



## System Reports Quick Reference Guide

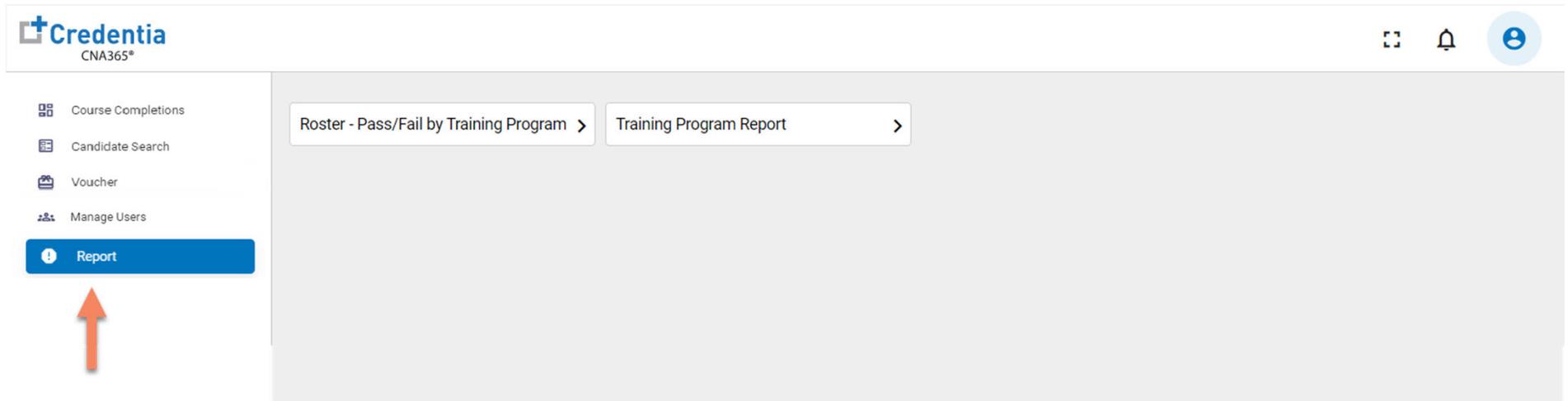


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# Accessing Reports

- 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.

# 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

Exam Date  
Global Filter

State (Select) ▾
Examdate (Select) ▾
Trainingprogramename (Select) ▾
Schedule

### Roster - Pass/Fail by Training Program

Pass Vs. Fall (%)

Examlevel	Pass (P)	Fail (F)
written/orals	69.37%	18.97%

### Roster - Pass/Fail by Training Program

Pass Vs. Fall (candidates)

Examlevel	Pass (P)	Fail (F)
written/orals	2.24K	613

### Roster - Pass/Fail by Training Program

Candidate Details

State	Papertestingid	First Name	Middle Name	Last Name	Candidate Id	Social security #	Date of Birth	Exam Date	Progr
-	-	Isabella	Marie	Sisca	7	xxx-xx-4144	09/12/2002	02/11/2022	E6A Nurs Exan
-	391386038	LaPortia	M	Thompson	8	xxx-xx-9094	04/19/1990	02/12/2022	E6A Nurs Exan
-	391386038	LaPortia	M	Thompson	8	xxx-xx-9094	04/19/1990	02/12/2022	E6A Nurs Exan
-	-	Penelope	S	Badger	358	xxx-xx-4107	03/19/1975	02/13/2022	E6A Nurs Exan

# 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

State	Paper Testing Id	Candidate Id	First Name	Middle Name	Last Name	Social Security#	Date Of Birth	Exam Series Description	Exam Date	Exam Mode
-	-	7	Isabella	Marie	Sisca	xxx-xx-4144	09/12/2002	NNAAP Written	02/12/2022	Online
	391386038	8	LaPortia	M	Thompson	xxx-xx-9094	04/19/1990	NNAAP Skills	02/08/2022	Test Cent
	391386038	8	LaPortia	M	Thompson	xxx-xx-9094	04/19/1990	NNAAP Written	02/12/2022	Test Cent
-	-	358	Penelope	S	Badger	xxx-xx-4107	03/19/1975	NNAAP Written	02/13/2022	Online
-	-	402	kelis	irie	banks	xxx-xx-1001	03/13/2003	NNAAP Written	02/08/2022	Online
-	-	695	Jeanette	Nicole	Brooks	xxx-xx-4833	05/12/1996	NNAAP Written	02/08/2022	Online
	391278220	899	Cherelle	-	Carey	xxx-xx-7074	03/15/1988	NNAAP Skills	01/22/2022	Test Cent

Select a Filter for Any Chart Column

Explore  

# 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

# Exporting Reports

## Exporting a Tabular Chart

1 Select report options icon at top of tabular chart

2 Select desired file export format

- CSV
- XLSX (Excel)
- PDF

Candidate Details

State	Paper Testing Id	Candidate Id	First Name ↑	Middle Name	Last Name	Social Security#	Date Of Birth	Exam Series Description		
	1100162491	851237	AHMED	-	LANGHORNE	xxx-xx-7765	09/13/1984	Nurse Aide Skills Exam		
	1100162491	851237	AHMED	-	LANGHORNE	xxx-xx-7765	09/13/1984	Nurse Aide Written Exam		
	0910085314	722440	AICHATA	-	ALI	xxx-xx-6431	05/18/1992	Home Health Aide Skills Exam		
	1101273776	1010431	ALANDA	LASHON	RUSHIN	xxx-xx-8466	01/13/1972	Nurse Aide Skills Exam	02/21/2022	Test Center
	4800205374	1009136	ALEXANDER	-	SHIAMGBOR	xxx-xx-5072	05/17/1979	Nurse Aide Skills Exam	02/03/2022	Test Center
	1100160101	849447	ALexandria	-	Woods	xxx-xx-1772	01/18/2000	Nurse Aide Skills Exam	02/02/2022	Test Center
	1100160101	849447	ALexandria	-	Woods	xxx-xx-1772	01/18/2000	Nurse Aide Written Exam	02/02/2022	Test Center
	-	1009767	AMINATA	-	FOFANA	xxx-xx-0835	08/11/1989	Nurse Aide Written Exam	02/07/2022	Online

1

2

Explore  

Pin

Download as CSV

Download as XLSX

Download as PDF

Present

# 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 displays the 'Roster - Pass/Fail by Training Program' interface. At the top, there are filters for 'State (Select)', 'Examdate (Select)', and 'Trainingprogramname (Select)'. A 'Schedule' button is highlighted with a red circle and the number 1. Below the filters are two stacked bar charts. The left chart shows 'Pass Vs. Fail (%)' with a green bar at 69.37% and a red bar at 18.97%. The right chart shows 'Pass Vs. Fail (candidates)' with a green bar at 2.24K and a red bar at 613. A modal titled 'Add a schedule for Roster - Pass/Fail' is open. It has a 'Schedule' section with 'Repeats' set to 'Daily' on 'Every day' at '04:00' hours. The 'UTC' checkbox is checked. The 'Name\*' field contains 'Pass/Fail Report' and the 'Description' field contains 'Enter description here (optional)'. The 'Type' is set to 'PDF' with a 'Configure Layout Options' link. The 'Gating condition' section has '+ Add condition' and 'Delete' buttons. On the right, there is a recipient selection area with 'janderson@credentia.com' and 'Add Recipients' section with 'Users or groups' and 'Emails' input fields. At the bottom right, 'Cancel' and 'Schedule' buttons are visible, with the 'Schedule' button highlighted by a red circle and the number 6. A red circle with the number 2 points to the 'Repeats' dropdown, a red circle with the number 3 points to the 'Name\*' field, a red circle with the number 4 points to the 'Description' field, and a red circle with the number 5 points to the 'Type' radio buttons.

# 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 of report schedules. The top chart, titled "Roster - Pass/Fail by Training Program", shows a stacked bar chart for "written/orals" with a total count of 69.37%. The bottom chart, also titled "Roster - Pass/Fail by Training Program", shows a stacked bar chart for "written/orals" with a total count of 2.24K. The table below lists report schedules with columns for Name, Status, Recipient, Run History, Created, and Author. A search bar and navigation 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