# Reports

When you first log in to your account from the pickAtime home page, you will be in the Admin tool and will default to the **Event Reporting** page within the Admin tool. Reports are divided into two categories: **Event-Specific** and **Account-Specific**.

# Event Specific Reports

Under the Event pull-down, select your PTA event.  On the Event-specific reports, you will see a Dates area where you can enter a from date and a to date. It is only necessary to enter values in these fields if the dates of your event have passed.

You will have the option of the following reports:

## Teachers' Schedule

This shows the appointment schedule for each teacher. Under Additional report fields, the links "Student's contact's field",  "Parent's contact's fields", and "Appointment fields" are available on this report. There will also be a pull-down where you can select the report for a specific teacher name.

You can also check the box "Show All Slots" to review the list of all slots for your teachers.

On the Teachers' schedule, you have the option to email the report to all your teachers or to an individual teacher. In the Teacher pull-down, you can select All or the name of an individual teacher and then select the Email Report button.

## Teachers' appts

This report displays the number of appointments that have been scheduled for each teacher.

## Teachers' slots

This report displays the number of available slots and the total number of slots for each teacher.

## Teacher By Rooms

This will produce a sorted list of all appointments for each room. The report displays the room number, the teacher's name, the time of the appointment, the student's name, and the parent's name. Under Additional report fields, you will see three links: "Parents' contact's fields", "Student's contact's fields", and "Appointment fields". These links can be used to add additional information to the report, such as studentID, parent email address, etc.

In this report, you can check the box "print one per page" to have a page break by room.

# Parents’ Schedule

This will produce a sorted list of the appointments for each parent. Under Additional report fields, the links "Student's contact's field" and "Appointment fields" are available to add additional student and/or appointment information to this report. There will also be a pull-down where you can select the report for a specific parent name.

On the Parents' schedule, you have the option to email the report to all your parents or to an individual parent. In the Parent pull-down, you can select All or the name of an individual parent and then select the Email Report button.

***This report can be sent to the parents**

# Students’ Schedule

This will produce a sorted list of the appointments for each student. Under Additional report fields, the links "Parent's contact's field" and "Appointment fields" are available to add additional parent and/or appointment information to this report. There will also be a pull-down where you can select the report for a specific student name.

***This report can be sent to the students**

# Number of parents and students

This will display the number of parents and students who have appointments in the system. This will be sorted by date if your event spans several days.

# Appointment Histogram

This report shows the number of appointments by date and time.

# Appointment Count by parent

This will provide a list of all the parents who have booked appointments and the number of appointments they have made. Under Additional report fields, the link “Parent’s contact’s fields” is available to add information (such as email address) to this report.

# Appointment Count by student

This will provide a list of all the students where the parent has made an appointment. Under Additional report fields, the link "Student's contact's fields" is available to add student information to this report.

# Students without any scheduled parent-teacher appointments

This will provide a list of all the students whose parents have not made an appointment.

***This report can be sent to the parents**

## Students without any scheduled parent-teacher appointments by class

This will provide a list of all the students whose parents have not made an appointment for a class. If a student is enrolled in 7 classes, and the parent has booked appointments with 5 of the 7 teachers, this report will list the 2 teachers where the parent has not booked an appointment.

***This report can be sent to the parents**

## All Teacher/Team Appointments

This report is similar to the Teachers' Schedule report. However, if you have created any teams of teachers, each teacher will have a master schedule showing all appointments booked with them individually and all appointments booked with them as a team.

## Class Rosters

This report will show the class roster for each teacher/class.

## Appointments by Date/Time

This report will list each appointment by date and time.

## Display only empty (not blocked) slots

This report displays a list of empty slots for each teacher.

# Managing Reports

For every report generated, you have the following options:

- **Format:** Print, Export to XML, or Export to a Tab-delimited file (Excel compatible).
- **Email:** Send the report directly to yourself or others.
- **Save Settings:** If you customise a report (e.g., by adding "Additional report fields"), click **Save Report Settings**. The system will remember these preferences the next time you run the report.
- **Automated Delivery:** Administrators can click **Schedule Report Delivery** to set a date range, time of day, and frequency for automated email delivery.

## Save Report Settings

There is also an option on any report to save the settings for that report. For example, if you add additional fields to your report, such as the email address of the participant, you can now add these fields and then select the Save Report Settings button, and your new selection will be saved. The next time you return to this report, you will see the additional fields displayed.

# Account Specific Reports

To access these, toggle the view to **Account Reports** mode. These cover data across your entire vendor account.

You will have the option of the following reports:

## Settings

The Settings report will list the URL that was automatically created for your online scheduler.

## Account - Invoices and Payments

This report will display the balance on your account. It will also list your invoices and payments. You can click on an invoice # to see the invoice. On any invoice page, you will have the option to pay by credit card.

## Problem Appointments

If there are any "problem appointments" on your account, this report will provide you with a list of these appointments. A "problem appointment" is an appointment that has been placed "on hold". For example, if you delete a slot that had an appointment on it, the appointment is not automatically deleted. The appointment is tagged as a "problem appointment", and you must decide what you will do with this appointment.

## Appointments from all events

This report will display a list of all appointments from all your events.

## Appointments for all Roster events

This report will display a list of all appointments from all Roster events.

## Contacts without appointments

This report will display a list of all the contacts that have logged into your account and have not booked an appointment. The "Contact's fields" link is available on this report to add contact information (ex. email address) to your report.

## List of Admins

This report will display a list of your admins. It will show you the email address that was imported, as well as the Access Level provided to each admin. When teachers are imported, they are automatically given Appointment Viewer access, and this report will also show you the resources (teacher names) that each teacher has access to. To see when your admin(s) last logged in, click the green “Additional Fields” button and then select “Last Logged In.”

## % Full

If you have multiple events, this will show you the percentage of booked slots out of the total available slots.

## Cancelled Appointments

This report lists all cancelled appointments, the date and time the appointment was cancelled, and the email address of the Contact Person who cancelled the appointment.

## Appointment Counts for all Events

This will provide you with the total appointment counts for all your events.

## Resource Mapping

This report shows all the Resources on your events and the contacts (if any) associated with each Resource. For Parent Teacher Conference scheduling, this will allow you to check the connection between assigned contacts (teachers) and Teams.

## Parents without Students

This report displays a list of parents who are not associated with any students.

## Students without Parents

This report displays a list of students who are not associated with any parents.

## Parent-Student Relationship

This report displays a table showing the association between parents and students.

## Scheduled Report Delivery

This report displays the details of your Scheduled Report Delivery settings. This shows the reports you have scheduled for delivery, what the time period is for those reports, who the report is going to, the interval frequency of the report, and when the report was last sent. You can also cancel the Scheduled Report Delivery from here by selecting the delete option next to the report.

## Appointments Summary by Contacts

This report allows admins to see appointments booked by contact(s) on all events across the Vendor account.

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