



Report Writer Basics for Programs

User Brief

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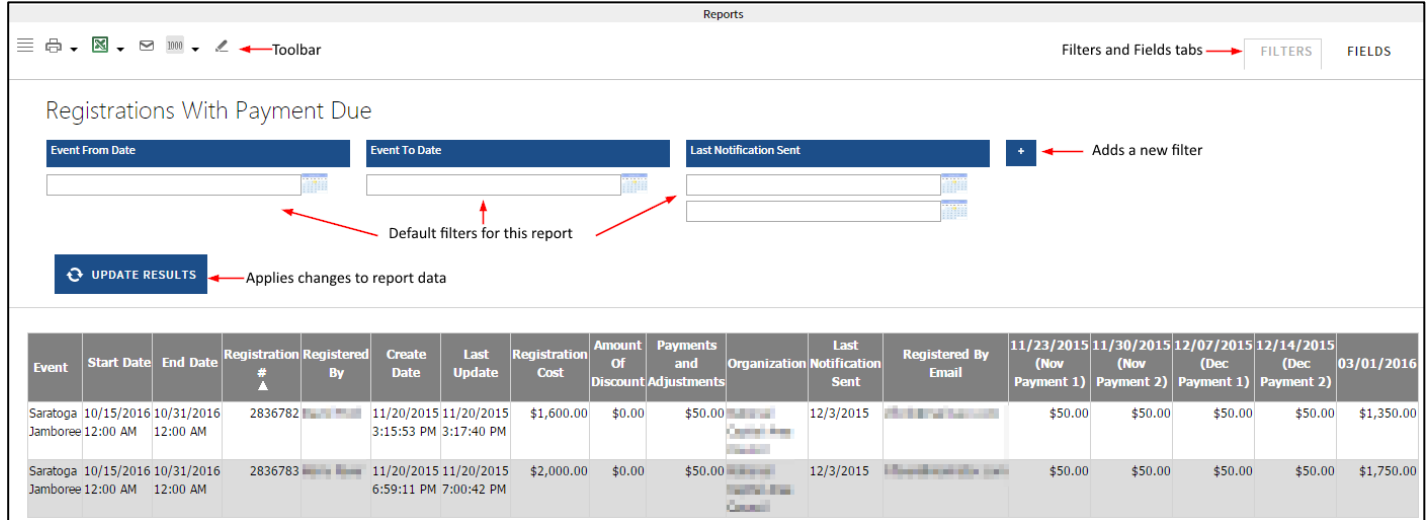
Report Writer: Introduction

This solution brief explains how to use two of Report Writer’s most important features

Understanding the Report Writer Interface

When you open any report in Report Writer, a screen similar to the following is displayed. The red arrows and text identify the important parts of the Report Writer Interface.

Red arrows and descriptive text identify the important parts of the Report Writer interface.



The following table explains each Report Writer feature.

Item	Function
Toolbar	Provides access to common tasks including returning to the report list; printing the report; saving the report in a common file; emailing the report; changing the number of rows displayed; and accessing advance report design functions.
Filters tab	Provides options to configure, modify, and remove filters. When you open a report, this tab is selected by default.
Fields tab	Provides options to configure, modify, or remove data fields.
Default filters	By default, standard reports contain the most commonly used filters.
Add Filter button	Adds a new filter.
Update Results button	Applies your changes to fields and/or filters to the results.

Understanding Fields and Filters

The most common activities in Report Writer are working with fields and working with filters.

- **Fields change the kind of data that’s displayed in the report.** Each field is represented by a column in the report. If you remove a field from a report, the corresponding column and its data will no longer be displayed. Adding and removing fields to a report allows you to create a custom report that meets your exact needs. See [Working With Fields](#) for more information.
- **Filters change the results (rows) that are displayed in the report.** Filters do not change kind of data (columns) displayed in the report. Filters are used to limit the results to those that meet the criteria that you set in the filter. For example, if you want to view data for a specific date range, you would use a filter to set the date range. Removing the filter would display all results for the report regardless of date. See [Working With Filters](#) for more information.

Working With Fields

This section contains information about Report Writer data fields. The following topics are covered:

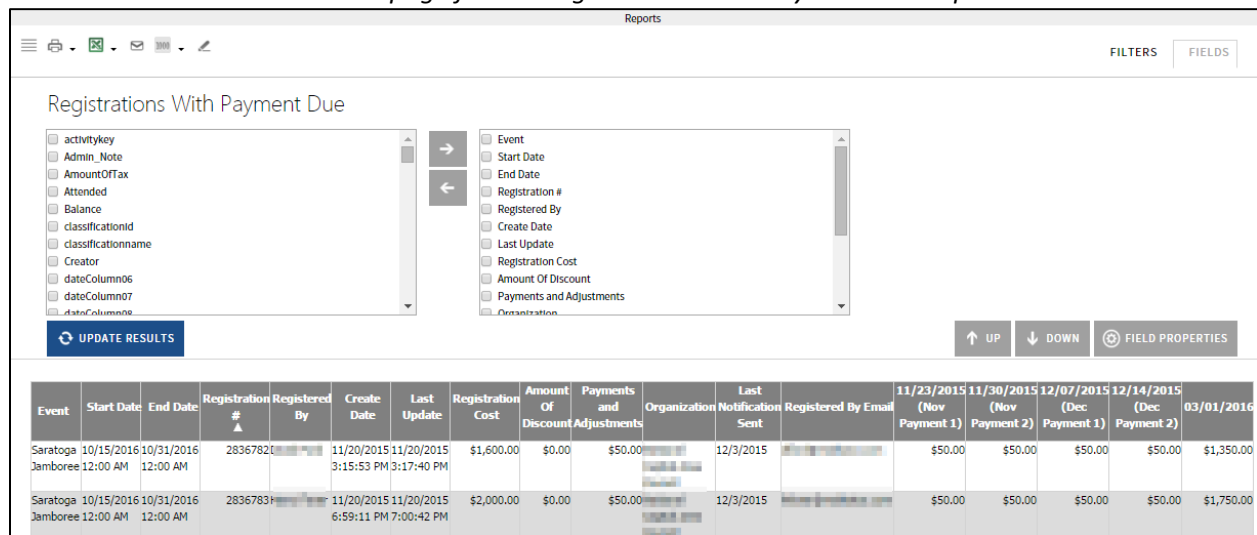
- Displaying the FIELDS page
- Adding data fields to the report
- Removing data fields from the report
- Setting the order of data columns in the report
- Changing column formatting, including changing column width and justifications

Displaying the Fields Page

To display the Fields page follow this step:

1. On the far right, click the **Fields** tab. The FIELDS page is displayed.

The Fields page for the Registrations with Payment Due report



About the Fields Page

Fields in the panel on the *left* are **not** currently displayed but can be added to the report.

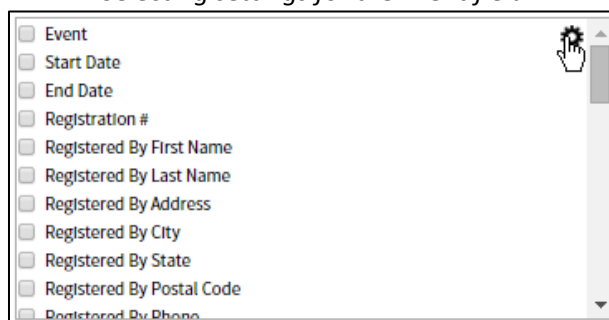
Fields in the panel on the *right* are currently included in the report, and can be removed from the report.

Changing How a Field is Displayed

To change the settings for a field is displayed, follow these steps:

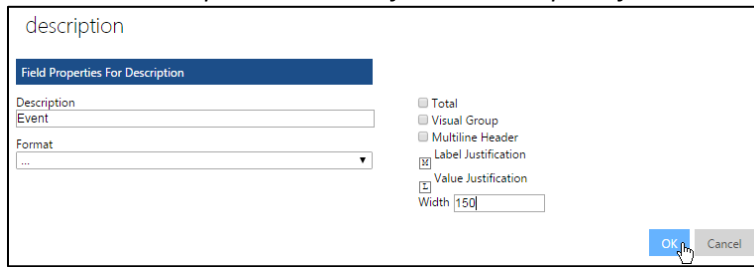
1. Move the mouse over the name of the field (see the picture below). The settings icon (which looks like a gear) will be displayed at the right.

Selecting settings for the Event field



2. Click the **Settings** icon (the gear). The FIELD PROPERTIES window for the field will be displayed.

Field Properties window for the Description field



3. Use the information in the following table to change properties of the field:

To change this:	Do this:
Text displayed at the top of the column for this field	In the DESCRIPTION field, enter the new name.
Format (available for fields that contain information like numerical data and dates)	Select the desired format from the menu.
Add the total of a numeric column at the bottom of the column for this field	Select Total .
Create a visual group (this is an advanced feature for experienced report designers)	Select Visual Group .
Use a multiline header in the column for this field	Select Multiline Header .
Change the justification of the text displayed at the top of the report column for this field (the label)	Click the box next to LABEL JUSTIFICATION until the desired option is displayed: <ul style="list-style-type: none"> • M = middle (center) justification • R = right justification • L = left justification
Change the justification of the data in the column for this field	Click the box next to VALUE JUSTIFICATION until the desired option is displayed: <ul style="list-style-type: none"> • M = middle (center) justification • R = right justification • L = left justification
Change the width of the column (especially useful for events with long names)	In the WIDTH field, enter the desired width in pixels (for example, enter 150 to set the width to 150 pixels).

4. To apply your changes, click **Update Results**.

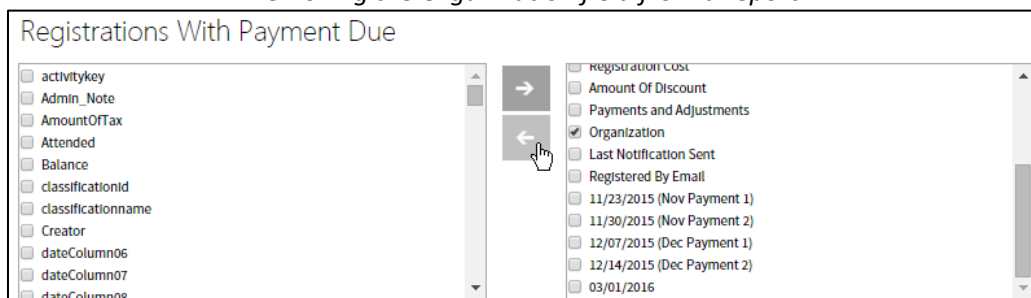
Removing a Field from a Report

You can remove fields that you don't want to display from a report. For example, if you're only viewing reports for one organization, you might choose to remove the Organization field so that the Organization column is no longer displayed in the report.

To remove fields from the report, follow these steps:

1. In the panel at the *right*, select the field(s) you want to remove.
2. Click the arrow pointing to the left. The selected fields will move into the panel at the left and will not be displayed in the report anymore.

Removing the Organization field from a report



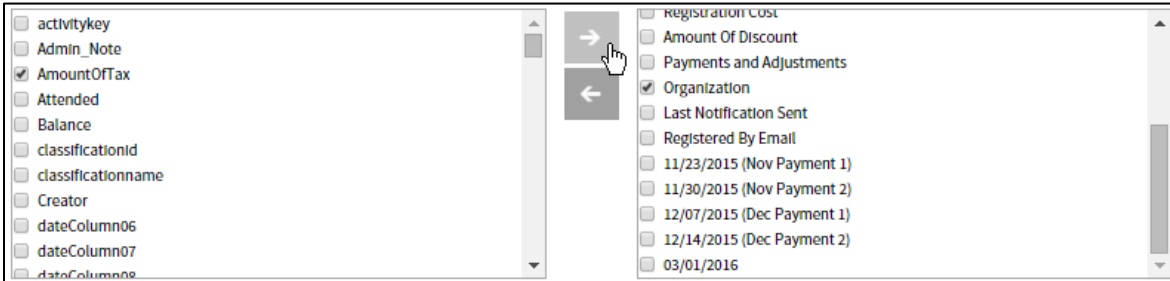
3. To apply your changes, click **Update Results**.

Adding a Field

To add a field to the report, follow these steps:

1. In the panel at the *left*, select the field(s) you want to add.
2. Click the arrow pointing to the right. The field(s) will be added to the panel at the right, and will be displayed in the report.
3. To apply your changes, click **Update Results**.

Adding the Amount of Tax field to a report



Changing the Order of Fields in the Report

To change the order in which columns are displayed in the report, follow these steps:

1. In the panel at the right, select the field you want to move.
2. At the far right side of the screen, click the **Up** button or the **Down** button as many times as you need to move the field to the desired location.
3. Repeat steps 1-2 for all the fields you want to move.
4. To apply your changes, click **Update Results**.

Moving the Payments and Adjustments field up in the list so it displays earlier in the report



Working With Filters

Applying a filter lets you to view a *subset* of the data in the current report. Applying filters does not change the data columns that are included in the report. For example, if you are in a View Reservations report that shows all facility reservations, you can use a filter to show only the reservations in the next two weeks. Reservations that are 15 days away are still in the report, but they are not displayed. You can display them again by removing or changing the date range in the filter.

When you open a report, the filters that you are most likely to use are automatically displayed. For example, in the Registrations With Payment Due report, you're most likely to want to search for registrations during a specific date range or for notification reminders that were sent during a specific date range. The filters to enter these dates are already displayed on the page.

Viewing Information About a Filter

By default, filters only display their name and a field to enter your criteria. (If the filter is applied to a date range, a calendar icon to select a date is also displayed.)

To learn what kind of information the filter uses, follow this steps:

1. Move the mouse over the filter's blue title bar. Information about the filter and a button to edit the filter's settings are displayed.

Moving the mouse over the title shows that this filter will return registrations in which the balance due is not less than the amount you enter in the field.



Common Doubleknot Filters and Options

The following filters are commonly displayed by default:

- **Event From Date:** Specifies the beginning date in a range
- **Event to Date:** Specifies the ending date in a range
- **Last Notification Sent:** Specifies the dates that automatic notifications were sent

Applying a Filter

The general steps to apply a filter are the following:

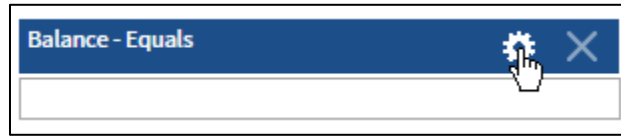
1. Move the mouse over the filter's blue title bar to understand how the criteria you enter will be applied.
2. In the field, enter the criteria.
3. Repeat steps 1-2 for all the filters you want to apply.
4. Click **Update Results**. Data that matches the criteria in filters will be displayed.

Adding a New Filter

Standard reports automatically display the most commonly used filters. However, you can add new filters that apply to any field in the report. To add a new filter, follow these steps:

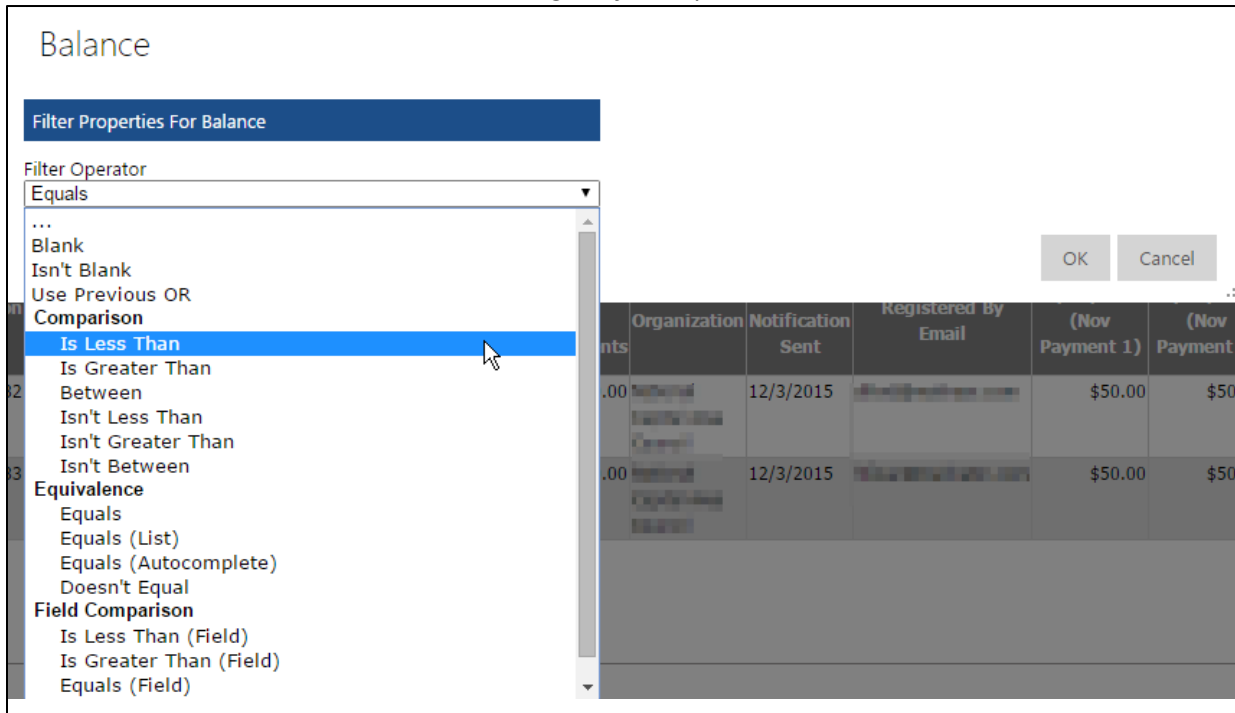
1. Click the + to the right of the last filter. (See [Understanding the Report Writer Interface](#) for an illustration.) A blank filter will be displayed.
2. Click the menu beneath the blue heading. A list of data fields that you can work with are displayed.
3. Select the item that you want to use in the filter. For example, if you want to filter based on the balance due, select **Balance**.
4. Move your mouse over the blue title field so that more filter options are displayed, including the settings icon (a gear).
5. Click the gear icon to edit the settings. A FILTER PROPERTIES window for the filter will be displayed.

Click the gear icon to display the Filter Properties window for this filter



6. In the FILTER OPERATOR menu, select the operation you want to use. For example, if you've selected a field with currency values such as Balance and you want to find all records with a balance that's less than an amount you specify (for example, balances less than \$100), select the filter operator **Is Less Than**.

Selecting the filter operator



7. Click **OK** to return to the report.
8. Enter your criteria in the new filter field.
9. Click **Update Results** to apply all the current filters to the report.

Changing a Filter's Settings

To change the settings for an existing filter, follow these steps:

1. Move the mouse over the filter's title bar so that the filter operator and settings icon are displayed.
2. Click the settings icon (the gear) to edit the settings. A FILTER PROPERTIES window for the filter will be displayed.
3. In the **FILTER OPERATOR** menu, select the operation you want to use.
4. Click **OK** to return to the report.
5. Enter your criteria in the new filter field.
6. Click **Update Results** to apply all the current filters to the report.

Removing a Filter

To remove a filter, follow these steps:

1. Move the mouse over the filter's title bar so that the filter operator and settings icon are displayed.
2. Click the **X** at the far right of the title bar. The filter will be removed.

Saving Your Changes in a New Custom Report

In Report Writer, you can save your field and filter settings as a custom report. When you open the custom report, all the fields and filter settings that you saved will automatically be applied to the data.

Saving a New Custom Report

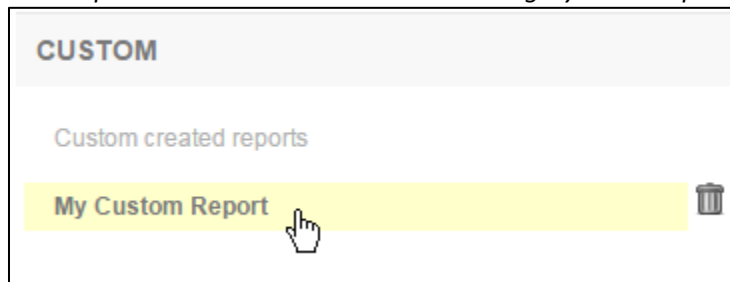
To save a report that you've modified as a custom report that you can return to later, follow these steps:

1. In the toolbar at the top left of the report, click the **Report Designer** icon (the pen, which is the last icon on the right). The REPORT DESIGNER will be displayed.



2. In the second row of the REPORT DESIGNER toolbar, click **Save As...** A dialog box to enter the report name will be displayed.
3. Enter a name for your custom report.
4. Click **OK**. When you return to the report list, your report will be located in the CUSTOM category at the bottom of the page.

Custom reports are located in the Custom category in the report list



Making Changes to a Custom Report

If you've created a custom report and want to make additional customizations, follow these steps:

1. Open the report.
2. Make the desired changes.
3. Click the **Report Designer** icon.
4. Choose one of the following:
 - To save the changes to the *existing* custom report, click **Save**. The changes to the report will be saved.
 - To save these changes as *another* custom report, click **Save As...** and follow the steps [in Saving a New Custom Report](#).

Program Reports

The reports in this section contain information about programs, registrations, and registrants configured in the PROGRAMS tab in Event Management.

Information about reports for individual sessions is located in [Program Session Reports](#), and group registration information for group leaders is located in [Group Registration Reports](#).

Viewing Program Reports

From the Administer Panel

1. In the ADMINISTER panel, click **Reports**.
1. Click the **Program Reports** category.
2. Select one or more items to include in the report.
3. Click **Continue**. A list of reports is displayed.

In the Programs Tab in Event Management

1. In the PROGRAMS tab in Event Management, click **Report Multiple**.
2. Select one or more programs to include in the report.
3. Click **Continue**. Reports for the selected programs will be displayed.

On the Management Page for a Program

1. Click **Reports**. Reports for the program will be displayed.

Program Report List

The following reports are available (listed by category). The reports that are displayed may be different depending on your permissions and the features that your organization uses. If you save changes to a standard report, your custom report will be displayed at the bottom of the page in the Custom category.

All Registration and Registrant Information

- View All Registrations and Registrant Information
- View Registrations Without Registrant Information
- View Registrations Without Registrant or Form Information

Attendance

- Program Registrants by Session
- Total Number of Program Registrants by Group
- Total Registrants per Session

Payments

- Balance Due by Session
- Payment Transaction Details (Form Costs Included in Registration Cost)
- Payment Transaction Details (Form Costs Listed Separately)
- Registration and Payment Summary with Group Information
- Registrations With Payment Due

Products

- Registrations with Packages

Program Session Reports

These reports are available for organizations that use Doubleknot's program management solution.

Viewing Program Session Reports

These reports contain comprehensive information about program sessions, session events, registrations, and registrants configured in the PROGRAMS tab in Event Management.

To view program session reports, follow this step:

1. On the management page for a session, click **Reports**. Reports for the session will be displayed.

Program Session Report List

The following reports are available (listed by category). The reports that are displayed may be different depending on your permissions and the features that your organization uses. If you save changes to a standard report, your custom report will be displayed at the bottom of the page in the Custom category.

All Registration and Registrant Information

- Registration Detail—Formatted
- Registrations with Packages
- View Registrations and All Registrant Information
- View Registrations Without Registrant Info
- View Registrations Without Registrant or Form Information

Attendance

- Course Completion Records (Export Only)
- Registrant List By Activity/Class
- Registrant List By Group
- Registrants Cleared from Waitlist
- Registrants for All Session Events By Group
- Session Completion Awards
- Session Completion Overview
- Session Events Registration Summary
- Unit Schedule

Payments

- Balance Due By Session
- Payment Transaction Details (Form Costs Included in Registration Cost)
- Payment Transaction Details (Form Costs Listed Separately)
- Registration and Payment Summary
- Registrations With Payment Due

View and Export

- Email Me Registration Export
- View and Export Registrations

Group Registration Reports

For programs like scout camps that use group registration, reports are available for the owner of each registration.

About Group Registration Reports

There are two ways to view group registration information:

- If you're an administrator for the camp or council,
- If you're a group leader and you want to see reports for a group you registered

Instructions For Doubleknot Administrators

To view group registration reports for programs, follow this step

1. Open the management page for the program session.
2. Click **Manage Registrations**. A list of registrations will be displayed.
3. Locate the registration whose reports you want to view.
4. Click **Edit**. The group registration page is displayed.
5. In the bottom right corner, click **Reports**. The reports for the selected group registration will be displayed.

Instructions for Group Leaders and Registration Owners

If you're instructing group owners to view reports for their own registrations, the group owners should follow these steps:

1. Log into the council's web site with the logon ID they used to register. Their account information summary page will be displayed.
2. Click the **Registrations** tab. A page of registrations is displayed.

NOTE: You must be sure to click the **Registrations** tab. The Reports option is not available on the Summary page, even though the registration will be listed there.

3. Locate the registration whose reports you want to view.
4. At the right of the registration, click **Reports**. The reports available for that registration will be displayed.

Group Registration Report List

- Class/Activity Attendance
- Class/Activity Completion Award
- Course Completion Records (Export Only)
- Summer Camp Roster
- Unit Schedule