

Programs for Minors CircuiTree Guide

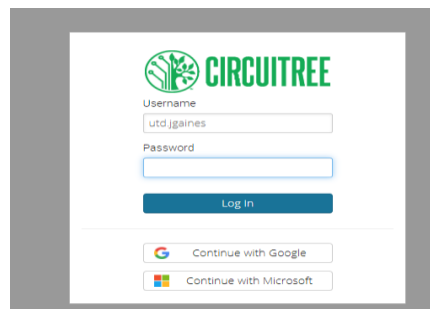
Accessing Queries and Reports in CircuiTree

CircuiTree has a host of reports and queries already setup to assist camp directors with managing their camps, camper information, tracking payments and discounts. All reports have a corresponding query but not all queries have a corresponding report, thus there are more queries than there are reports.

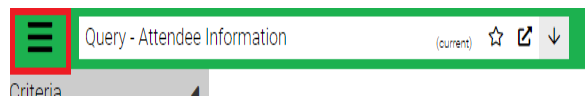
Reports have been formatted to look nice when printed. If you are looking for a listing of information that does not need to be sorted or filtered, a report will work. Queries, on the other hand, can be downloaded to an Excel spreadsheet, which can be sorted and filtered.

To access reports and queries, follow these steps:

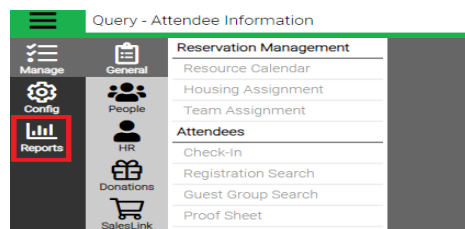
1. Login to the [CircuiTree Admin](#) site.



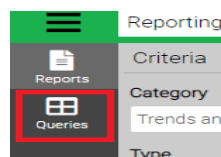
2. Click on the three horizontal, bold lines in the upper left corner of the screen. (Your search will bring up the last page you were on. It does not have to say “Query-Attendee Information” as pictured below.)



3. Select “Reports” from the menu, also in the upper left corner.

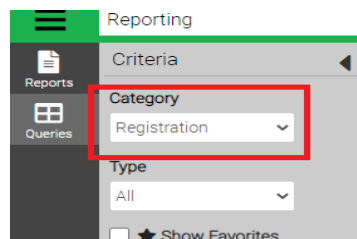


4. Select either “Reports” or “Queries” in the upper left corner.



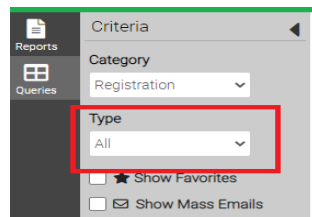
Programs for Minors CircuiTree Guide

5. Click the category dropdown menu. You may leave this blank and pull up reports/queries in all categories or pick a specific category. The categories you will use most often include:
- **Accounting** – Reports and queries that provide detailed information about registrations, refunds and discounts. Examples of Accounting reports/queries camp directors might find useful are:
 - Discounts Given (Report or Query).
 - Payment Audit (Query).
 - Balances Due (Report or Query).
 - Registration Accounting Summary (Query).
 - **Medical** – In-person PACE will use these reports and queries to ensure all participants have a current, signed medical information and release on file. Please note medical forms are not required for virtual interaction with minors. Examples of Medical reports/queries camp directors might find useful are:
 - Missing Medical Forms (Report or Query).
 - Medical Forms by Individual (Report or Query).
 - Medical Forms for Event (Report or Query).
 - Campers with Medical Conditions (Report or Query).
 - Medical Attributes (Report).
 - **Registration** — Reports and queries that provide detailed information about participant registrations. Examples of Registration reports/queries camp directors might find useful are:
 - Attendee – Additional Questions Attributes (Query).
 - Email Addresses for Event (Query)
 - Forms by Event (Query).
 - Missing Legal Terms (Query).
 - Pick-Up Authorization (Query).
 - Registration Detail Export – Campers (Query).
 - Registrations by Month (Query).
 - Roster Export (Query).
 - Signed Medical Forms (Report or Query).
 - Registration List (Report).

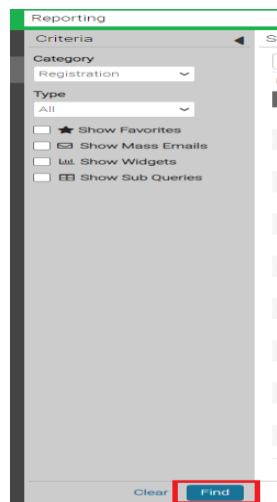


Programs for Minors CircuiTree Guide

6. Select "All" from the Type dropdown menu.



7. Click "Find" on the bottom left corner of the screen.



8. The queries are listed in alphabetical order.

Search Results

Type here to narrow the list of reports

Drag a column header and drop it here to group by that column

	Category	Name	Last Run	Fav	Cus
View	Accounting	Balances Due	08/27/2020	★	
View	Accounting	CircuiTree Billing Statement by Cost Center	07/07/2020	★	
View	Accounting	Discounts Given	04/14/2020	★	
View	Accounting	GL Batch Summary	06/15/2020	★	
View	Accounting	GL Batch Summary by Merchant Batch	05/06/2020	★	

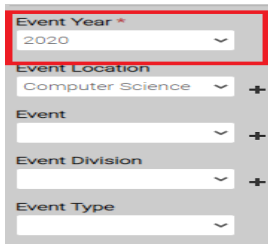
Note: You may mark any report/query as a favorite by clicking the star in the column to the right of the report name. The star will turn black indicating it is marked as a favorite. After step 6 above, you may select "Show Favorites" and only the reports you have marked as a favorite will display.

Programs for Minors CircuiTree Guide

9. After you have identified the report or query you want to view, click “View” to the left of the report/query.

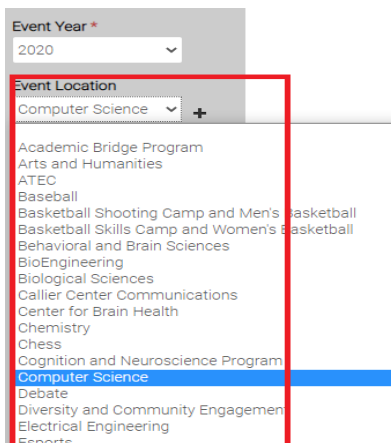
View	-92	Registration	Roommate Request Details
View	-93	Registration	Roommate Requests
View	-187	Registration	Roster Report
View	-352	Registration	Scholarships Given Summary
View	-244	Registration	Shared Activities
View	-334	Registration	Signed Medical Form

10. Change the “Event Year” to the year in which the event takes place.



The screenshot shows a filter panel with several dropdown menus. The 'Event Year' dropdown is highlighted with a red box and is currently set to '2020'. Other filters include 'Event Location' (set to 'Computer Science'), 'Event', 'Event Division', and 'Event Type', all of which have plus signs to the right, indicating they can be expanded.

11. Change the “Event Location” to the area hosting PACE for minors (i.e. Computer Science, Chess, Soccer). You will only be able to see events for the department in which you work.



The screenshot shows the 'Event Location' dropdown menu expanded. The current selection is 'Computer Science', which is highlighted in blue. A red box highlights the entire dropdown menu. The list of options includes: Academic Bridge Program, Arts and Humanities, ATEC, Baseball, Basketball Shooting Camp and Men's Basketball, Basketball Skills Camp and Women's Basketball, Behavioral and Brain Sciences, BioEngineering, Biological Sciences, Callier Center Communications, Center for Brain Health, Chemistry, Chess, Cognition and Neuroscience Program, Computer Science, Debate, Diversity and Community Engagement, Electrical Engineering, and Esports.

12. Event, Event Division and Event Type are optional. These fields can be left blank or they may be used to further narrow down a specific event if a location has several PACE for minors registered.

Programs for Minors CircuiTree Guide

Event Year *
2020

Event Location
Computer Science

Event

- AI/ML/DL Workshop (9 weeks) June 1 - July 31
- Coding Camps Wk1 June 1 - 5
- Coding Camps Wk2 June 8 - 12
- Coding Camps Wk3 June 15 - 19
- Coding Camps Wk4 June 22 - 26
- Coding Camps Wk5 July 6 - 10
- Coding Camps Wk6 July 13 - 17
- Coding Camps Wk7 July 20 - 24
- Coding Camps Wk8 July 27 - 31
- Coding Camps Wk9 August 3 - 7
- Computer Science Private Tutoring
- Cyber Security Advanced (2 weeks) July 20 - July 24
- Cyber Security Fundamentals (3 weeks) June 29 - July 5
- Cyber Security Fundamentals (5 weeks) June 8 - July 14

13. Depending on the report/query you are running, there are other criteria dropdown menus to select that will help narrow down the search to the exact information you are looking for.

Always look at all of the criteria options. If **Registration Status** is one of the criteria options, it is important to make sure it is set for the registration status you want to include. Not setting this option could lead to misinformation regarding the number of participants enrolled in a program. One or multiple registration status options may be selected. The status options are:

- **Blank** – Includes all participants regardless of registration status.
- **Pending** – Participants that have started but have not completed the registration process.
- **Active** – Participants who are currently registered for the event.
- **Waiting List** – Participants who are waiting to join the PACE if space opens up. When all of the seats in an event have been filled (i.e., maximum number of participants are Active), CircuiTree will start a Wait List. As space opens up, camp directors should contact waiting participants in the order they appear to fill the available seats.
- **Canceled** – An Active participant has requested to cancel their registration and receive a refund.
- **Pending Wait List** – Programs that have an approval process for participants to join the program (i.e. teacher recommendation required, essay required, prior classes completed, etc.) may use the Pending Wait List to approve qualified participants to be in the program.

14. Once the criteria for the report/query have been selected, click “Find” at the bottom of the criteria menu on the left side of the screen.

Criteria

Event Year *
2020

Event Location
Computer Science

Event

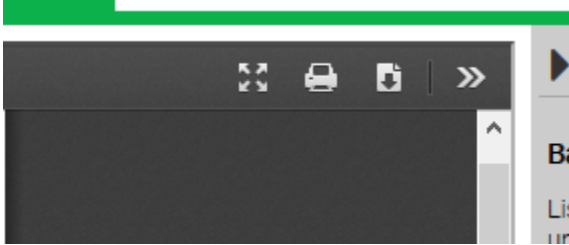
Event Division

Event Type

Clear Find

Programs for Minors CircuiTree Guide

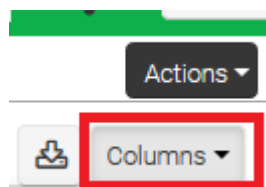
15. CircuiTree will populate the information that meets the criteria selections.
16. Reports may be downloaded or printed by using the menu on the top right corner of the report.



Queries may be downloaded to an Excel worksheet by clicking the “Actions” button in the upper right corner of the screen. Downloading to Excel will allow you to sort the data in various ways. If some of the information you are looking for is not included in the query, contact the Programs for Minors Office and we will help you add the information you need.



17. Camp directors also may create custom queries to include information that is unique to their camp. Additional information can be added to any Query by clicking the Columns dropdown button in the top right corner of the screen, under the Actions button.

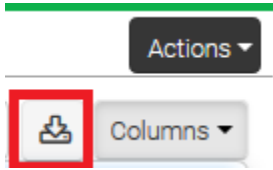


All of the Columns programmed to populate for the existing query will be in the top section of the dropdown with a check in the box next to the information item. Additional columns that can be added are listed in the bottom section of the dropdown list. Check the box next to the information you want to include in the downloaded query. After selecting the additional information, click the Refresh button on the top left corner of the screen.



Programs for Minors CircuiTree Guide

Select the query you added the additional columns to again and click Find. The additional data set will be added to the end of the query displayed. The additional columns will be saved, so you do not need to add them each time you want to run the custom query. To download the custom query to Excel, click the download button to the left of Columns button.



You can still download the original query without the added data by selecting the Actions button and downloading to Excel.