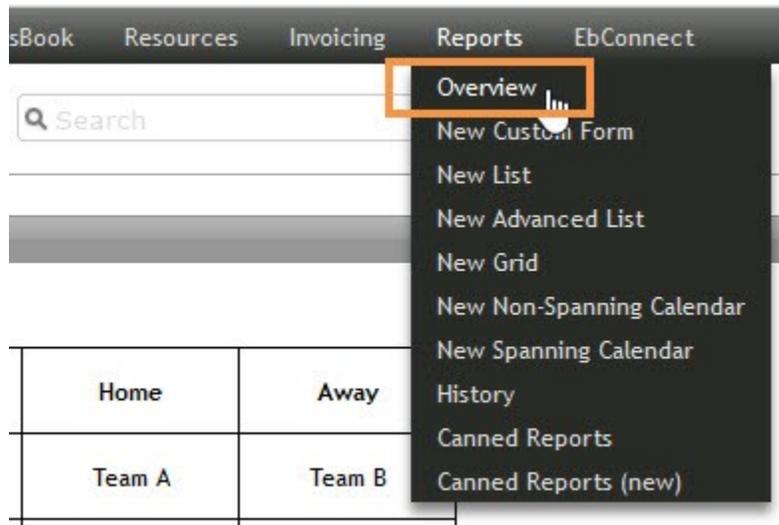


Running a Report

Updated: November 4, 2015

To run a report that you have created or that has been shared with you:

1. Hover over *Reports* and click *Overview*:



2. Find the report you would like to run in your report list, and click on the title to select it.

If you are the owner of the report, don't click on the paper and pencil icon -- that will open the report for editing.

The R icon in your list stands for report; reports search for event information by date range. The CF stands for custom form. Custom forms are custom-coded documents (such as contracts, BEO's, work orders, etc.) that are run on an event-by-event basis.

The screenshot displays the eventbooking.com interface. At the top left is the logo "eventbooking.com" and a search bar. Below the logo is a "Reports and Forms" panel with a search field and a list of reports. The "Monthly Calendar" report is highlighted with an orange box. To the right is a "Monthly Calendar (id=287)" details panel. Below the reports list is a "Generate" panel with a "Range" section containing "From: 11/1/2015" and "To: 11/30/2015" date pickers. The "Generate" panel also has radio buttons for output formats: HTML (selected), PDF, PDF (old), MS Word (97 to 2007), Text, and MS Word. A "Generate Monthly Calendar" button is at the bottom of the "Generate" panel. The details panel for "Monthly Calendar" shows fields for Name, Description, Owned by (Linda Moyer), and Where appears (Event). Below these fields are tabs for "Used By Forms" and "Revision", with "Used By Forms" showing "Not being used".

3. Use the date picker to enter the date range for your report.

Note: The longer your date range, the longer the report will take to run.

The screenshot shows the eventbooking.com interface. At the top, there is a search bar and the logo. Below, the 'Reports and Forms' section is visible, listing various reports. The 'Monthly Calendar' report is selected, and its details are shown on the right. A date range picker is open, showing the date range from 11/1/2015 to 11/3/2015. The date picker is highlighted with an orange box.

eventbooking.com Search

Reports and Forms

Filtering: mine, shared, reports, forms

- Journal report
- R Journals by Sales Rep
- R Lost Business Report
- R Lost Business Summary (I)
- R **Monthly Calendar**
- R Note report
- R Resource for F&B
- R Resources by Day by Eve
- R Revenue by Month
- R Side by Side
- R Timeline Report
- cf * Estimate of Charges
- cf * Event Report (by Funct
- cf * Event Report (by Funct

Monthly Calendar (id=287)

Name: Monthly Calendar

Description: No Description

Owned by: Linda Moyer

Where appears: Event

Used By Forms: Revision

Not being used

Generate

Range

From: 11/1/2015

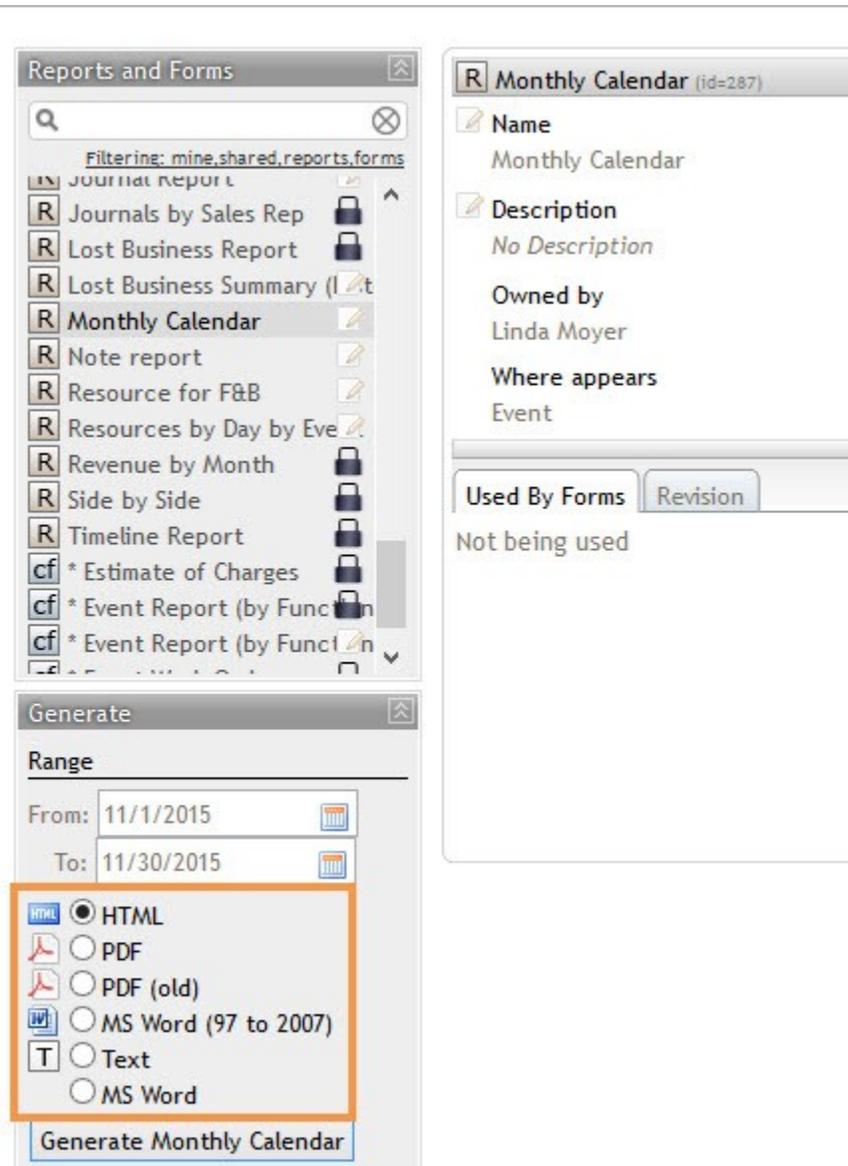
To: November 2015

	Su	Mo	Tu	We	Th	Fr	Sa
		2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	1	2	3	4	5
Gene	6	7	8	9	10	11	12

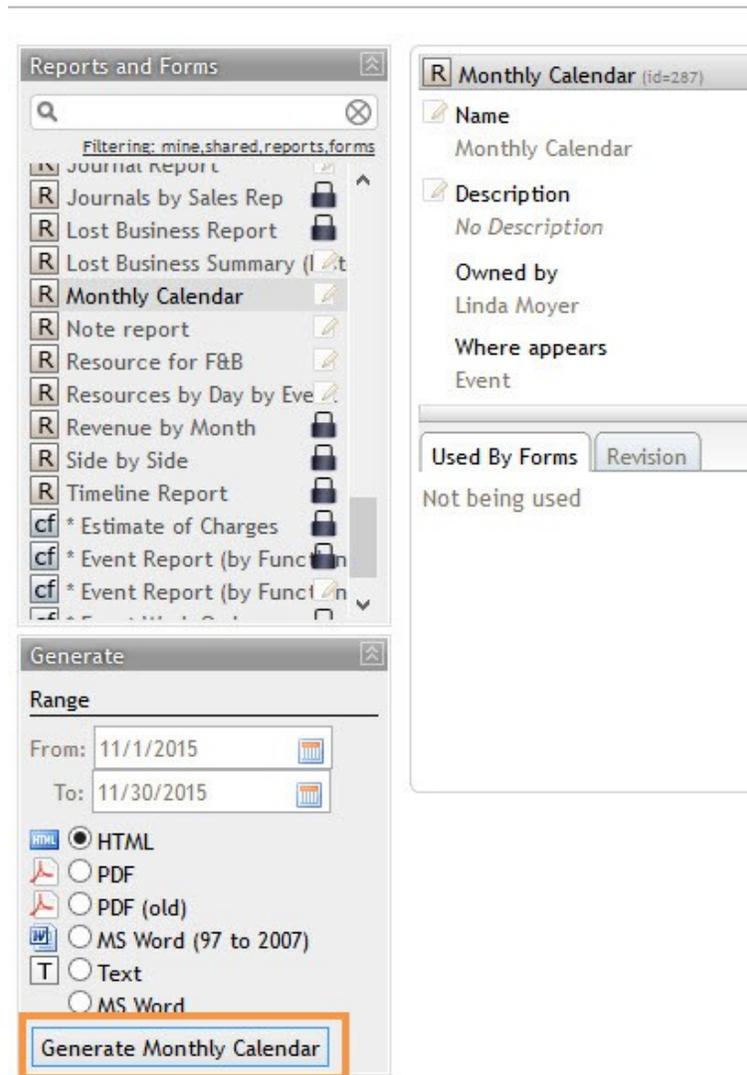
Today: 11/3/2015

4. Choose the format you would like your report to export to. If you would like to email your report, choose HTML. The HTML preview will also allow you to customize the paper size and whether your report will be exported as portrait or landscape.

Note: Not all report formats will export to all file types. For example, in this screenshot we are running a calendar report, thus Excel is not an option. Also, please use PDF. The PDF (old) is for some grandfathered reports.



5. Click *Generate*.



6. Your report has been created! Depending on your browser, you will see a pop up allowing you to save or open the file, or the file will be saved to your downloads folder.

- Just a reminder that depending on the complexity of your report and the length of your date range, the report could take anywhere from a few second to more than ten minutes to run.
- If you chose HTML, a preview window will pop up, from which you can export or email your report, as well as customize the paper size and whether your report will be portrait or landscape.
- To print calendar reports, for best results export to PDF and then print the PDF.