



## System Reports Quick Reference Guide

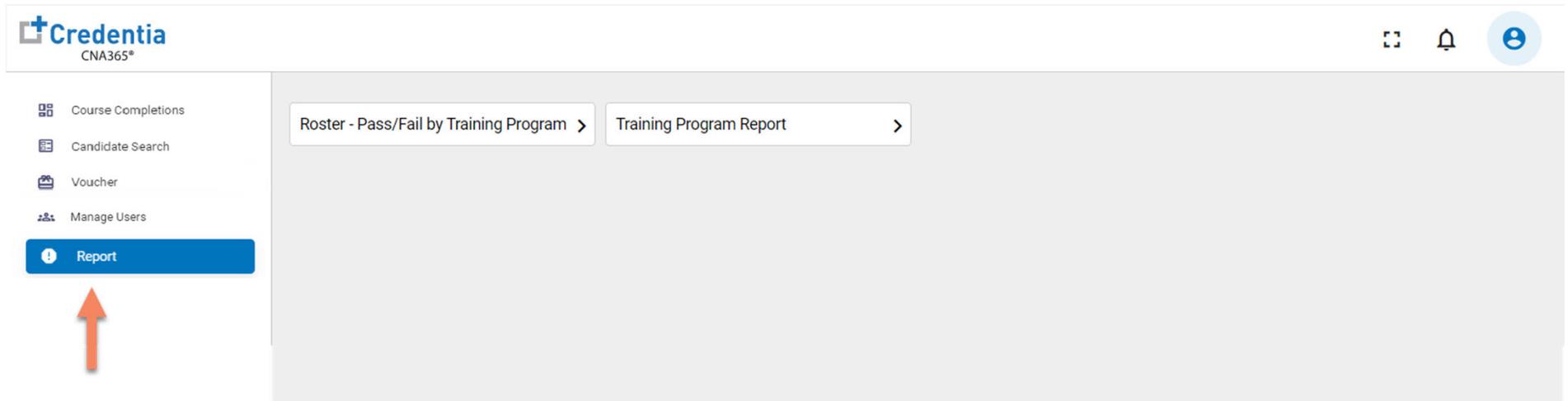


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# Accessing Reports

- Select a report from the “Report” main menu



**IMPORTANT:** Report data is currently updated daily at 12:30am EST. Any training program user assignments to a training program will be applied at the next daily system update time. Report data will not be visible for the new assigned training program until after the daily update.





# Exporting Reports

## Exporting Entire Report to PDF File

- 1 Select report options icon at top of report
- 2 Select "Download as PDF" from menu
- 3 Select Visualizations option
- 4 Select download button

The screenshot shows a report interface with two charts and a table. At the top right, there is a menu icon (three dots) labeled '1'. A dropdown menu is open, showing options: 'Schedule', 'Configure filters', 'Present', 'Download as PDF' (labeled '2'), and 'Manage schedules'. The left chart is a stacked bar chart titled 'Roster - Pass/Fail by Training Program' showing 'Pass Vs. Fall (%)' with categories 'written/orals' and 'Examlevel'. The right chart is a stacked bar chart titled 'Roster - Pass/Fail by Training Program' showing 'Pass Vs. Fall (candidates)' with categories 'written/orals' and 'Examlevel'. Below the charts is a table titled 'Roster - Pass/Fail by Training Program' with columns for 'State', 'Department', 'Institution', 'First Name', 'Middle Name', 'Last Name', 'Candidate Id', 'Social Security', 'Date of Birth', 'Exam Date', and 'Program'.

The 'Download' dialog box is shown with the following settings:

- Format:  Liveboard,  Visualizations (labeled '3')
- Layout:  Landscape,  Portrait
- More Settings:  All,  Pass vs. Fall (candidates),  Pass vs. Fall (%),  Candidate Details (labeled '4')

Buttons: Cancel, Download



# Managing Report Schedules

## Adding a Report Schedule

- 1 Select Schedule button at top of report
- 2 Specify frequency of report daily, weekly, monthly, etc.) and at what time to generate report
- 3 Enter a name for your report
- 4 Enter description for your report (optional)
- 5 Specify type of report format (CSV or PDF)
- 6 Select "Schedule" button and your report will be sent to you via email based on your frequency settings

The screenshot shows a dashboard with two reports and a 'Schedule' dialog box. The reports are 'Roster - Pass/Fail by Training Program' and 'Roster - Pass/Fail by Training Program (candidates)'. The 'Schedule' dialog box is open, showing settings for the report.

**Report 1: Roster - Pass/Fail by Training Program**  
 Pass Vs. Fall (%)  
 Total Count C...  
 100.00%  
 75.00%  
 50.00%  
 25.00%  
 0.00%  
 18.97%  
 69.37%

**Report 2: Roster - Pass/Fail by Training Program (candidates)**  
 Pass Vs. Fall (candidates)  
 Total Count C...  
 4K  
 3K  
 2K  
 1K  
 613  
 2.24K

**Add a schedule for Roster - Pass/Fail**

**Schedule**

Repeats: Daily on Every day at 04 : 00 hours

UTC

Name\*: Pass/Fail Report

Description: Enter description here (optional)

Type:  CSV  PDF [Configure Layout Options](#)

Gating condition: + Add condition Delete

\* Required field

Add Recipients: janderson@credentia.com

Users or groups: Add

Emails: Add

Cancel Schedule

# Managing Report Schedules

## Editing a Report Schedule

- 1 Select report options icon at top of report
- 2 Select "Manage Schedules" menu item
- 3 Select name of report to open edit screen to change your report settings

The screenshot displays a report interface with two charts and a table. The top chart, 'Roster - Pass/Fail by Training Program', shows a stacked bar chart for 'written/orals' with a total count of 69.37% (Pass) and 18.97% (Fail). The bottom chart, 'Roster - Pass/Fail by Training Program (candidates)', shows a stacked bar chart for 'written/orals' with a total count of 2.24K (Pass) and 813 (Fail). The table below lists report schedules with columns for Name, Status, Recipient, Run History, Created, and Author. A search bar and pagination controls are visible at the top right of the table.

Name	Status	Recipient	Run History	Created	Author
Test training program report Test description here	Paused	1 Recipient	Run History	a day ago	Jeff Anderson