HealthStream Community

CloudCME - Registrations Report

Revised: 7/10/2023

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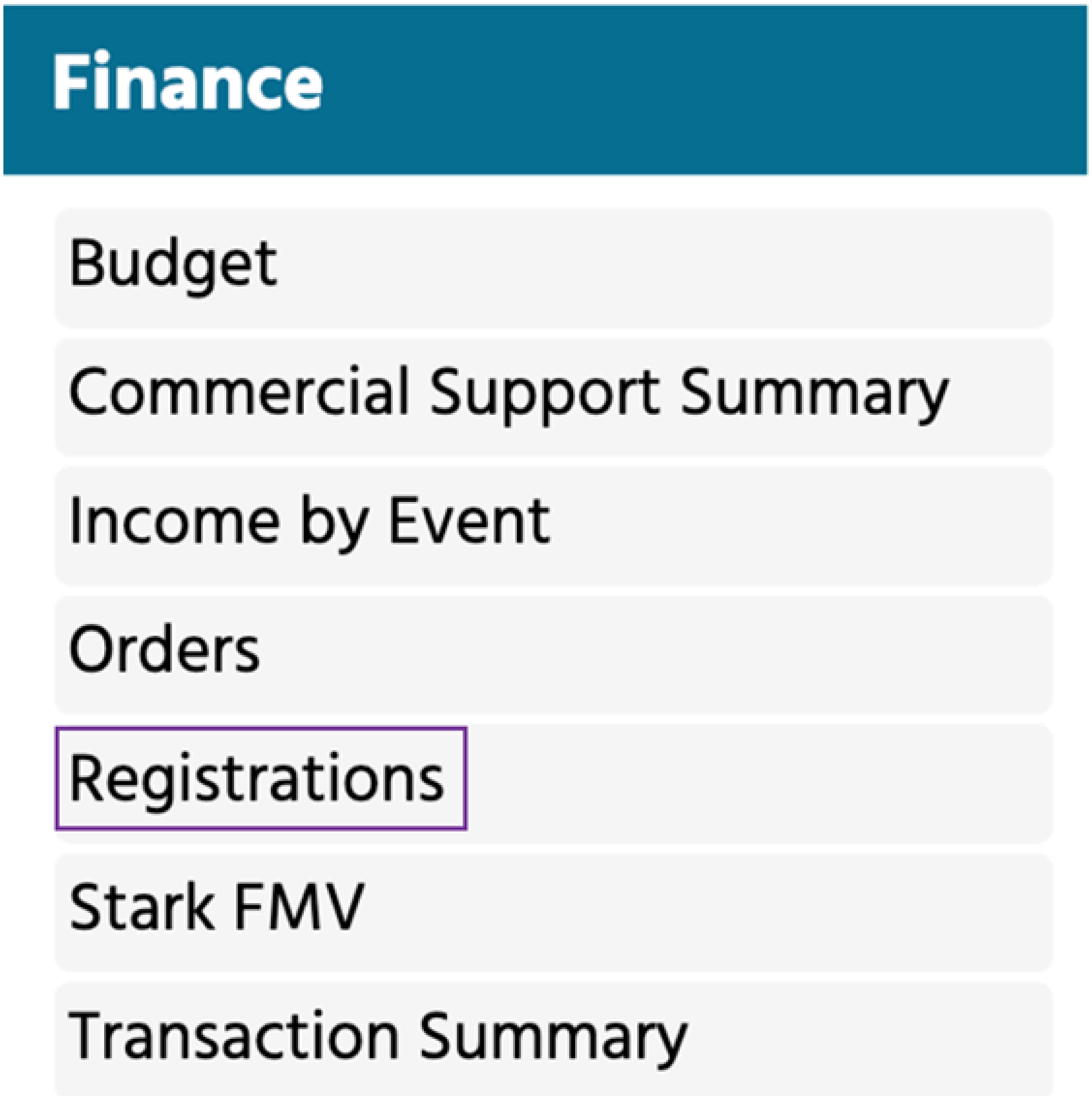
Registrations Report

The Registrations report allows users to view registration information, email registrants, and print badges or sign-in sheets for an activity. The Automated Reporting Settings can be used to email the Registration report to individuals on a regular basis (see the end of this article).

To access the reports from the Main Menu, go to **Reports > Finance > Registrations**.



View a Registration Report

Search and select an activity from the drop-down list. The **Select Event** drop-down will list all current, active activities setup in CloudCME®. The page will refresh and display all of the paid registered users for that specific activity, grouped by the product ordered then sorted by date ordered.

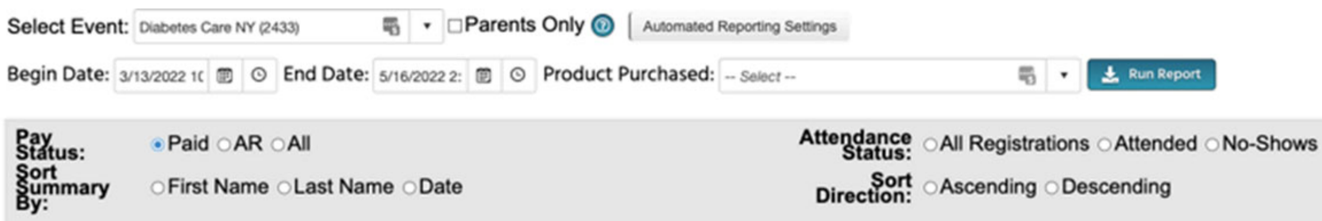
The data displayed in the summary can be changed to show "Unpaid" registrants by selecting **AR** (Accounts Receivable), meaning no payment has been received. Both paid and unpaid registrants can be viewed by selecting **All**.

Once the activity has ended and attendance has been recorded, you can filter the registration report by **Attendance Status**:

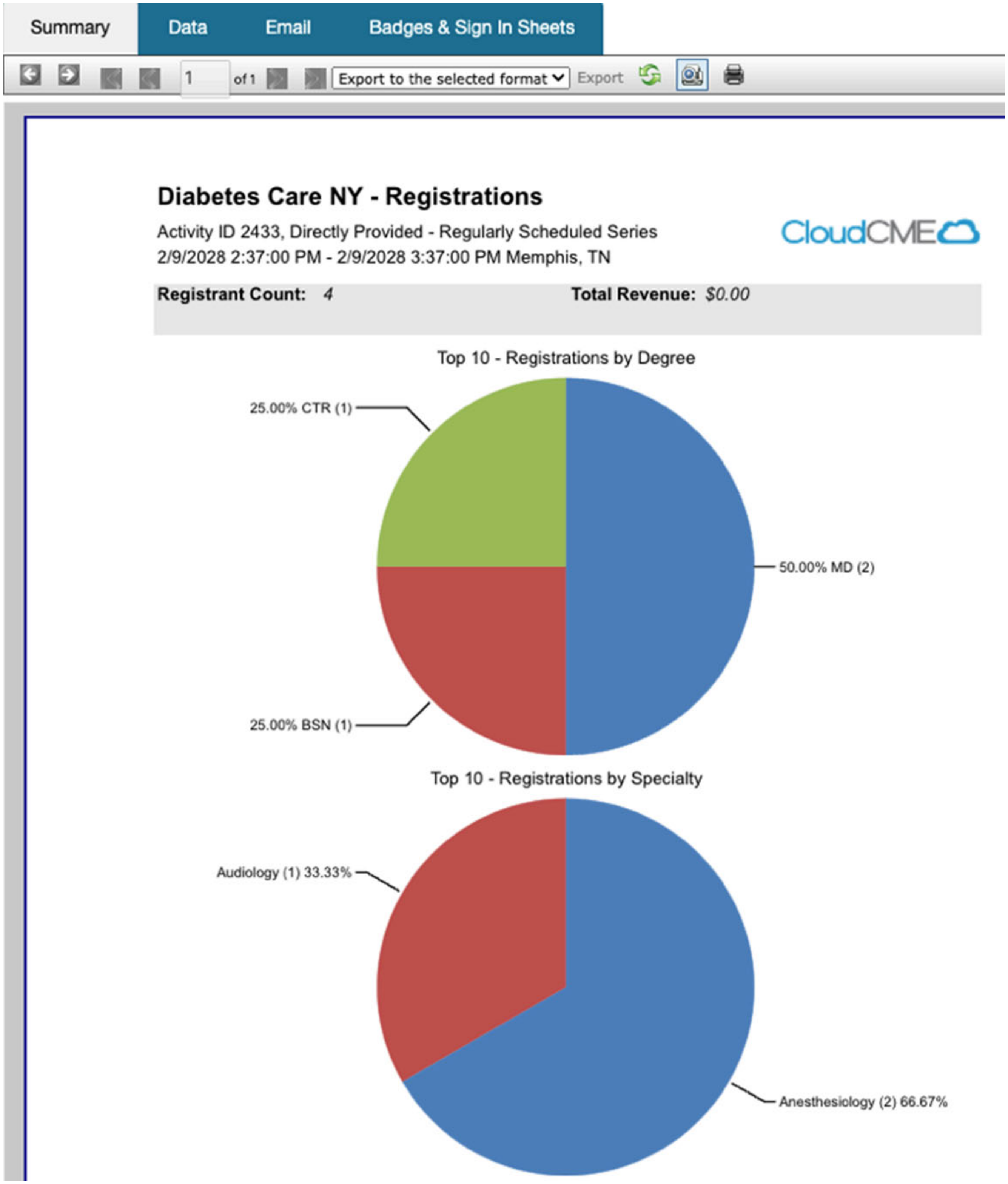
- **All Registrations** - shows all registrations regardless of attendance

- **Attended** - filters the report by only those with a PAID order that have attendance recorded for the activity.
- **No Shows -** filters the report by only those who have an order but DO NOT have attendance recorded for the activity.

NOTE: By default, the registration report shows only **paid** registrants.



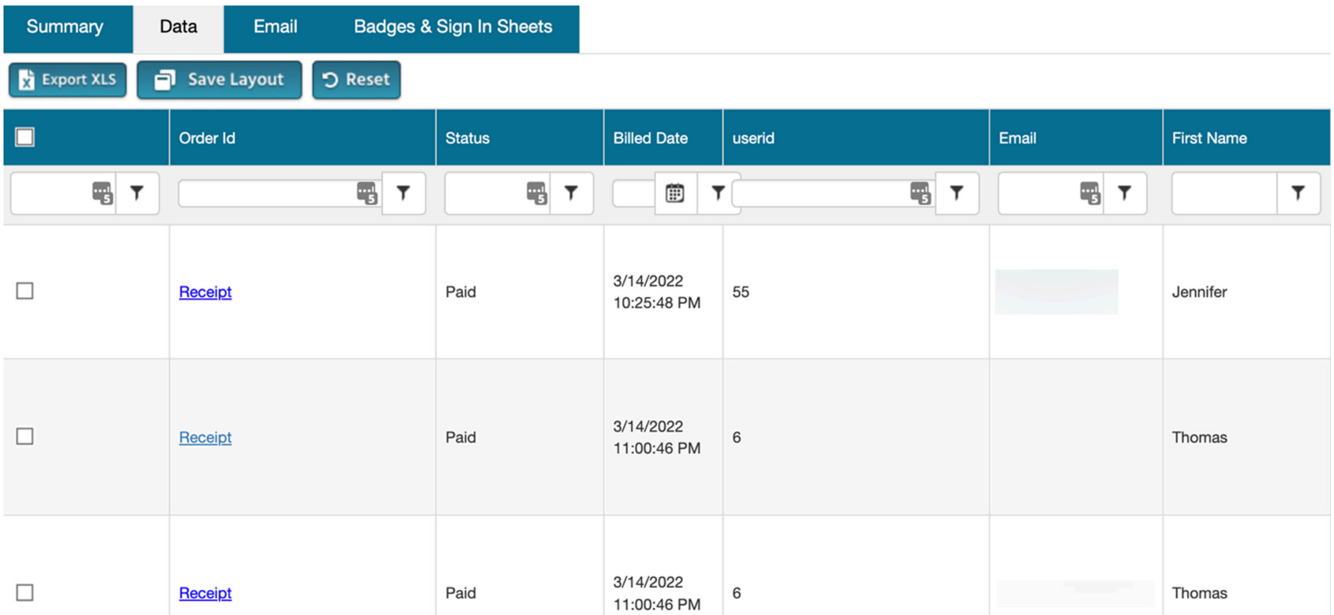
The page will refresh and display all of the paid registered users for that specific activity, grouped by the product ordered then sorted by date ordered.



NOTE: The chart displays the top 10 degrees for the activity.

View Data and Export to Excel

All registration data is visible on the **Data** tab (by default, this will show PAID orders). From the Data tab, users can view, print, or email receipts for registrants by clicking the **Receipt** link. Data can also filtered by using the available options: choosing which columns to display, arranging the columns in a specific order, and/or filtering the data using the built-in filters. The layout can be saved by clicking **Save Layout** (columns, arrangement, filters) and data can be exported to Excel by clicking the **Export XLS** button. The tabs of the Registration report will reflect selections that were made within the **Product Purchased** filter.



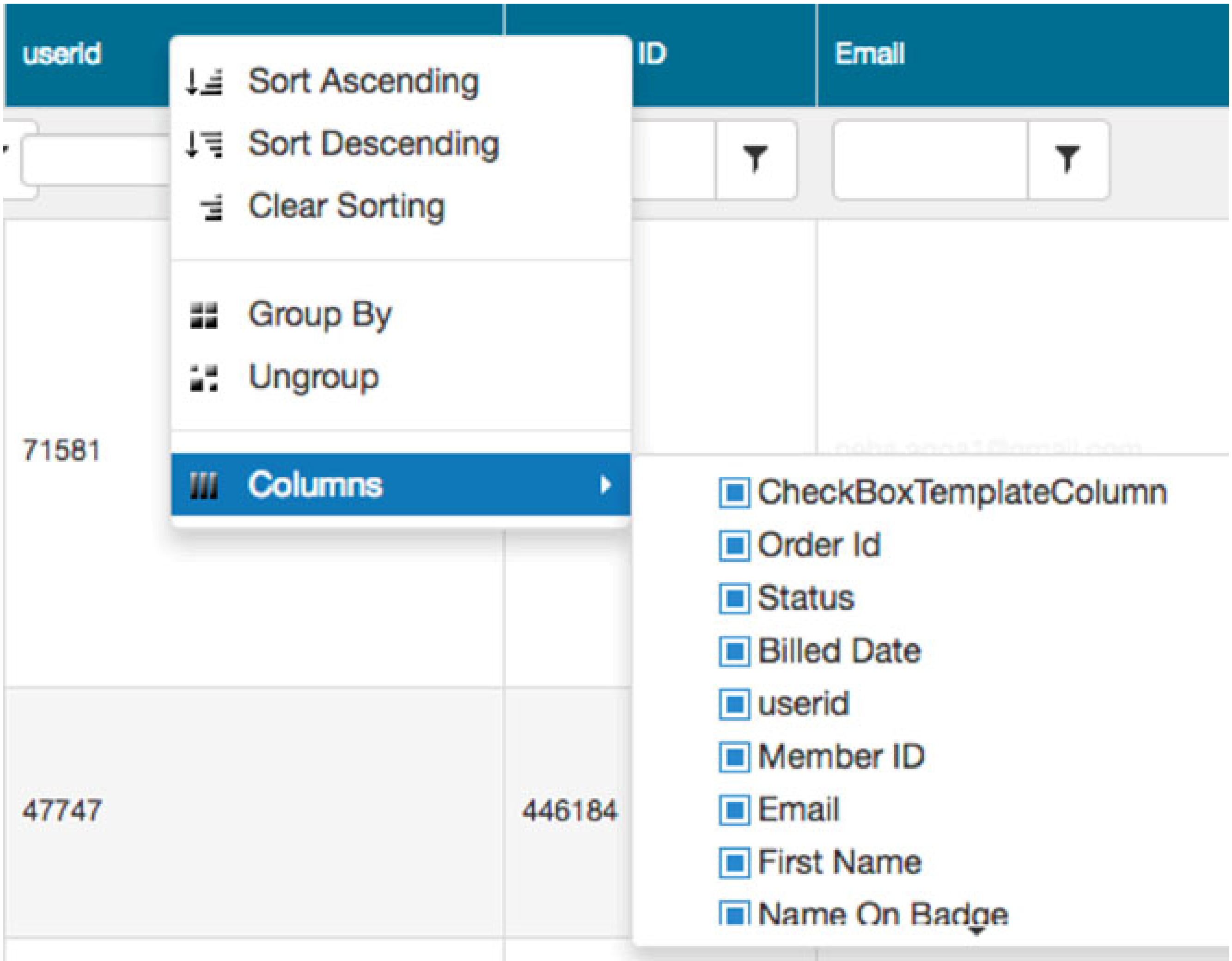
NOTE: When exporting to Excel, if you want to see all data, make sure to remove any filters.

Choose Columns to Display

1. Right-click on any column and deselect/select columns to be visible on the **Data** tab.

2. Save the layout (so only those columns are visible in the report) by clicking **Save Layout**.

To reset the layout, click **Reset**.



Arrange Columns in a Specific Order

1. Drag columns left or right to move them into an order that is most beneficial.

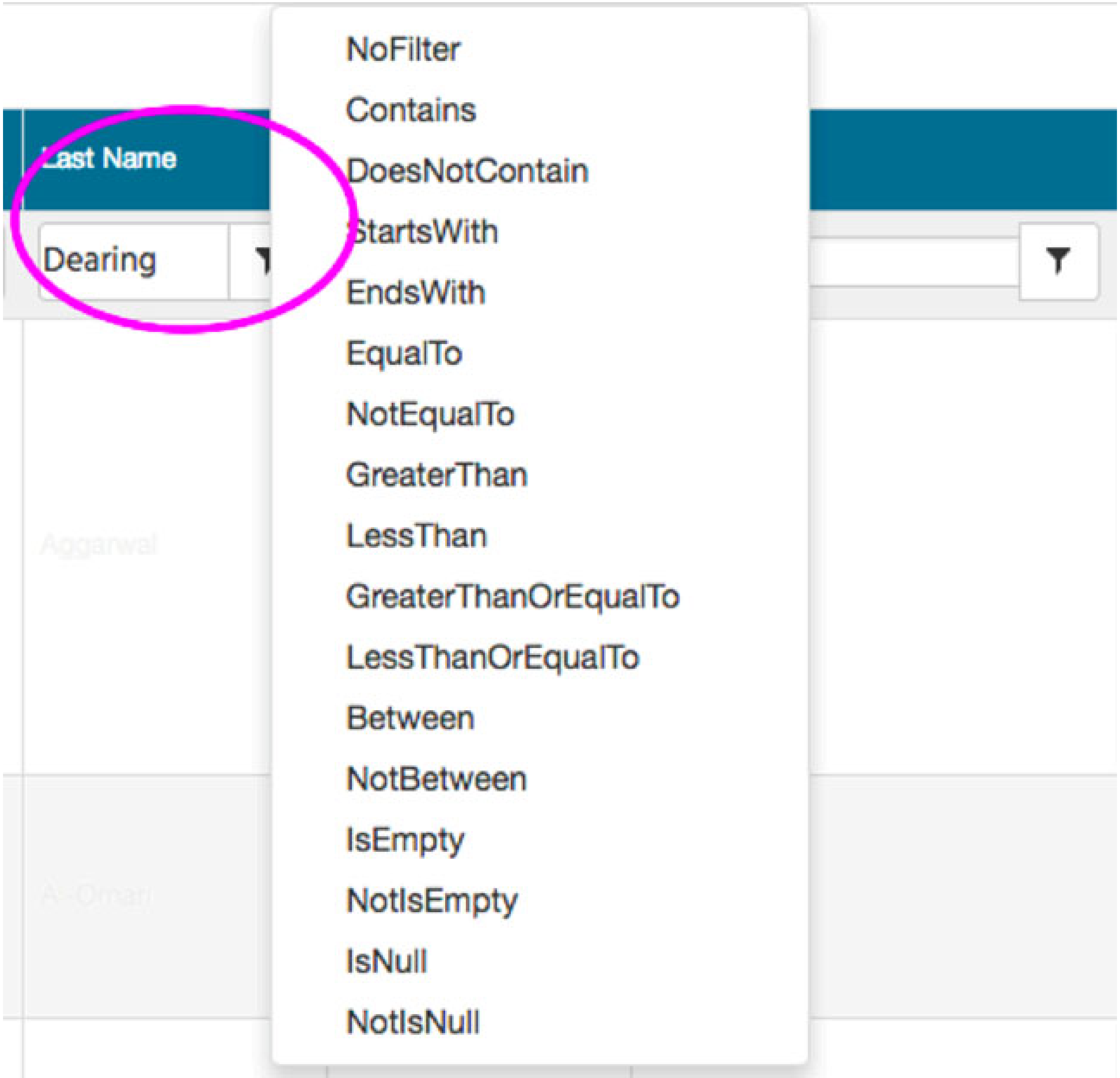
2. Save the arrangement of the columns by clicking **Save Layout**.

To reset the layout, click **Reset**.

Filter Columns

Filter the data displayed by using the built-in filters on the columns. For example, if the list of registrants will be filtered by a specific last name, type the last name in the field at the top of the **Last Name** column, click the funnel, and select **Contains**. The screen will refresh and display only those individuals with that last name or, if there are no results, will indicate there are no matches. More than one column can be filtered.

NOTE: To reset the list (so it is not filtered) locate the column(s) with the applied filters and click the funnel again. Select **No Filter**. This will need to be done for all filtered columns.



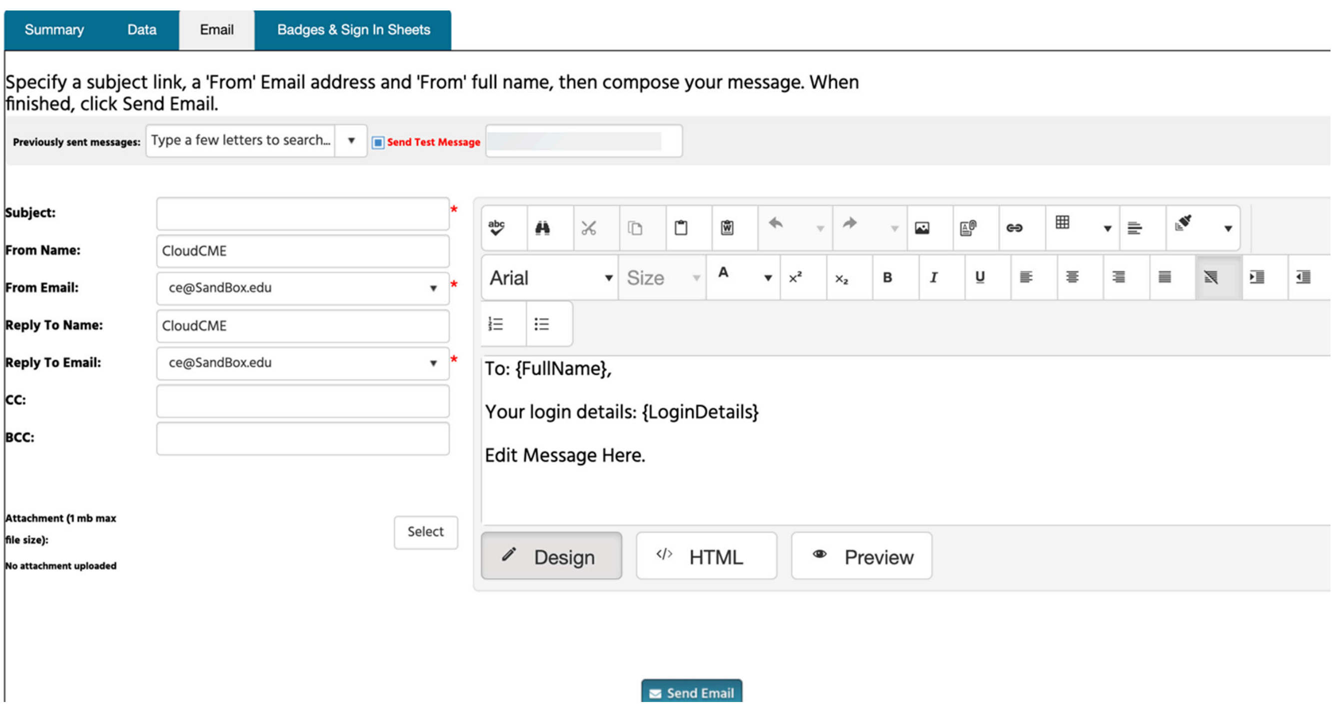
Emailing Registrants

1. Before emailing registrants, they must be selected on the **Data** tab*.* Check the **Select All** checkbox (at the top of the table) to select all the registrants.

	Order Id	Status	Billed Date	userid	Email	First Name
	Receipt	Paid	3/14/2022 10:25:48 PM	55		Jennifer
	Receipt	Paid	3/14/2022 11:00:46 PM	6		Thomas
	Receipt	Paid	3/14/2022 11:00:46 PM	6		Thomas

2. Once the registrants are selected, click the **Email** tab.

3. Fill in the content of the email, and then click the **Send Email** button. Once the emails are sent, the table at the bottom of the screen will display how many emails have been sent.

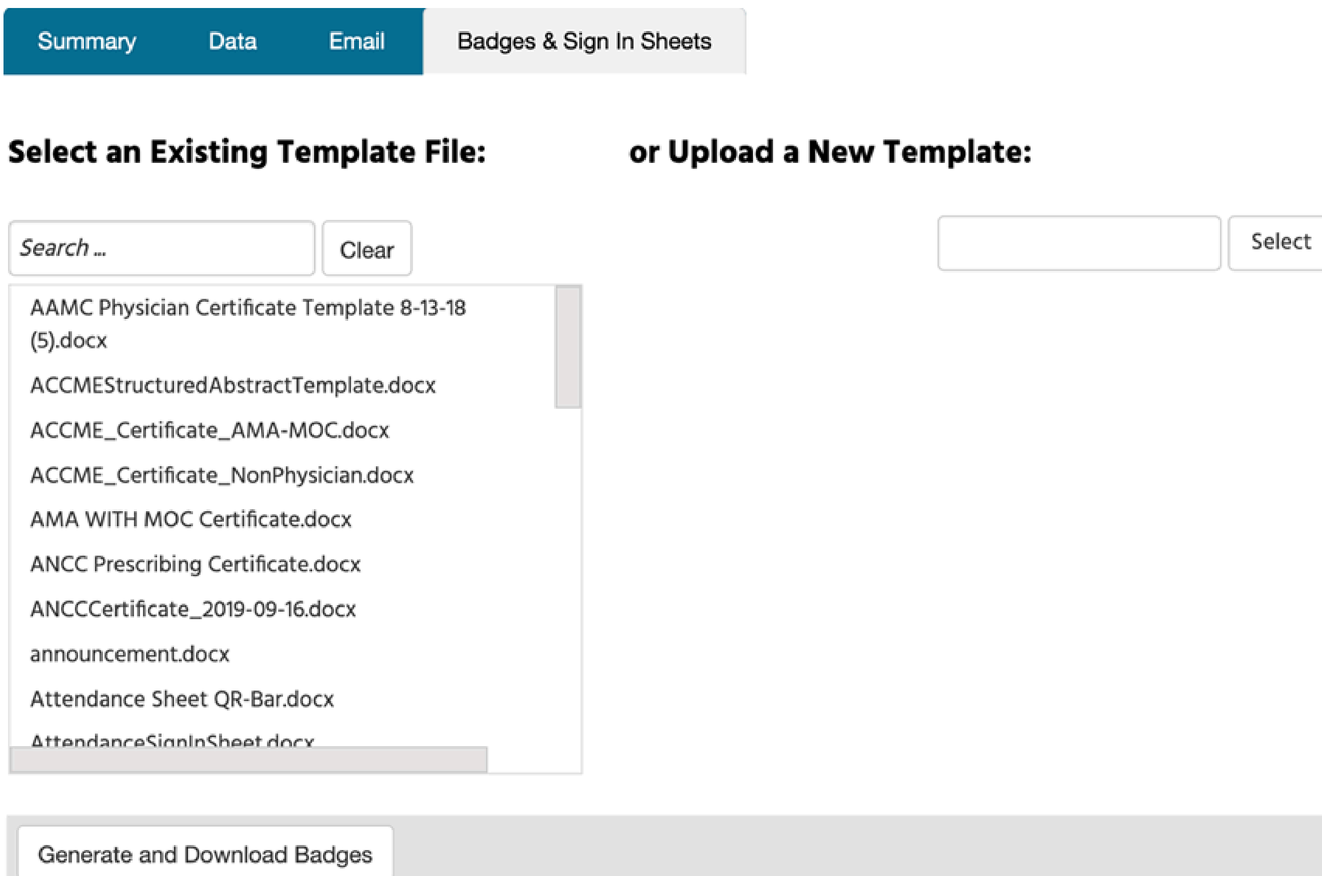


NOTE: When sending emails, it is *highly recommended* that you send yourself a test message *before* sending emails to users.

Exporting Badges

NOTE: Before printing badges for registrants, registrants **must** be selected on the **Data** tab. Check the "**Select All**" checkbox (at the top of the table) to select all the registrants. To select specific registrants based on registration type, or other criteria, use the filters to refine the records displayed on the screen and select those records.

1. Once the registrants have been selected, click on the **Badges & Sign In Sheets** tab.



CloudCME® provides a badge template, which will be listed in the **Select an Existing Template File** area. The template is usually named "BadgeTemplateMaster.docx" or "BadgeTemplateMasterWithLogo.docx" and is designed from the Avery template with 6 badges per sheet.

2. Select the appropriate badge template and, if scanning attendee badges using the CloudCME® mobile app, select **QR Code**, then click **Generate and Download Badges** to create the badges.

3. Upload a New Template allows users to create a badge template (to match specific badges that will be used). The user will click the **Select** button and choose the appropriate template saved on their computer.

4. Click the **Generate and Download Badges** button.

Creating the Badge Template File

In Microsoft Word, create a template by going to **Tools > Labels** and select the specific label format by clicking **Options**. Select one of the pre-defined Avery or other vendor labels.

Mail merge fields must be added. If you have not used MS Word merge fields before, review the Microsoft help.

NOTE: Users cannot type a merge field into the document, it must be inserted. To insert a merge field, select **Insert > Field > Mail Merge > MergeField**. After the word "MergeField", enter a space followed by the field name.

Inserting QR Codes into a badge

QR codes can be inserted into a badge. A special merge field will need to be inserted as follows:

*MERGEFIELD **Image:UserID***

In this example, **Image:** instructs the system to add in a QR code image and **UserID** is the value that will be used for the bar code. Also, you can use UserID, OrderID, or MemberID – any numeric field, depending on your particular requirements.

NOTE: If you do not want QR codes to show on the badges, remove the *MERGEFIELD Image:UserID* from the Badge or Sign-In template you are using.

Uploading the Template File

The template file needs to be loaded to the server in order to be used. The **Badges and Sign-In Sheets** tab on the Registration report includes an optional Upload functionality.

Select a file, browse on your computer or network, and click **Upload Word Template**. The uploaded file (*Microsoft word .doc or .docx formats only*) will be displayed in the list. Auto-select and a prompt will appear indicating you are ready to generate badges. Upload and over-write existing files, if needed, to adjust layouts or change to a different label template.

Generating Badges

Once the activity, registrants and template have been selected, click **Generate and Download Bar Codes.** When complete, a Microsoft Word file will auto-download in your browser and can be found in the download folder. It is common that fonts need to be adjusted or other formatting changes need to be made.

Creating Badges for a Select Group of Registrants

Using the filter options in the data table, narrow the registration list to a select group, such as one day attendees, Faculty or any other criteria. Modify the date ranges or select a specific product in order to narrow the registration list. As long as your users' rows are selected on the **Registrants** tab, they will be part of the badge output.

Creating Automated Reports

This report can be automatically emailed to individuals using the **Automated Reporting Settings** button.

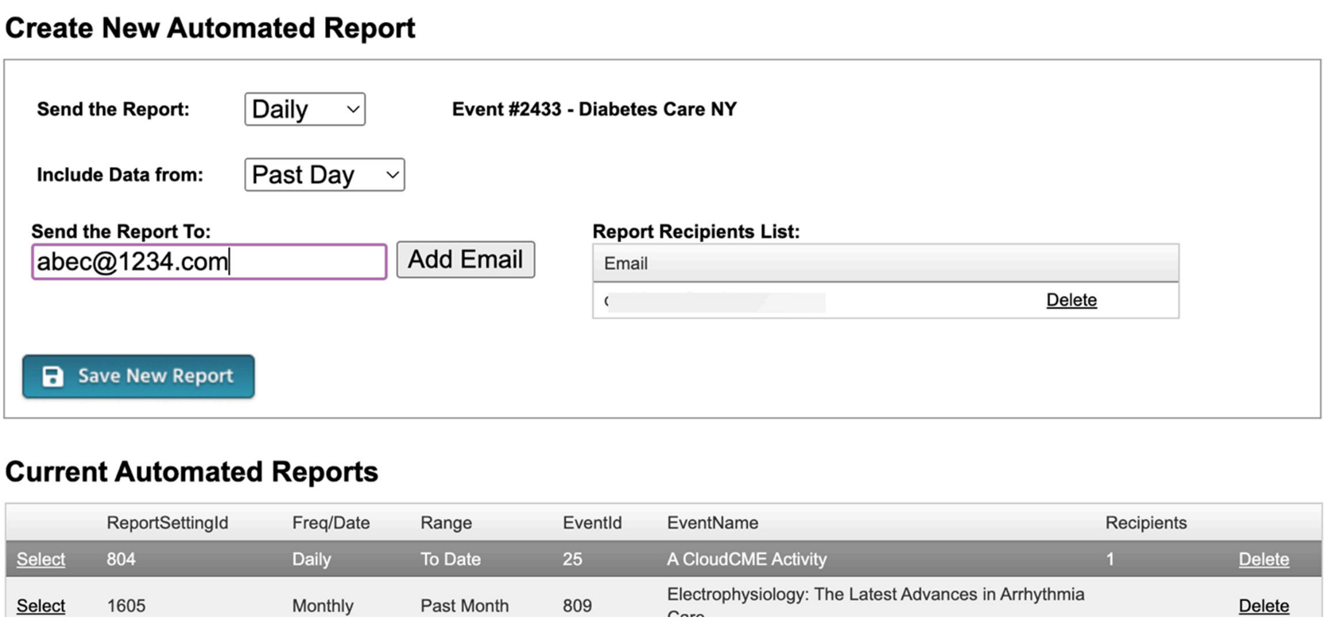
NOTE: Email addresses must be valid and must be associated with CloudCME® profile in order for the report to be sent.

1. To create a new automated report, in the **Send the Report** drop-down list, set the report frequency to **Daily**, **Weekly** or **Monthly**.

2. In the **Include Data from** drop-down, choose the data time frame for the report (**Past Day**, **Past Week**, **Past Month** or **To Date**).

3. Enter the valid email addresses that are associated with a CloudCME® profile in the **Send the Report to:** section and click the **Add Email** button.

4. Then, click the **Save New Report** button. The report will display in the **Current Automated Reports** section below.



5. To add an email address to an *existing* automated report, first click **Select** next to the report in the **Current Automated Reports** section, and then click **Add Email**. The user will be added to the existing automated report.

To delete an automated report, click **Delete**.

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