Custom Report Manager Introduction

CampTrak has several ways to sort and filter your data. When you are in Record Information under Functions, there is the Filter On, Donor Filter, MOR Filter and Block filter. If these quick and easy filters do not have what you need you can turn to the more powerful Custom Report Manager.

Some people find the Custom Report Manager 'overwhelming' and 'scary'. In order to take the 'scary' out of the Custom Report Manager, let me reassure you that you can't hurt anything while using the Custom Report Manager. All it does is pull data. The Custom Report Manager does NOT change the data in any way. So feel free to experiment all you want so you become more comfortable. Hopefully, the following will help take the 'overwhelming' out of the Custom Report Manager.

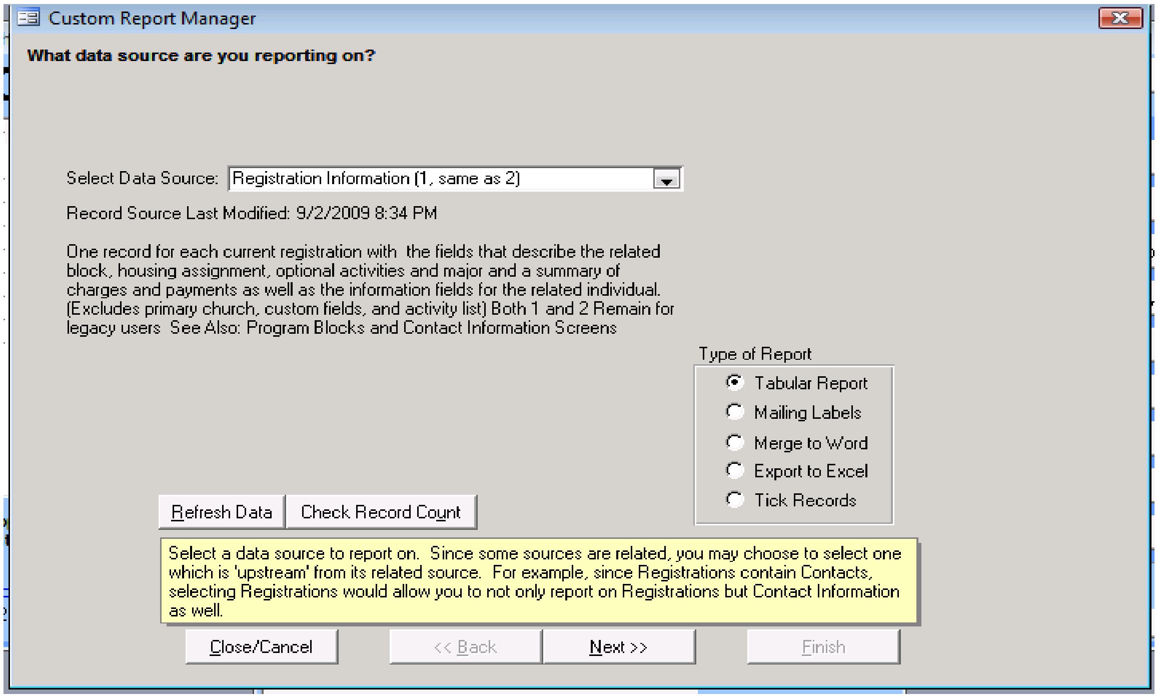
As you know, CampTrak is based on Access. Each screen or form that you see when you navigate through CampTrak is pulling information from tables where all your data is stored. The Custom Report Manager has numerous Data Sources that are actually queries. In other words, each data source goes out to the different tables of information and pulls the data into a 'source' so that you can use it in different ways.

When you are in the Custom Report Manager screen, if you push F1, you will see a list of each data source and a paragraph explaining which forms or screens in CampTrak from which the data source pulls the information. When you use the pull-down and pick a data source a paragraph will appear under the data source that tells you the same thing for that particular data source.

For instance, if you want to send a letter to all the campers who came to your camp last summer, you would look through the data sources to find the one that has the information you want. Here is where the 'overwhelming' often starts. So let's take a deep breath and think about our data and how it is organized. Think about the screen or form where you get the information.

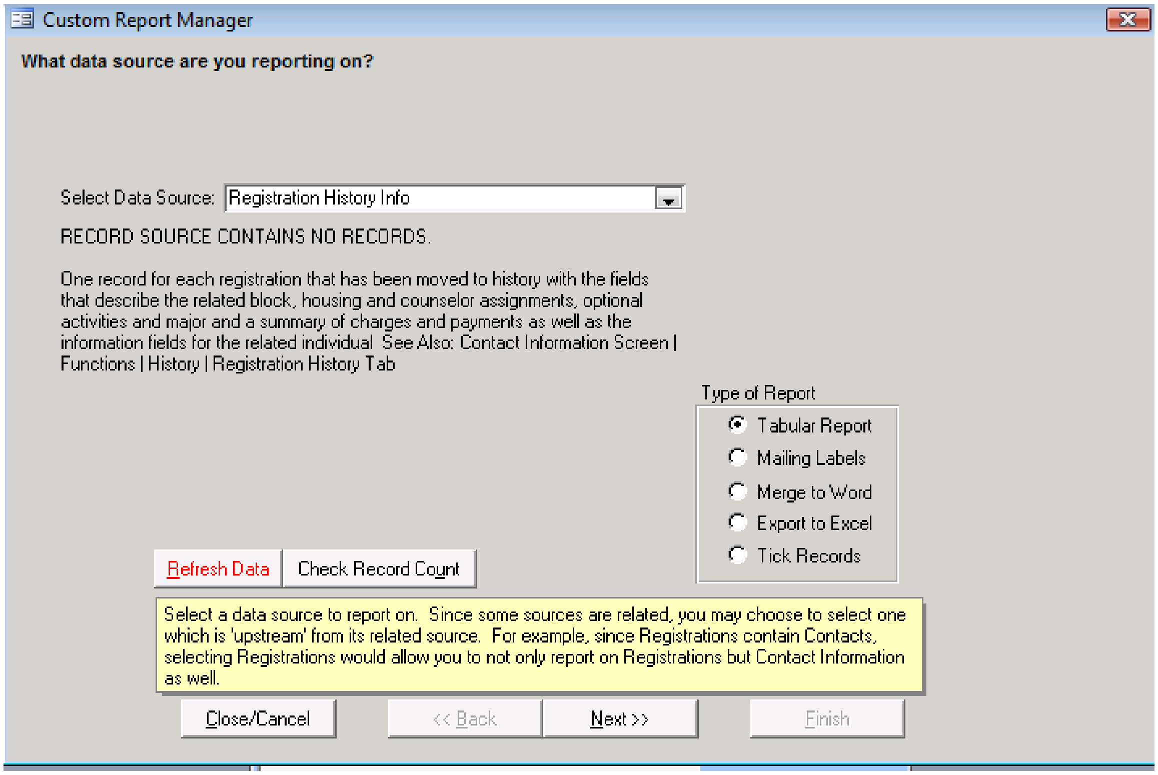
1. If you HAVE NOT yet sent the campers to history, the screen or form where you would find the information for a particular camper is the Registration Tab under the Record Information screen. So the data source you are looking for would be the Registration Information. (You can ignore the (1, same as 2) and (2, same as 1). It is there for some legacy users. It doesn't matter which of those two you use they are the same.)
2. If you HAVE sent the campers to history, then you would find limited information for a particular camper under Record Information →Functions→History. You can find all the information that was sent to history under the data source called Registration History Info.

So lets look at the paragraph under the Registration Information Data Source:



It tells us that it is pulling the information from screens that show the blocks, housing assignments, optional activities, and optional majors. It also pulls from the Transaction Tab a summary (meaning a total) of the charges and payments. It also pulls other information from the Record Information →Record Info tab. The paragraph gives you a hint at the end of what screens it is pulling the information from.

If we look at the Registration History Info paragraph:



We see that it pulls from some of the same screens that would have been there if the information had not been sent to history.

Now that we begin to understand where the data is coming from for each data source, lets talk about Refreshing the Data. Remember when I said the Custom Report Manager Data Sources are queries? Well, what each data source does is go out and look at all the data as it is at that moment in CampTrak and then it pulls the information into the data source. If you changed the data since the last time you used that data source. For instance if you changed the 'tick' or added a camper or changed a camper's address or the camper's age changed then the data current data in CampTrak has changed. (Remember, even the data sources that pull from history also pull from the current contact information screens.) When you hit the 'Refresh Data' button, the Custom Report Manager performs another query and gets the current data from CampTrak. So if you are getting really odd results, this might be a place to start.

The Custom Report Manager can produce five different kinds of results:

1. Tabular Report: Produces a report in an Access format
2. Mailing Labels: Produces labels for a mailing
3. Merge to Word: Data can be merged directly to Word using merge fields
4. Export to Excel: Data can be exported to Excel and then manipulated.
5. Tick Records: A different way of ticking records. It can be quite powerful.

Each of these results will have it's own video and it's own chapter.