

MPI CHAPTER PROCESSES & BEST PRACTICES

ACCESS PORTAL REPORTS - NAMING CONVENTION

When publishing reports to the Access Portal, it's important to follow a consistent naming convention so you can easily identify in Cvent which reports have been published for your specific chapter. When creating a custom report in the event, use the format: **MPI [Chapter Name] [Event Name]** and then save it.

Publishing Report to Access Portal with the Naming Convention:

Creating Reports within Event

- Go to Events and open the specific event.
- Go to Reports > Reports in your event.
- Run/open the appropriate report template (for example, Registrant Details)
- Customize fields, filters, and advanced criteria as needed.
- From the Actions menu, choose Save As, name the report as per the naming convention shared above, and save it

Publish the saved report to the Access Portal

- On the event's **Reports** page, go to the **Saved Reports** area and locate your saved report.
- Click on the kebab menu towards the far-right side of the saved report and select 'Publish to Access Portal'
- In the publish wizard:
 - On the **Viewing Rights** step, select **Only Selected users**, and select the specific portal users or groups who should see the report
- Click on Publish.

☰ Education Event Template-DO NOT

- Home
- General
- Website
- Speakers
- Agenda
- Registration
- Marketing
- Email
- Attendees
- OnArrival
- Surveys
- Reports**
- Reports
- Engagement Score
- Invitee Summary
- Question Summary

Events

Save

Age

Registrant Details ⓘ

Data ▾

Actions ▾

- Export report
- Save As**

Registration Trend

Registration Type

⊕ Add

Save Report

Report Details

Name
MPI [Chapter Name] [Event Name]

Description
500 characters left

Summary

Schedule
None

Visible to
Only me

[Cancel](#) [Save and exit](#) [Save](#)

Navigation: [Saved Reports](#) | [Report Templates](#) | [Scheduled Reports](#)

Buttons: [Create report](#) | [Tags](#) | [Favorites](#) | [Scheduled](#) | [Published](#) | Sort by [Last modified](#)

My Reports

☆ MPI [Chapter Name] [Event Name]
Last modified on Mar 5, 2026 4:25 PM by Aniket.Gupta@cvent.com

- Delete report
- Edit visibility
- Create schedule
- [Publish to Access Portal](#)
- Export report

Choose who can access this content

Portal: MPI Internal Cvent Access Portal
Content: Event Registration Report

Content expiration date mm/dd/yyyy

Viewing Rights

Visible to: Only selected users All portal users

Email notifications:

8 selected, 4 on this page

<input type="checkbox"/>	Name	Email Address	Type	User Type
<input type="checkbox"/>	Acosta, Melissa	melissa.acosta@culturalspark.com	Account User (Single Chapter Administrator)	Guest
<input checked="" type="checkbox"/>	Admin, MPI	mpiadmin@cvent.com	Account User (Master Administrator)	Manager
<input type="checkbox"/>	Baghaei, Amanda	abaghaei@mpi.org	Account User (MPI Global Education)	Guest
<input type="checkbox"/>	Benedick, Rachel	rbenedick@mpi.org	Account User (MPI Global Events)	Guest
<input checked="" type="checkbox"/>	Benson, Tim	tbenson@mpiweb.org	Account User (Master Administrator)	Manager
<input type="checkbox"/>	Burkey, Allison	aburkey@mpi.org	Account User (MPI Global Events)	Guest
<input type="checkbox"/>	Caron, Alanna	alanna@iconicventexperiences.com	Account User (Single Chapter Administrator)	Guest
<input type="checkbox"/>	Carter, Avery	acarter@mpi.org	Account User (MPI Global Development Admin)	Guest
<input type="checkbox"/>	Child, Alex	achild@mpi.org	Account User (MPI Global Development Admin)	Guest
<input type="checkbox"/>	Clarkebutler, Cee	ceecclarkebutler@gmail.com	Account User (Multi Chapter Administrator)	Guest
<input type="checkbox"/>	Connor, Colleen	cconnor@mpi.org	Account User (MPI Global Administrator)	Guest
<input type="checkbox"/>	Cooke, Julee	juleecooke@gmail.com	Account User (Multi Chapter Administrator)	Manager

Please note: If you need assistance creating event reports and publishing it to the Access Portal, please contact the system admins at aniket.gupta@cvent.com and mshoaibmauloodi@cvent.com. If you have any other questions, please feel free to reach out to us.