

User Guide

Part 4 - Reports

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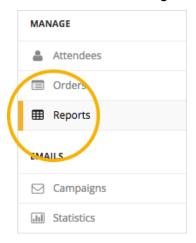
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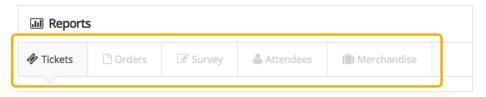
Accessing Reports

To access the reports, click on Reports in the left hand navigation under the **Manage** category:



**Above image illustrates the location of Reports on menu bar

Once under the Reports section, click on the category tabs at the top to load the corresponding report:



**Above image illustrates the available Reports

Note: By default, the Tickets report will be loaded.

Customizing a report

Note that the saved settings of a report are saved even if you leave the page or Logout/Login. The settings are permanent.

The saved settings is applied to <u>All users</u> accessing the report, once a change is made, it's applicable to <u>All users</u> viewing the same customization

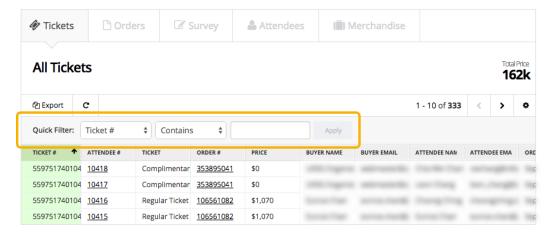
- 1. Navigate to 'Reports' on the left panel
- 2. Click on the "gear" icon on the top right of the table



- a. This will open up the customization panel where you can:
 - i. Select & rearrange the Columns' view
 - ii. Sort by a Column
 - iii. Filter the report
 - 1. If you have > 1 filter conditions
 - 2. You can define the "Filter Pattern" E.g. (1 and 2 and 3) OR (1 or 2 and 3)
 - iv. Report size (number of items per page)
 - v. Report aggregation (e.g. Total Price, Average Price ...)
 - This appears on the top right of the table
 E.g. Under "Attendees" report, the aggregation by default is
 'Registered Attendees & Checked-in Attendees', you can add another configuration to show 'number of unique Companies'
 - 2. Maximum of 5 aggregations for each report
 - vi. Report Metadata (Report Name)

Filtering a report

In order to filter reports based on your preference, we can use the quick filter bar:



Applying a quick filter

The quick filter is used as a quick and temporary way to filter a report (temporary in the sense that the filter is not saved in the report. That means that if the report is refreshed or the page is refreshed, the filter will no longer be applied).

To apply a quick filter to a report:

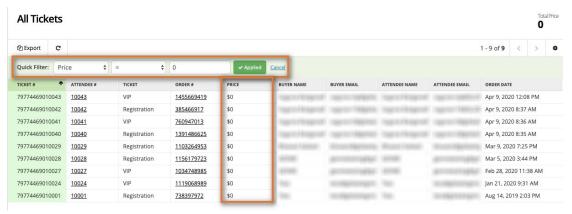




- 1. Choose the column which you want to filter from the first dropdown e.g Price.
- 2. Select the operator (that you want to apply on the chosen column) from the second dropdown e.g Price =.

Note: Based on the column chosen in the previous step the operator available in the dropdown will vary.

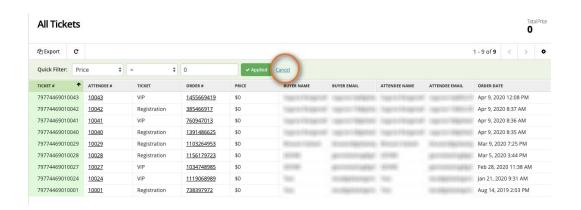
- 3. Enter a value in the last textbox.
- 4. Click on the Apply button.
- 5. This will result in the filter being applied on the report, based on the settings and values entered. To show that a quick filter is being applied, the quick filter bar will be highlighted in light green:



Clearing a quick filter

To clear the quick filter, simply click on the cancel button in the quick filter bar:

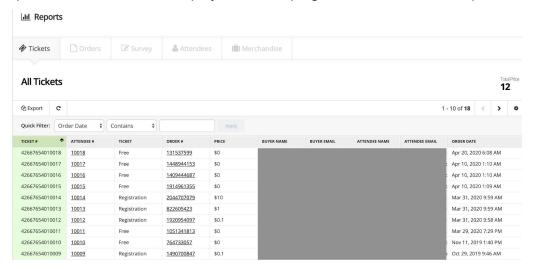




Reports within the Event

Ticket Report

The Tickets report gives you an account of all the tickets sold/issued under your event. Additionally, the total price of all the tickets is displayed in the top right hand corner of the report.



**Above image illustrates the Tickets report

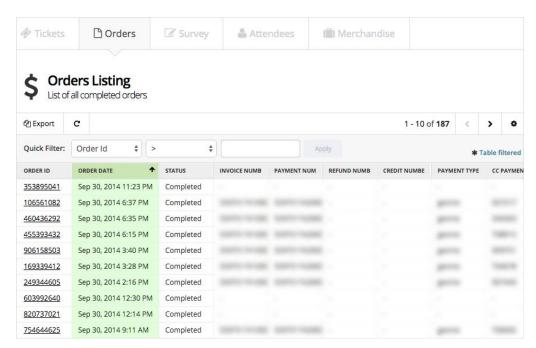
Orders Report

There are 3 reports under the Orders category and are all displayed one after each other on the same page.

Orders Listing

The Orders Listing report shows you all the completed orders for your event, i.e. orders which have been fully paid for. By default, the report is filtered to show only completed orders.

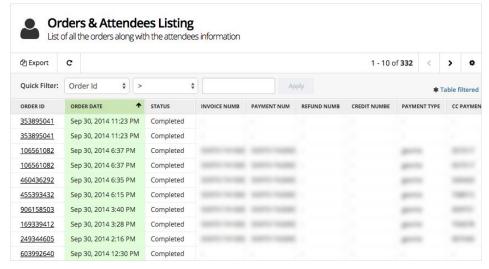




**Above image illustrates the display of Orders Listing Report

Orders & Attendees Listing

The Orders & Attendees Listing gives you the list of all completed orders, along with the corresponding attendees information. In a way, therefore, from this report you can see all the attendees for whom full payment has been made. Just like the Orders Listing report above, this report is also filtered by default to show only completed orders.

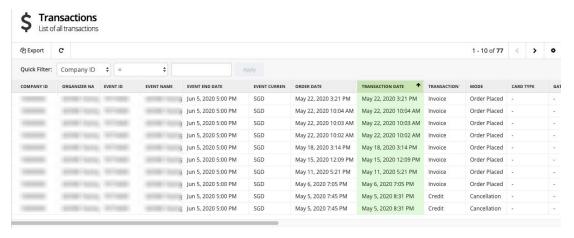


**Above image illustrates the display of Orders & Attendees Listing Report



Transactions

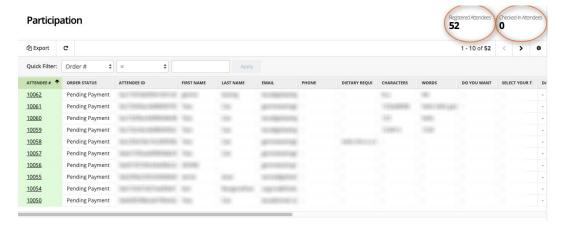
The **Transactions** report lists all the payment transactions received both online and offline.



**Above image illustrates the display of Transactions Report

Attendees Report

The Participation report under the Attendees tab gives you an overview of all the attendees that have registered for your event. In addition to that, the number of Checked-In attendees is also displayed in the top right hand corner of the report.



**Above image illustrates the display of Participation Report

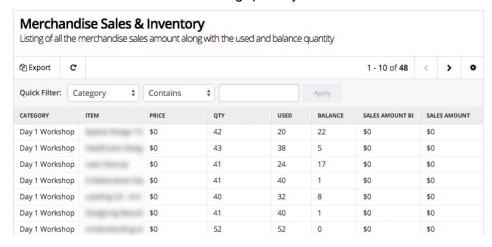


Merchandise Report

There are 2 reports under the Merchandise tab:

Merchandise Sales & Inventory

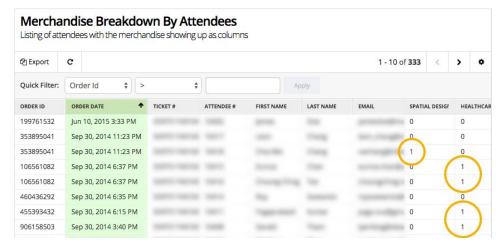
This report gives you an account of all the merchandise items that you have created along with their total sales amount and their used/remaining quantity.



**Above image illustrates the display of Merchandise Sales & Inventory Report

Merchandise Breakdown By Attendees

This report on the other hand, lists down all the attendees of your event with their choice selection based on the merchandise that you have created. Under each merchandise column, a zero (0) indicates that the participant did not choose this option, while a one (1) indicates that the participant had chosen that option.



**Above image illustrates the display of Merchandise Breakdown By Attendees



Merchandise Breakdown By Buyers

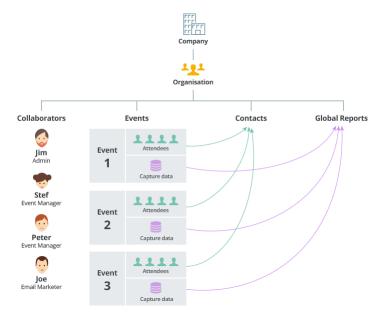
This report on the other hand, lists down all the buyers of your event with their choice selection based on the merchandise that you have created for the Buyer Form. If there is no field of Merchandises and Inventories in Buyer Form, then there will be no data to display.



**Above image illustrates the display of Merchandise Breakdown By Buyers

Organization Global Report

Global Reports (as opposed to event-level reports) give you access to reports and data across all the events under the organization. From the Global Reports, therefore, you can generate organization-level reports like the total payments collected across all your events. Diagrammatically therefore, the full structure translates to this:



^{**}Above image illustrates the display the connection of data across organisation's events



Please note that for **event-level fields** to appear in Global Report, they have to be created as **Predefined Fields**.

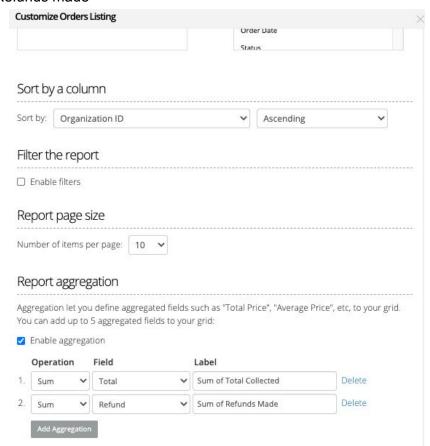
Tips:

You can create **Predefined fields** with the same **field name** to be used in all your Attendee Form, Admin Form, in order to get information at one shot in Global Report.

Global Orders Report

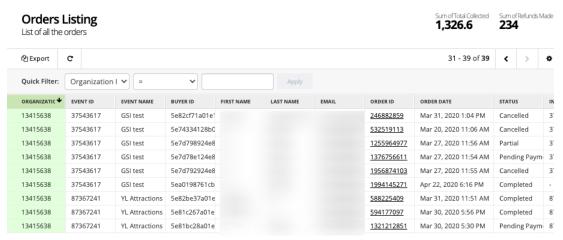
Global Orders report under the main 'Global Reports' module indicates all Order information under the same Organisation across all events. By setting the table filter, you're able to generate an overview of the below information:

- 1. Sum of Total Amount collected
- 2. Sum of Refunds made



**Above image illustrates the display of Custom Report filter



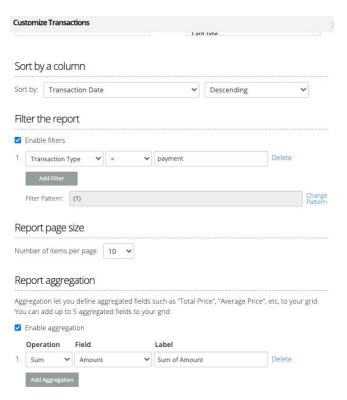


**Above image illustrates the display of after the Custom Report filter is saved

Global Transaction Report

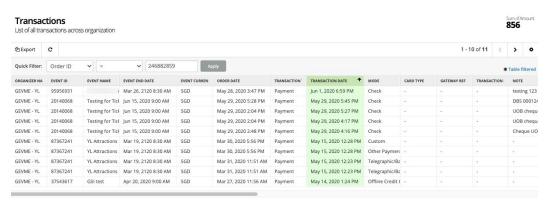
Similarly to the Global Orders report, the Global Transactions report is a further breakdown of Order information on a transaction level. By setting the table filter, you're able to generate an overview of the below information:

- 1. Collected amount
- 2. Refund amount



**Above image illustrates the display of Custom Report filter



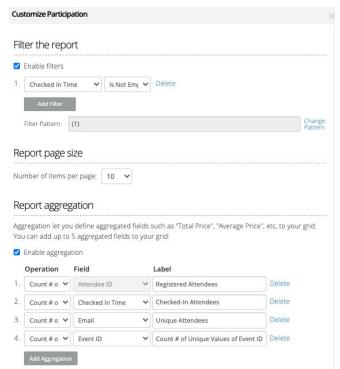


**Above image illustrates the display of after the Custom Report filter is saved

Global Attendees Report

Global Attendees report under the main 'Global Reports' module indicates all Attendees information under the same Organisation across all events. By setting the table filter, you're able to generate an overview of the below information:

- 1. Number of registered Attendees
- 2. Number of checked-in Attendees
- 3. Number of unique Attendees
- 4. Number of unique Events



**Above image illustrates the display of Custom Report filter





**Above image illustrates the display of Custom Report filter

Global Organisation Report

This report differs from the remaining 'Event related' reports. In this Global Organisation report, it indicates the list of users and its information for easy audit retrieval.

There are 2 types of reports in this tab:

- 1. Users Listing that shows GEVME backend user information
 - a. First Name
 - b. Last Name
 - c. Email
 - d. Status
 - e. Roles
 - f. Events
 - g. Last Login Date
 - h. Last Login IP
- 2. User Login Attempts that shows the number of attempted login tries
 - a. Date and Time
 - b. User Name (Email)
 - c. Failed Attempt
 - d. IP Address
 - e. Page Accessing