

USER GUIDE FOR

In-App Report

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Glossary

Word Index

Super Admin - This is an employee account level that allows the user to have full access to the system, review the subscription plan information, download the subscription plan invoices, create employees (students, admins, and super admins) & set up permissions for admins.

Admin - This is an employee account level that allows the user to see all locations and departments assigned to them by their default department & location or by another Super Admin, create student accounts, and use all modules unless super admins set permission restrictions.

Data Sets - A data set is a structured collection of related data associated with a unique source and typically covers one topic at a time. MedTrainer uses data sets to compile specific data from our different segments within the system to retrieve the required information for reporting purposes.

Custom Report - A custom report refers to a report that has been customized or cloned by a user. With a custom report, the users will be able to configure filters, columns, and sorting ranges to include and decide how they should be displayed.

Preconfigured Report - These help ensure report consistency and give users a starting point for creating reports. These can include placeholders, calculations, and renamed columns.

In-App Report - is a MedTrainer revolutionary tool for creating reports and viewing data due to its innovative infrastructure to pull data from different data sets(sources), real-time results, and data filtering capabilities.

Dialog - A dialog is a type of modal window that appears in front of app content to provide critical information or ask for a decision. Dialogs disable all app functionality when they appear, and remain on screen until confirmed, dismissed, or a required action has been taken.

Snackbar - Snackbars provide brief feedback about an operation through a message containing a single line of text directly related to the operation performed which will show at the bottom of the screen.



In-App Reporting

This report aims to provide all <u>Super Admins & Admins</u> the ability to create custom reports to pull information from the selected <u>dataset</u> in a simple interface that allows users to utilize it as a primary reporting source.

Note: We are continuously working on updating datasets and reports based on client & business requirements.

Who can access

Super Admin & Admin users will be able to create as many <u>custom reports</u> as they require. Each user has viewing & editing capabilities on their own custom reports <u>only</u>, meaning any custom report that has not been created by the user is off-limits as visibility is limited to the report creator.

How to access

Step 1: Log into your MedTrainer account: <u>https://lms.medtrainer.com/</u>

Step 2: Once you are in your account, you may either:

- 1. Go to mt|credentialing menu, scroll to the bottom, and click on Credentialing Reports
- 2. Go to the Document Center menu, scroll to the bottom, and click on Compliance Reports
- 3. Go to the mt | learning menu, scroll to the bottom, and click on the Learning Reports

↓	2	3 mt learning
My Credentialing Dashboard	Documents & Policies	My Course Assignments
Admin Dashboard	Incident Report v3	Course Catalog
Provider Profile	Safety Plans	Group Learning
Documents	Contract Management	Live Training Calendar
Enrollments	Compliance Reports	Course Authoring Tool
Insurances		Learning Reports
Locations		
Credentialing Reports 🍈		





In-app Report Overview

Reports within the In-App reporting tool

Each dataset contains a set of preconfigured reports that users can utilize or modify depending on their needs and requirements. At first, when clicking on the "Select report" drop-down menu the user will only be able to see the <u>preconfigured reports</u> created by MedTrainer, which will be labeled with an MT logo. However, once the user starts saving their own customized reports, those will also be visible in the drop-down menu.

In-app Report Components

	1		2				3
≡ Company name							
	In-app reports						
	Data set Enrollments	Report Better doctor rost	ler 👻	•	11 A Unsaved configur	ation changes	eport Save Save as
					Placeholder column Columns	🗐 Sort Range 🛛 🕈 Filters	🛓 Export 🛛 🔊 Schedule
5	 Provider first name 	Provider middle name	Provider full name	Provider primary email	Provider phone	Employee start date	Employee start date
	Megan	-	Kelvin Lucas	sara.cruz@example.com	+1-484-445-8860	28/06/2020	06/06/2020
	Stanislav		Daniel Martinez	dolores.chambers@example.com	+1-484-521-1079	09/04/2020	16/06/2020
	Graham	-	Clifton Wells	bill.sanders@example.com	+15854370970	11/07/2020	11/07/2020
•	Matt		Tomas Crawford	michael.mitc@example.com	+1-484-298-9312	30/04/2020	12/06/2020
<u> </u>	Josh	-	Sheri Warner	curtis.weaver@example.com	+1-610-234-7156	26/04/2020	24/03/2020
mt I credentialing +	Patrick	-	Jamie Arnold	tim.jennings@example.com	+1-484-521-1079	30/01/2020	30/01/2020
g mic) credentating	Patrick	Bessie	Margie Sutton	dolores.chambers@example.com	+1-484-521-1079	16/06/2020	03/03/2020
My Credentialing Dashboard	Bill		Greg Wise	michael.mitc@example.com	+1-484-298-9262	06/06/2020	30/04/2020
Provider Onboarding Checklist	Ammer		Alejandro Brock	sara.cruz@example.com	+15854370970	30/07/2020	27/02/2020
Admin Dashboard	Bill		Audrey Williams	alma.lawson@example.com	+1-610-245-8249	03/03/2020	31/03/2020
	Stanislav	Henry	Santos Payne	kenzi.lawson@example.com	+1-610-234-7504	29/05/2020	15/05/2020
Provider Profiles	Peter	-	Glenda Mendoza	nevaeh.simmons@example.com	+1-484-298-9262	25/01/2020	23/03/2020
Documents	Dave	-	Jimmy Hardy	felicia.reid@example.com	+1-484-298-9262	12/06/2020	26/04/2020
Enrollments	Thomas		Sylvia Lamb	michelle.rivera@example.com	+1-484-445-8849	14/02/2020	30/07/2020
Verifications Dashboard	Patrick		Deborah Carr	jackson.graham@example.com	+1-484-263-4768	19/07/2020	25/01/2020
Internet	Ammer		Domingo Flores	debbie.baker@example.com	+1-585-438-0237	27/02/2020	29/05/2020
II ISUITE KUUS	Ansel	Jane	Casey Jimenez	tanya.hill@example.com	+1-610-245-8249	15/05/2020	19/07/2020
Priviloges	Peter	Eleanor	Alexis Gibson	jessica.hanson@example.com	+1-814-351-9540	23/03/2020	28/06/2020
Locations	Harry		Gladys Frazier	debra.holt@example.com	+1-610-234-7156	24/03/2020	09/04/2020
Facility Credentialing	Dave		Courtney Holloway	deanna.curtis@example.com	+1-610-234-7504	31/03/2020	14/02/2020
Credentialing Reports	Harry		Gladys Frazier	georgia.young@example.com	+1-610-234-7156	24/03/2020	09/04/2020
	Dave	-	Courtney Holloway	willie.jennings@example.com	+1-610-234-7504	31/03/2020	14/02/2020
		1. 481	Gladys Frazier	jackson.graham@example.com	+1-610-234-7156	24/03/2020	09/04/2020
Exporte	ed in-app reports are limited	to TUK records . X				Rows per page 20 🔻	1-20 of 20+ items <

Report detail

- 1. Data set
- 2. Select report
- 3. New report, Save and Save as buttons

Main table

- 4. Actions bar (Columns, Filters, sort, export, schedule)
- 5. Table header
- 6. Table rows
- 7. Movable Table Columns
- 8. Table footer



Information alerts

- 9. Placeholder badge
- 10. Snackbar
- 11. Unsaved changes alert



How to set up a custom report

Using the "New report" button.

Step 1: Select the "new report" button.

	New re	eport Save	Save as
Columns	▼ Filters 于 Sort rang	je 🛨 Export	Schedule

Step 2: Fill in the required fields by

- A. Choosing a data set. The dataset will determine the source from which the report will retrieve the information.
- B. Naming the new report that is about to be created.

Step 3: Select the "Create" button.

Create new report	×
Data set*	•
Report name*	
Cancel	Create



Step 4: Start adding columns to the report through the "Columns" option in order to enable the grayed out options, including the "Save" and "Save as" buttons.

A Unsaved con	figuration chan	ges New repo	Save	Save as
Columns	Y Filters	= Sort range	🛓 Export	Schedule

Step 5: After having added some columns to the brand new report, select either "Save" or "Save as" buttons to save the new report.

A Unsaved configuration changes	New report	Save	Save as
🚻 Columns 🍸 Filters 🚍	Sort range 👤	Export	Schedule

Step 6: Select the "Save" button on either the "Save report" or the "Save as" dialog windows.

Save report \times	Save as ×
Data set : Enrollments (One location per row) Type a report name *	Data set : Enrollments (One location per row) Rename *
Demo	Demo
Cancel Save	Cancel Save





Duplicating preconfigured reports using the "Save as" button.

Step 1: Choose the dataset from the drop-down. The dataset will determine the source from which the report will retrieve the information.

Data Set Dataset example 1	•
Dataset example 1	
Dataset example 2	
Dataset example 3	

Step 2: Choose a preconfigured report from the "Select report" drop-down.

Select report	
Default report 1	mt
Default report 2	mt
Default report 3	mt

Step 3: Select the "Save as" button to create a copy of the preconfigured report.

			New report	Save as
Columns	Filters	= Sort range	🛓 Export	Notes Schedule



Step 4: Select the "Save" button on the "Save as" dialog window.

Save as	×
Data set : Enrollments (One locatio	n
per row)	
Demo	
Cancel Save	

In-app Report Components

Columns

The "Columns" component from the action bars will make a <u>dialog</u> window appear, allowing the user to customize the columns shown on the report.

Column Dialog Components

This will allow users to customize how columns will appear in the report by using the following components:





Available Columns

Within this panel, you will find a set of categories based on the selected dataset. The user can click on the arrow drop-downs to expand the dropdown menus in order to view all available columns within the dataset.



Customize the columns for your report.

How to transfer columns from Available Columns to Selected Columns

Option 1: If the user wants their transferred columns to be positioned at the top of the 'Selected Columns' column list, they must select a column from the 'Available column' panel by clicking on the checkboxes beside them. Once all selections have been made,

click on the right caret icon located in the middle so those selections are transferred and displayed correctly in the Selected Columns panel.

earch	۹	+ Add placeholder column
Employee profile	* * *	Employee name / 10 C
		Assignment status Completion date Assigned by

Option 2: If the user wants their transferred columns to be positioned below a specific column in the 'Selected Columns' panel, they must start by choosing the column from the 'Selected columns' column list by pressing Ctrl / ℜCmd + click on your keyboard and then select a column from the 'Available column' panel by clicking on the checkboxes beside them. Once all selections have been made, click on the

right caret icon located in the middle so those selections are transferred and displayed correctly in the Selected Columns panel.

vailable columns		Selected columns ①		
earch	Q	+ Add placeholder column		
Employee profile		Employee name	/ 6	•
Employee prome	Ť	Employee last name	/ 0	•
Supervisors	~	Employee email	/ 0	•
Course information	~	Employee location	/ 6	•
Course assignment information	~	Employee hire date	· · ·	•
		> Course name	/ 6	•
		Assignment date	10	•
		Assignment status	/ 0	•
		Completion date	/ 6	•
		# Assigned by	/ 6	•

The user will be able to quickly identify the categories that have already been added from the 'Available Columns'

onto the 'Selected Columns' by the badge count number 📿 displayed on the right.



×

Selected Columns

This panel will summarize your current column selections and let you edit how these will be displayed on the report's main table.

The user will have the ability to sort the order by dragging and dropping the columns. You can

accomplish this in three different ways;

- 1. Select one row Click & hold
- 2. Select multiple rows Shift + click
- 3. Select skipped lines Ctrl / HCmd + click

and finally just drag to move.

Sele	ected columns (i)			
+	Add placeholder column			
	Individual provider NPI	1	D	•
	Provider last name	1	D	•
	Provider first name	1	D	•
	Provider specialty	1	D	•
	Practice name	1	D	•
	Address street 1	1	D	•
	City	1	D	•
	State	1	D	•
	Zip code	1	D	•
	Appointment phone number	/	D	•
	Cancel	-	Custo	mize

The user can also modify the columns by clicking any action icons. The action icons allow the user to edit the column name, duplicate the column and eliminate the column.

Selected columns 🛈			
+ Add placeholder column			
Individual provider NPI	1	D	•
Provider last name	1	Ū	•
Provider first name	1	D	۰
Provider specialty	1	D	۰
Practice name	1	D	•
Address street 1	1	D	۰
City	1	D	۰
State	1	D	•
Zip code	/	D	•
Appointment phone number	1	D	•
Cancel		Custo	omize

Once the user has successfully made all the configurations within the Columns panel, they can click on the 'Customize' button for the report to display the results based on the customizations made. If the user decides not to continue with the changes, they can simply click on the 'Cancel' button.



Filters

The filter panel offers many options for the user to filter data in real-time. To easily locate a filter option, the user can use the search bar to search for filters or scroll until they find the required option.

To select an option, the user must click on the arrow drop-down v to expand. We currently have two filter types; check box listed menu or date picker. Depending on the filter type the option will either show a checkbox listed menu from which the user can search using the search bar and select one or multiple options or a date picker that will allow the user to select empty dates, custom selected dates or choose from the predetermined date ranges provided as options.

saved configuration changes	Save as
Columns Y Filters C Sort	Export
Search filters	Q
Employee start date®	~
Provider type	~
Provider position	~
Employee status	~
Insurance name	~
Enrollment status	~

Check box listed menu

Outa set Enrollments	Select report Better doct	tor roster 🔹		A Unsaved configuration changes	Save as
				Columns Y Filters	👲 Expo
Individual provider NPI	Provider last name	Provider first name	Provider specialty	Cased filters	
	Perez	Dr.		Search hiters	0
	Perez	Dr.		Employee start date	
	Kuri	John		Employee start date	
				Provider type	
				Provider position*	
				Employee status	`
				Insurance name	

Date Picker



s

Removing an applied filter

- If the user wants to remove a selected option from the checkbox listed menu, they can simply click on the 'X' button next to the selected option.
- 2. If the user wants to remove the date picker filters from a specific category, they can simply click on the radio button that says "no filter."
- 3. If the user wants to remove all filters applied, they can simply click on 'Clear all' to remove any date picker and/or checkbox listed filters.

Once the user selects the required filters to be applied, they can either click on the 'Close' button located on the bottom right or click on the **X** button located on the top right of the filter panel.

The displayed blue indicator, will make it easy to identify which filter option is currently being applied to the report. The user will also know the total number of filter options used for filtering since the total number will be displayed in the badge count icon on top of the 'Filter' button.

▼ Filters = Sort	Export
Filters	× ^
Search filters	٩
Employee start date	^
No filter	- 1
O Empty dates	
O Date range	
Provider type*	^
Provider type (1) Osteopathic Doctor (ו
Provider position	~
Employee status	~ _
Clear all	Close

Sorting

Sorting will allow the user to apply an ascending or descending order to any columns that have the ability to do so.

Click on the 'Sort' icon, and the multi-sort dialog will emerge. The multi-sort dialog will allow the user to sort up to 3 columns simultaneously. Each sorted column can be set to sort ascending or descending.

The user will have to select the column they'd like to sort from the drop-down, then select if it'll sort ascending or descending, and finally, they can then click on the "Sort" button to apply changes or click on the "Add another sort column" to add more. To delete a sort range, the user must click the 'trash bin' \mathbf{I} icon.



Sort range	3				×
Sort by	Hire date	•	O ASC ↑	○ DESC ↓	Ĩ
Then by	Department	•	O ASC ↑	\bigcirc desc \checkmark	Ĩ
Then by	Select column	•	O ASC ↑	O DESC ↓	Ĩ
	Search	Q		_	
	Provider first name			Cancel So	rt
	Provider full name	- 11			
	Provider middle name				
	Provider full name				
	Employee start date				
	Provider primary email				
	Provider phone				

Table Footer

The footer can be found in the bottom right corner of the main table. This is used to visualize the total registries that have been retrieved as a result of the filters and columns added to the report, the user will be able to determine how many rows will be visible per page and can also click on the next and previous arrows to change from page to page.





Movable columns within the report's main table

The in-app report has the capability of not only sorting the column order through the <u>'Selected Columns'</u> panel inside the 'Column Dialog,' but also, the user can move these around within the report's main table. In order to do this, the user must click, hold and drag the column sideways until finally dropping it in the required position.

				Columns Y Filters	🗐 Sort 🛓 Export
Individual provider NPI	Provider last name	Provider first name	Provider specialty	Practice name	Address street

Save & Save As

Once the user has applied edits to a report, the system will alert the user to store the unsaved changes. **Unsaved configuration changes**.

If they decide to proceed with the changes, they will have 2 options to save them:

Option 1 - <u>'Save as'</u>

Both **custom** and **preconfigured reports** will allow the client to make as many duplicates as they require by utilizing the 'Save as' button. There are 2 ways to go about duplicating a report.

- 1. Select the dataset > Select the report > Click on Save As > Name the report > Apply changes > Save
- 2. Select the dataset > Select the report > Apply changes > Click on Save As > Name the report > Save

Note: The option to save the report as 'Save As' will allow the user to create a copy of the report selected, the original version will remain unaffected, and the new clone can now be customized. This option will be enabled for all reports.

Option 2 - 'Save'

Users will only have the 'Save' option available for **custom reports.** The 'Save' option will not generate a copy of the report. If a custom report is opened and edits are made, when saving the report, all those changes made will overwrite the previous version.

Note: We will constantly continue to add preconfigured templated reports for the users to review, clone, and make their own.

If the user does not want to save any of the changes, they can refresh the screen or click out of the In-app report module to revert to the initial state of the report.



downloading and the system will inform process completion by changing the loading 'exporting' button back to it's original state.

Note: Given that the In-app report is intended for operational reporting only, it has an export file limit of 10k records. If the exported report surpasses the limit, the system will notify the user and only export 10k records.

Delete

Step 10: The user also has the option to delete any of their custom created reports by opening the 'Select report' drop-down menu and clicking on the trashcan icon. As soon as this icon is clicked, a dialog window will appear cautioning the user about their irreversible action and asking for an additional confirmation to proceed. The user must then click on the "delete" button to complete the process.



Warning dialog windows

These messages will appear in order to prevent the user from losing unsaved changes by accidentally performing different actions without saving the changes first.

The "Leave this page without saving changes?" warning dialog window will appear when the current report the user is editing has unsaved changes and:

- The user tries to switch to a different dataset
- The user tries to switch to a different report
- The user tries to create a new report



Leave this page without saving changes?		×
Unsaved changes will be permanently lost.		
	Leave	Stay

The "Schedule report?" warning dialog window will appear when the current report the user is editing has unsaved changes and:

• The user tries to schedule the report

Schedule report?	×
A report cannot be scheduled until the changes to the report have been saved.	
Cancel Save and sched	ule

How to schedule a report

Scheduling a report will allow the user to arrange streamlined report delivery for all of their custom and/or preconfigured reports. The user will be able to set external or internal recipients, delivery time and frequency.

In order to schedule a report, the user must have already selected the pertinent dataset and report before clicking on the 'Schedule' button. Once it's clicked, the page will load and consequently admit the user to the 'Scheduled reports' page.

Scheduled Reports Components

Schedule reports	5			
Search Q				New schedule
- • 2 · •				Clear selection ×
Schedule report name	↑ Number of recipients	Frequency	Scheduled time	Next delivery
 thrivingseptum 	5	Weekly	02:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
 digitsscarf 	4	Daily	07:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
 catchablesadly 	3	Weekly	06:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
	5	Daily	04:00am PST	Wed, 10 Jun 2020 12:00 pm PST
 lewissanctuary 	1	Daily	02:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
 jumblecitation 	3	Daily	05:00 pm PST	Wed, 10 Jun 2020 104:00 pm PST
 chimneysrepress 	2	Monthly	05:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
 Admin reports 			06:00 am PST	
 multitudekalman 	5	Monthly	06:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
 alrightpumpkins 	4	Monthly	05:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
 pyxisconcerto 	1	Daily	07:00 am PST	Wed, 10 Jun 2020 04:00 pm PST
 unlockedeconomic 	4	Monthly	07:00 am PST	Wed, 10 Jun 2020 12:00 pm PST
C chummyrimmed	4	Daily	05:00 pm PST	Wed, 09 Jun 2020 09:00 pm PST
 sticksmeat 	0	Daily	11:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST
 kilobytemimicry 	2	Daily	12:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
 walmartworking 	3	Weekly	01:00 am PST	Wed, 09 Jun 2020 09:00 pm PST
snoopplow	1	Monthly	12:00 pm PST	Wed, 10 Jun 2020 12:00 pm PST
 arsenicirrelevant 	0	Daily	08:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST
humiliatefence	4	Monthly	11:00 pm PST	Wed, 10 Jun 2020 04:00 pm, PST
 twinspartners 	0	Weekly	01:00 pm PST	Wed, 10 Jun 2020 04:00 pm PST
				Rows per page 20 👻 1-20 of 50 items < 🗲 🗲

Scheduled reports main table .

1. Actions bar (edit, delete, clear selection)

- 2. Selected row
- 3. New Schedule
- 4. Search
- 5. Sort

Initially the 'Scheduled reports' page will exhibit a bare main table where the only supplied choice is the 'New schedule' button that will allow the user to create a new schedule to the report.

New schedule

Step 1: Click on the 'New schedule' button.

Step 2: A 'Schedule report' configuration dialog will appear from which the user can name the scheduled report, set the frequency (daily, weekly, monthly), set the delivery time, add internal or external recipients and finally click on the call to action button to finish the scheduling process.

Schedule new report .

- 1. Schedule report configuration dialog
- 2. Schedule report recipients
- 3. Call to action button
- 4. Close dialog or cancel schedule

Setting frequency options

Option 1: Daily frequency will send the report on a daily basis. In order to use this option the user must select 'Daily' from the 'Frequency' drop-down and select the preferred time from the 'Time' drop-down.

Schedule new report				×
Report name* Credentialing Report	□ Frequency* □ Daily	· Tin 10:	ne* 00 am PST	G
Search or add new emails*				۹
sara.cruz@gmail.com			External	×
georgia.young@gmail.com			External	×
Theresa Webb emedtrainer.com@gmedtrainer.com.	com		Admin	×
		Cancel	Sched	ule

Option 2: Weekly frequency will send the report on a chosen day of the week on a weekly basis. In order to use this option the user must select 'Weekly' from the 'Frequency' drop-down, select the preferred time from the 'Time' drop-down, and choose a day of the week.

Option 3: Monthly frequency will send the report on a monthly basis. The scheduled report will continue to run on the specific day selected.

In order to use this option the user must select 'Monthly' from the 'Frequency' drop-down, select the preferred time from the 'Time' drop-down, and user can either select a starting date by clicking on the calendar or using the default start date which will be the user's present date.

Schedule new report								×
Credentialing Report		Frequer Monti	ncy* — hly		•	- Tir 10	^{me*} —	1 P 🕓
Report will be sent starting on	01/11	/2023	Ċ					
Search or add new emails *	<	Ja	inuary	~	2023	· ~	>	٩
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	lulo
	1	2	3	4	5	6	7	luie
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	
	22	23	24	25	26	27	28	
	29	30	31	1			4	

Adding recipients to the email list

The user will be able to send the scheduled report to employees with an Admin or Super Admin level in Medtrainer and/or external emails.

Search & send reports to Admins & Super

Admins. In order to locate a specific employee within Medtrainer, the user must input characters that either match the employee's name or email. The matched results will display on a drop-down list from which the user can select from one to multiple employees by clicking on the check boxes.

Note: The system won't let the user search for employees that do not have an "active" status, therefore, they won't be able to receive scheduled reports either.

Add external emails to recipient list. Once the user starts typing, the system will initiate a search based on the characters entered. If there are no matches, the system will ask the user to try a new search since no results were found. The user may continue to type until eventually writing out the complete external email address, which then the system will recognize as a real email and ask the user if they would like to add it as an external user to the recipient list.

Note: Here's an example of how the recipients will receive their scheduled reports

Editing & Deleting Scheduled Reports

In order to have the option of editing or deleting a scheduled report there must be atleast one scheduled report on the scheduled reports main table.

Step 1: In order to edit, user must find the scheduled report they want to modify, click on the radio button located beside the scheduled report's name and click on the 'Edit' pencil icon.

Scheduled reports Credentialing reports / Default Report 1	
Search Q	
Edit	
Schedule report name	
Credentialing report	

Step 2: The 'Edit schedule' dialog window will pop-up and allow the user to make the required changes.

Report name* Frequency Credentialing Report] Daily	Time* 04:00 am
he report will be sending daily	
Search or add new emails	a
sara.cruz@gmail.com	External X
debbie.baker@gmail.com	External X
georgia.young@gmail.com	External X
Felicia Reid felicia.reid@medtrainer.com	Admin X
Jessica Hanson jessica.hanson@medtrainer.com	Admin X
	Cancel

Step 3: In order to delete, user must find the scheduled report they want to remove, click on the radio button located beside the scheduled report's name and click on the 'Delete' trashcan icon.

Schedule reports Credentialing reports / Default Report 1
Search C
Delete
Schedule report name
Weekly report

Step 4: As soon as this icon is clicked, a 'Delete schedule' dialog window will appear cautioning the user about their irreversible action and asking for an additional confirmation to proceed. The user must then click on the "delete" button to complete the process.

