of events to offer more of in the future, or how to classify and market events in a way that will attract the most patrons.

Using this filter allows you to sharpen the focus of your reports.

6. How do you want to view the report?

There are many ways to see the data the report generates. HTML form lets you look at the page in a web browser. Word is a word processing program that makes the report easy to print, edit, and include in other documents. Excel is a spreadsheet program that allows you to sort data, add up data, and create a wide variety of wonderful tables and charts. CSV, or Comma Separated Value, is a format that can be easily read by a wide variety of text readers if you don't have access to Word or Excel.

7. How much data do you want in the report?

The final field has many options and can appear daunting, but don't be intimidated. The myriad of fields are there to help you get the information you need. Some of the boxes may be checked by default, but remember that you don't HAVE to include them in your report.

Ask yourself: what do I really need to know?

For example, do you want to know about the set up and take down time for the events? If not, then don't check that box.

The more boxes you check, the more information your report will contain, but the more complicated it will be as well. As you read through the boxes, if there is an option don't understand, simply leave it unchecked. If you don't understand what the field refers to, you likely don't need the data it offers.

8. Will you want to run this report again in the future?

If you think you'll want to run your custom report again, click save as. Give the report a name and you'll be easily able to access it again for future use.

Congratulations, you've prepared your custom report! Click "Submit" and you're done!

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