

HOW TO CREATE CUSTOM AD HOC REPORTS

(Ad Hoc - formed or used for specific or immediate problems or needs, as in *ad hoc solutions*)

1. Go to www.swiftium.co/reporting. Enter your username and password (which you will have received by email) on the login screen. Then click *Sign In*.



Username:

Password:

Sign In

2. After you sign in you will see a drop down arrow. Click the arrow and select the name of the show. There will only be one show name listed.

Filter Shows

 Select A Show

Select a Show ▼

Select a Show

DemoEvent

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3. Once you are logged in you will be at the main screen. This provides an event overview. It shows how many scans you have that are unique vs. duplicate as well as how many scans have notes attached to them.

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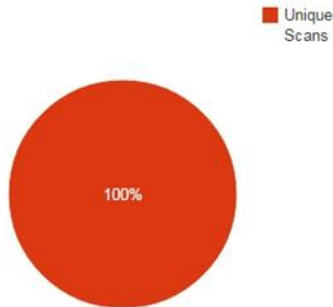


DemEvent

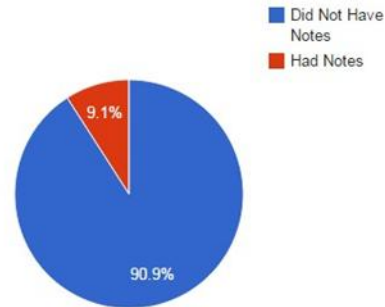
[Sign Out](#) | [Change Event](#)

- Event Overview
- Transactions
- Qualifiers
- Exhibitors
- Attendees
- More

Event Scan Statistics



Event Note Statistics



4. To Access your Ad Hoc Reports hover over the *More* menu option. A drop-down menu will appear with the Ad Hoc Reports option. Click *Ad Hoc Reports*.

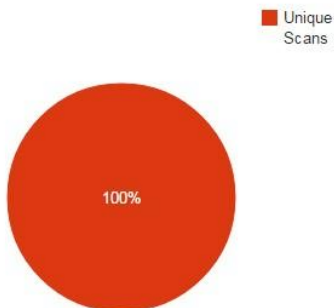


DemEvent

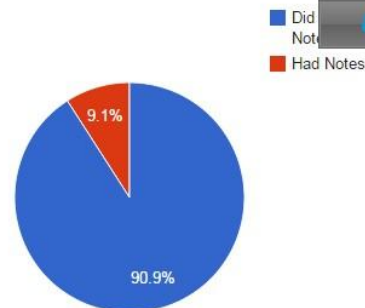
[Sign Out](#) | [Change Event](#)

- Event Overview
- Transactions
- Qualifiers
- Exhibitors
- Attendees
- More

Event Scan Statistics



Event Note Statistics



- Sessions
- Ad Hoc Reports
- Marketing
- SalesForce

5. Once the page has navigated to the Ad Hoc Reports home page you will be presented with a list of previously created reports and the option to create a report. On the right click *Create Ad Hoc Report*. You can also click the *Create Reports Here* link at the bottom of the page instead of the Ad Hoc icon.

Your Custom Reports

Filter Download Results

Start Date: 01/24/2015 ▼ End Date: 01/24/2015 ▼

Start Time: 12 AM ▼ End Time (+59 minutes): 12 AM ▼

 Create Ad Hoc Report

6. If you are creating a new report you will be prompted to enter a name for your report. Enter a name in the text box and press *Create*. Please note the chosen name of the report is seen later on your Ad Hoc reports page.

Create A Report

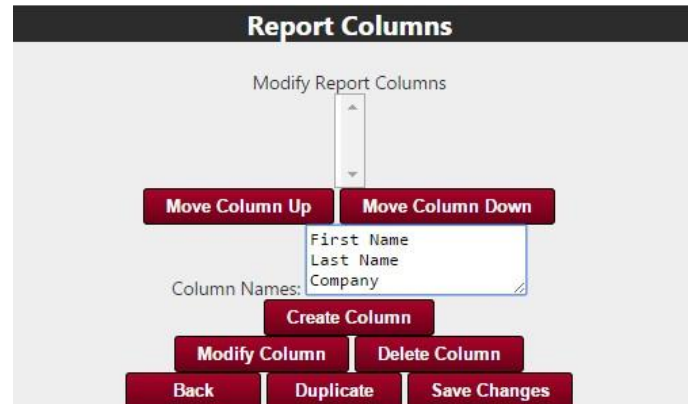
Enter Report Name

7. A box will now appear to the right where you can Select a Report. Using the dropdown menu select the report that you just created. You will now be able to start creating/editing the selected custom report.

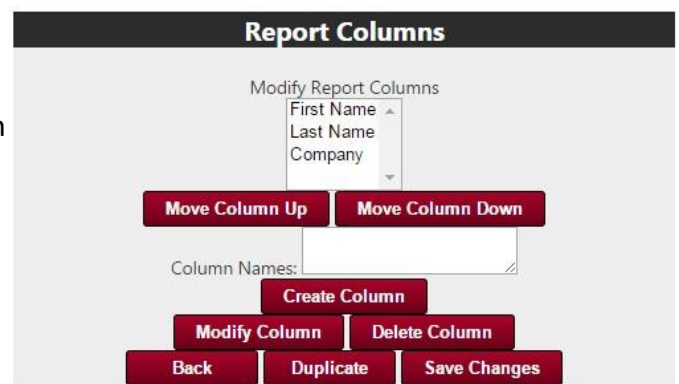
Select A Report

Select A Report

8. The first thing you will need to do is create the column headings. In this example we will use First Name, Last Name and Company.



9. Once you have entered your entire list of column headers, click *Create Column*. This will load all of your columns from the box above. Once they are loaded, click *Save Changes* to save your progress.



10. In order to determine what data is included in the report, each of the columns must be configured. To configure a column, select one heading from the list of columns. Then click *Modify Column*. This will allow you select the data that will populate the column.



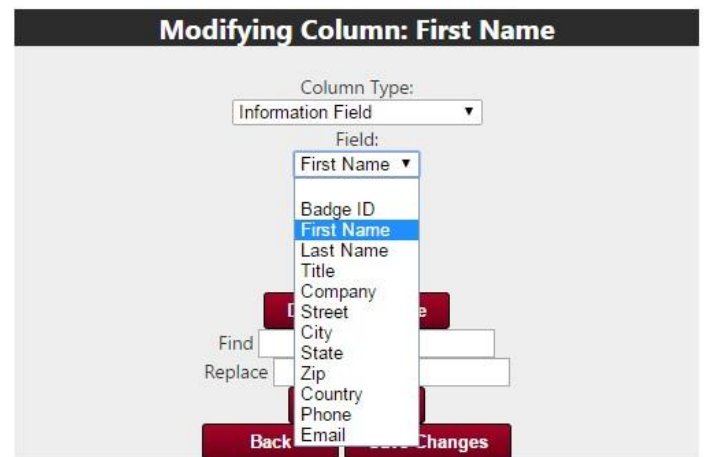
11. Once you click *Modify Column* you will have the option to select the type of data this column will be populated with. The column types are described below in further detail:

- a. Information Field – This will be the data that was included in the barcode.
- b. Custom Qualifier – These are the answers to the custom qualifier questions.
- c. Notes – This includes any notes that were taken during the event.
- d. Sever Capture Date Time – This is the date and time that the data hit our server (refer to the Date Format table for customizing the data time format).

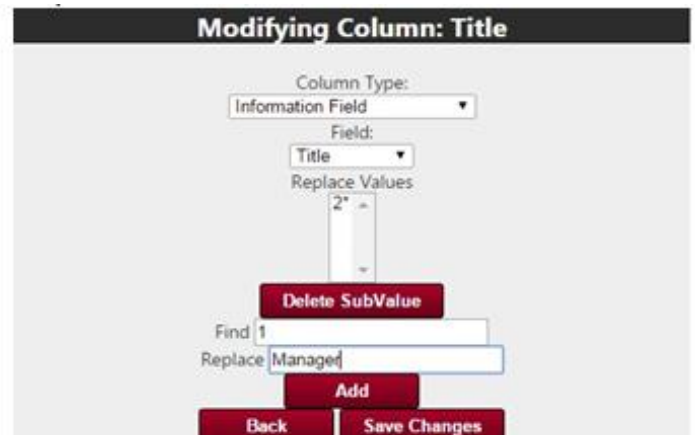
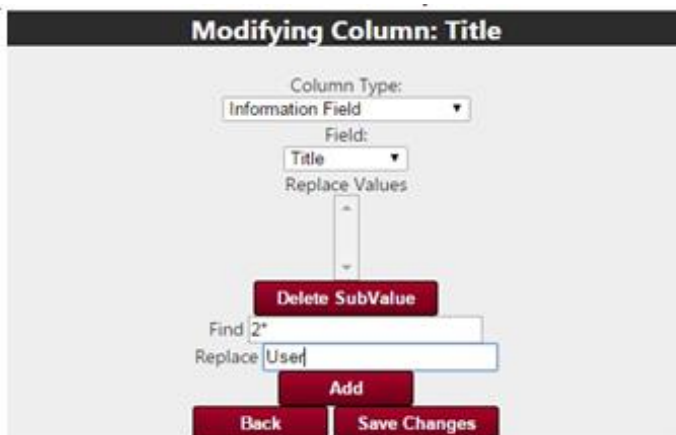
HOW TO CREATE CUSTOM AD HOC REPORTS

- e. Session – If the device was used for session tracking this would display the session names.
- f. Access Control – Is the same as above sessions.
- g. Static Value – If you would like each row to have a static value (for example, the name of the event).
- h. Capture Device ID – This is the IQR Leads Device ID (a 5 digit number).
- i. Exhibitor Booth – If a booth number was entered into the device at the time of handout we would be able to display the booth number.
- j. Exhibitor Company – If a company name was entered into the device at the time of handout we would be able to display the company name.
- k. Device Capture Date Time - This is the date and time that the badge was scanned; we receive this information directly from the device directly (refer to the Date Format table for customizing the data time format) .

12. After you select the information field you will see a drop down arrow underneath the field heading *Field*. Select the field name that you would like to display. In our example we have a field heading called First Name so we will select First Name from the dropdown list. Once this is selected click *Save Changes*.



13. Each column has the option to perform a find and replace on the actual data that is populated. The column may have a number of key value pairs to find and replace. The key may also include a wildcard for searching. An asterisk can be substituted for any sequence of characters. For example, if you wanted to replace some of the information in the field Title but there are too many combinations that would have to be defined in order to cover all possibilities, utilizing a wildcard you could define a rule where any "Title" starting with "2" is replaced with "User". Another rule could be defined for the case where "Title" equals "1." Now any data that meets any of those column rules will be replaced with the defined replacement value.



Report Before Applying Wildcard Find + Replace Values		
First Name	Title	Company
Mike	3	xyz Company
Sarah	264	xyz Company
Andrew	247	xyz Company
Robert	1	xyz Company
Report After Applying Wildcard Find + Replace Values		
First Name	Title	Company
Mike	3	xyz Company
Sarah	User	xyz Company
Andrew	User	xyz Company
Robert	Manager	xyz Company

14. Repeat steps 11 – 13 until all your columns have the appropriate data.

15. You now need to save the report to ensure that all field data is saved. If you forget to save your changes won't be saved. After saving, you will see a notification in the top left "Successfully Saved Report."

16. If you would like to create additional reports you may do so by repeating steps 6 – 15.

17. Once you are finished creating your reports, click on the event name at the top of the screen. You will be brought back to the event overview. Click *More* and then select *Ad Hoc Reports*.

18. You will now see the name of the report that you created. Click the download icon and your report will begin to download.

The screenshot shows the Swiftium Portal interface for a DemEvent. At the top, there is a navigation bar with the Swiftium Portal logo, the event name 'DemEvent', and links for 'Sign Out' and 'Change Event'. Below this is a menu with options: 'Event Overview', 'Transactions', 'Qualifiers', 'Exhibitors', 'Attendees', and 'More'. The main content area is titled 'Your Custom Reports' and contains a 'Filter Download Results' section with dropdown menus for Start Date (01/24/2015), End Date (01/24/2015), Start Time (12 AM), and End Time (+59 minutes) (12 AM). To the right of the filter section is a green plus icon and the text 'Create Ad Hoc Report'. Below the filter section is a card for 'Demo Report' with a download icon and the word 'Download'.

19. You can also filter the data so that only data between certain dates or time periods is shown. To utilize this feature use the filter start date/time and end date/time to have the downloaded data only include the data for that specific time period.

Date Format

Format Key	Description	Example
“d”	The day of the month, from 1 through 31.	1 15
“dd”	The day of the month, from 01 through 31.	01 15
“ddd”	The abbreviated name of the day of the week.	Mon (en-US)
“dddd”	The full name of the day of the week.	Monday (en-US)
“M”	The month, from 1 through 12.	6
“MM”	The month, from 01 through 12.	06
“MMM”	The abbreviated name of the month.	Jun (en-US)
“MMMM”	The full name of the month.	June (en-US)
“y”	The year, from 0 to 99.	0 19
“yy”	The year, from 00 to 99.	01 19
“yyy”	The year, with a minimum of three digits.	001 900 2009
“yyyy”	The year as a four-digit number.	2009
“h”	The hour, using a 12-hour clock from 1 to 12.	1 1
“hh”	The hour, using a 12-hour clock from 01 to 12.	01 01
“H”	The hour, using a 24-hour clock from 0 to 23.	1 13
“HH”	The hour, using a 24-hour clock from 00 to 23.	01 13
“m”	The minute, from 0 through 59.	9 29
“mm”	The minute, from 00 through 59.	09 13