

# Creating and Exporting an Event Participant Report

13 Steps [View most recent version](#) 

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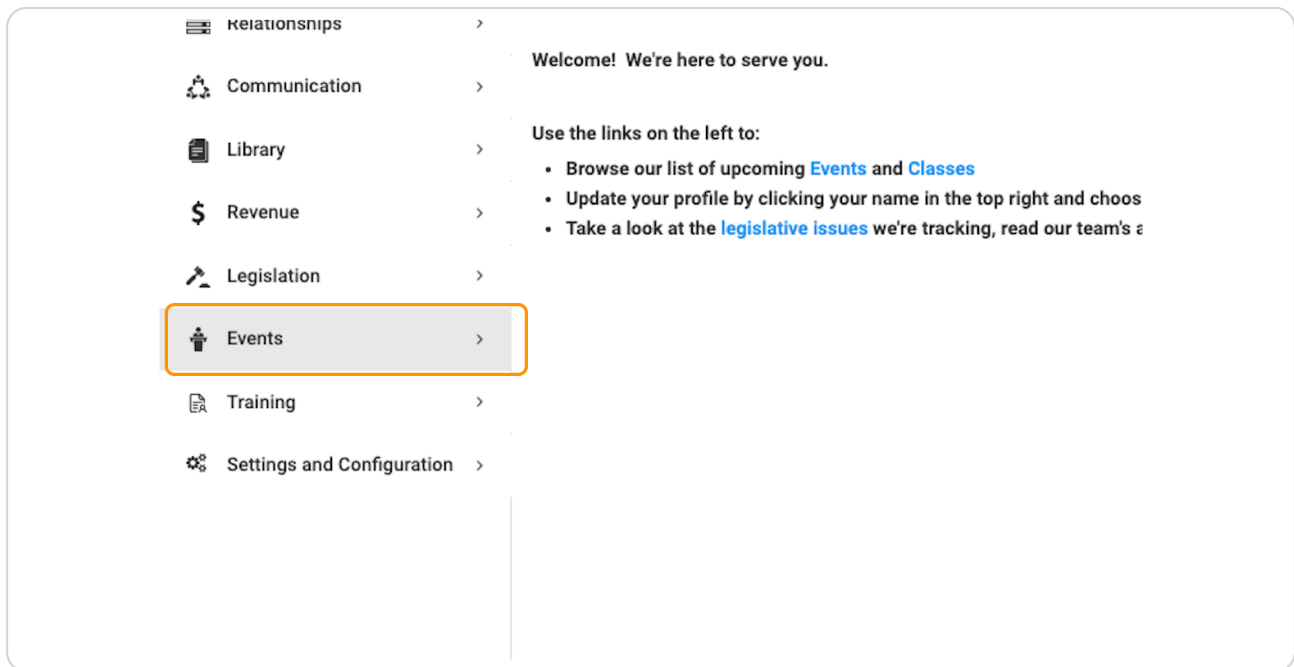
Created by  
Engagifii Inc.

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April 15, 2024

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April 15, 2024

## STEP 1

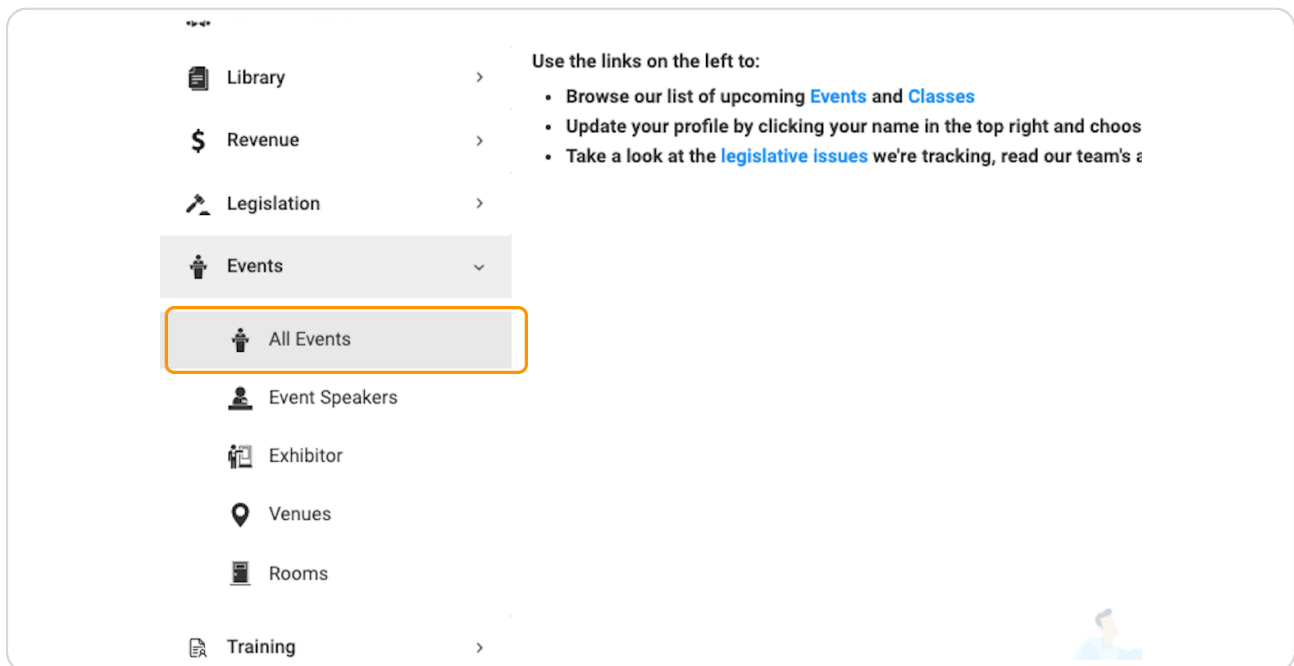
### Click on Events



A screenshot of a dashboard sidebar. The sidebar contains the following items: Relationships, Communication, Library, Revenue, Legislation, Events (highlighted with an orange border), Training, and Settings and Configuration. The main content area displays a welcome message: "Welcome! We're here to serve you." Below this, it says "Use the links on the left to:" followed by a list of instructions: "Browse our list of upcoming Events and Classes", "Update your profile by clicking your name in the top right and choos", and "Take a look at the legislative issues we're tracking, read our team's e".

## STEP 2

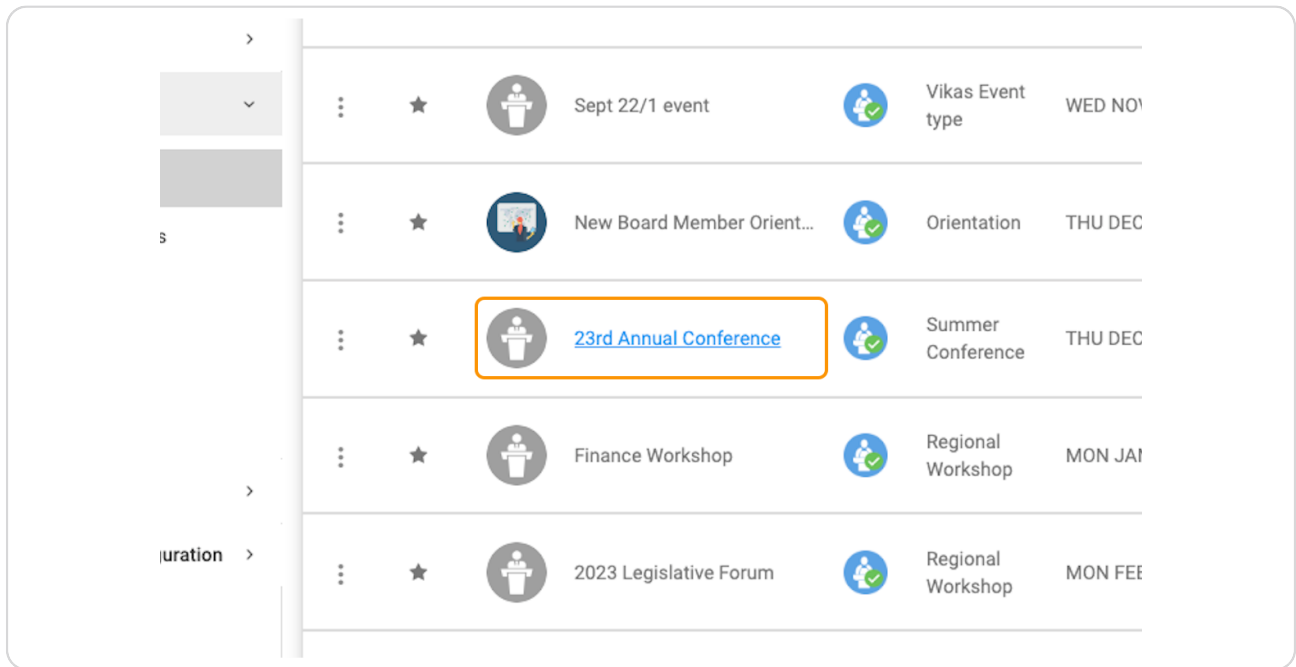
### Click on All Events



A screenshot of a dashboard sidebar. The sidebar contains the following items: Library, Revenue, Legislation, Events (expanded to show a dropdown menu), All Events (highlighted with an orange border), Event Speakers, Exhibitor, Venues, Rooms, and Training. The main content area displays the same welcome message and instructions as in Step 1. A small profile picture of a person is visible in the bottom right corner of the main content area.

### STEP 3

Click on the event you wish to view

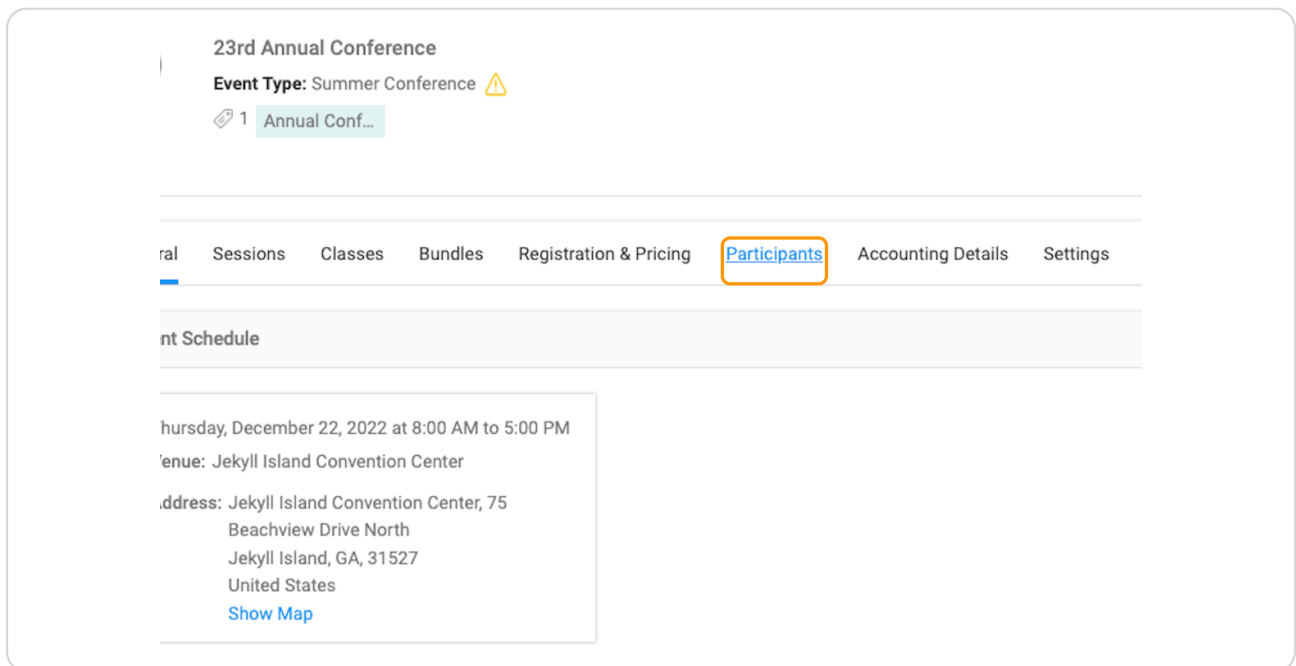


The screenshot shows a list of events in a table format. On the left, there is a sidebar with a search bar and a 'Duration' filter. The main table contains the following rows:

Event Name	Event Type	Date
Sept 22/1 event	Vikas Event type	WED NOV
New Board Member Orient...	Orientation	THU DEC
<b>23rd Annual Conference</b>	Summer Conference	THU DEC
Finance Workshop	Regional Workshop	MON JAI
2023 Legislative Forum	Regional Workshop	MON FEE

### STEP 4

Click on Participants



The screenshot shows the details for the '23rd Annual Conference'. The event type is 'Summer Conference' with a warning icon. Below the title, there is a tabbed interface with the following tabs: 'Sessions', 'Classes', 'Bundles', 'Registration & Pricing', 'Participants' (highlighted with an orange box), 'Accounting Details', and 'Settings'. Below the tabs, there is a section for the event schedule and location details:

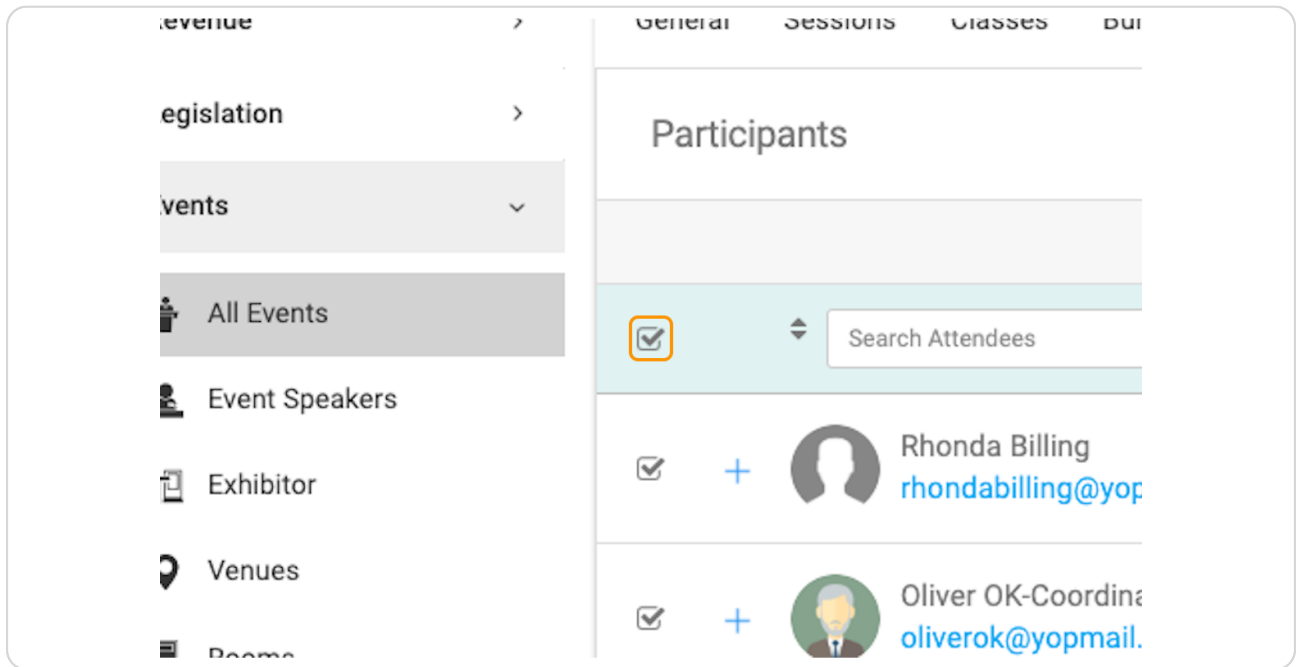
**23rd Annual Conference**  
**Event Type:** Summer Conference ⚠️  
1 Annual Conf...

**Event Schedule**

Thursday, December 22, 2022 at 8:00 AM to 5:00 PM  
Venue: Jekyll Island Convention Center  
Address: Jekyll Island Convention Center, 75 Beachview Drive North, Jekyll Island, GA, 31527, United States  
[Show Map](#)

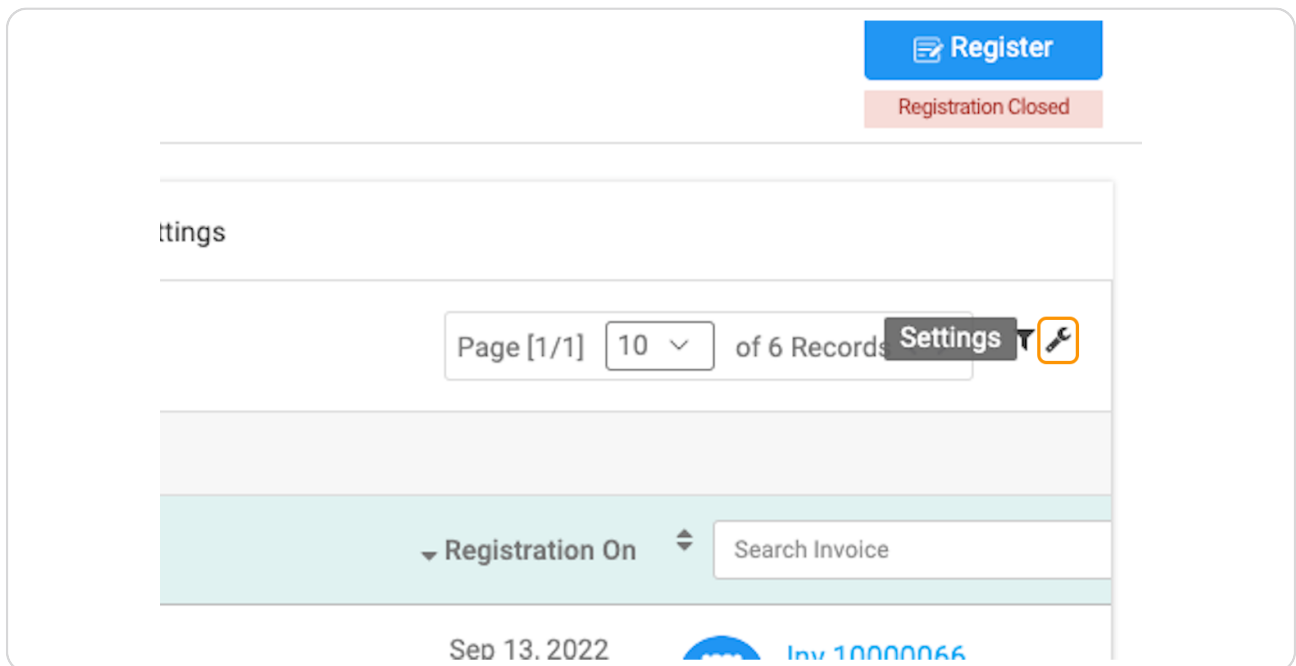
STEP 5

Check the box to select all participants



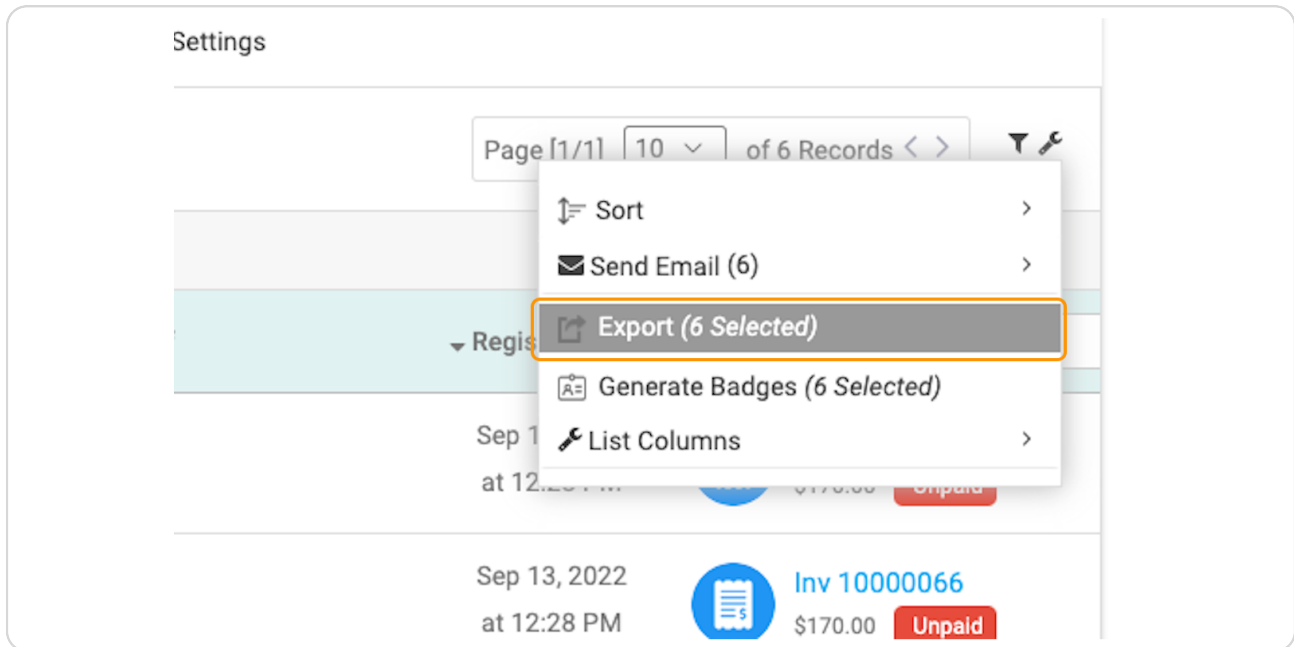
STEP 6

Click on the wrench icon



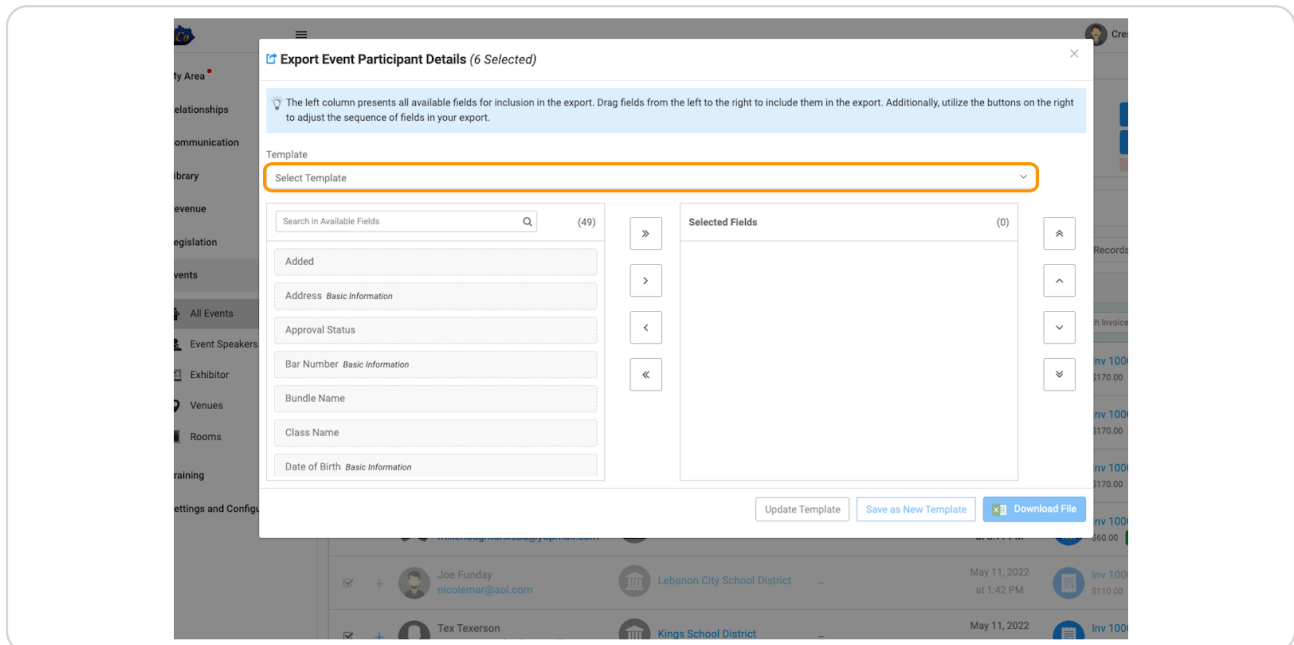
## STEP 7

### Click on Export



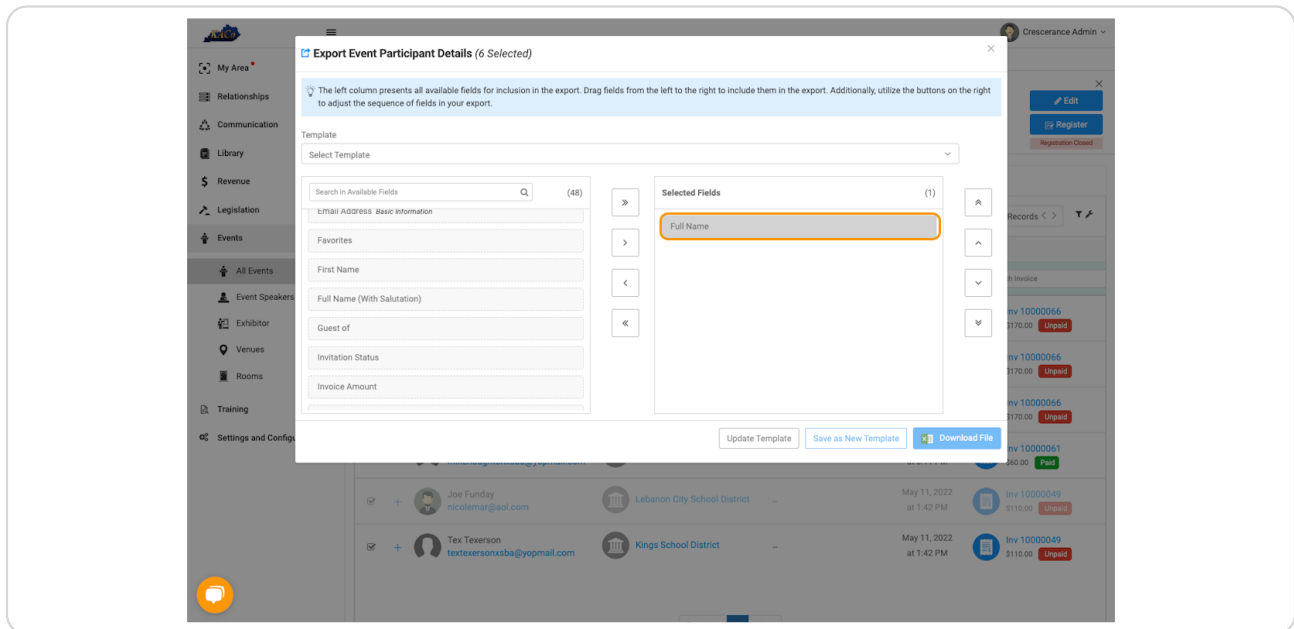
## STEP 8

### Click on Select Template if you wish to use a pre-existing report template from the dropdown menu



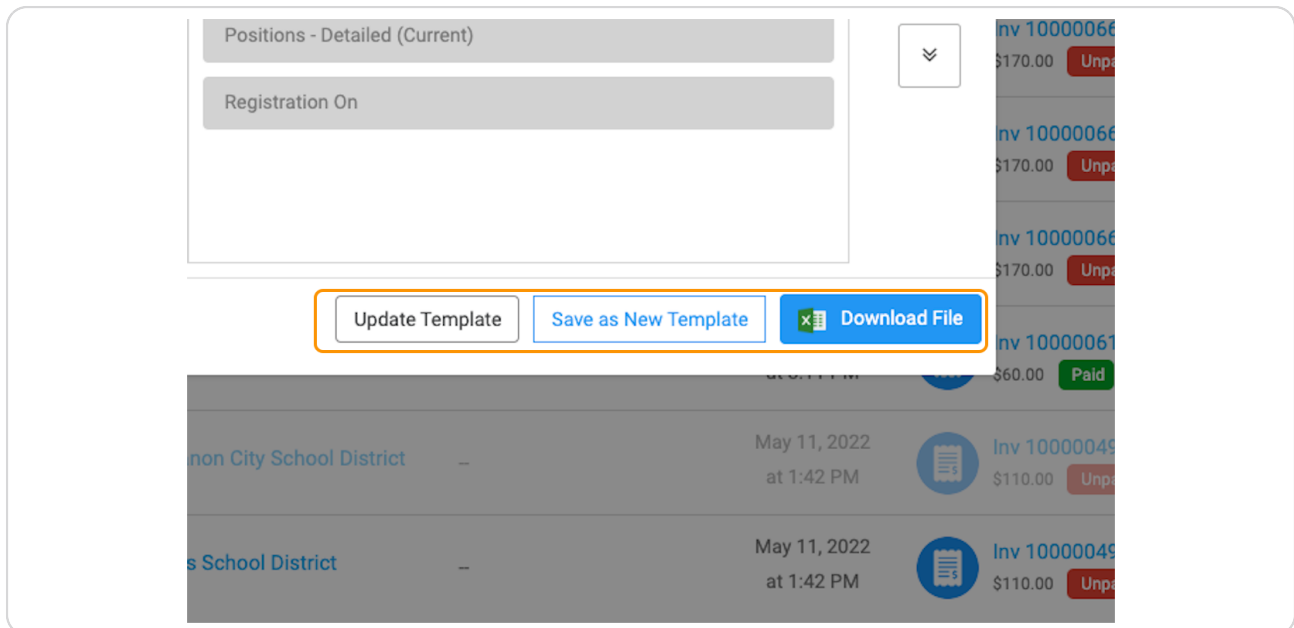
## STEP 9

Drag the fields on the left over to the right to select the criteria for your report



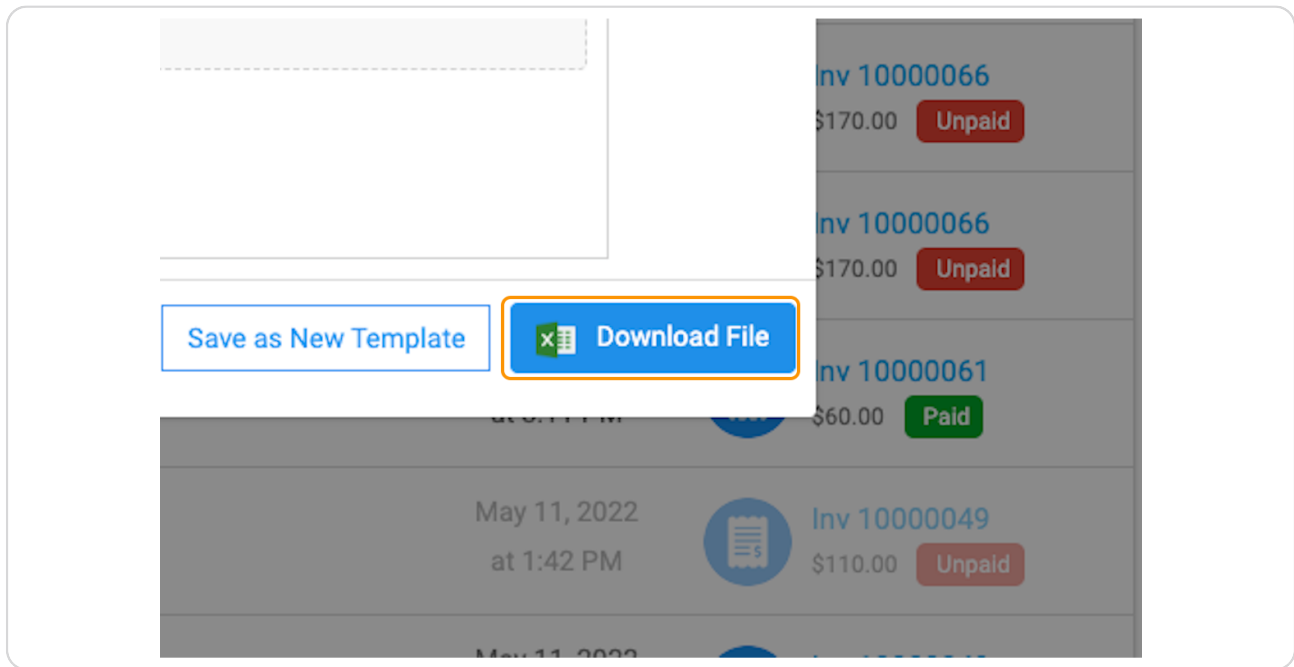
## STEP 10

When finished, you can either Update an Existing Template, Save as a New Template or just Download one time.



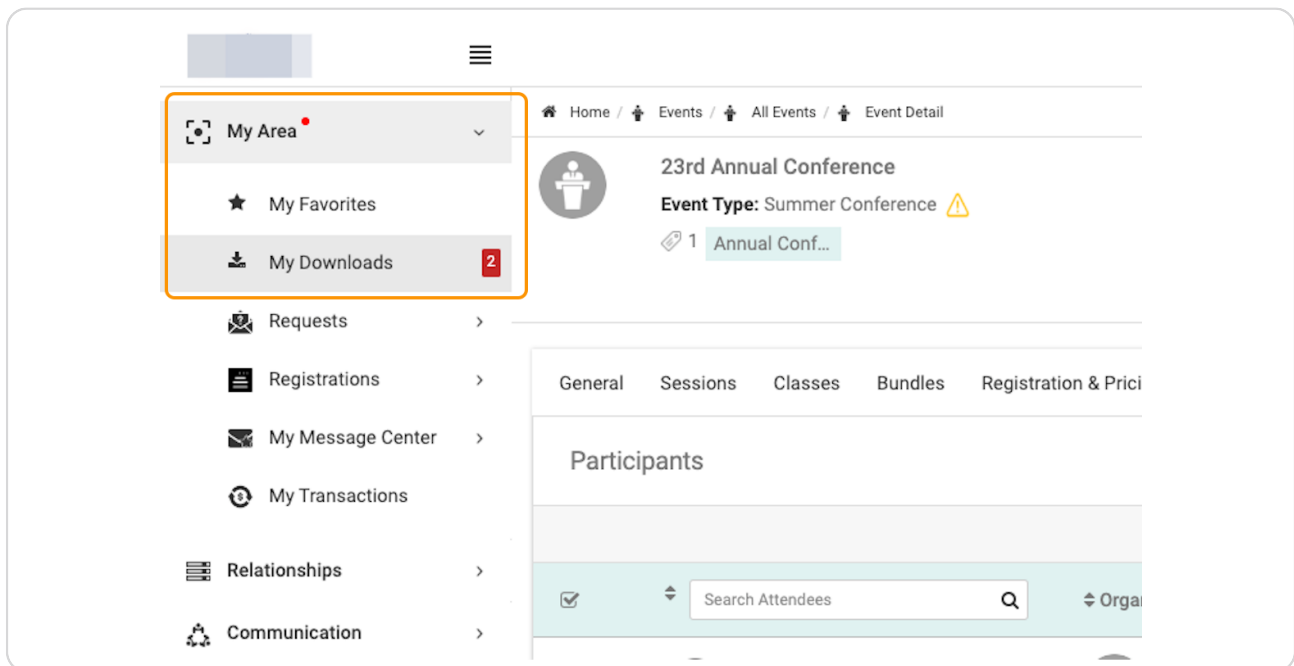
## STEP 11

### Click on Download File



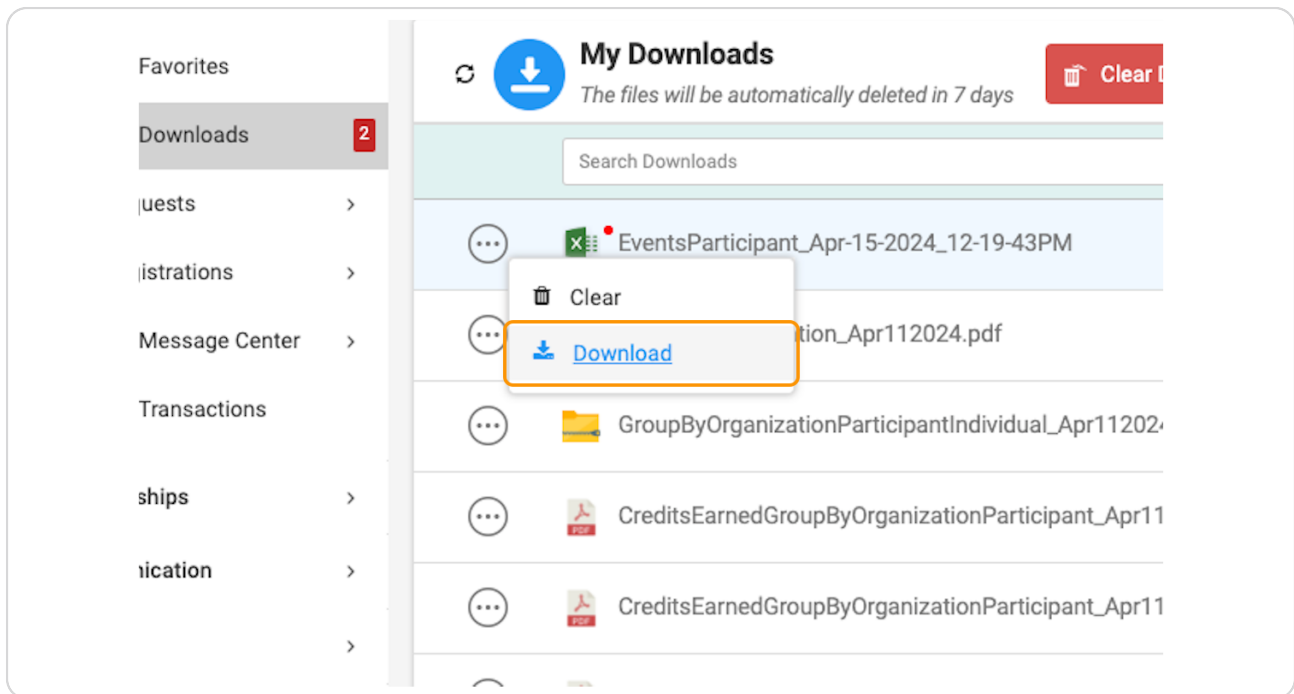
## STEP 12

### Click on My Area and My Downloads to view your file



## STEP 13

Click on Download to view your report



The screenshot displays the 'My Downloads' section of a user interface. On the left is a navigation sidebar with categories: Favorites, Downloads (with a red badge showing '2'), Requests, Administrations, Message Center, Transactions, Reports, and Communication. The main content area is titled 'My Downloads' and includes a refresh icon, a blue download icon, and a red 'Clear' button. Below the title is a search bar labeled 'Search Downloads'. A list of files is shown, each with a three-dot menu icon to its left. The second file in the list is 'EventsParticipant\_Apr-15-2024\_12-19-43PM', which is highlighted in blue. A context menu is open over this file, showing 'Clear' and 'Download' options. The 'Download' option is highlighted with an orange border. Other files in the list include 'GroupByOrganizationParticipantIndividual\_Apr112024', 'CreditsEarnedGroupByOrganizationParticipant\_Apr11', and another 'CreditsEarnedGroupByOrganizationParticipant\_Apr11'.



