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How to Create a Report

User Guide

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This guide outlines how create a report in Rapid Induct.

To create a report in Rapid Induct, follow the steps 1, 2 and continue from 7 below:

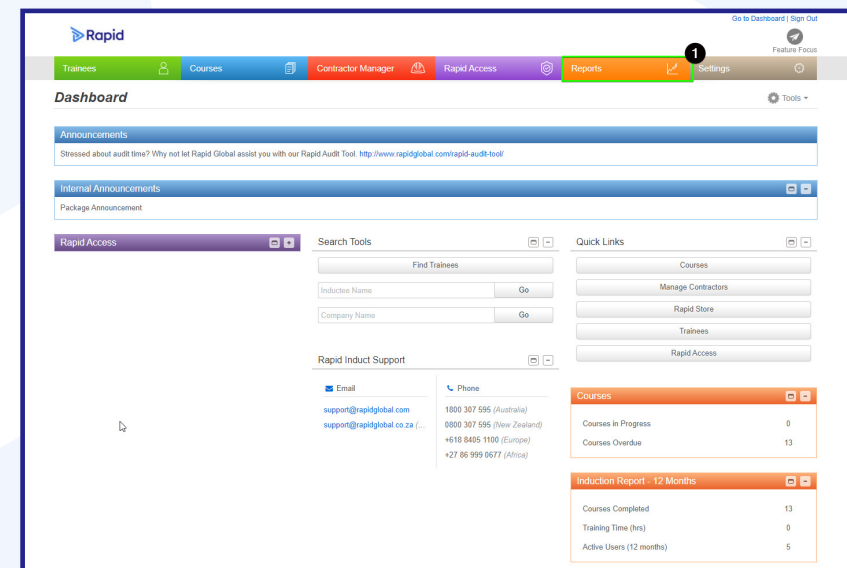
To filter reports in Rapid Induct, follow the steps 1-7 below.

Step 1. Log-in to your MyRapid account, click 'Rapid Induct' and click 'Enter' into the relevant account.

Step 2. Click 'Reports' on the main client portal page (*Figure 1.0*).

Figure 1.0

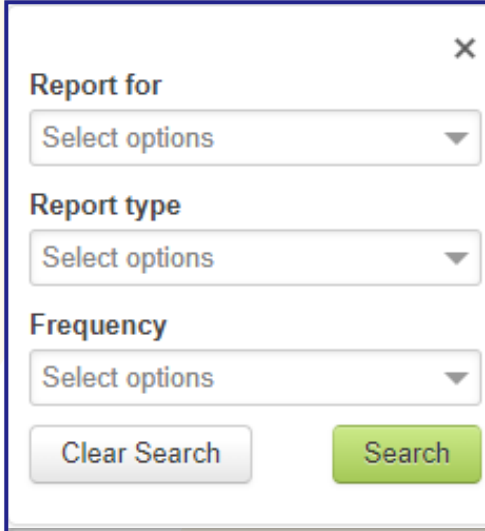
Client portal page example for Rapid Induct.



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- Step 3.** The filters (*Figure 2.0*) are on the left side of the page. This can be used to filter the previously generated reports.
- Step 4.** To filter the reports please select an option from the dropdowns which can filter by 'Report for', 'Report type' and 'Frequency'.
- Step 5.** Once the desired filters are selected, please press search. This will place the filters and only show the reports set by these filters.
- Step 6.** To see the default view again, select 'Clear Search' and all the filters will be reset.



The image shows a modal dialog box titled 'Report Filters' with a close button (X) in the top right corner. It contains three dropdown menus, each with the text 'Select options' and a downward arrow. The dropdowns are labeled 'Report for', 'Report type', and 'Frequency'. At the bottom of the dialog, there are two buttons: a grey 'Clear Search' button and a green 'Search' button.

Figure 2.0
Report Filters that can filter the reports shown.

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Step 7. To start the new reports creation, please select the green button, 'Schedule New Report' (Figure 3.0).

Step 8. This will bring out a 'pop-up' (Figure 4.0), this will provide options below (Figure 5.0 and 6.0).

- 'Report type', details the type of report that is generated.
- 'Report name', is the name that will be listed on the generated report for future reference.
- 'File Format' is the document format that will be generated.

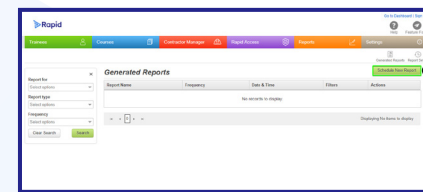


Figure 3.0

Report page, to generate new reports and view existing reports.

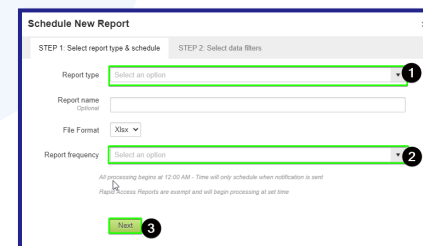


Figure 4.0

Generate Report creation pop-up. This allows the user to create a desired report.

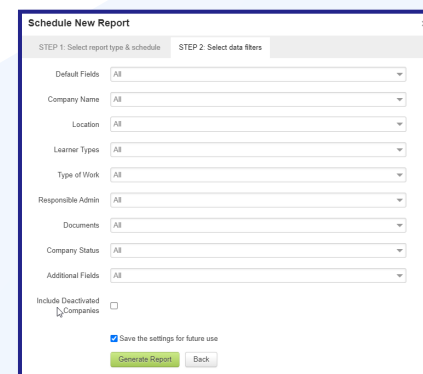


Figure 5.0

Dropdown selection in the report generation popup.

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- 'Report frequency', as shown in (Figure 6.0) the second selection (2) will set the frequency of the report. If this only needs to be completed for one time, please select "Once off" in the drop-down.
- If any other 'Report Frequency' is selected, a new option will appear listed as 'Time of day'. This will schedule the report to be generated at a specific time for the next generation cycle.

Figure 6.0
Frequency selection.

Step 9. The options must be selected as the pop-up will not allow the 'Next' button to be pressed until all options are filled. Once complete please select next.

Step 10. A new message will now appear, to dismiss this please select the 'Close' button.

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Step 11. The 'STEP 2: Select data filters', these filters will be different for every report. The report shown in the screenshot are the 'Trainee Report' filters. These filters will dictate the data that is generated into the report. If no filters are selected, the Rapid will proceed to generate the report by selecting 'Schedule Report' (Figure 7.0).

Step 12. Please note selecting 'Back' will navigate to the previous page to adjust any settings on the previous page of the pop-up.

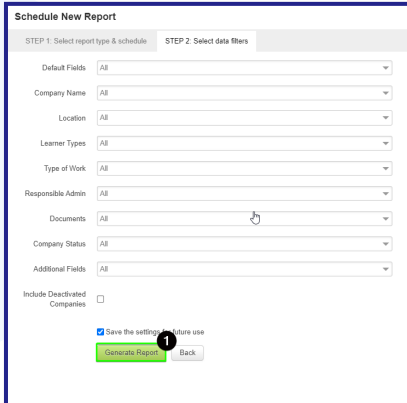




Figure 7.0
Filter selection for the generating report.

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Step 13. After generating the report, the report will show in 'Report Setup', this is used to adjust any filters in future scheduled reports (*Figure 8.0*).

- a. To edit any filters for this report please select the  icon.
- b. To delete the report so it will no longer generate please select the  icon.
- c. To view the filters please select the green 'View Filters' button.
- d. To manually generate the report please select the green 'Generate' button.

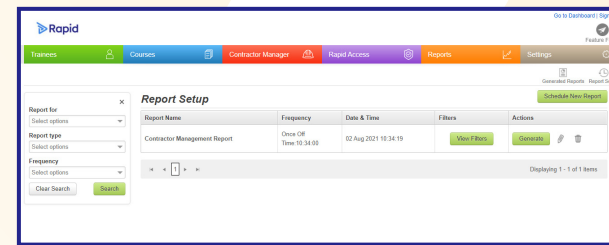


Figure 8.0
Post-generation,
report editing and
removal options.

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- Step 14.** Please also note that depending on the amount of information in the report that needs to be generated will impact the time it will take for the report to generate.
- Step 15.** Once the report has been generated the user creating the report will be notified and follow the prompt in the email to view the report.
- Step 16.** Alternatively, manually viewing the generated report can be done by selecting 'Generated Reports' in the 'Reports' section. Then select the report's name or the  button under 'Actions' (*Figure 9.0*).

Figure 9.0
 Manual report download and view.

Report Name	Frequency	Date & Time	Filters	Actions
Contractor Management Report	Once Off Time:10:34:00	02 Aug 2021 21:44:52	View Filters	 



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