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 Report

To view data for a single event, use the **Event** dropdown to select your Roster event.

Participant List

This report provides a comprehensive list of all individuals who have registered for the selected event, including any data entered during the sign-up process.

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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