Credentia
CNA365®

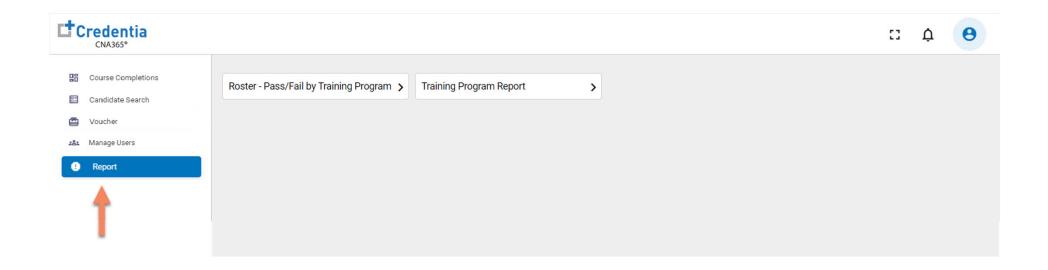## System Reports Quick Reference Guide

Contents

Version 1.0

Accessing Reports

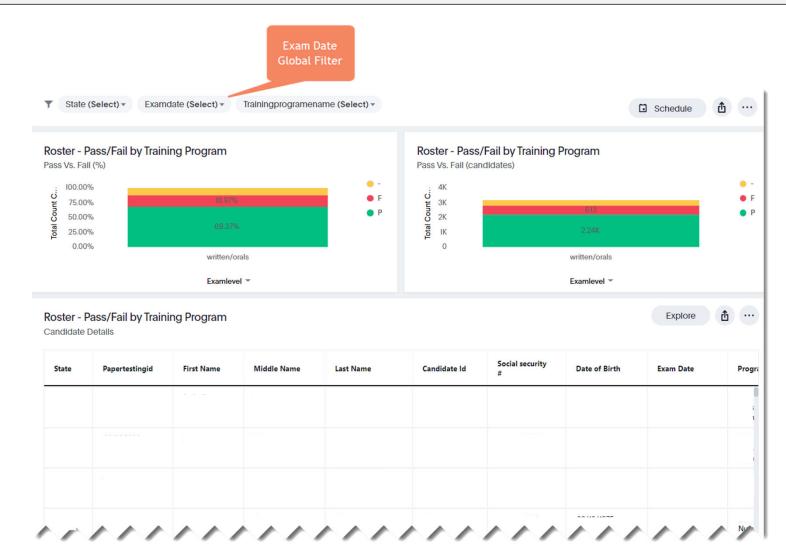➢ Select a report from the "Report" main menu

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.
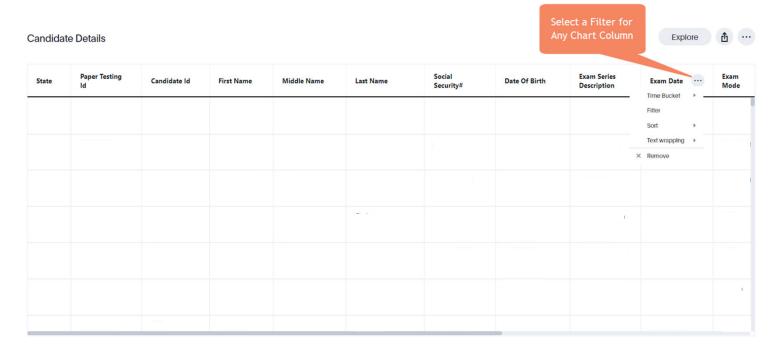
Report Filtering & Sorting
Global Report Filters

➢ To apply exam date filter to all graphs and tabular charts for a report, apply global filter at the top of the report
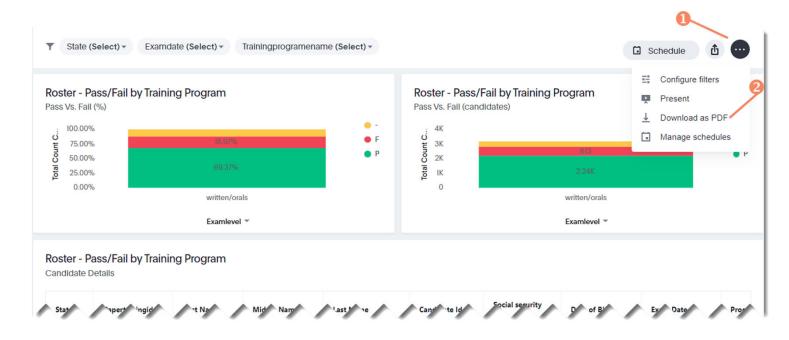
Report Filtering & Sorting
Tabular Charts

➢ Hover over a column header on a tabular chart to set a filter for a specific data column

➢ Click on a column header to sort the report in ascending or descending order

Candidate Details

Select a Filter for Any Chart Column

Explore

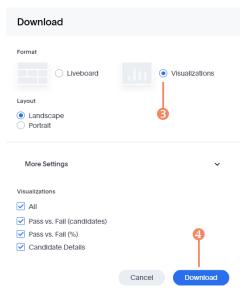| State	Paper Testing Id	Candidate Id	First Name	Middle Name	Last Name	Social Security#	Date Of Birth	Exam Series Description	Exam Date ⋯	Exam Mode
									Time Bucket ▶	
									Filter	
									Sort ▶	
									Text wrapping ▶	
									✕ Remove	

Exporting Reports
Exporting Entire Report to PDF File

❶ Select report options icon at top of report

❷ Select "Download as PDF" from menu

❸ Select Visualizations option

❹ Select download button

Exporting Reports
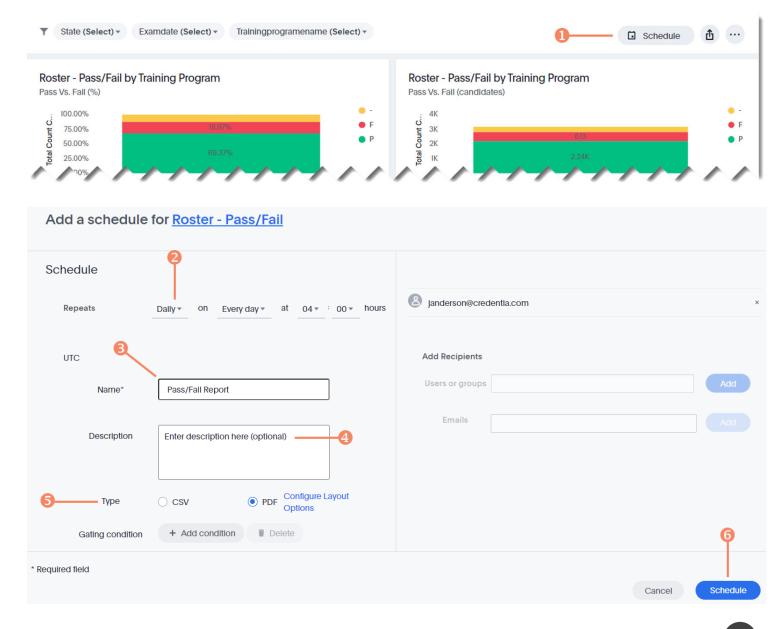## Exporting a Tabular Chart

❶ Select report options icon at top of tabular chart

❷ Select desired file export format

- CSV

- XLSX (Excel)

- PDF

Managing Report Schedules
Adding a Report Schedule

❶ Select Schedule button at top of report

❷ Specify frequency of report daily, weekly, monthly, etc.) and at what time to generate report

❸ Enter a name for your report

❹ Enter description for your report (optional)

❺ Specify type of report format (CSV or PDF)

❻ Select "Schedule" button and your report will be sent to you via email based on your frequency settings

State (Select) ▾   Examdate (Select) ▾   Trainingprogramename (Select) ▾   ❶ ⎯⎯⎯ ▣ Schedule   ⬆   •••

Roster - Pass/Fail by Training Program
Pass Vs. Fail (%)

Roster - Pass/Fail by Training Program
Pass Vs. Fail (candidates)

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)

❺ ⎯ Type   ◯ CSV   ◉ PDF   Configure Layout Options

Gating condition   [+ Add condition]   [🗑 Delete]

👤 janderson@credentia.com   ✕

Add Recipients

Users or groups   [   ]   [Add]

Emails   [   ]   [Add]

❻

* Required field   [Cancel]   [**Schedule**]

Managing Report Schedules
Editing a Report Schedule

❶ Select report options icon at top of report

❷ Select "Manage Schedules" menu item

❸ Select name of report to open edit screen to change your report settings