



# ProVenue<sup>®</sup> Reporting Portal:

*User Guide*

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## Introduction

Welcome to the *ProVenue® Reporting Portal Version User Guide*. This document contains information about using the ProVenue Reporting Portal to...

- run, schedule, and view reports.
- search for reports and report output.
- save report parameter values as "Report Versions" for later use, and use Report Versions to run reports.
- change the Agency governing your reporting session (to report on a different set of events, for example).

## About the Product

The ProVenue Reporting Portal provides a streamlined alternative to accessing reports from the core ProVenue ticketing system. For example, the Reporting Portal allows users without general access to the ticketing system to generate/view reports from a mobile device such as a tablet.

In addition to running preconfigured reports, the Reporting Portal allows authorized users to design/run custom reports via the Ad Hoc Editor, and view event-based report data via a "dashboard" interface.

## Standard (Preconfigured) Reports

The Reporting Portal provides various "standard" reports—reports created by Tickets.com that offer a pre-defined set of reporting options.

Many of the standard reports are adaptations of legacy reports that are available in the core ProVenue ticketing software, while other reports are only available in the Reporting Portal. Note that many of the adapted legacy reports have been enhanced with new features that are exclusively available in the Reporting Portal.

At the *Reports Repository* screen (described below), the ● symbol identifies standard reports.

For general users, the Reporting Portal provides the following standard reports:

<i>Combined Audit</i>	<i>Event Sales Summary Crosstab (Transaction Date)</i>
<i>Credit Export (Closing Date)</i>	<i>Event Sales Today and Cumulative</i>
<i>Cumulative Sales by Date</i>	<i>Event Sales Today and Cumulative Export</i>
<i>Cumulative Sales by Date Export</i>	<i>Event Seat Status</i>
<i>Event Count</i>	<i>Location Count</i>
<i>Event Cumulative Totals Export</i>	<i>Market Type Distribution</i>
<i>Event Profile Dashboard</i>	<i>Marketing Source Summary</i>
<i>Event Sales by Price and Buyer (Cumulative)</i>	<i>Marketing Source Summary Export</i>
<i>Event Sales by Price and Buyer (Transaction Date)</i>	<i>Receivables Export (Closing Date)</i>
<i>Event Sales by Price or Buyer (Cumulative)</i>	<i>Scan Media Summary</i>
<i>Event Sales by Price or Buyer (Transaction Date)</i>	<i>Single Event Audit</i>
<i>Event Sales Summary (Cumulative)</i>	<i>Ticket and Service Charge Audit (Standard)</i>
<i>Event Sales Summary (Transaction Date)</i>	<i>Ticket and Service Charge Audit (Wide)</i>
<i>Event Sales Summary by User</i>	<i>Ticket and Service Charge Export</i>
<i>Event Sales Summary Crosstab (Cumulative)</i>	<i>Ticket Delivery Summary</i>

## Dashboards

The Reporting Portal provides the ability to view report data via a "dashboard" interface. A dashboard displays report information in a way that is easy to read and analyze. For example, a dashboard can display metrics from multiple reports in a single on-screen interface, using interactive charts, tables, and lists.

Dashboards display different types of output data (sales data and inventory data, for example) on a single screen. Output data is refreshed at a predefined interval allowing you to monitor changes to data as they occur.

The ProVenue Reporting Portal includes the *Event Profile Dashboard*, which displays detailed information for a single Event. For more information, refer to [Event Profile Dashboard](#).

## Ad Hoc Reports

In addition to the standard (preconfigured) reports described above, you may have the ability to run one or more custom ("Ad Hoc") reports. For more information, refer to [Product Access & Data Security](#) (below).

Note that only users with report design permissions can create Ad Hoc reports using the Ad Hoc Editor. For more information about creating custom reports, refer to the *ProVenue® Reporting Portal: Ad Hoc Editor Reference Guide*.

## Time Zone/Timestamps for User Interface & Reports

Your ProVenue environment's time zone determines...

- the display of user interface elements, such as a date-related user selection or the 'Created Date' for a report. For related information, refer to [Relative Date Range Parameters](#).
- the timestamp displayed on report output.

## Product Access & Data Security

Your implementation determines the exact features and reports to which you have access. Consequently, users in your organization may not have access to some of the reports or report design features presented in this document.

## Access to the Reporting Portal

You can access the Reporting Portal via a standard web browser, using the web address (URL) that is specific to your organization and user group, and the login information provided by your Tickets.com representative.

Logins for the ProVenue Reporting Portal are synchronized with the ProVenue ticketing system, allowing authorized users to create the logins in either system.

For example, a ticket seller who is also allowed to run reports uses their ProVenue ticketing system credentials to log into the Reporting Portal. Similarly, ProVenue records credentials created in the Reporting Portal for a promoter or comparable user without access to log into the ProVenue ticketing system.

A connection to the Tickets.com **Virtual Private Network (VPN)** is not required.

## Access to Reports

Your organization has at least one user with administrator privileges for the Reporting Portal.

Your administrator determines access to individual reports (including the *Event Profile Dashboard*), Ad Hoc views if any, and other reporting components on a per-user group basis.

For example, your administrator determines the exact set of standard reports and/or Ad Hoc reports you are permitted to run, the degree to which different users have access to different sets of reports, and the report(s) available to any promoter or other third party permitted access to your organization's ticketing data.

For more information, refer to the *ProVenue® Reporting Portal: Administrator Guide*.

## Report Data Security

For both standard (preconfigured) and Ad Hoc reports (if any), the [Agency](#) governing your Reporting Portal session determines the ticketing data available to you.

For example, to report on an event, your user account must belong to an Agency that has been associated with the event's Supplier in ProVenue.

Additional security for Event data is provided by the 'Event Access' settings as defined in ProVenue, including calendar-based permissions defined via the Report Calendar.

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### Notes:

ProVenue 'Report Access' settings do not affect your access to reports in the Reporting Portal.

Reporting Portal administrative users have the ability to further restrict your access to specific reporting "domains." For more information, refer to the *ProVenue® Reporting Portal: Ad Hoc Editor Reference Guide*.

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## Security for Liability (Credit) and Receivable Data

The Reporting Portal provides you with Open Item Liability data (account credits) via the *Credit Export (Closing Date)* report, and Open Item Receivable data via the *Receivables Export (Closing Date)* report based on the Agency governing your Reporting Portal session and the ProVenue Organization to which it is assigned.

For example, when running the *Credit Export (Closing Date)* report, the system only displays Suppliers that are associated with the ProVenue Organization that 'owns' the Agency governing your Reporting Portal session.

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**Note:** Reporting on any Open Item Liability Type or Open Item Receivable Type requires "Read" access to the Liability/Receivable Type, as well as "Read" access to the Patron Account.

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## Agency Permissions in the Reporting Portal

In ProVenue, a user can belong to multiple Agencies, each Agency applying different security/permission settings to its users.

Your reporting session is governed by the permissions defined in ProVenue for your user account within the context of a specific Agency.

If your user account is associated with more than one Agency in ProVenue, you can [change the Agency](#) governing the current reporting session at any time—via the *View > Agency* menu option.

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**Note:** By default, your reporting session is governed by the Primary Agency assigned to your user account in ProVenue.

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If you are setting report parameters in real time (as opposed to scheduled reports or saved parameters—see below), the selected Agency determines the following for both preconfigured reports and (authorized users) Ad Hoc reports:

- The values available for selection when specifying report parameters. For example, you can only specify a particular Supplier for most reports if your session's Agency is associated with that Supplier in ProVenue.

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**Note:** For more information on selecting a Supplier for the *Credit Export (Closing Date)* and *Receivables Export (Closing Date)* reports, refer to [Security for Liability and Receivable Data](#) above.

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- The events included in report output. For example, if you use a start and end date to include a range of events, report output only contains events in the range that are accessible to the Agency governing your Reporting Portal session.
- Event Report Calendar security. For example, a user within the context of a specific Agency might only be permitted to report on an event for a set period of time, with access to the event being prevented outside of that time range.

Adjustments to user/Agency related settings in ProVenue affect your access to data in the Reporting Portal.

### Agency Retained for Scheduled Reports & Report Versions

Scheduled reports and saved parameter values ("Report Versions") retain the permissions of the Agency that is governing the session at the time the scheduled report/Report Version is created. The Agency in place at that time...

- determines the events, Buyer Types, Suppliers, etc. that are available (or saved) as input parameters.
- determines the data that is reportable later, in the output of all corresponding job run(s).
- is identified, view-only, on all tabs at the *Schedule* interface when creating/editing the scheduled report.

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**Note:** To schedule a report using the data access configured for a particular Agency, first ensure that the reporting session is being governed by the desired [Agency](#), and then [create the scheduled report](#). Once a scheduled report has been saved, its Agency assignment cannot be changed, and a user logged in under a different Agency cannot edit the job.

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### Roles

"Roles" define a user's access to specific items within the Reporting Portal. Roles also define whether a user has access to the Ad Hoc Editor to create and edit Ad Hoc reports. For example, the role assigned to user "A" may grant permission to run Ad Hoc reports, while the role assigned to user "B" may grant permission to both create and run Ad Hoc reports.

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**Note:** The creation and configuration of Roles is performed by an authorized Tickets.com representative.

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### Software & Hardware Compatibility

The ProVenue Reporting Portal supports the following platforms, web browsers, and devices:

ProVenue version 3.1 and higher	Internet Explorer® version 11
Datamart version 2.3 and higher	Google Chrome™ 6.0 and higher
Adobe Acrobat® 7 and higher	Mozilla® Firefox® 3.6 and higher
Adobe Flash® 8 and higher	Apple® Safari® 4.0 and higher (including iOS®)
Java™ 1.6.0_2 and higher	

Support for mobile devices (such as iPad® and Android™ tablet devices) is provided on the basis of browser capability.

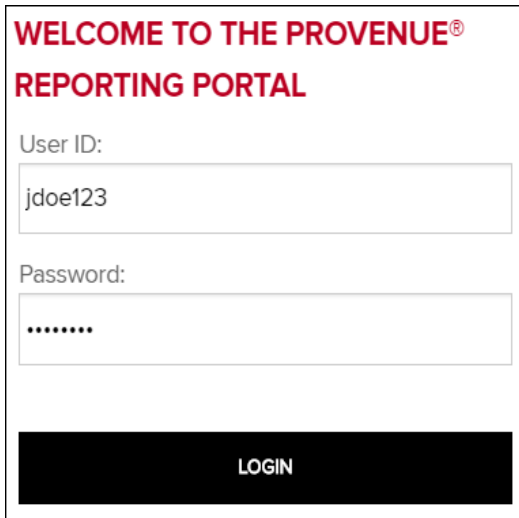
## Getting Started

This document section provides general information about the Reporting Portal interface, including the login procedure and an overview of the options displayed at the *Home* and default *Reports Repository* screens.

## Logging In

To access ProVenue Reporting Portal features...

- navigate to the web address (URL) provided by Tickets.com or by an Administrative user for your organization.
- log into the system as described below.



Type your 'User ID', and 'Password' in the provided fields.

Your username/password is the same as your username/password for the ProVenue ticketing system.

The fields at the *Login* screen are case-sensitive.

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**Note:** Your specific configuration may display an 'Organization' field in addition to the 'User ID' and 'Password' fields. In this case, you are required to enter the name of your organization.

Typically, the URL provided by Tickets.com includes a client-specific organization and the 'Organization' field is not displayed at the *Login* screen. In any case, note that the 'Organization' element required for logging into the Reporting Portal is not related to 'Organizations' as defined in the ProVenue application.

Contact your Tickets.com representative for more information.

A successful login displays the *Home* screen (see image on next page).

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**Note:** If your user account is associated with more than one Agency in ProVenue, you can change the Agency governing the reporting session. For more information, refer to [Agency Permissions in the Reporting Portal](#).

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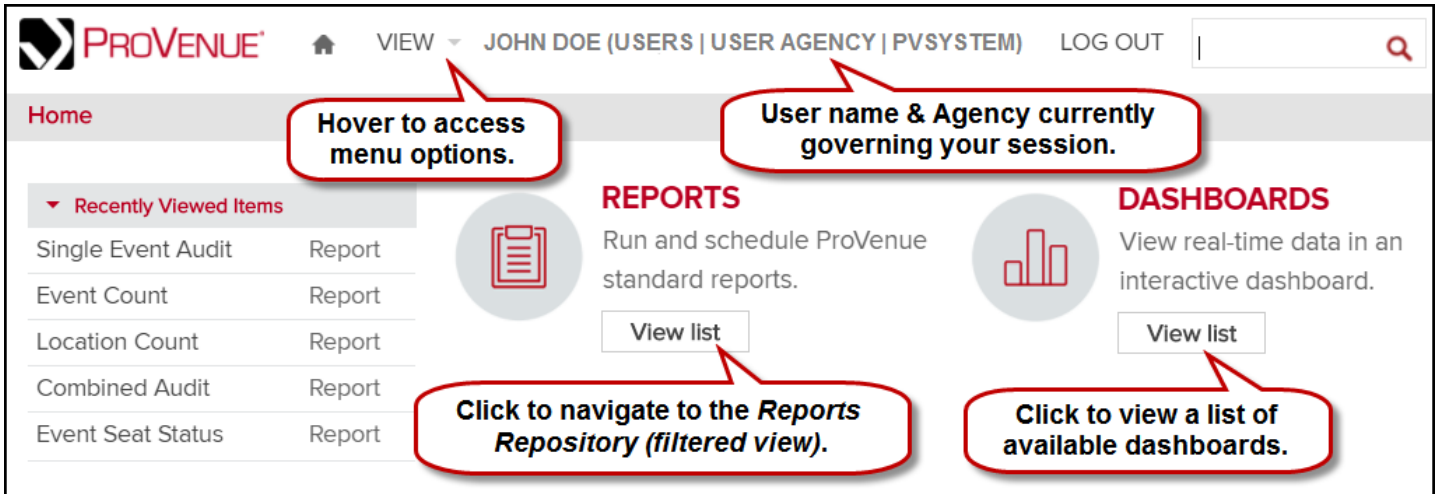
## Using the Home Screen

The *Home* screen provides...

- quick links to commonly used product areas, such as the [Reports Repository](#), [dashboards](#), and other areas (determined by your account permissions).
- a collapsible list of recently viewed items, allowing you to navigate directly to any item in the list.
- the menu bar which allows you to [view menu options](#), navigate to different areas of the Reporting Portal, perform a [global search](#) for report items, and logout.

The menu bar displays at the top of each screen in the Reporting Portal, and identifies your user name and the Agency currently governing your reporting session.

The image below shows the *Home* screen for a general user without permission to create Ad Hoc reports.



The screenshot shows the ProVenue Reporting Portal Home screen for a user named John Doe. The user's name and agency (JOHN DOE (USERS | USER AGENCY | PVSYSYSTEM)) are displayed in the top navigation bar. A 'VIEW' dropdown menu is available. The main content area is divided into two sections: 'REPORTS' and 'DASHBOARDS'. The 'REPORTS' section includes a 'View list' button. The 'DASHBOARDS' section includes a 'View list' button. A 'Recently Viewed Items' list is shown on the left side of the page.

**Hover to access menu options.** (Callout pointing to the 'VIEW' dropdown menu)

**User name & Agency currently governing your session.** (Callout pointing to the user information in the top navigation bar)

**Click to navigate to the Reports Repository (filtered view).** (Callout pointing to the 'View list' button under the 'REPORTS' section)

**Click to view a list of available dashboards.** (Callout pointing to the 'View list' button under the 'DASHBOARDS' section)

### 'View' Menu Option

The 'View' drop-down menu provides the following options:

Menu Option	Description
<b>Search Results</b>	(Default view) Displays the results of the last filter/search.  For example, if you are currently viewing report output and had previously selected the filters "Viewed by me" + "Past Week," then selecting "Search Results" returns you to the screen displaying those results.
<b>Repository</b>	Displays your user repository (folder), which contains all standard (preconfigured) and Ad Hoc reports that you have access to, as well as report output created by you.  <b>Note:</b> When the <i>Reports Repository</i> is accessed via the 'View' menu option (rather than from the <i>Home</i> screen), filters are not available.
<b>Schedules</b>	Displays the <i>Schedules</i> screen, which contains a list of your scheduled jobs for <u>all</u> reports.  <b>Note:</b> You can also view your scheduled jobs for a <u>single</u> report at the <i>Scheduled Jobs</i> screen. For more information, refer to <a href="#">Scheduled Reports Overview</a> .
<b>Messages</b>	Displays the <i>Messages</i> screen, which contains a global list of system-generated messages (such as any errors encountered while running a report).
<b>Agency</b>	Displays the <i>Select Agency</i> screen, which allows you to change the Agency governing the reporting session. For more information, refer to <a href="#">Agency Permissions in the Reporting Portal</a> .

## Using the Reports Repository Screen

The *Reports Repository* screen provides access to all reports and reporting functions available to you.

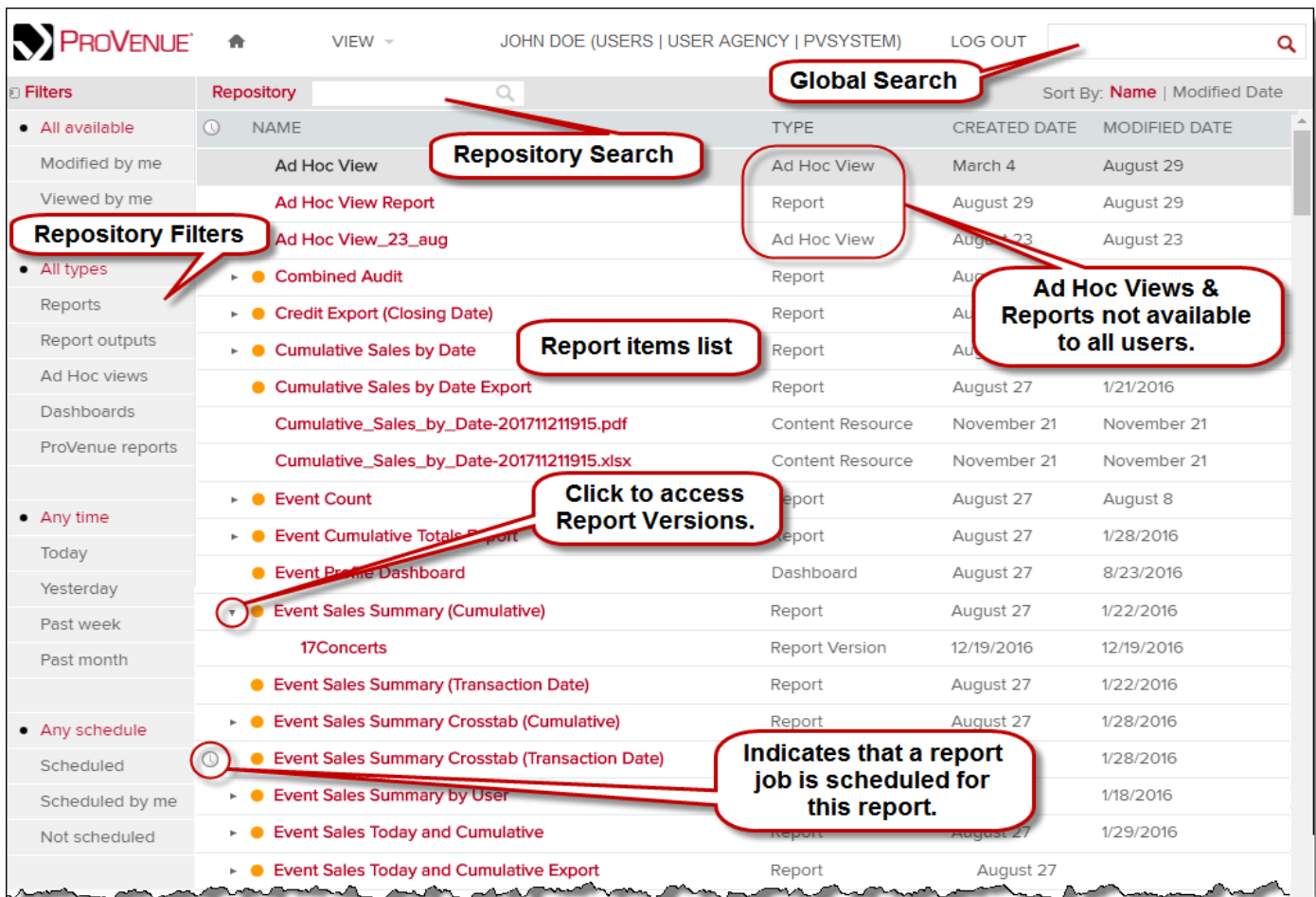
**Note:** Your user account determines the exact reports and menu options to which you have access. Some of the reports and menu options depicted in this document's images may not be available to you.

You can access the *Reports Repository (filtered view)* screen by clicking the "View list" link under the "Reports" heading at the *Home* screen. You can also access the *Reports Repository (folder view)* screen by selecting the *Repository* menu option from the 'View' menu. The information below is based on accessing the *Reports Repository (filtered view)* screen from the *Home* screen.

Use the options at the *Reports Repository (filtered view)* screen to...

- search for reports, [Report Versions](#), and/or [report output](#).
- run a report or schedule a report to run later.
- select a report output for viewing or exporting.
- select a report to edit, or create an Ad Hoc view (subject to user permissions).

The components of the *Reports Repository (filtered view)* screen are described in detail below.



The screenshot shows the ProVenue Reports Repository interface. Key components are highlighted with callouts:

- Global Search:** A search bar at the top right of the repository view.
- Repository Search:** A search bar within the repository table header.
- Repository Filters:** A sidebar on the left containing filters for 'All available', 'Modified by me', 'Viewed by me', 'All types', 'Any time', and 'Any schedule'.
- Report items list:** The main table listing reports with columns for NAME, TYPE, CREATED DATE, and MODIFIED DATE.
- Ad Hoc Views & Reports not available to all users:** A callout pointing to a red 'X' icon in the 'TYPE' column of a report row.
- Click to access Report Versions:** A callout pointing to a circular icon in the 'NAME' column of a report row.
- Indicates that a report job is scheduled for this report:** A callout pointing to a clock icon in the 'NAME' column of a report row.

NAME	TYPE	CREATED DATE	MODIFIED DATE
Ad Hoc View	Ad Hoc View	March 4	August 29
Ad Hoc View Report	Report	August 29	August 29
Ad Hoc View_23_aug	Ad Hoc View	August 23	August 23
Combined Audit	Report	August 27	August 27
Credit Export (Closing Date)	Report	August 27	August 27
Cumulative Sales by Date	Report	August 27	August 27
Cumulative Sales by Date Export	Report	August 27	1/21/2016
Cumulative_Sales_by_Date-201711211915.pdf	Content Resource	November 21	November 21
Cumulative_Sales_by_Date-201711211915.xlsx	Content Resource	November 21	November 21
Event Count	Report	August 27	August 8
Event Cumulative Totals Report	Report	August 27	1/28/2016
Event Promo Dashboard	Dashboard	August 27	8/23/2016
Event Sales Summary (Cumulative)	Report	August 27	1/22/2016
17Concerts	Report Version	12/19/2016	12/19/2016
Event Sales Summary (Transaction Date)	Report	August 27	1/22/2016
Event Sales Summary Crosstab (Cumulative)	Report	August 27	1/28/2016
Event Sales Summary Crosstab (Transaction Date)	Report	August 27	1/28/2016
Event Sales Summary by User	Report	August 27	1/18/2016
Event Sales Today and Cumulative	Report	August 27	1/29/2016
Event Sales Today and Cumulative Export	Report	August 27	August 27

## Report Items List

The main viewing frame displays a list of any items to which you have access, as determined by your search filters/criteria (for more information, refer to [Search Features](#)). The list of items may include:

**Standard (Preconfigured) Reports** – reports provided by Tickets.com with pre-defined options and output formats (crosstab, table, chart). Standard reports (including dashboards) are identified by the ● indicator.

**Report Output** – files that are generated by running a report, available for viewing, saving, and/or exporting.

**Report Versions** – sets of input parameters that are saved and can be re-used when running the report at a later time.

**Ad Hoc Reports** – custom reports designed by someone in your organization.

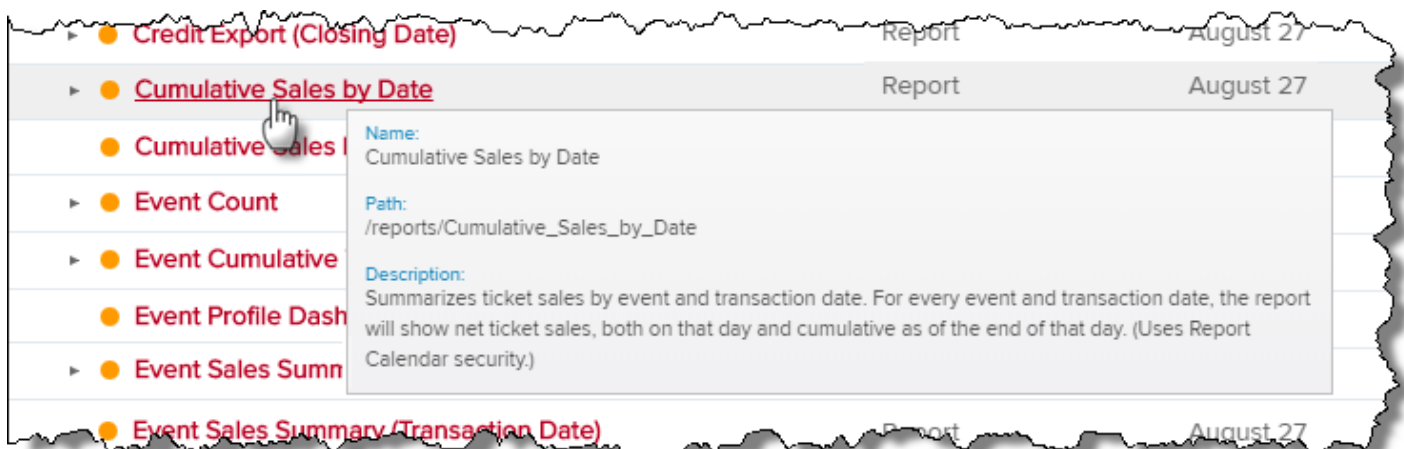
**Ad Hoc Views** (for authorized users) – design elements used for custom reports. For more information, refer to the *ProVenue® Reporting Portal: Ad Hoc Editor Reference Guide*.

For each item listed at the *Reports Repository* screen, the system displays the following information:

- **Name** – names for standard reports are preconfigured by Tickets.com. The names for all other items in the list are configured by the user that created each item.
- **Type** – for example, whether the item is a report, Content Resource (report output), or [Report Version](#)
- **Created Date** – the date that the item was added to the Reporting Portal.
- **Modified Date** – the date that the item was last modified (changing a parameter for a Report Version, for example).

Note that you can obtain more information (such as a detailed description) for any item by positioning your mouse cursor over the item name, or by right-clicking an item name and selecting "Properties..."

Example mouse-over information:



▶ ● <b>Credit Export (Closing Date)</b>	Report	August 27
▶ ● <b>Cumulative Sales by Date</b>	Report	August 27
▶ ● <b>Cumulative Sales I</b>	<p><b>Name:</b> Cumulative Sales by Date</p> <p><b>Path:</b> /reports/Cumulative_Sales_by_Date</p> <p><b>Description:</b> Summarizes ticket sales by event and transaction date. For every event and transaction date, the report will show net ticket sales, both on that day and cumulative as of the end of that day. (Uses Report Calendar security.)</p>	
▶ ● <b>Event Count</b>		
▶ ● <b>Event Cumulative</b>		
▶ ● <b>Event Profile Dash</b>		
▶ ● <b>Event Sales Summ</b>		
▶ ● <b>Event Sales Summary (Transaction Date)</b>	Report	August 27

## Search Features

The *Reports Repository* screen provides you with a variety of search features to help you find or generate the desired information.

### Filters

When you access the [Reports Repository](#) from the [Home screen](#), the system displays the *Filters* panel on the left side of the screen. The *Filters* panel determines which reporting items (such as reports or report output files) are displayed in the list.

Use any combination of the following filter options to display your desired items in the list.

Filters	Description
'All available' 'Modified by me' 'Viewed by me'	Filter options that display items based on your activity.  For example, selecting 'Modified by Me' lists only the items that you have changed.
'All types' 'Reports' 'Report outputs' 'Ad Hoc views' 'Dashboards' 'ProVenue reports'	Filter options that display only items of a particular type.  For example, select 'Report outputs' to list only report output files generated within the last seven days.  Selecting 'ProVenue reports' displays only the standard (preconfigured) reports provided by Tickets.com.
'Any time' 'Today' 'Yesterday' 'Past week' 'Past Month'	Filter options that display items relative to the time the item was created or last accessed.  For example, selecting 'Today' lists only items created or accessed on the current day.
'Any schedule' 'Scheduled' 'Scheduled by me' 'Not scheduled'	Filter options that display reports based on whether or not the reports are scheduled to run at a later time, and/or whether the report was scheduled by the current user.  For example, selecting 'Scheduled' lists only scheduled reports.

You can combine multiple filter options. For example, to view *scheduled reports* and *report output files* that you have *modified within the past week*, you would select the following filters:

"Modified by Me" + "All Types" + "Past Week" + "Scheduled"

### Repository Search Field

The 'Repository' search field allows you to refine your report list by combining any criteria selected in the *Filters* panel with any text value.

For example, if you have set the *Filters* panel options to display items "All available" + "Reports," then searching for the term "sales" displays only reports that contain the term "sales" in the report name.


### Global Search Field

Located at the upper-right side of all screens in the Reporting Portal, the global search resets any filters to "All/Any" and searches the system for the specified text value.

For example, search globally for "sales" to display all report output, Report Versions, standard reports, or custom reports (to which you have access) with "sales" in their name.

## Menu Options & Navigation

Use the following options to navigate from the *Reports Repository* screen to other areas of the Reporting Portal.

- Use the [View drop-down menu](#) to navigate to a specific area (to change the Agency governing your Reporting Portal session, for example).
- Click  in the menu bar to return to the *Home* screen at any time

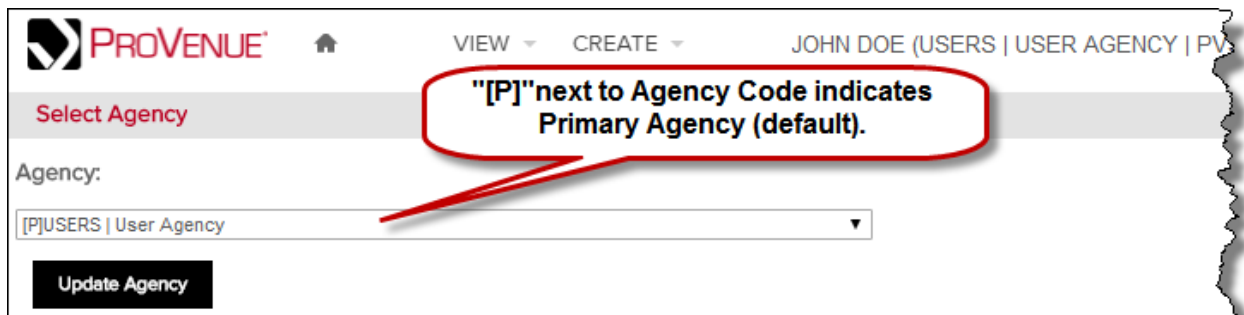
## Selecting a Different Agency for the Session

By default, your reporting session is governed by the Primary Agency assigned to your user in ProVenue.

**Note:** The Agency governing your reporting session determines your access to report data. For example, selecting a different Agency may allow you to report on a different set of events. For more information, refer to [Agency Permissions in the Reporting Portal](#).

To select a different Agency for the session...

1. Select the *View > Agency* menu option. The *Select Agency* screen displays:



2. Click the 'Agency' drop-down field to display a list of all of the Agencies associated with your user account, as configured in ProVenue.

In the list, "[P]" indicates your Primary Agency (selected by default on initial login).

3. Select the desired Agency from the drop-down list, and then click **Update Agency**.
  - The system displays the following confirmation message at the top of the screen:  
Agency is in context and successfully saved.
  - The code and description for the newly selected Agency displays in parentheses next to your user name at the top of the screen (see image above).
  - The Reporting Portal adjusts your report data access to the permissions defined for the selected Agency.

### Notes:

If you are setting report parameters in real time, your current Agency selection governs the events, Suppliers, Venues, and related elements that are available as parameter values, as well as the data included in report output.

By contrast, scheduled reports and saved parameters ("Report Versions") are governed by the Agency in place at the time the scheduled report/Report Version was created.

For more information, refer to [Agency Permissions in the Reporting Portal](#).

## Running & Scheduling Reports

The procedures below provide step-by-step guidance for running and scheduling reports.

### Running Reports in "Real time"

Use the following procedure to run a report in real time. For the purpose of this document, "real time" means running a report immediately and waiting for the output to be displayed on-screen, rather than scheduling a report.

To schedule a report to run at a later time, refer to [Scheduling a Report](#).

### Running a Report

The following procedure provides the steps for...

- selecting a report to run.
- defining the report parameters.
- running the report.
- viewing the report output.

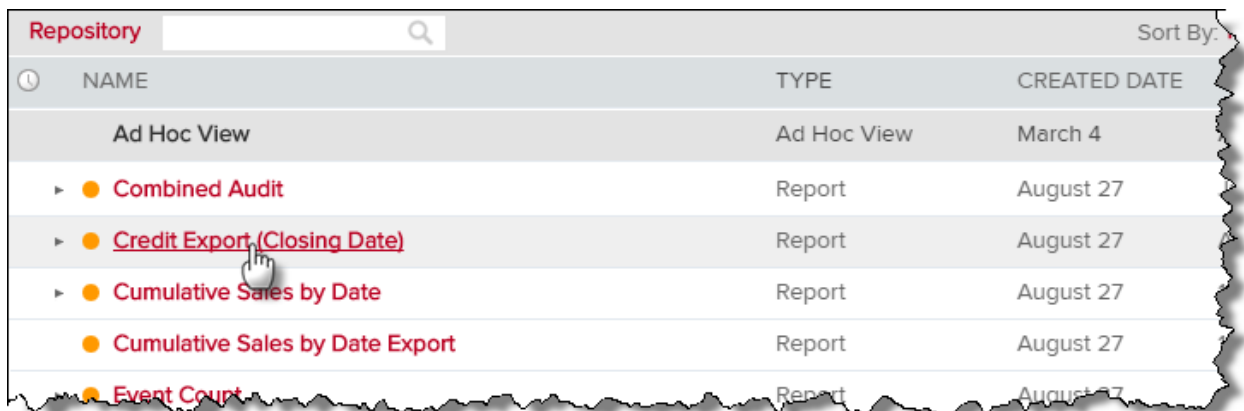
---

**Note:** The Reporting Portal allows you to [change the Agency](#) governing your Reporting Portal session. Agency-based permissions determine the values you can select as report parameters and the data included in report output. For more information, refer to [Agency Permissions in the Reporting Portal](#).

---

The procedure assumes you are currently viewing the [Reports Repository](#) screen and have located the report that you wish to run.

1. Click the report name or right-click the report name and then select "Run."



Repository		Sort By
NAME	TYPE	CREATED DATE
Ad Hoc View	Ad Hoc View	March 4
▶ ● Combined Audit	Report	August 27
▶ ● <b>Credit Export (Closing Date)</b>	Report	August 27
▶ ● Cumulative Sales by Date	Report	August 27
● Cumulative Sales by Date Export	Report	August 27
● Event Count	Report	August 27

2. At the *Input Controls* screen, select the desired report parameters. For more information, refer to [Report Parameters](#).

As an alternative to selecting individual parameters for the report, you may use a previously-defined/saved set of parameters. For more information, refer to [Running a Report with Saved Parameters](#).

3. When you are finished defining the report parameters...
  - (Optional) you can save your parameter selections as a [Report Version](#) by clicking **Save** before running the report.
  - Click **OK** to run the report.
4. The system displays the report output as a web page.

To export the report output to another format, refer to [Report Output – Viewing and Exporting](#).

## Running a Report with Saved Parameters (Running a Report Version)

You can run a report that uses pre-defined parameter values (a "Report Version"), which allows you to initiate a report run without the need to manually select the parameter values.

At the *Reports Repository* screen, Report Versions are identified as such in the 'Type' column of the report list (see image below).

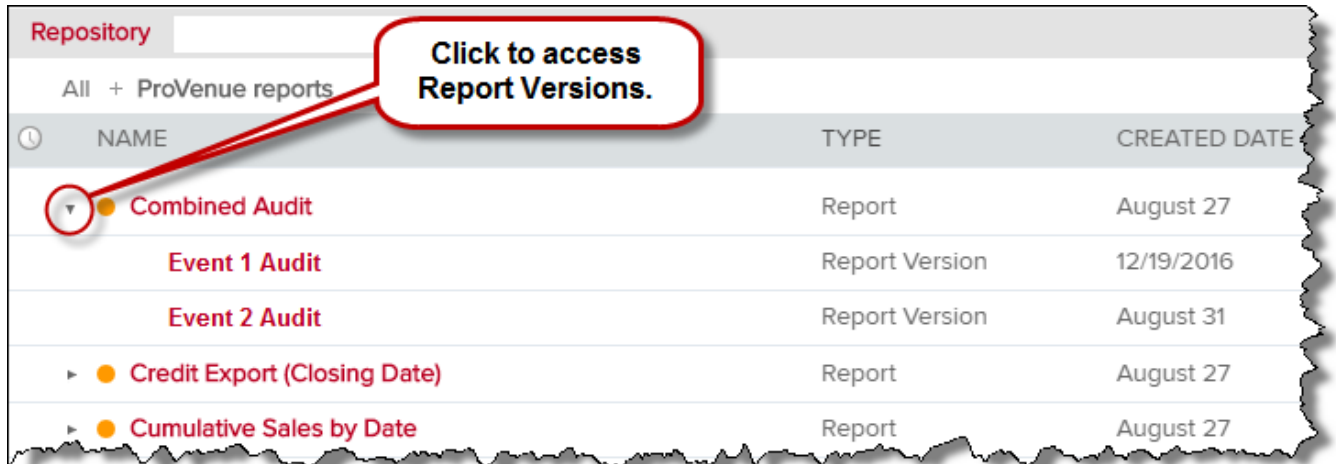
The following procedure provides the steps for...

- selecting a Report Version.
- running the report.
- viewing the report output.

The procedure assumes you are currently viewing the [Reports Repository](#) screen and have located the Report Version that you wish to run.

Click the arrow to the left of the report name to display any Report Versions associated with the report.

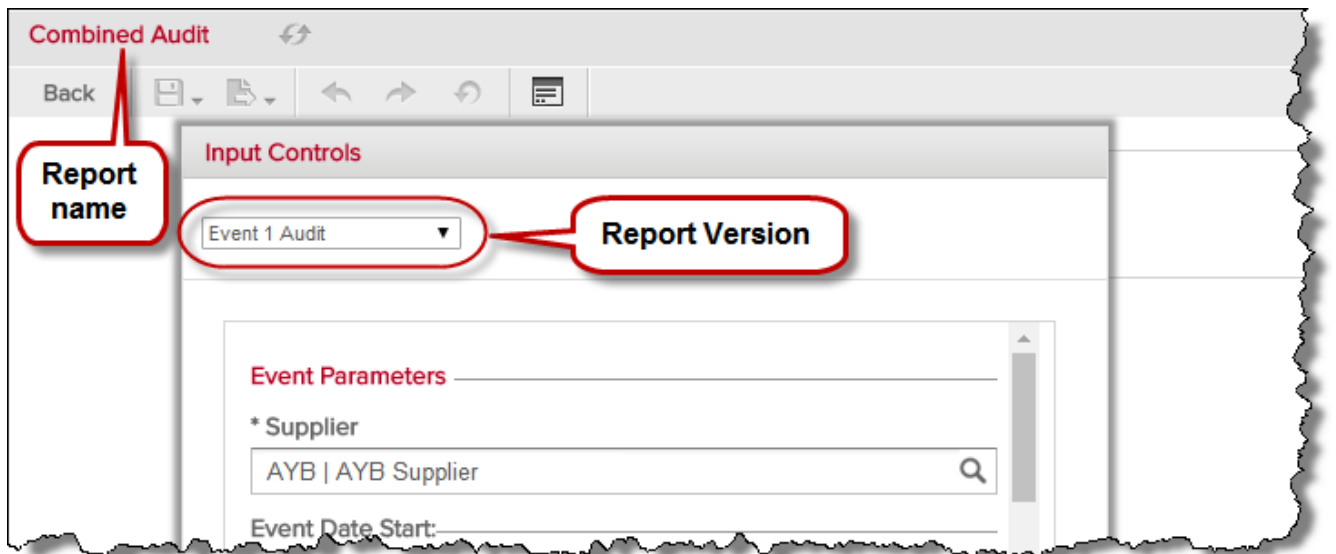
5. Click the Report Version name or right-click the Report Version name, and then select "Run."



Repository			
All + ProVenue reports			
NAME	TYPE	CREATED DATE	
<span>▼</span> ● <b>Combined Audit</b>	Report	August 27	
<b>Event 1 Audit</b>	Report Version	12/19/2016	
<b>Event 2 Audit</b>	Report Version	August 31	
▶ ● <b>Credit Export (Closing Date)</b>	Report	August 27	
▶ ● <b>Cumulative Sales by Date</b>	Report	August 27	

**Note:** Saved parameter values ("Report Versions") retain the permissions of the Agency that was governing the session at the time the Report Version was created. For more information, refer to [Agency Permissions in the Reporting Portal](#).

The drop-down field at the top of the *Input Controls* screen displays the selected Report Version.



Combined Audit

Back

**Report name**

**Report Version**

Event 1 Audit

**Event Parameters**

\* Supplier

AYB | AYB Supplier

Event Date Start:

6. Click **OK** to run the report using the saved values.
7. The system displays the report output as a web page.

To export the report output to another format, refer to [Report Output – Viewing and Exporting](#).

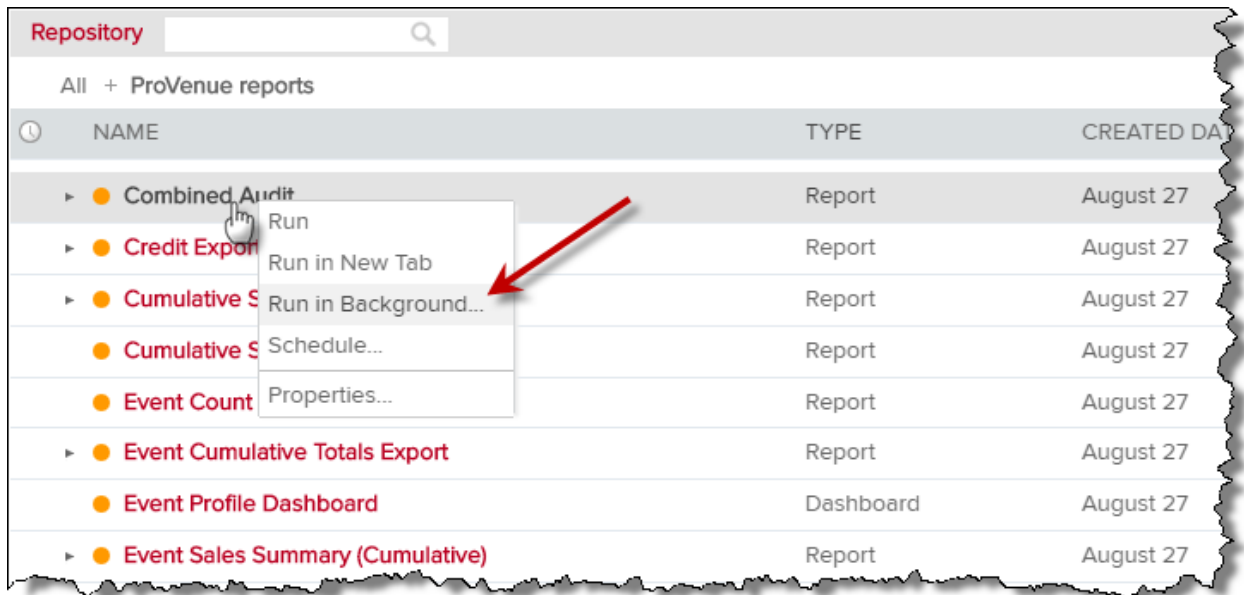
## Running a Report in the Background

Running a report in the background suppresses the report output from displaying on the screen as a web page. The system instead allows you to configure advanced report output options via the *Schedule* interface.

The following procedure provides an overview of running a report in the background.

The procedure assumes you are viewing the [Reports Repository](#) screen and have located the report that you wish to run.

8. While viewing the list of reports, right-click the report name and select "Run in Background."



The system launches the *Schedule* interface.

**Note:** For detailed information about using the *Schedule* interface to set parameters and configure output files and notification settings, refer to [Scheduling a Report](#).

9. Click the "Parameters" tab (if not already selected).
10. Set the parameter values for the report.  
You may use a saved set of parameters by selecting from the drop-down list at the top of the screen.
11. Configure the output settings for the report.
12. Configure notification settings.
13. Click **Submit** to run the report.

**Notes:**

The background report runs "silently," displaying no further prompts or report output. When finished, the report output is available in the reports repository, in the format you selected. For more information, refer to [Report Output – Viewing and Exporting](#).

You may continue to browse the user interface while a background report is running.

Report output remains in the reports repository for 7 days, and is then deleted. To retain output that might be needed beyond 7 days, export the output and archive outside of the Reporting Portal.

## Scheduling a Report

You may schedule a report to run automatically at a specific time using the *Schedule* interface.

### Scheduled Reports Overview

The *Schedule* interface is a step-by-step configuration environment that provides you with advanced options, such as the ability to choose a report format and the ability to email the report when complete.

---

#### Notes:

The process for [Running a Report in the Background](#) invokes the *Schedule* interface, providing you with access to advanced features (such as email notification) while allowing you to run the report immediately.

You may also run a real-time report using advanced features by selecting **Run Now** from the *Scheduled Jobs* screen, or from the *Schedules* screen (as accessed via the 'View' menu).

---

When viewing the list of items at the [Reports Repository](#) screen, the "clock" icon (🕒) identifies any report that you have scheduled to run at a later time. The system does not display indicators for reports scheduled by other users.

Click 🕒 to view a report's schedule at the *Scheduled Jobs* screen. Note that you can use filtering options available at the *Reports Repository* screen (when accessed via the *Home* screen) to sort/view only the reports that you have scheduled.

### Creating a Report Schedule

The following procedure provides the steps for...

- selecting a report and setting up the scheduled "job."
- setting the schedule date/time and recurrence.
- configuring the report output file name, format, location, and email notification.

The procedure assumes you are viewing the *Reports Repository* screen and have located the report that you wish to schedule.

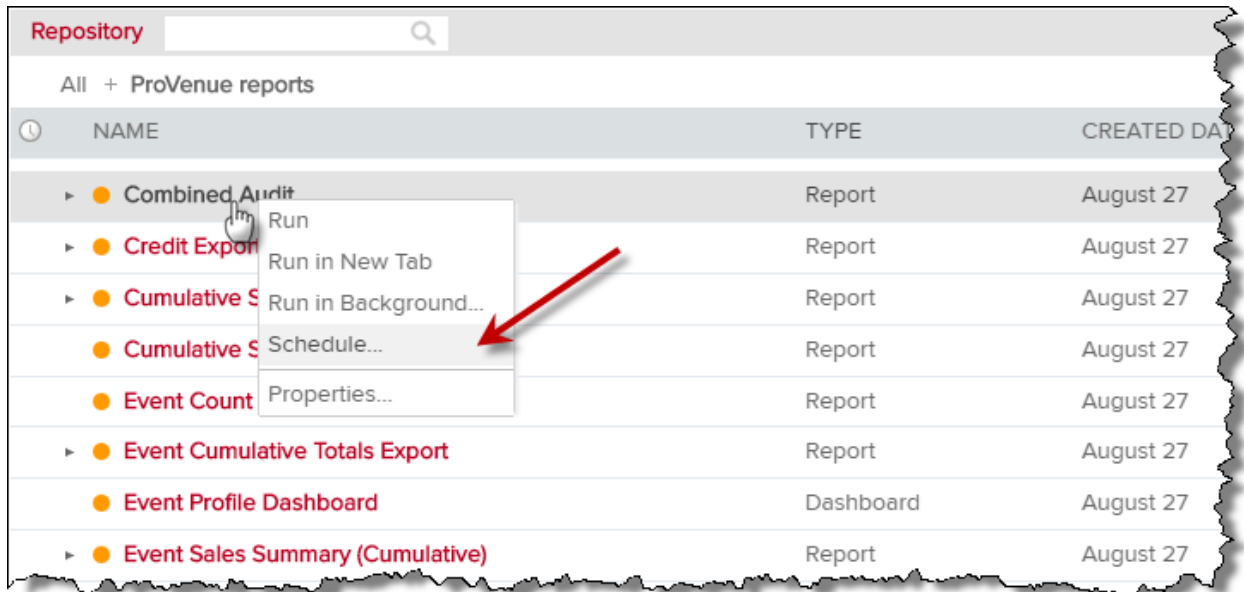
---

**Important:** To schedule a report using the data access configured for a particular Agency, first ensure that the reporting session is being governed by the desired [Agency](#), and then create the scheduled report. Once a scheduled job has been saved, its Agency assignment cannot be changed, and a user logged in under a different Agency cannot edit the job. However, you can create a new scheduled job with the desired Agency as needed.

---

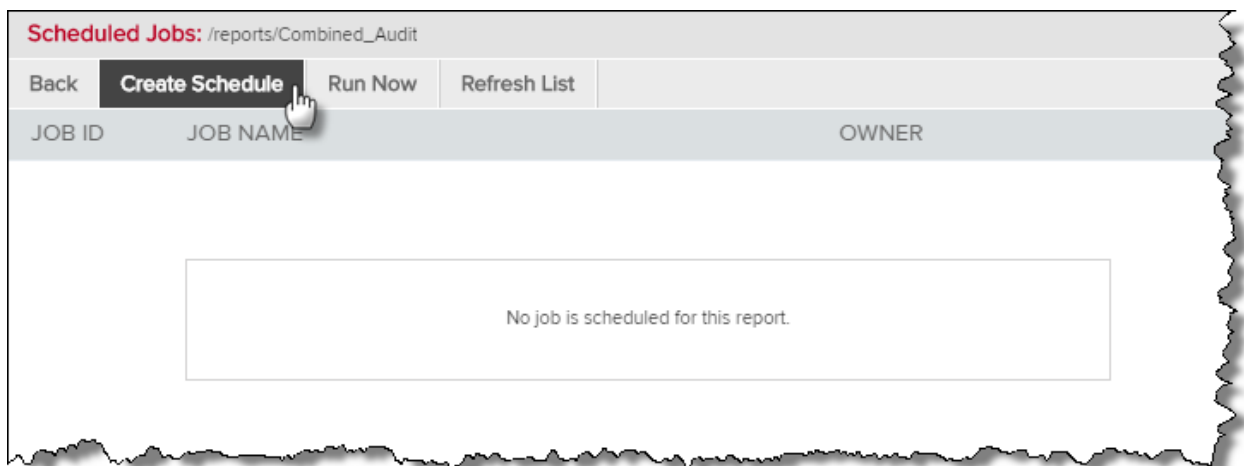
To schedule a report...

14. At the *Reports Repository* screen, right-click the report name, and then select "Schedule..."



The system displays the *Scheduled Jobs* screen which lists any existing scheduled jobs for the selected report.

15. Click **Create Schedule**.



16. At the *New Schedule* screen > "Schedule" tab, specify whether to start the job immediately, or choose a specific date for the job. (For related information, refer to [Date/Time Formats](#))

The actual date and time at which the Reporting Portal runs a newly scheduled report is determined by both the 'Scheduled Start' settings and 'Recurrence' settings.

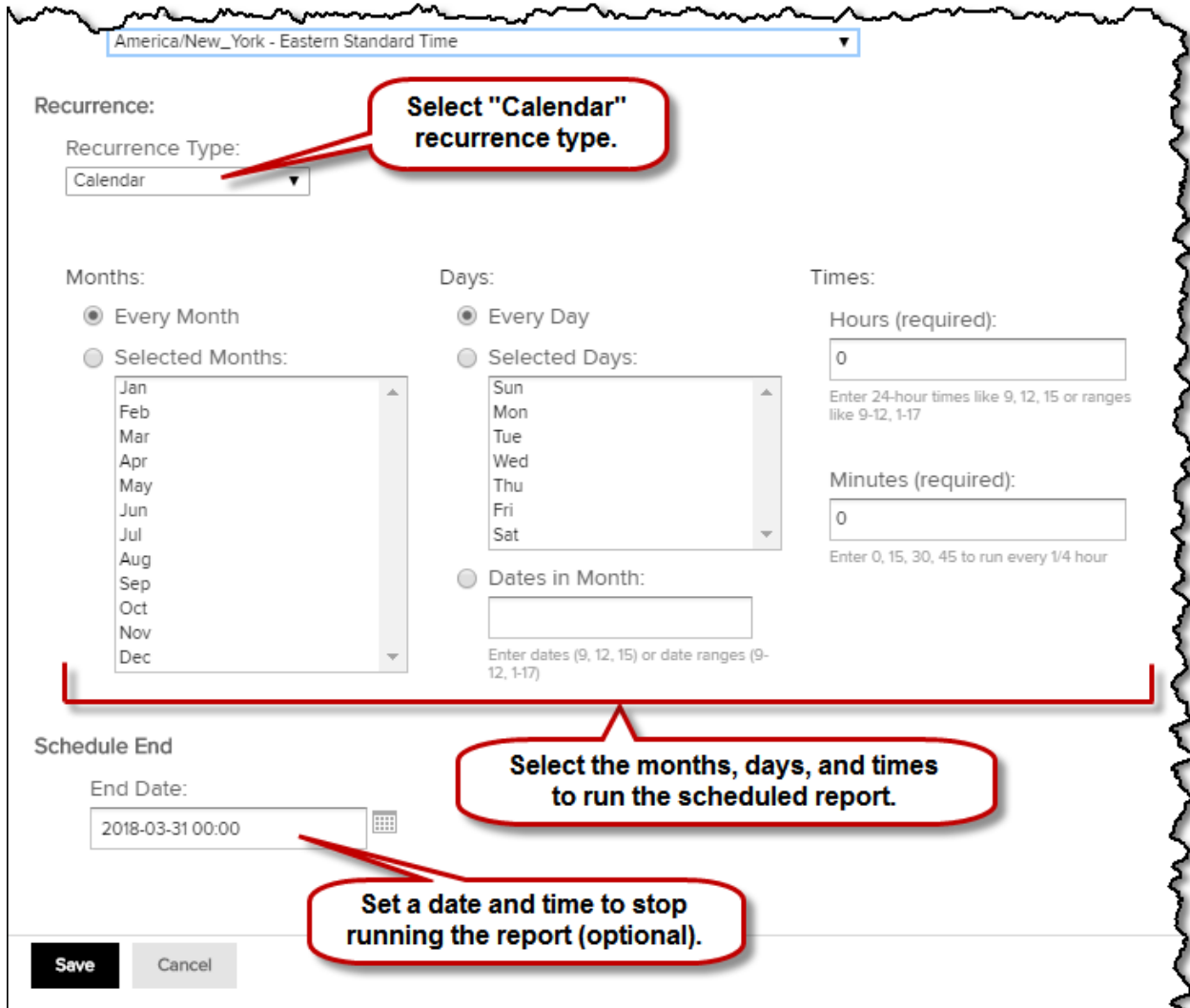
Note the following about the first run of a scheduled report with no recurrence:

- When 'Start Date' is set to "Immediately," the report runs immediately after clicking **Save** in the *Schedule* interface.
- When 'Start Date' is set to a specific date/time, the report runs at the specified date/time.

See step 5 below for more details on the expected first run behavior when a scheduled job is set to recur.

17. Select the 'Time Zone' that represents your location (defaults to your ProVenue environment's time zone).
18. Set the scheduled job to recur (if desired) using the 'Calendar' option.

**Calendar:** The 'Calendar' schedule method provides advanced options for setting recurrence for specific days, weeks, or months. The 'Calendar' option also allows you to set recurrence for a specific time-of-day (including multiple times per day).



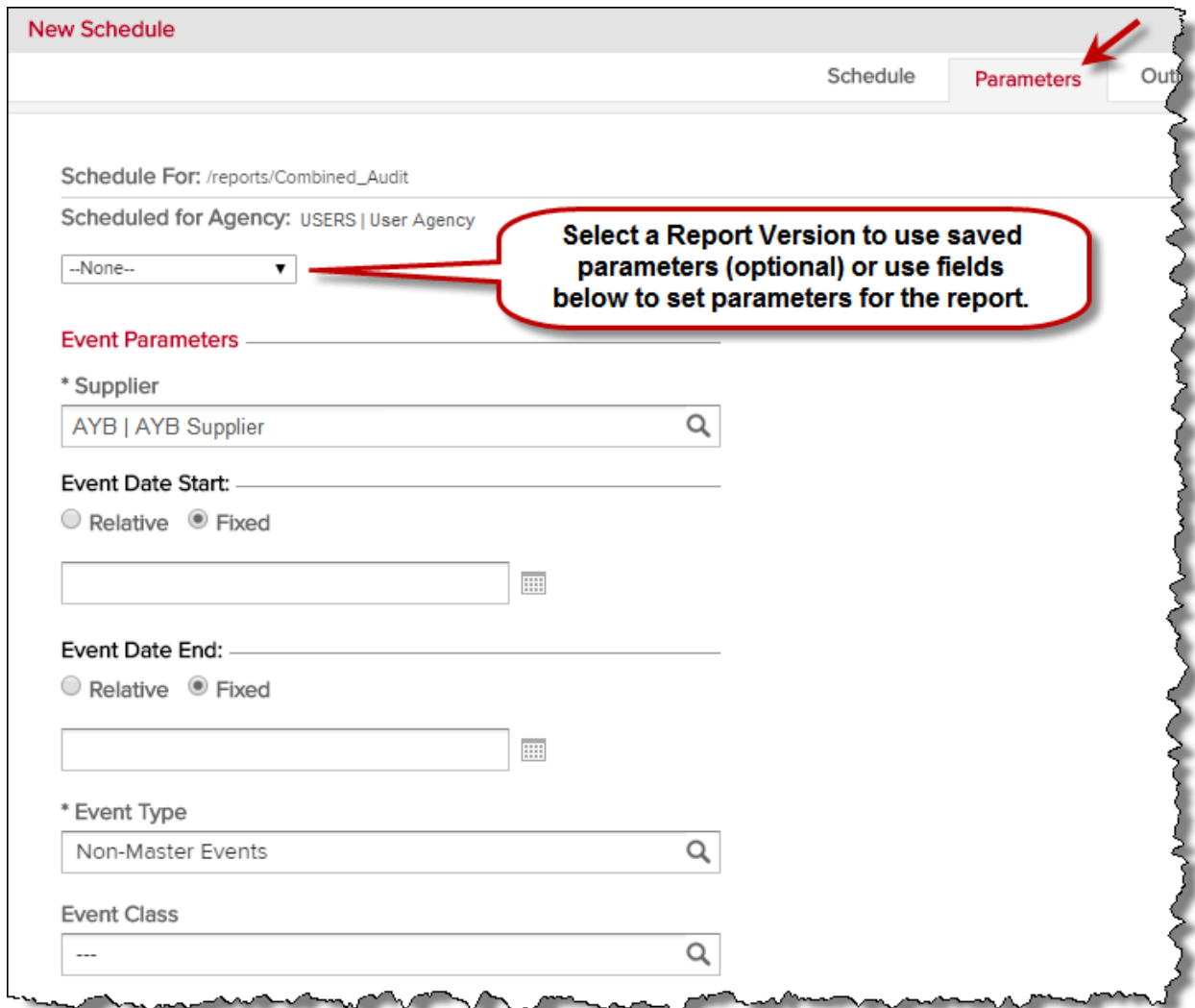
When a newly scheduled report is configured to use a 'Recurrence Type' of "Calendar," the date and time at which the system begins to run the scheduled job is determined by the value defined for the 'Start Date' field (see step 3 above). Note the following about the first run of a scheduled report using "Calendar" recurrence:

- When 'Start Date' is set to "Immediately," the report runs on the current day at the time specified for recurrence, then recurs according to the months, days, and times specified.
- When 'Start Date' is set to a specific date/time, the report runs at the date/time specified, then recurs according to the months, days, and times specified.

For example, if a scheduled job is set to run every Monday in the month of May at 8:00 and the 'Start Date' is set to "Immediately," the system runs the scheduled job for the first time on Monday, May 1 at 8:00.

If the 'Start Date' for this example is instead set to the specific date of May 8<sup>th</sup>, the system skips the first Monday in May, and runs the scheduled job for the first time on Monday, May 8 at 8:00.

19. When finished entering details at the "Schedule" tab, click the "Parameters" tab to set the parameter values for the report (see step 7 below). Note that you can click **Cancel** to quit creating a new schedule.
20. At the "Parameters" tab, select the desired report parameters. You may use a previously-defined/saved set of parameters (if available) by selecting from the drop-down list at the top of the screen. If no parameters have been saved for the selected report, the Parameters tab does not display the drop-down field.



**New Schedule**

Schedule Parameters Output

Schedule For: /reports/Combined\_Audit

Scheduled for Agency: USERS | User Agency

--None--

**Event Parameters**

\* Supplier  
 AYB | AYB Supplier

Event Date Start:  
 Relative  Fixed

Event Date End:  
 Relative  Fixed

\* Event Type  
 Non-Master Events

Event Class  
 ---

Select a Report Version to use saved parameters (optional) or use fields below to set parameters for the report.

For more information on selecting report parameters, refer to [Report Parameters](#).

---

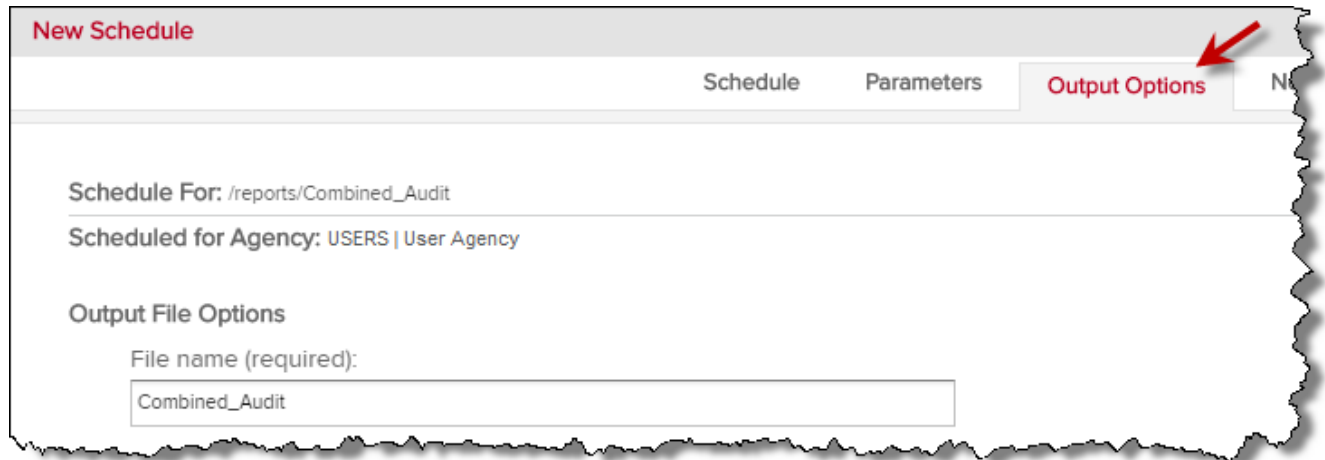
**Note:** Every instance of a scheduled report's output is subject to the data permissions of its 'Scheduled for Agency' (depicted above)—the Agency that is governing the session at the time the scheduled report is created. Once a scheduled report has been saved, its Agency assignment cannot be changed.

---

When finished entering parameters, click the "Output Options" tab.

## 21. Configure the report output options.

The "Output Options" tab allows you to configure the output file, and the location where the output file is saved when the scheduled job is run.



**New Schedule**

Schedule Parameters **Output Options** N

Schedule For: /reports/Combined\_Audit

Scheduled for Agency: USERS | User Agency

**Output File Options**

File name (required):

Combined\_Audit

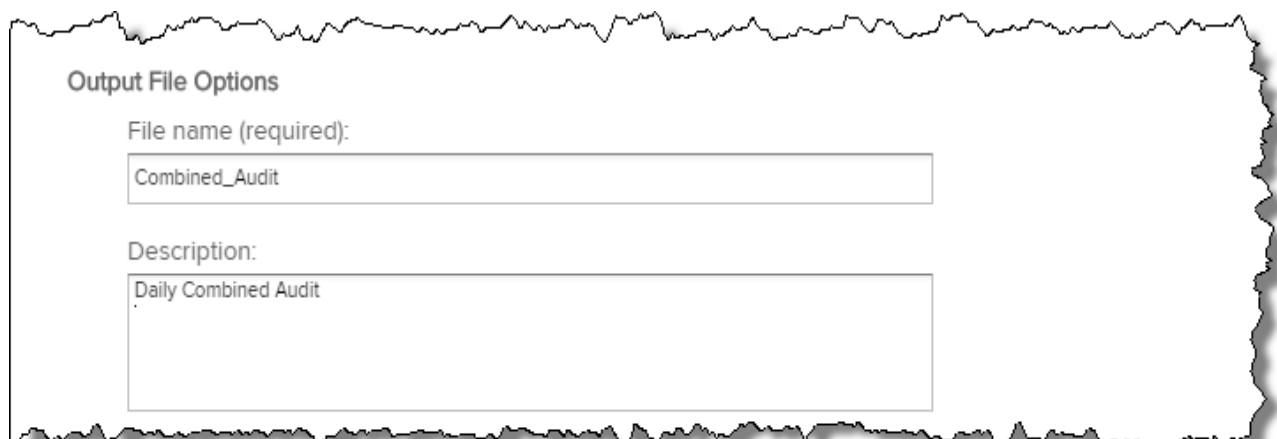
### Output File Options:

The "Output File Options" section allows you to identify the file output, select one or more file formats for the output file, and determine the handling of new output files.

- **File Identification:**

Enter a 'File name' (or accept the default) and a 'Description'. Note that the output file name must not contain any spaces. Use underscores, for example, to separate words as necessary.

The file name(s) for all report output generated by the scheduled job begin with the specified name.



**Output File Options**

File name (required):

Combined\_Audit

Description:

Daily Combined Audit

- **Output Locale (if configured)**

If your system is configured to display the 'Output Locale' field, use the drop-down field to select a different language for the scheduled report's output.

**Note:** To configure your system to display the 'Output Locale' field, contact your Client Services Representative.

- **File Formats:**

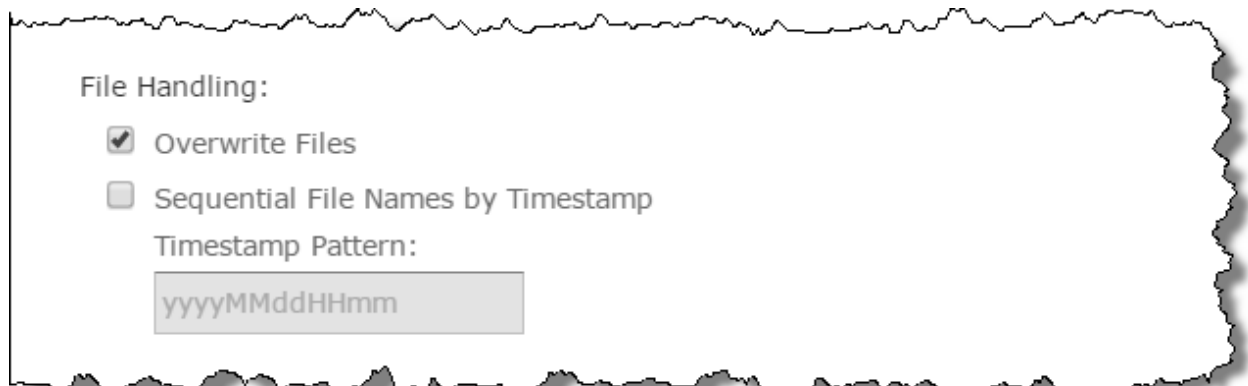
Specify the preferred output file format. In addition to the standard CSV, PDF, XLSX, and Excel formats, 'HTML' allows you to send report output in the body of an email message.



You can select one or more formats for the report output file. For example, you can send embedded HTML and a PDF attachment within the same email message.

- **File Handling:**

Specify how the system creates the report output file names:



**Sequential File Names** – If enabled, the system appends a unique timestamp (configurable using the 'Timestamp Pattern' field) to the report output file name for each report run. The system uses the time zone of your ProVenue environment.

**Overwrite Files** – If enabled, the system overwrites the previous report output file with the most recent report output file. If not enabled, the system creates a new report output file for each report run.

**Note:** When scheduling a report, you must enable at least one of the 'File Handling' options.

**Output Destination:**

The "Output Destination" section allows you to output files to a defined repository, and/or save your output files to an FTP server.

- **Output To Repository:**

Determines the location of the scheduled report output. The system automatically selects the default report output repository to which your user has access. You can click **Browse...** to select a specific location or accept the default location (recommended).

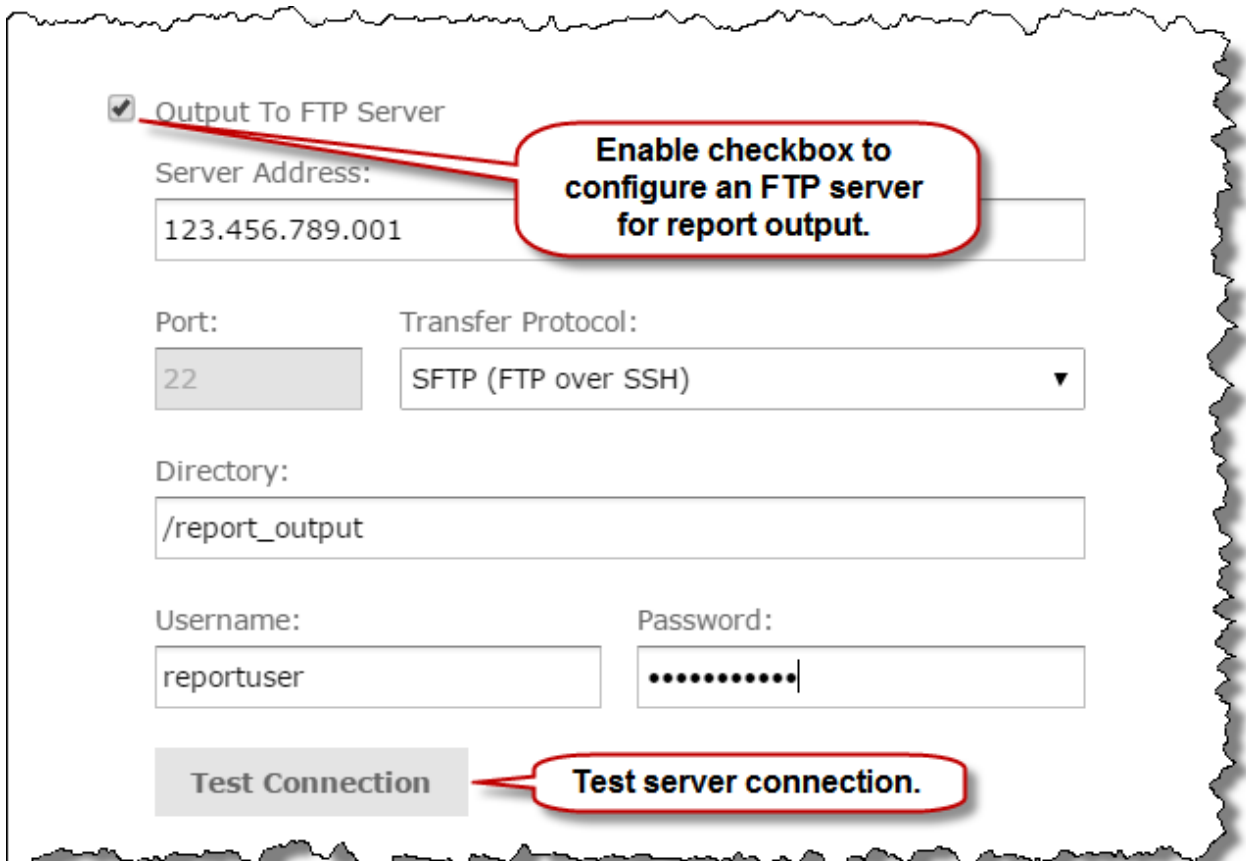


**Output Destination**

Output To Repository

- **Output To FTP Server:**

Use the 'Output To FTP Server' fields to deliver scheduled report output to an FTP server.



Output To FTP Server

Server Address:

Port:  Transfer Protocol:

Directory:

Username:  Password:

**Test server connection.**

Once an FTP server is configured, each scheduled report output is saved directly to the FTP server. If the 'Output To Repository' checkbox is also enabled, report output is saved to both the defined repository and the FTP server.

**About 'HTML':**

Due to the expanding number of computing devices, operating systems, web browsers, email clients, and screen resolutions that are currently in use, optimal display of HTML in email is not assured for all environments. In other words, the HTML output generated by some reports, when rendered by the recipient's email client, may display in a way that is not visually pleasing.

If you are interested in using HTML output, you are encouraged to evaluate the embedded HTML feature within their preferred environment(s) to determine which reports are best suited for use with this functionality.

Generally, embedded HTML output is most useable for less detailed reports. For example, a simple Ad Hoc crosstab "summary" report usually renders better in the body of an email than a highly detailed, multi-page report with a complicated layout.

Choosing the 'HTML' option prevents entry of custom text for inclusion in the body of the email message.

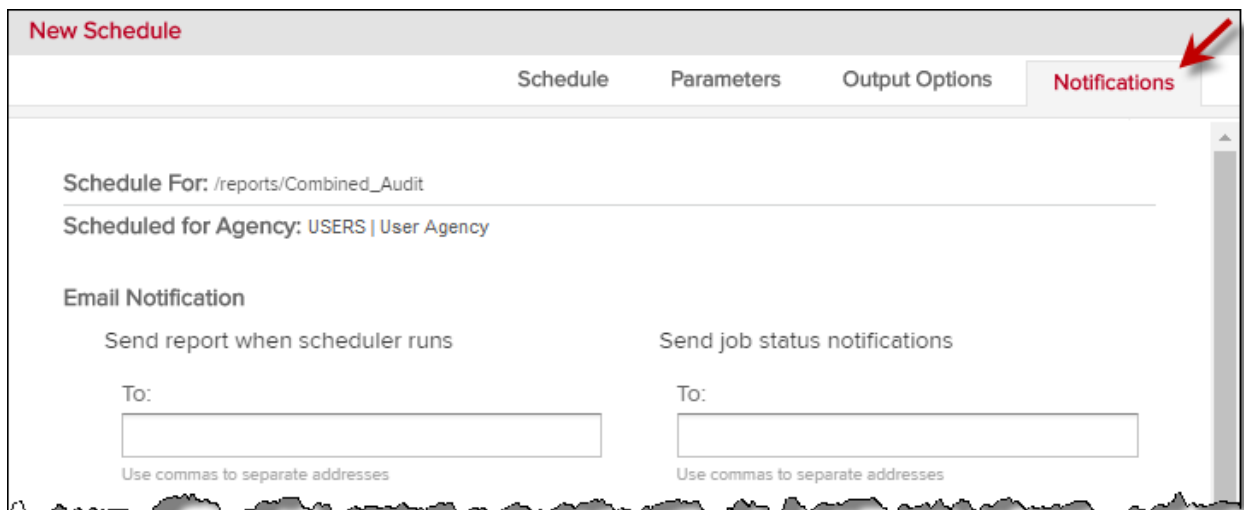
When sending critical reports via email, it is recommended to include the report output as an attachment (PDF, XLS, XLSX, or CSV format).

When finished entering output options, click the "Notifications" tab.

22. Configure Email Notification Settings

The "Notifications" tab allows you to...

- send scheduled report output to one or more email recipients.
- send scheduled report status notifications to one or more email recipients.



### Send Report:

The "Send report when scheduler runs" section allows you to define one or more email recipients, the email subject line, and the email body (message) for an email containing report output.

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

### Send Job Status:

The "Send job status notifications" section allows you to define one or more email recipients, the email subject line, and the email body (message) for an email notifying the recipients of the status of a scheduled job run.

---

**Note:** If a scheduled report run encounters an error, the Reporting Portal sends details of the error to Tickets.com staff for further investigation, as well as to any email address you define in the "Send job status notifications" section.

---

### Including Report Output

The Reporting Portal provides several options for including the report output files in an email. The method by which an email recipient receives report output files depends on settings at both the "Output Options" tab, and the "Notifications" tab:

**Links to report output:** By default, the 'Include reports as repository links in email body' option is selected at the "Notifications" tab. In this case, an email body includes links to the saved reports. To view the reports, the recipient must click a report link and log into the Reporting Portal.

**Attaching report output:** When any combination of PDF, CSV, Excel, and/or XLSX is selected at the "Output Options" tab, you must select either the 'Include report files as attachments' or the 'Include report files as ZIP attachment' option at the "Notification" tab in order to attach the report output file to an email.

**Including report output in the body of an email:** When the HTML format is selected at the "Output Options" tab, you must select the 'Include HTML report in email body' option at the "Notifications" tab for the email body to contain the report output.

When selecting to attach the report output and include the report output in the body of an email, you must select the desired format for the attachment, and select HTML at the "Output Options" tab. At the "Notifications" tab, you must select to include the report files as attachments (or a ZIP attachment) and select to include HTML in the report body.



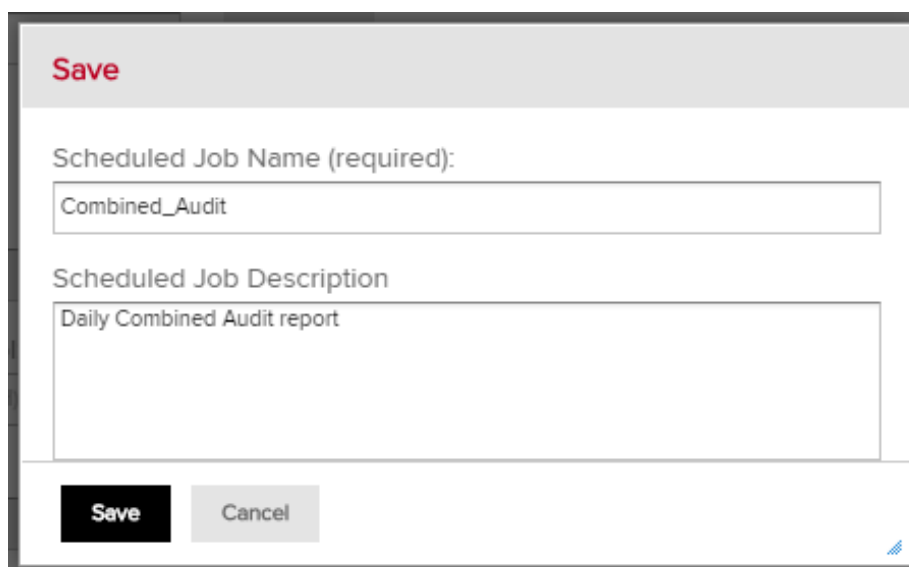

---

**Note:** The system cannot send an email message greater than 10MB in size. If the file size limit is exceeded, the recipient receives an email with an error notification.

---

23. Click **Save**.

Once your desired settings are configured on each of the *New Schedule* tabs, click **Save**. The *Save* window appears, allowing you to define a name and description for the scheduled job.



After entering a name and description for the scheduled job, click **Save**.

The *Scheduled Jobs* screen displays your new scheduled job, along with any other jobs for this report.





**Scheduled Jobs:** /reports/Combined\_Audit

JOB ID	JOB NAME	OWNER	STATE	LAST RUN
2448...	Combined_Audit	jdoe123Iorganizatio...	NORMAL	

**Click to run any enabled report in real time.**

Note that for any scheduled job, you can...

- click **Run Now** to execute the job (run the report in real time).
- click the 'Enabled' checkbox to enable/disable the scheduled job.
- click  to make changes to the scheduled job.
- click  to delete the scheduled job.

The Reporting Portal also displays the scheduled job at the *Schedules* screen which displays the scheduled jobs created by your user account for all reports.

To view the *Schedules* screen, select the *Schedules* menu option from the 'View' menu.

---

**Note:** To edit a scheduled job, a user must be logged into the Reporting Portal with the same "Scheduled for Agency" that created the scheduled job.

---

## Report Parameters

Report parameters, sometimes referred to as "input filters" or "input controls," determine the data values that are included in the report.

For example, selecting a specific 'Supplier' indicates that only data related to that Supplier is included in the report output.

For a report run, you can define parameters manually (select a value for each individual parameter), or choose a set of previously configured parameter values that were saved as a [Report Version](#).

Access to certain parameters, such as events, Suppliers, and Venues, is determined by either the Agency governing your Reporting Portal session or, for scheduled reports and Report Versions, the Agency that was governing the session when the scheduled report/Report Version was created. For more information, refer to [Agency Permissions in the Reporting Portal](#).

## Defining Report Parameters

You can define report parameters at the following locations, based on whether you are running a report in real time, or setting up a scheduled report:

- *Input Controls* screen, displayed when [running a real-time report](#).
- *New Schedule* screen > "Parameters" tab, available when [running a background report](#) or when [scheduling a report](#).

At each of the screens above, the system displays the parameter options, such as Supplier, Events, and Dates that are specific to the report you are running.

Select or enter data using the appropriate drop-down, checkbox, or text fields as indicated for the report (for example, you must enter a value for any required fields).

## Special Parameter Features

The Reporting Portal offers the following convenient parameter selection features.

### Cascading Parameters

When defining the input controls for a report, the availability of some parameter values is determined by the selection of other parameters.

For example, if the Agency governing your Reporting Portal session is associated with more than one Supplier in ProVenue, you can use a 'Supplier' drop-down field to choose from multiple Suppliers. In this case, the specified Supplier determines the events available via an 'Events' drop-down field.

Cascading parameters prevent you from selecting incompatible report parameters, resulting in unexpected results or no results at all.

## Manual Text Entry

Each parameter allows you to manually type a value into a search field, automatically filtering parameter options to match your entry.

For example, if your venue offers several "Summer Concert" events, typing "summ" into the search field for an 'Event' parameter filters out all events that do not have a code or description that contains "sum," narrowing the display of events for the field.

## Date Range Parameter Options

You can define a date range using either 'Fixed' or 'Relative' values:

Date Option	Description
<b>Fixed</b>	Specify Start and End dates by manually typing the dates or by using a typical calendar interface.
<b>Relative</b>	Define a date range that is relative to the current system date. For more details, see "Relative Date Range Parameters" below.

You can use fixed and relative dates in combination. For example, to run a report for games played to date, select:

- Event Start Date: April 1, 2018 (or actual start date of the regular season)
- Event End Date: DAY-1

Using the date parameters in the example above, you can save, schedule, and run a report multiple times throughout the season without the need to adjust the date parameters.

## Relative Date Range Parameters

In addition to allowing you to enter/select fixed dates for a report's date range parameters, the Reporting Portal allows you to enter relative dates using a date expression.

A relative date establishes a date or date range that is relative to the current system date. For example, when running a report in the middle of a given month, you can enter "MONTH" for the start and end dates to view output for all days in the current month.

Since local time zones are ignored, reports for the same ProVenue environment, run by different users in different time zones, produce the same results.

Entering a relative date range requires manual entry of a start and/or end relative date expression.

**Expression Format:** use the following format when defining a relative date expression.

**[time unit]+/-[number]**

Examples: WEEK-1, MONTH+2, YEAR-2

**Expression Components:** a relative date expression consists of at least a time unit but can also include a time modifier.

Component	Notes
<b>Time Unit</b>	You can use the following units of time in a relative date expression: DAY                      WEEK                      MONTH QUARTER                SEMI                      YEAR (three months)        (six months)            (twelve months)
<b>Time Modifier</b>	Use a "+" or "-" operator and a numeric value to extend a relative date forward or backward in time from the current date ("DAY+4" for example). You can also enter a time unit by itself to express the current day, week, month, etc. ("DAY" to start/end the range on the current date, for example).

**Time Units & Start/End Dates:** The system regards the start/end of each time unit as follows.

Time Unit	Starts	Ends
<b>WEEK</b>	Sunday (default – see notes below)	Saturday (default – see notes below)
<b>MONTH</b>	1 <sup>st</sup> of the calendar month (March 1 <sup>st</sup> , for example)	Last day of the calendar month (March 31 <sup>st</sup> , for example)
<b>QUARTER</b>	January, April, July, or October	March, June, September, or December
<b>SEMI</b>	January or July	June or December
<b>YEAR</b>	January	December

Note the following about entering relative date expressions:

- When defining a relative date that requires both a start and an end date parameter, you can provide a relative date expression for the start and end date, or you can provide a relative date expression in one parameter and a fixed calendar date in the other.
- When defining a relative date that requires both a start and an end date parameter, you can use a different time unit in each expression (WEEK and MONTH, for example).
- Administrative users can change the WEEK time unit's starting and ending days from 'Sunday through Saturday' (default setting) to 'Monday through Sunday'. For more information, refer to the *ProVenue® Reporting Portal Client Administrator Guide*.

## Date/Time Formats

When entering fixed dates/times in the Reporting Portal, you can use the calendar icon or enter the date/time values manually. Use the following convention:

- Date – YYYY-MM-DD (2017-02-29 for February 29, 2017)
- Time – HH:MM (01:00:00 for 1:00am; 19:30:00 for 7:30pm)

As in ProVenue, an undefined "Start" time defaults to 00:00, and an undefined "End" time defaults to 23:59.

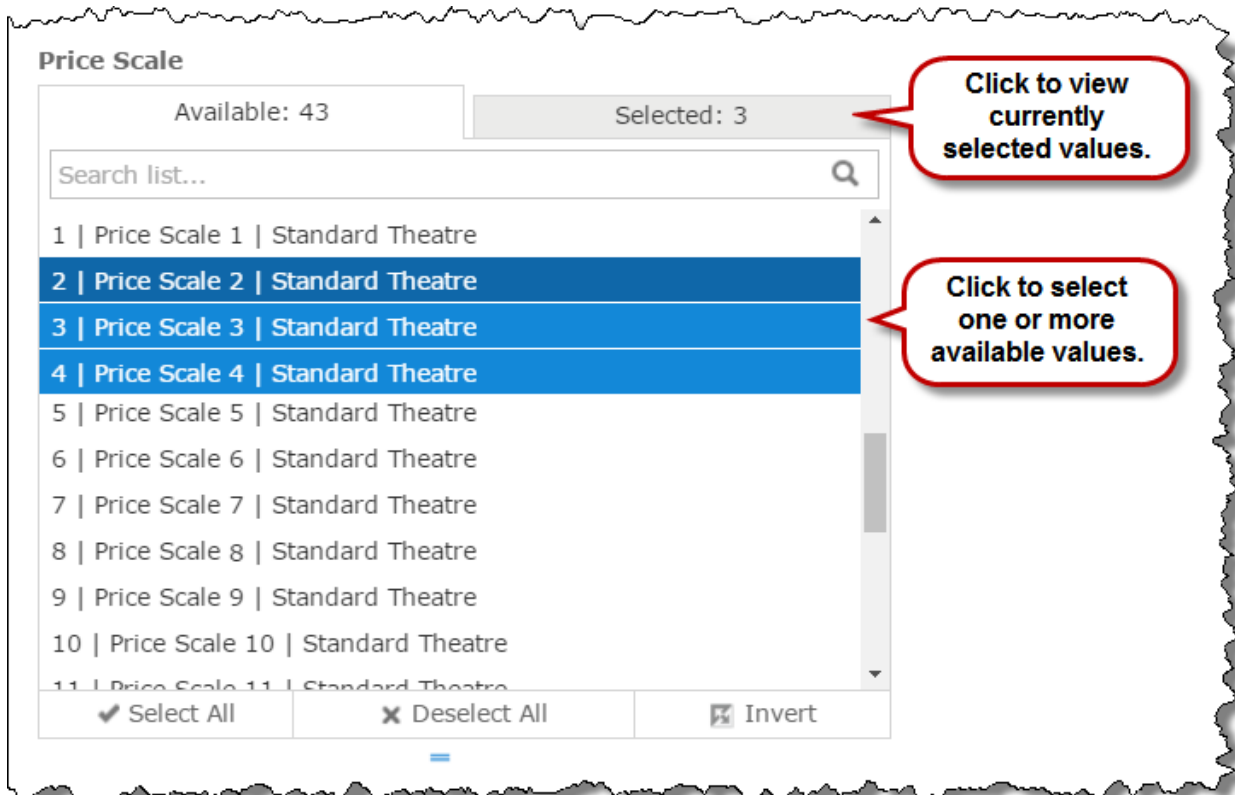
## Multi-Select Values for a Parameter

Certain parameter selection fields allow you to select multiple values. To multi-select, click each desired item at the "Available" tab.

Use the buttons at the bottom of a multi-select parameter to...

- select or deselect all values in the displayed list.
- invert the selected and un-selected values

For example, in the image below, three values are selected (Price Scales 2, 3, and 4). Clicking **Invert** deselects Price Scales 2, 3, and 4, and selects all other Price Scales.



As you select values, they are added to the "Selected" tab. Click the "Selected" tab to view your current selections. Click the "X" next to any value that you wish to remove.

### Notes:

Multi-select parameters are not available for all reports.

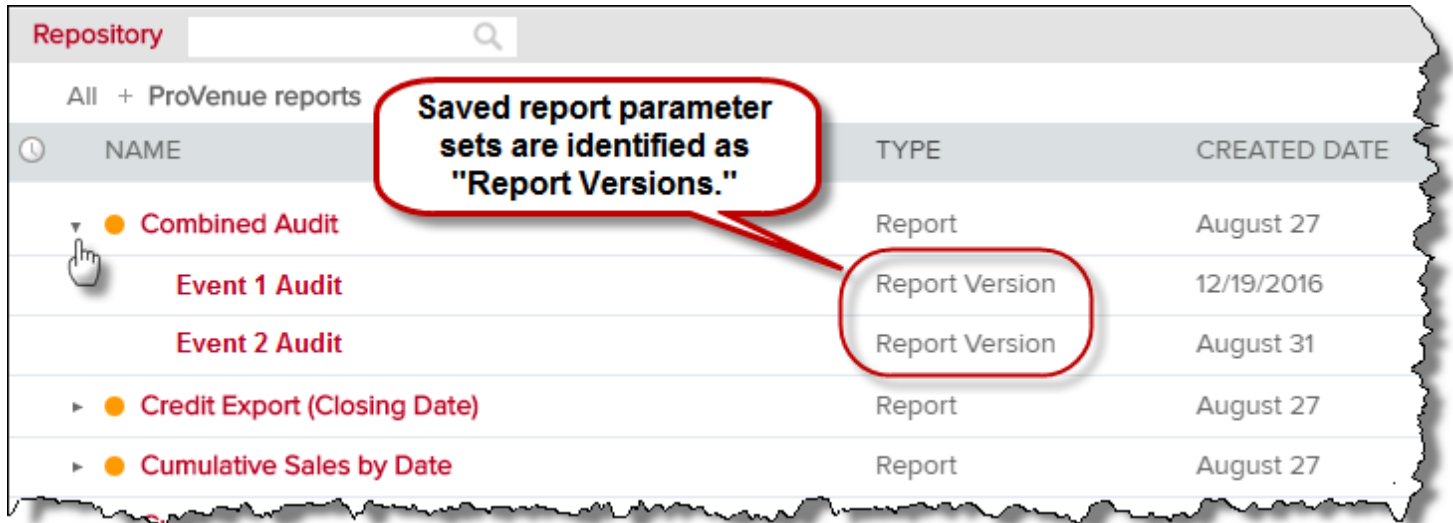
The system may display the 'Supplier' field as an optional multi-select parameter for some, but not all reports.

If no value is selected for a multi-select parameter, the system runs the report for all values available for the parameter. To improve report response times, it is recommended that you select at least one value for each multi-select parameter when possible.

## Saving Parameter Values (Saving 'Report Versions')

The system allows you to save sets of report parameter values for later use. For example, if you run a report often using an identical event range or transaction date range, using saved parameters eliminates the need to define the parameters manually each time the report is run.

For each report, the system allows each user to create multiple sets of saved parameter values, characterized as "Report Versions" in the user interface. At the *Reports Repository* screen, click the arrow to the left of a report to access its Report Versions.



The screenshot shows the 'Repository' screen with a search bar and a list of reports. A callout box points to the 'Report Version' entries in the table.

NAME	TYPE	CREATED DATE
<ul style="list-style-type: none"> <li>Combined Audit</li> <li>Event 1 Audit</li> <li>Event 2 Audit</li> </ul>	<ul style="list-style-type: none"> <li>Report</li> <li>Report Version</li> <li>Report Version</li> </ul>	<ul style="list-style-type: none"> <li>August 27</li> <li>12/19/2016</li> <li>August 31</li> </ul>
<ul style="list-style-type: none"> <li>Credit Export (Closing Date)</li> </ul>	<ul style="list-style-type: none"> <li>Report</li> </ul>	<ul style="list-style-type: none"> <li>August 27</li> </ul>
<ul style="list-style-type: none"> <li>Cumulative Sales by Date</li> </ul>	<ul style="list-style-type: none"> <li>Report</li> </ul>	<ul style="list-style-type: none"> <li>August 27</li> </ul>

All parameter configuration screens allow you to save a set of parameter values as a new Report Version:

- At the *Input Controls* screen, click **Save** at the bottom of the screen.
- At the *New Schedule* screen > "Parameters" tab, click **Save Current Values** in the upper-right corner of the screen.

When creating a new Report Version, you must enter a unique name for the Report Version when saving.

**Note:** Saved parameter values ("Report Versions") retain the permissions of the Agency that is governing the session at the time the Report Version is saved. For example, a user saves a Report Version specifying a particular event while Agency A is governing the session. In this case, the event remains reportable if the user later changes to Agency B and runs a report using that Report Version—assuming the user's account in ProVenue remains associated with Agency A.

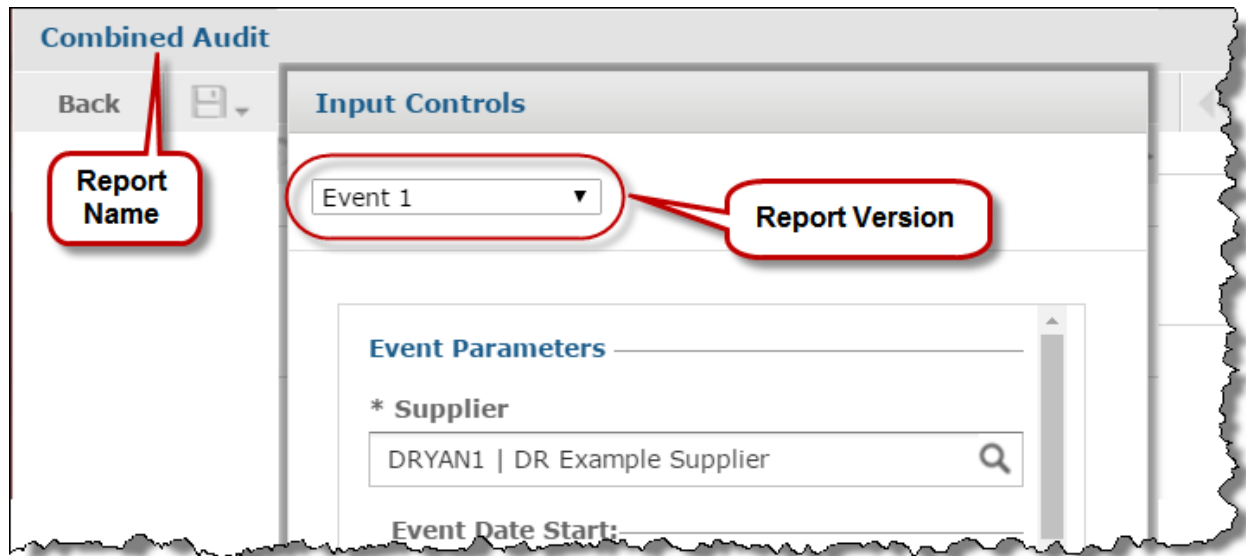
## Using Saved Values when Running Reports

You can use saved parameter values ("Report Versions") for both real-time and scheduled reports.

For real-time reports, you can select a Report Version to initiate the report run as described in [Running a Report with Saved Parameter Values](#).

When running a real-time report or creating/editing a scheduled report...

- you can select a Report Version from the drop-down list at the top of the parameter screen. If no Report Versions have been saved for the selected report, the parameter screen does not display the drop-down field.



- the saved values retain the permissions of the [Agency](#) that was governing the session at the time the Report Version was created.
- you can change any of the saved parameters before running a real-time report or when saving edits to a scheduled job without changing the underlying Report Version (allowing you to use the Report Version as originally configured for other reports).

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**Note:** Each Report Version is available only to the user that created it, and other users within the same user group. Different user groups can have different Report Versions for the same report.

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## Report Output

A report run can generate output in a variety of different formats:

Format Option	Description
HTML	For real-time reports, the system displays report output on-screen as a web page.
	<p><b>Note:</b> Scheduled/background reports do not output to the screen.</p> <p>For scheduled/background reports, selecting the HTML format results in report output displayed in the body of an email.</p>
PDF	For PDF, CSV, and Excel formats, the system allows you to... <ul style="list-style-type: none"> <li>• manually export HTML report output to the desired file format.</li> <li>• select the desired file format for a scheduled/background report.</li> <li>• send an email attachment in the desired file format (for scheduled/background reports).</li> <li>• save the desired file format to an FTP server.</li> </ul>
CSV	
Excel (XLS or XLSX)	

### Notes:

The first page of report output identifies the input parameters in place when the report was generated, the user who generated the report, and the Agency governing the report job.

Report output remains in the [Reports Repository](#) for 7 days, and is then deleted. To retain output that might be needed beyond 7 days, export the output and archive outside of the Reporting Portal.

## Viewing Report Output

Real-time report output is displayed at the *Report Viewer* screen in HTML format. If necessary, the system creates multiple pages, which are accessible using the "page" icons at the bottom of the *Report Viewer* screen.

For Ad Hoc report output, you can [modify the displayed output data interactively](#).

For reports that were run previously, you can view the saved output file by selecting the output file name from a list available at the *Reports Repository* screen.

24. At the *Reports Repository* screen, select "Report outputs" from the Filters panel to list output files.

25. Click the report output file name to view the contents of the report output file.

The system launches the appropriate application to display the report output.

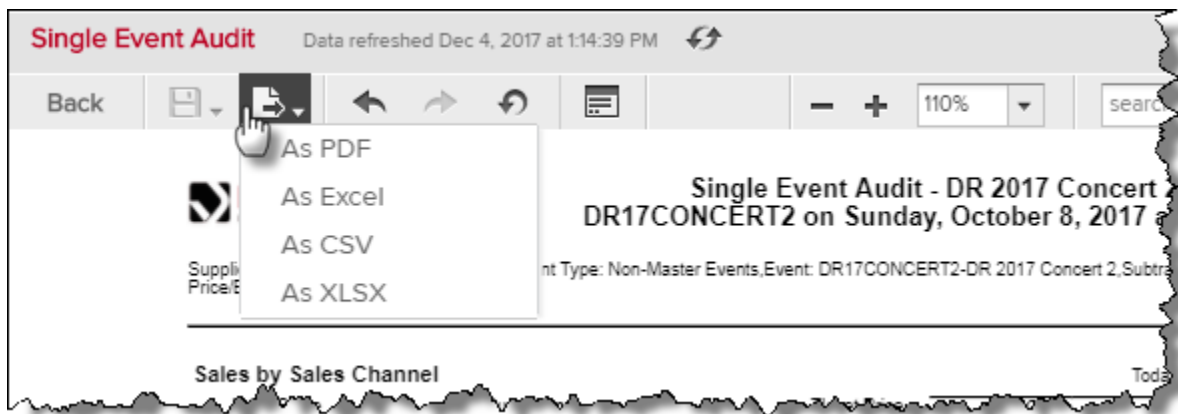
## Exporting Report Output

You can export an HTML report output as a PDF, CSV, Excel, or XLSX file.

This procedure assumes you are viewing the HTML output of a report that has finished running, or that you have opted to view the HTML output of a report that you ran previously.

To export report output as a PDF, CSV, Excel, or XLSX file...

26. While viewing the report output, click the *Export* icon, and then select the desired output format.



27. The system...

- generates the output file in the selected format.
- displays the output file using the appropriate application.
- allows you to save the output file to a location of your choosing.

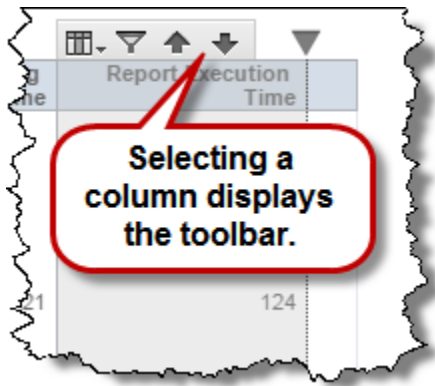
## Interactive Report Output

When viewing Ad Hoc report output, the Reporting Portal allows you to modify the display of structural elements (such as columns) and data values to improve readability.

For example, you can...

- show/hide/resize various columns.
- set/change font properties of column headings and data values.

To make changes to the Ad Hoc report output display, you must click to select the column you wish to modify. The system then highlights the column and displays the interactive toolbar options.



Note that the column edit feature is not available for all report formats, such as Crosstab reports.

### Column Edit Toolbar

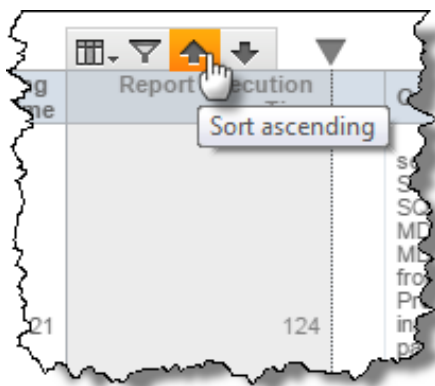
When you click a column in Ad Hoc report output, the Column Edit toolbar displays four icons above the column.



Use the toolbar icons as described below to modify the display characteristics of the column and its data values.

### Sort Data Values

You can sort the data contained in the column fields, in either ascending or descending order, by clicking the "up" or "down" arrow icon in the toolbar.




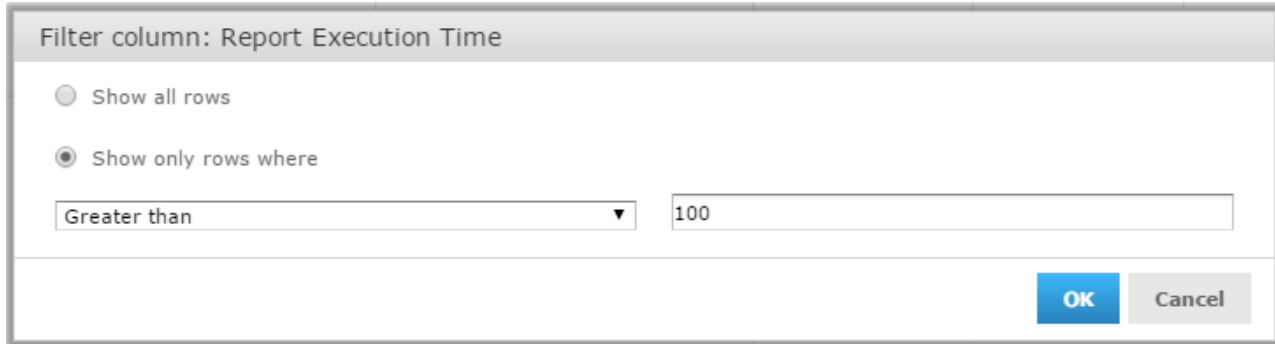
## Filter Data Values

You can filter the values in a column by various criteria (display only those rows with a specified value, for example).

To filter data values...

28. Click to select a column.

29. Click the  icon in the toolbar to display the *Filter column* subscreen.



30. Select the 'Show only rows where' option.

31. Select an operator from the drop-down list. The operator determines the method by which the column values are filtered relative to the value specified in the corresponding text field.

The column type determines the operators that are available in the drop-down list.

For example, the drop-down list for a "Date" column includes operators such as:

"Is before"

"Is after"

"Is between"

Whereas the drop-down list for a "Datasource URI" column includes operators such as:

"Contains"

"Starts with"

"Ends with"

32. Type a value (or values) in the text field(s).


33. Click **OK**.

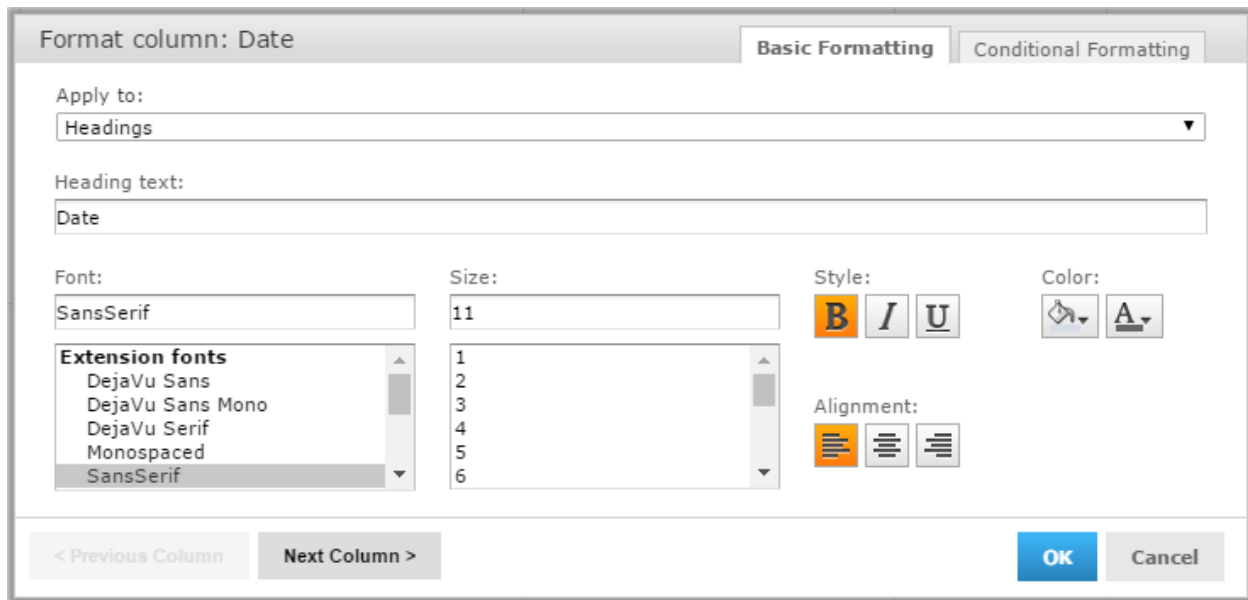
For example, to display only rows that contain an exact value of 20.00 in a selected column, select the "Equals" operator and type "20.00" in the text field.

## Format Column Headings

The system allows you to format the display of column headings, including the column name, font type, and font size.

To format column headings...

34. Click to select a column.
35. Position the mouse cursor over the  icon in the toolbar, and then select the 'Formatting...' option.
36. At the *Format column* subscreen, select the "Basic Formatting" tab (if not already selected).
37. Set the 'Apply to' drop-down field to "Headings" (if not already selected).




38. Modify the column heading as desired using the provided options. When changing values such as the 'Font' and 'Size', be sure to select the desired value from the list and ensure that the value is highlighted before exiting the screen.
39. Click **OK** to save your changes.

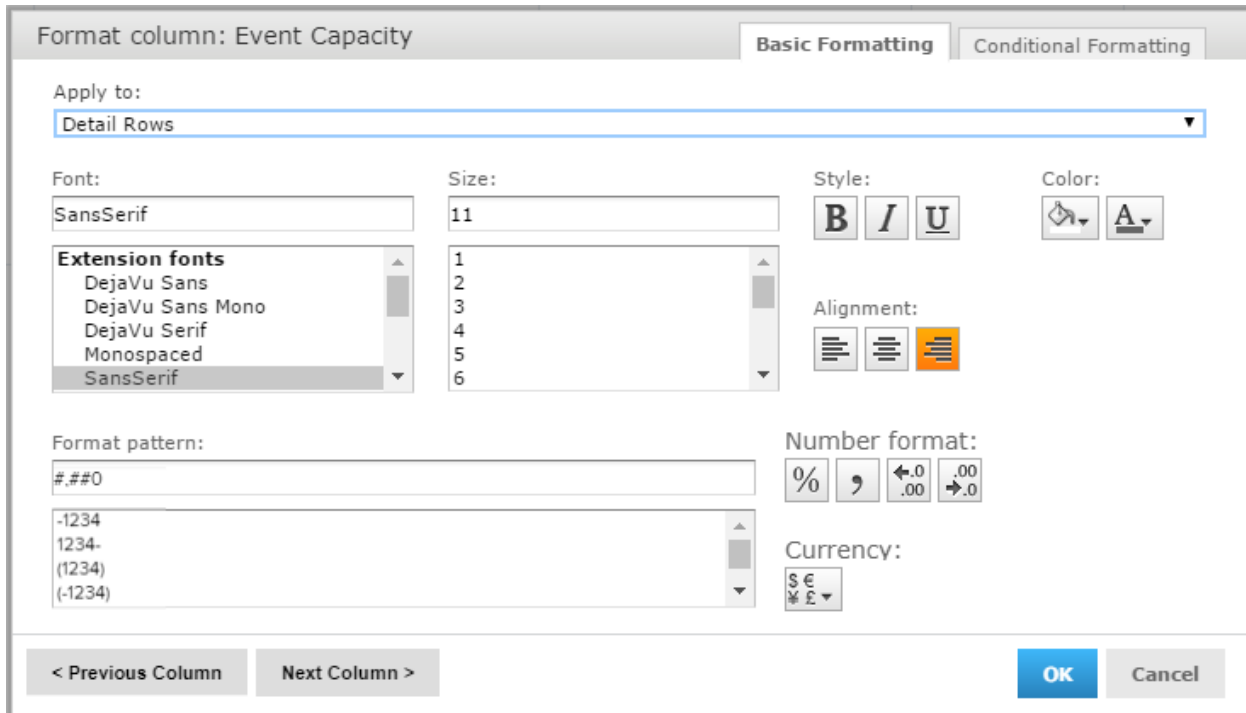
## Format Detail Rows

The system provides options for modifying the display of detail rows (data values) in the selected column, including font type and size, text alignment, and numeric formats/symbols.

For example, if a column contains monetary values, you may choose to display the appropriate currency symbol. For a column that contains text values, you may choose to align the text to the right of the cell, and display the value in italics.

To format column detail rows...

40. Click to select a column.
41. Using your mouse, hover over the  icon in the toolbar and then select the 'Formatting...' option.
42. At the *Format column* subscreen, select the "Basic Formatting" tab (if not already selected).
43. Set the 'Apply to' drop-down field to "Detail Rows."




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**Note:** The system displays different formatting options depending on the type of data included in the selected column. The image above displays formatting options for an "Event Capacity" column.

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44. Modify the column detail rows as desired using the provided options. When changing values such as the 'Font', 'Size' and 'Format Pattern', be sure to select the desired value from the list and ensure that the value is highlighted before exiting the screen.
45. Click **OK** to save your changes.

### Conditional Formatting

The system allows you to apply special formatting to the detail rows when one or more defined conditions are met.

For example, you can set a condition to highlight any detail row containing a date that is before July 31, 2017 with a selected color.

To apply conditional formatting...

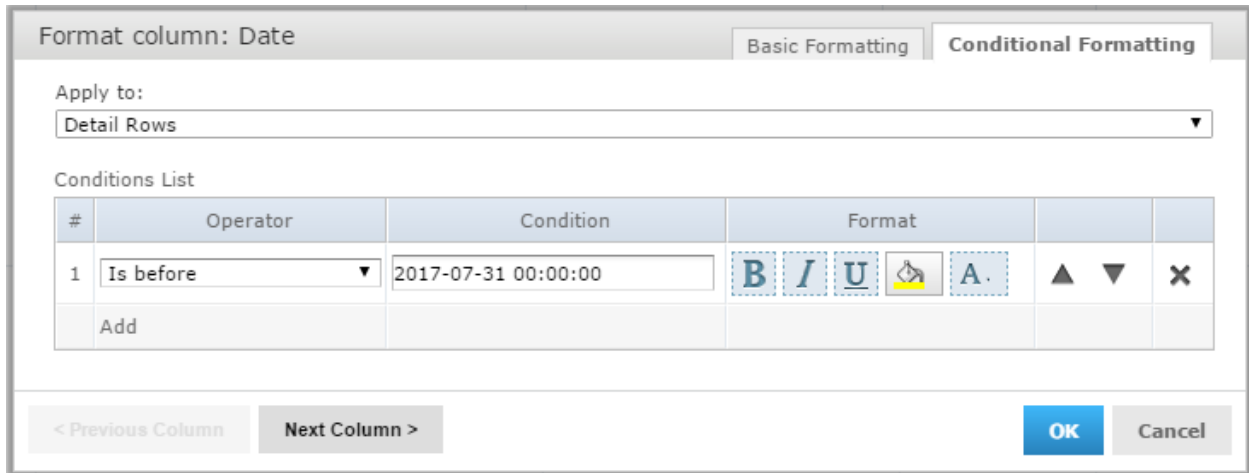
46. Click to select a column.
47. Using your mouse, hover over the  icon in the toolbar and then select the 'Formatting...' option.
48. At the *Format column* subscreen, select the "Conditional Formatting" tab.

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**Note:** As of the date of this document, conditional formatting can only be applied to detail rows.

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49. Click "Add" to create a new condition.

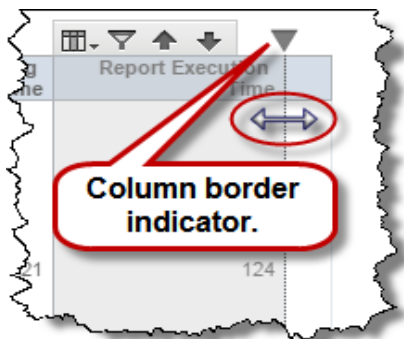


50. Select values for the operator and the condition placed on the operator, and then select the format option to apply when the condition is met.

51. Click **OK** to save your changes.

### Resize Columns

The system allows you to change the width of the selected column by clicking on and dragging the right-hand border of the column.




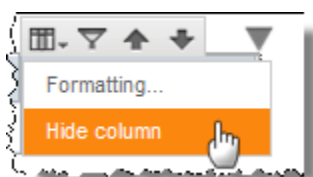
### Hide Columns

The system allows you to hide columns from view.

To hide a column...


52. Click to select a column.

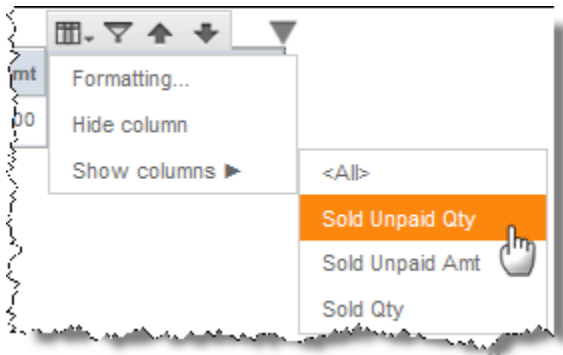
53. Using your mouse, hover over the  icon in the toolbar, and then select the 'Hide column' option.



### Re-Display Hidden Columns

To display (unhide) a column...

54. Click to select any column.
55. Position the mouse cursor over the  icon in the toolbar, and then hover over the 'Show column' option.
56. Click the column heading name for the column you wish to display. Note that you may select <All> to show/unhide all currently-hidden columns.



## Standard (Preconfigured) Report Descriptions

The Reporting Portal provides the following standard reports. For preconfigured reports, the input parameter selection options and output data field types are pre-defined. For information about creating custom (Ad Hoc) reports, refer to the *ProVenue® Reporting Portal: Ad Hoc Editor Reference Guide*.

Report Name	Description
<b>Combined Audit</b>	Reports ticket sales and inventory data for multiple events in a cumulative view for the purpose of event settlement. Reports ticket sales by Buyer Type and Price Scale, with sales for the current day displayed separately from the cumulative totals. Reports sold and unsold seats by Price Scale. (Uses Report Calendar security.)
<b>Credit Export</b>	This report shows a snapshot of liabilities (credits) on the system as existed at a defined point in time. (Uses Organization security.)
<b>Cumulative Sales by Date</b>	Summarizes ticket sales by event and transaction date. For every event and transaction date, the report will show net ticket sales, both on that day and cumulative as of the end of that day. (Uses Report Calendar security.)
<b>Cumulative Sales by Date Export</b>	Summarizes ticket sales by event and date, reporting net ticket sales both on that day and cumulative as of the end of that day. Optimized for export to a spreadsheet. (Uses Report Calendar security.)
<b>Event Count</b>	Shows paid, unpaid, reserved, comp, and open seat quantities by event.
<b>Event Cumulative Totals Export</b>	Summarizes cumulative ticket sales and reservations by event, usage date, price scale, channel, and many other dimensions. Optimized for export to a spreadsheet. (Uses Report Calendar security.)
<b>Event Profile Dashboard</b>	Provides a snapshot of one event, including high-level sales, inventory, and ticket print numbers.
<b>Event Sales by Price and Buyer (Cumulative)</b>	Breaks out cumulative comp/sold ticket quantities and amounts by price scale and buyer type, optionally including reservations. (Uses Report Calendar security.)
<b>Event Sales by Price and Buyer (Transaction Date)</b>	Net ticket sales over a transaction date range, grouped by price scale and buyer type. Does not include reservations. (Uses Report Calendar security.)
<b>Event Sales by Price or Buyer (Cumulative)</b>	Breaks out cumulative ticket quantities and amounts by either price scale or buyer type, optionally including reservations. (Uses Report Calendar security.)
<b>Event Sales by Price or Buyer (Transaction Date)</b>	Breaks out quantities and amounts of tickets sold during a defined transaction date range either by price scale or buyer type. (Uses Report Calendar security.)
<b>Event Sales Summary (Cumulative)</b>	Shows cumulative sales and comps by event. Optionally includes reservations. (Uses Report Calendar security.)
<b>Event Sales Summary (Transaction Date)</b>	Shows quantities and amounts of sold/comp tickets sold during a defined transaction date range. (Uses Report Calendar security.)

Report Name	Description
<b>Event Sales Summary By User</b>	Reports on cumulative comps and sales by user (operator) and event. Returned ticket counts are broken out separately. (Uses Report Calendar security.)
<b>Event Sales Summary Cross Tab (Cumulative)</b>	Shows cumulative sales by event and sales channel in a grid format. (Uses Report Calendar Security.)
<b>Event Sales Summary Cross Tab (Transaction Date)</b>	Shows sales over a defined transaction date range by event and sales channel in a grid format. (Uses Report Calendar security.)
<b>Event Sales Today and Cumulative</b>	Reports on the net quantity and value of sold and comp tickets by event, both cumulatively and for today only. (Uses Report Calendar security.)
<b>Event Sales Today and Cumulative Export</b>	Reports sold ticket quantities and amounts for today and cumulatively for one or more events. Optimized for export to a spreadsheet. (Uses Report Calendar security.)
<b>Event Seat Status</b>	Shows a summary of ticket sales and seat availability for one or more events. The report includes sales for a user-defined transaction date range, cumulative sales information, unsold quantities, and sales by sale type. (Uses Report Calendar security.)
<b>Location Count</b>	Location Count provides highly summarized sales and availability information for one or more events, apportioned by “location” (either the Price Scale or Section). For every event and location, the report shows sales for a user-defined transaction date range in addition to cumulative sales. The report also includes quantities of unsold seats for various Hold Codes, including Open, Reserved, Held, Blocked, and Blacked Out seats.
<b>Market Type Distribution</b>	Reports the distribution of tickets by event across market and market offer types, including quantities of tickets forwarded. (Uses Report Calendar security.)
<b>Marketing Source Summary</b>	Summarizes net ticket sales information by Event and Marketing Source, for one or more events. Reservation quantity and amounts are optional. (Uses Report Calendar security.)
<b>Marketing Source Summary Export</b>	Summarizes net sold and reserved ticket quantities and amounts, grouped by Marketing Source and other dimensions, for one or more events. (Uses Report Calendar security.)
<b>Receivables Export</b>	This report shows a snapshot of receivables on the system as they existed at a defined point in time. (Uses Organization security.)
<b>Scan Media Summary</b>	Reports quantities of scanned and unscanned tickets by event and delivery method. Scanned tickets are grouped by scan media type. (Uses Report Calendar security.)
<b>Single Event Audit</b>	Provides information about ticket sales and inventory for the purpose of event settlement. Ticket sales are reported by buyer type and price scale with today's sales listed separately from cumulative sales. Unsold seats are reported by price scale. (Uses Report Calendar security.)

Report Name	Description
<b>Ticket and Service Charge Audit (Standard)</b>	Reports cumulative ticket and Per Ticket service charge sales (up to 6) by event. Payment and Inventory summaries are optional. (Uses Report Calendar security.)
<b>Ticket and Service Charge Audit (Wide)</b>	Reports cumulative ticket and Per Ticket service charge sales (up to 9) by event. Payment and Inventory summaries are optional. (Uses Report Calendar security.)
<b>Ticket and Service Charge Export</b>	Reports cumulative ticket and individual Per Ticket service charge sales by event. Optimized for export to a spreadsheet. (Uses Report Calendar security.)
<b>Ticket Delivery Summary</b>	Reports quantities of printed, unprinted, and forwarded tickets by event and delivery method. (Uses Report Calendar security.)

## Event Profile Dashboard

The *Event Profile Dashboard* provides a “snapshot view” of data for one event, including high-level sales, inventory, and printed ticket counts.

The dashboard differs from a traditional report in that the dashboard output is...

- automatically refreshed at a defined interval, displaying the most up-to-date data that is available.
- consolidated, displaying data from a variety of report types on a single screen.
- interactive, allowing you to select the type of data that is displayed.

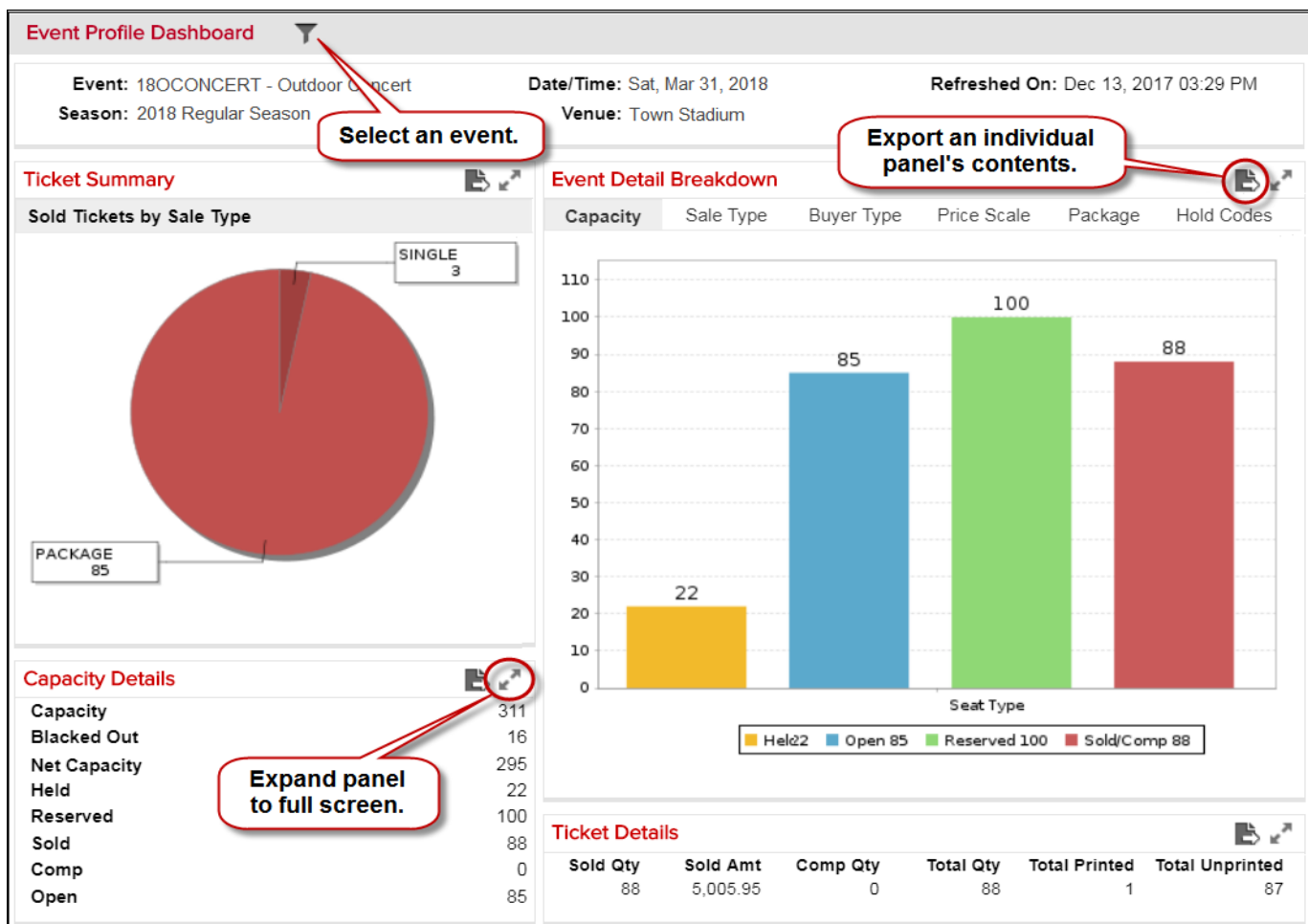
### Accessing the Event Profile Dashboard

To access the dashboard from the [Home](#) screen, select the "View list" link under "Dashboards," and then click "Event Profile Dashboard."

To access the dashboard from the [Reports Repository](#) screen, select the 'Dashboards' filter option, and then click "Event Profile Dashboard."

**Note:** You may or may not have access to the *Event Profile Dashboard*. For more information, refer to [Access to Reports](#).

### Example: Event Profile Dashboard



## Event Profile Dashboard Input Controls

The *Event Profile Dashboard* does not use the 'Input Controls' mechanism as other reports do. Instead, the dashboard allows you to filter data by 'Month', 'Year', and 'Event' at the *Filter Group* subscreen.

Clicking the filter icon (see image above) displays the *Filter Group* subscreen.

Note that you are not required to select any parameters when running the *Event Profile Dashboard*. When launched, the dashboard automatically selects the next primary-class event to which you have access, based on a comparison of the event's date/time and the current time.

## Event Profile Dashboard Output

The dashboard displays report output within multiple screen sections or "panels." Some panels display data interactively, allowing you to specify the data to display. Other panels are not interactive and are displayed at all times. Data contained in both the interactive and non-interactive panels is refreshed at the defined interval.

The 'Refreshed On' date/time (see image above) is based on your ProVenue environment's time zone.

## Frequently Asked Questions

Below are some common troubleshooting solutions for users of the ProVenue Reporting Portal.

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**Note:** Permissions determine the exact set of features, menu options, and report data available to you. You may or may not have access to all of the features described in this document.

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### **Why does the system display the message "Access Denied" or "Please contact your system administrator or log in as a user with permission." when I try to log in?**

Your ProVenue user has not been configured to use the Reporting Portal. Please contact your Tickets.com representative for assistance.

### **Why have my selected report parameters disappeared?**

The *Input Controls* screen may take several seconds to fully load. Report parameters are ready for definition only after all of the parameters have fully rendered onscreen. Specifying report criteria before the screen has fully rendered can result in the loss of your selections/settings.

Be sure the *Input Controls* screen is fully loaded before entering any report parameters.

### **Why am I unable to save edits to a Report Version from the Scheduler?**

To save an edited Report Version from the *Scheduler*, you must save your changes with a new file name.

For example, after making changes to a set of saved parameters named "Version1," you must save the changes as a "new" Report Version with a new name such as "Version2."

Attempting to overwrite a Report Version from the *Scheduler* results in an error.

### **Why am I unable to select a saved report at the Reports Repository screen?**

The system allows you to view/run a report with saved parameters by "expanding" the desired report in the list at the *Reports Repository* screen, and then selecting the name of the saved parameter set ("Report Version"). Sometimes an expanded report may collapse if you scroll past it, making saved parameters near the bottom of the list impossible to select from the *Reports Repository* screen.

In such cases, click the main report title at the *Reports Repository* screen to display the *Report Viewer*, and then choose the saved parameters you want to use from the *Input Controls* screen.

### **Why does my report name contain strange characters?**

When saving report parameters, providing a name for the set of parameters is a required step. If you are using Internet Explorer 8, note that the system changes any space in the name to "%20." For example, if you name a parameter set "Sales by date," it is saved as "Sales%20by%20date." This issue applies only to Internet Explorer version 8.

To avoid this issue, it is recommended that you use a different browser or use alternatives to spaces when naming saved parameters, such as the underscore character ( \_ ) or the dash character ( - ).

**Why did I receive an email message with no report attached?**

When using the *New Schedule* module to send an email notification, you must select either 'Include report files as attachments' or 'Include report files as ZIP attachment' at the *New Schedule* screen > "Notifications" tab to ensure that the report file (CSV, PDF, Excel, XSLX) is sent with the email message.

**Why can a general user still access certain data after ProVenue permissions were restricted for this user?**

If a user is logged into the Reporting Portal while the user's security is changed in ProVenue, the system does not enforce the security adjustments until the user's next login to the Reporting Portal.

**Why can't I access the Event Profile Dashboard or Event Count reports?**

Certain features require specific configuration for your reporting environment and are not available to all users. Please speak with your Tickets.com representative.

**Why is my report output blank?**

Possible reasons include:

- The report parameters as defined do not encompass any data (a date range for which no data is available, for example).
- Agency-user associations have changed in ProVenue. For example, if a scheduled report worked last week but fails to generate data this week, it's possible that your user's Agency-based permissions have changed in ProVenue since the last successful report run.

**Why have I lost access to certain data?**

Possible reasons include:

- Report Calendar permissions have expired for an event in ProVenue. In 'Event Access' setup in ProVenue, a user's access to event data (for reporting purposes) can be restricted to a particular time period.
- Agency-user associations have changed in ProVenue. For example, if a scheduled report worked last week but fails to generate data this week, it's possible that your user's Agency-based permissions have changed in ProVenue since the last successful report run.

**Why is my currently selected Agency not being honored?**

By design, saved parameters (Report Versions) and scheduled reports retain the Agency that was governing the session when they were created—regardless of the currently selected Agency.

Since you can [change the Agency governing your session](#), it's possible that your currently selected Agency is different than the Agency governing a scheduled report or Report Version. Note that you can create new scheduled reports and Report Versions with your currently selected Agency.