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.
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).
6. Select “All” from the Type dropdown menu.

![Type dropdown menu](image)

7. Click “Find” on the bottom left corner of the screen.

![Find button](image)

8. The queries are listed in alphabetical order.

<table>
<thead>
<tr>
<th>Category</th>
<th>Name</th>
<th>Last Run</th>
<th>Fav</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>Balances Due</td>
<td>08/17/2023</td>
<td></td>
</tr>
<tr>
<td>Accounting</td>
<td>CircuiTree Billing Statement by Cost Center</td>
<td>07/07/2023</td>
<td>★</td>
</tr>
<tr>
<td>Accounting</td>
<td>Discounts Given</td>
<td>04/14/2023</td>
<td>★</td>
</tr>
<tr>
<td>Accounting</td>
<td>GL Batch Summary</td>
<td>05/15/2023</td>
<td>★</td>
</tr>
<tr>
<td>Accounting</td>
<td>GL Batch Summary by Merchant Batch</td>
<td>05/16/2023</td>
<td>★</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>View</th>
<th>Registration</th>
<th>Roommate Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>-92</td>
<td>Registration</td>
</tr>
<tr>
<td>View</td>
<td>-93</td>
<td>Roommate Requests</td>
</tr>
<tr>
<td>View</td>
<td>-107</td>
<td>Registration</td>
</tr>
<tr>
<td>View</td>
<td>-352</td>
<td>Registration</td>
</tr>
<tr>
<td>View</td>
<td>-244</td>
<td>Registration</td>
</tr>
<tr>
<td>View</td>
<td>-334</td>
<td>Registration</td>
</tr>
</tbody>
</table>

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

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.

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.
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.
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 programed 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.
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.