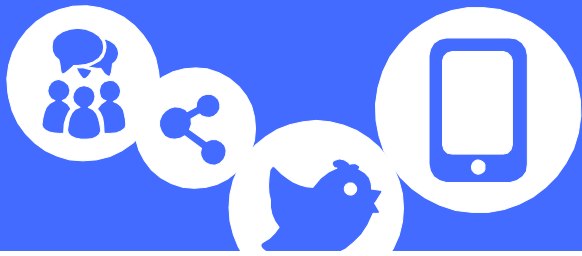




# How to:

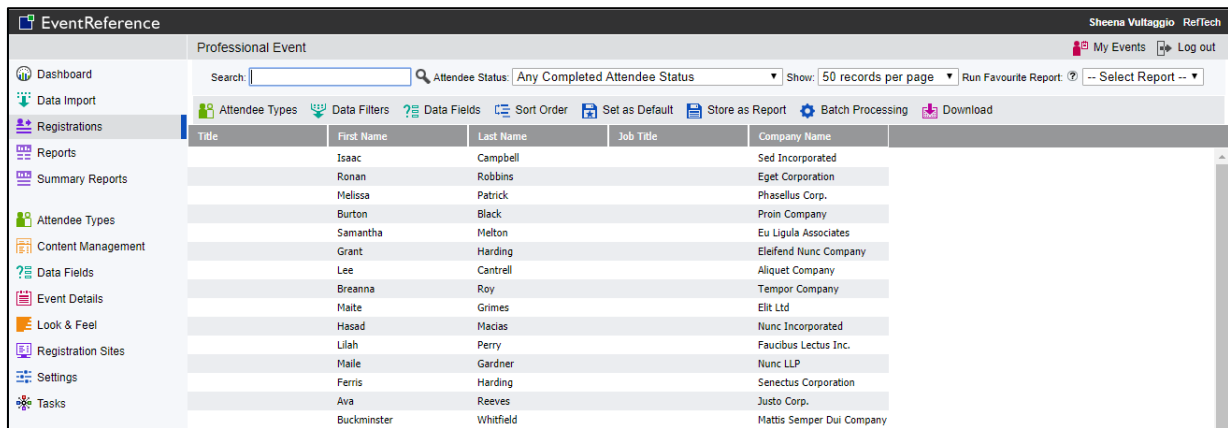
Filter your data and create reports

EventReference User Guide # 19



You can use EventReference to filter your data and create reports.

Click on  Registrations

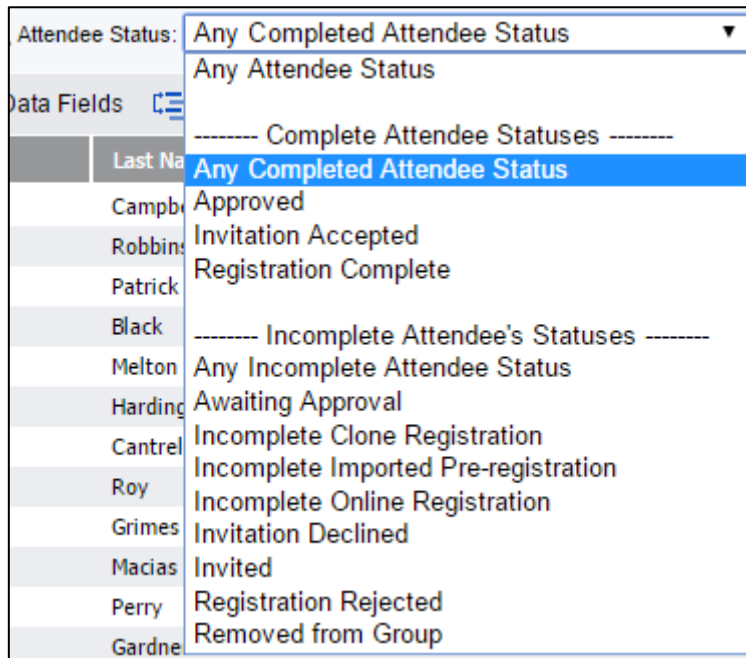



The screenshot shows the EventReference interface for a 'Professional Event'. The 'Attendee Status' is set to 'Any Completed Attendee Status'. The table below lists the registrations:

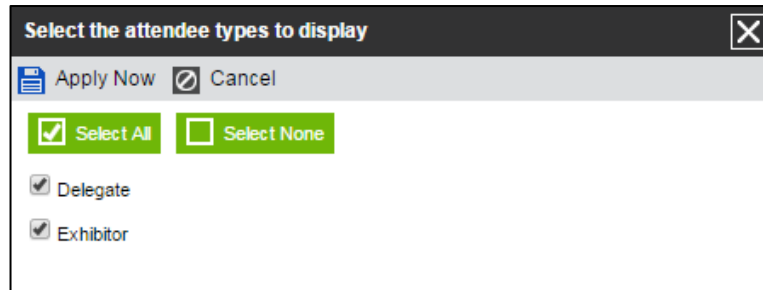
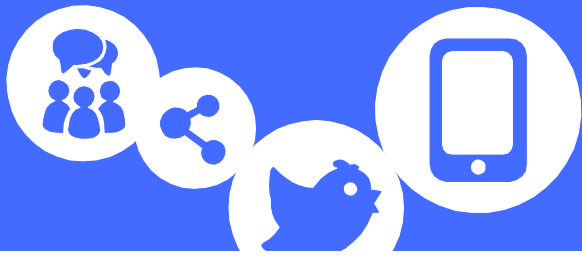
Title	First Name	Last Name	Job Title	Company Name
	Isaac	Campbell		Sed Incorporated
	Ronan	Robbins		Eget Corporation
	Melissa	Patrick		Phasellus Corp.
	Burton	Black		Proin Company
	Samantha	Melton		Eu Ligula Associates
	Grant	Harding		Eleifend Nunc Company
	Lee	Cantrell		Aliquet Company
	Breanna	Roy		Tempor Company
	Maite	Grimes		Elit Ltd
	Hasad	Macias		Nunc Incorporated
	Lilah	Perry		Faucibus Lectus Inc.
	Maile	Gardner		Nunc LLP
	Ferris	Harding		Senectus Corporation
	Ava	Reeves		Justo Corp.
	Buckminster	Whitfield		Mattis Semper Dui Company


This will show you a list of all your registrations.


Use the Attendee Status drop down to select the status you want to see. Usually this will be Registration Complete.

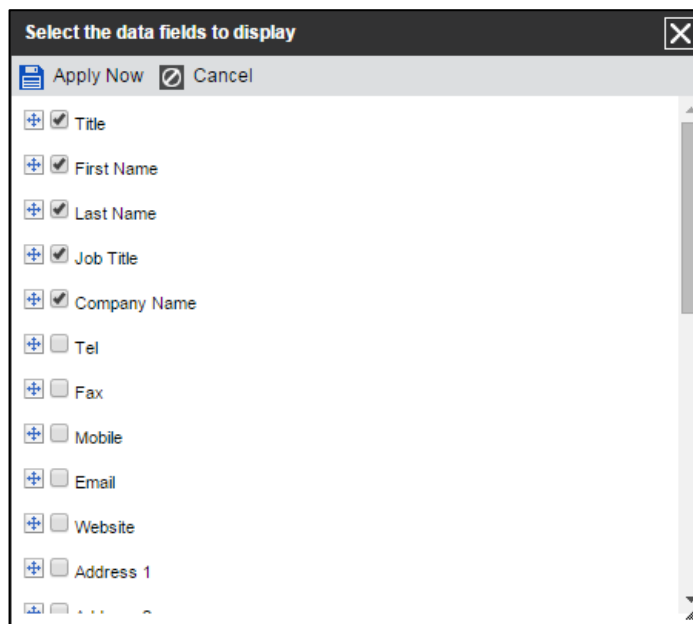


Select the attendee types you want in your report. Click on  Attendee Types and tick the types you want.




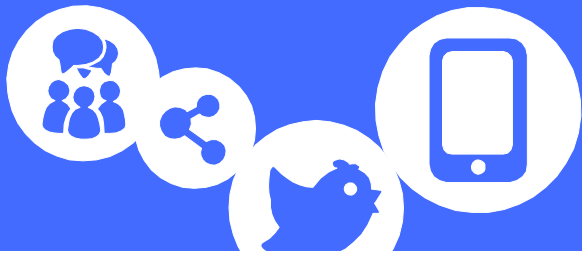
Click  **Apply Now**


To add the data fields that you want displayed in your report, click  **Data Fields** and tick/untick the fields you want.



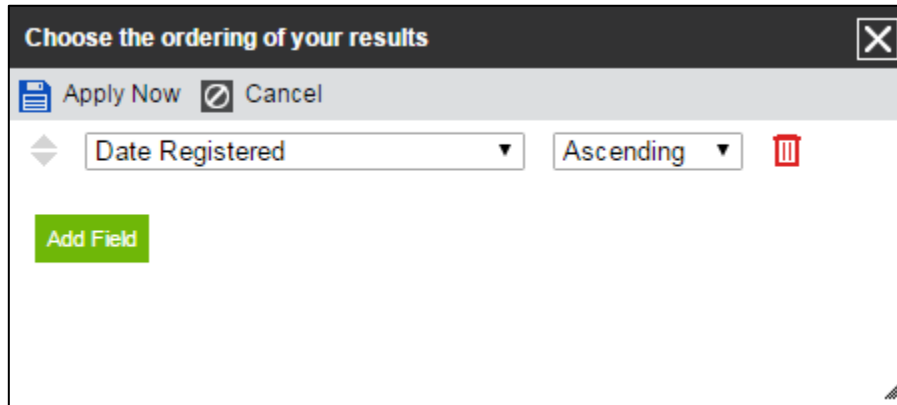
You can also change the order of the fields by dragging them up and down.

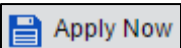
Click  **Apply Now** to view the fields you have selected.



You can sort the data into the order you want in your report. Click  and select the order you need.


The default is to have the most recent registration at the top but you may want to have it ordered by surname, or company name for example.



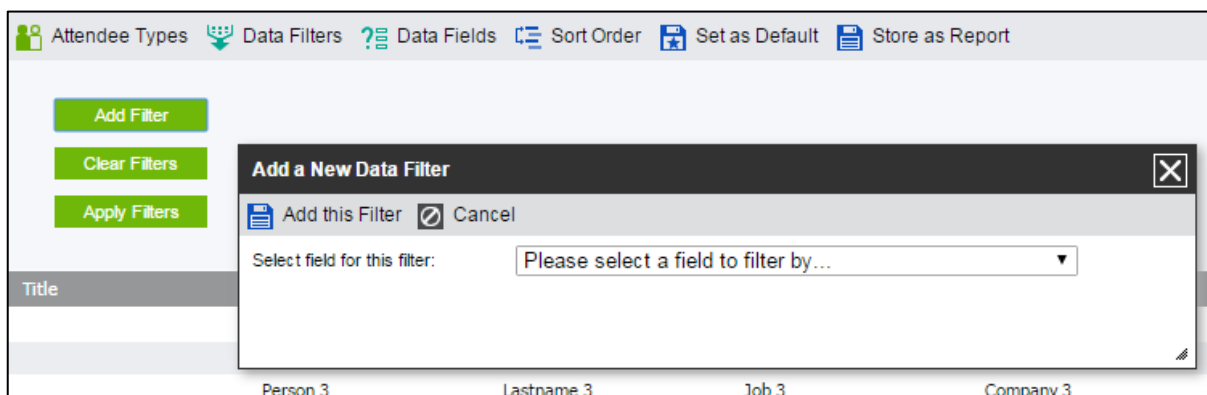
Click  to sort your data according to the criteria specified.

Next you need to filter your data to create your report.

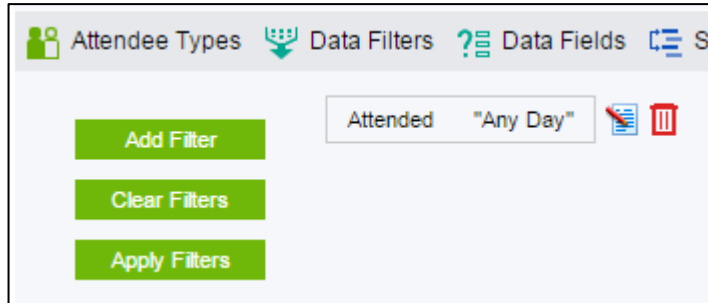
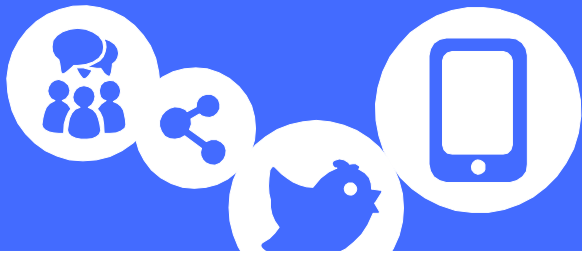
Click .


To add a new filter, click .

Select your criteria from the drop down boxes.

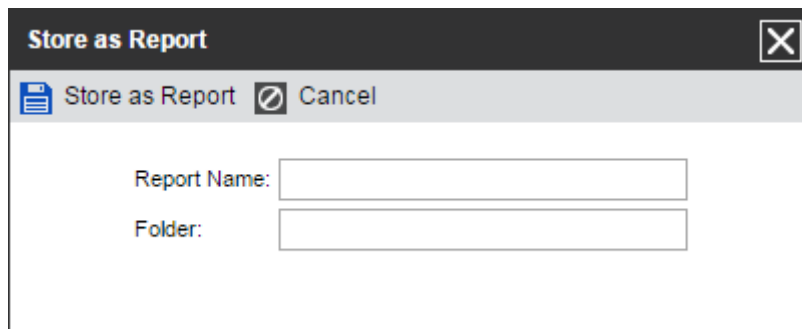


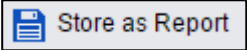
Click  Your filter will be shown on the screen.



You can continue to add more criteria to your filters if you want, or if you're ready to filter your data, click  and the data will be filtered according to your specified criteria.

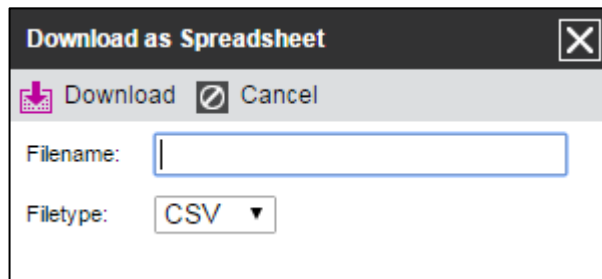
To save this set of filters as a report, click .

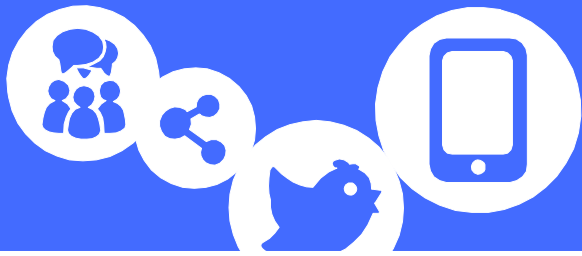


Name your report and specify a folder if you want, then click  to save.

You can also download the report by clicking .

Name your file, select whether you want CSV or XLSX and click Download and the file will be downloaded.



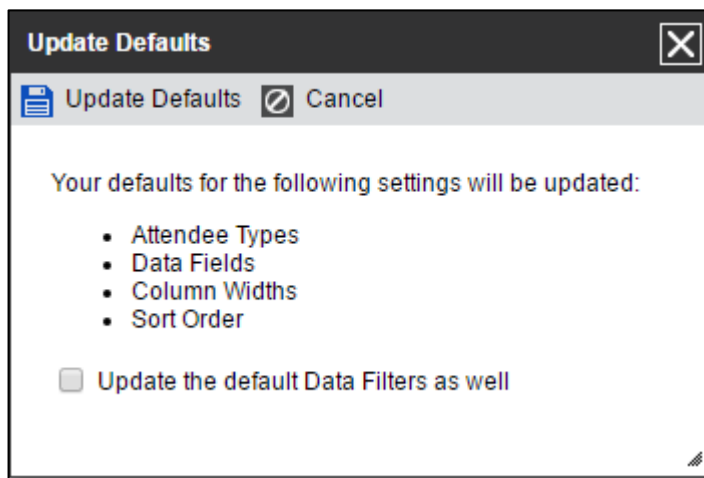


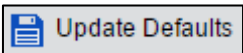
### Set a Default Data View

You can store any of your settings as default so that you will see your data like that any time you visit the Registrations page.

To do this, click 

You have the option to add on your data filters to the default settings, to do this, tick the box.

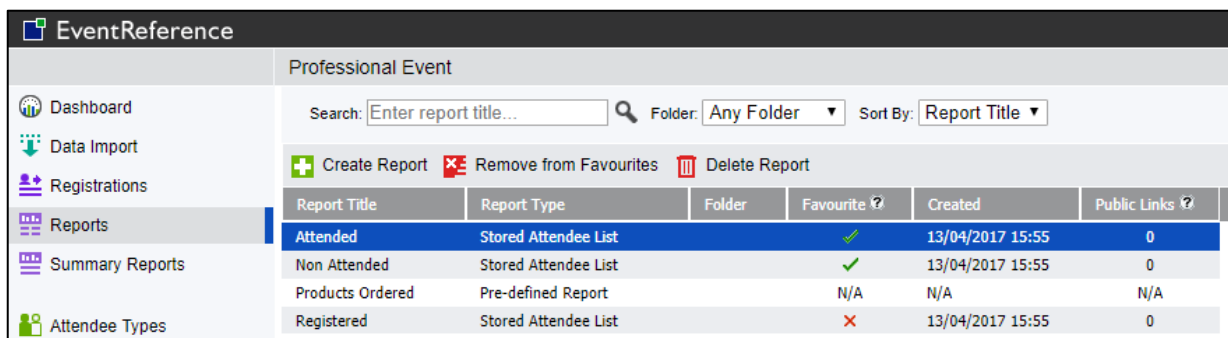


Click  to save.

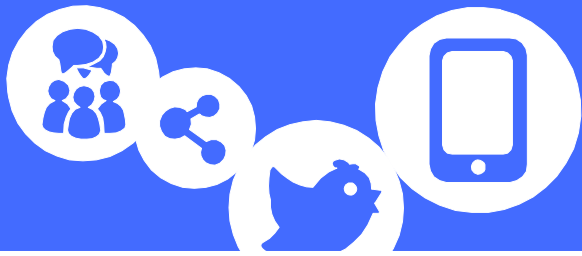
### View Stored Reports

To view your stored reports, select 

You will see a list of all the stored reports in your event.



Report Title	Report Type	Folder	Favourite	Created	Public Links
Attended	Stored Attendee List		✓	13/04/2017 15:55	0
Non Attended	Stored Attendee List		✓	13/04/2017 15:55	0
Products Ordered	Pre-defined Report		N/A	N/A	N/A
Registered	Stored Attendee List		✗	13/04/2017 15:55	0



To re-run a report, double click on it, click on the **Actions** tab and then select **Run Report**

The screenshot shows a tabbed interface with 'Actions' selected. Below the tabs, there are two green buttons: 'Reload Report' and 'Run Report'. The 'Run Report' button is highlighted.

This will give you the most up to date data based on the criteria specified.

The screenshot shows a 'Download Report to File' dialog with a table of data. The table has columns for Title, First Name, Last Name, Job Title, and Company Name. The data is as follows:

Title	First Name	Last Name	Job Title	Company Name
	Isaac	Campbell		Sed Incorporated
	Ronan	Robbins		Eget Corporation
	Melissa	Patrick		Phasellus Corp.
	Burton	Black		Proin Company
	Samantha	Melton		Eu Ligula Associates
	Grant	Harding		Eleifend Nunc Company
	Lee	Cantrell		Aliquet Company
	Breanna	Roy		Tempor Company

You can download the data from here in the same way as before.

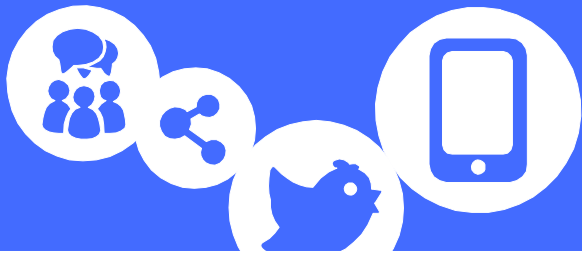
To modify the report criteria, click **Reload Report**

This will take you back to the Registrations screen where you can make amends to your settings.

To save your new settings, click **Store as Report**

You will then have the option to either overwrite the existing report or save a new one. Click the option you want.

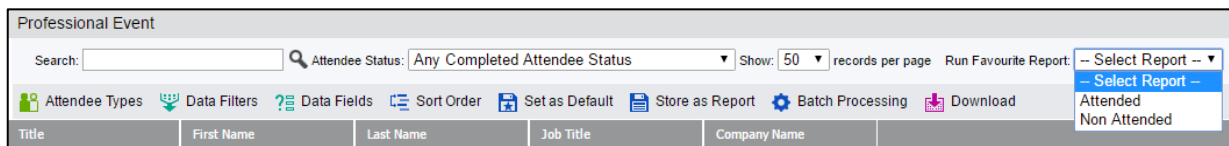
The screenshot shows a 'Store as Report' dialog box with two buttons: 'Overwrite the existing report' and 'Save a copy with a new name'.



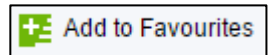
## Setting Favourite Reports

You can set up some reports as Favourites to have quick access to them from the Registrations page.

These will appear on the top bar.



To set a report as a favourite, highlight it in the Reports List and then click





# EventReference



Event Registration



Paid Registration



Event Management



WebBadging



Event Reporting



WebScanning

## YOUR EVENT. YOUR WAY.

*Self-service registration & badging*

*"I've signed up for EventReference"*

*"I can't believe how easy it is to get all the reports I need"*

*"I found it to be fast, powerful and easy to use for my event"*

*"I was able to extract the information easily, which is perfect"*

*"Being able to target abandoned registrations helped drive my registration numbers up"*

### What our customers say...

"We have been using EventReference through RefTech for over two years now and in this time we have seen it develop and progress constantly. As a small, independent conference organiser, Opening Doors & Venues needed a straightforward, pay-per-event platform for gathering registrations, that would be easy to manage in-house - it is exactly what EventReference offered us. We use the platform for both free-to-attend and paid-for registrations with multiple attendee types and varied fee structures and find the interface very user friendly, whether it is for building a landing page or formatting the registration form. We must also applaud the RefTech staff for their patience and promptness in providing the support we constantly require - even though at times we ask the oddest of questions!"

*Madalina Marincas, OPENING DOORS & VENUES*

+44 (0)1827 818181

 [www.eventreference.com](http://www.eventreference.com)

@ [support@eventreference.com](mailto:support@eventreference.com)