Guide to Generating & Scheduling Reports

You can run two types of reports in the Criteria platform:

1. **Test data reports**, which include individual candidate data and scores within your desired parameters.
2. **Aggregate reports**, which summarize your test usage.

If you have an Enterprise or Professional subscription, you can schedule both types of reports to run at specific times: daily, weekly or monthly.

Create a test data report

Note: when creating a report, the first page of the process allows you to set the parameters for your report. Once you've done this, you can choose which jobs you want to generate the report for on the next page of the process.

1. Go to **Manage > Reports**

2. Click **Create report** and select **Test Data Report**.

3. Enter a name for your report and, if required, a description.

4. If your organization has an Enterprise or Professional subscription, you will see the **Schedule Reports** section, where you can specify if you want to make this a recurring report that will run automatically at the specified times. All scheduled reports will run at 12am Pacific Time (PST/PDT).

Schedule Reports:

Monthly (1st of month) ▼

Note: Scheduled reports cannot be saved across user accounts. in order to avoid this.

Points to note for scheduling reports

- Any scheduled reports that you create – or existing "static" reports that you change to be scheduled reports - will be automatically emailed to you at the specified time as a .csv file.

- If you edit an existing "static" report that someone else has created and changed it to be a scheduled report, it will be sent to the original creator and not yourself. For this reason, we recommend making a copy of any report you want to receive yourself.

  You can do this by going to **Manage > Reports** and clicking the three dots (…) to the right of the report's name, then selecting **Copy**. Ensure that the copy is saved as a scheduled report and it will be sent to your email address at the designated times.

- If you need to share reports with other people, we recommend setting up an email forwarding rule in your email client, such as Outlook or Gmail.

5. In the **Filters** section, you can refine the parameters of your report. If you don't select any filters, all data will be returned for the jobs you select in the subsequent step.

Filters:

Date	Tests	Application Filters
Last Month ▼	Select a test ▼	Select an Application Filter ▼

Pipeline Stages	TestMaker Tests	Event Status
Select a pipeline stage ▼	Select a TestMaker test ▼	× Complete × ▼

Scheduled By	Labels	
Select a user ▼	Select a label ▼	☐ Include private candidates

Available filters

- **Date**: specify whether you want data from the current or previous day or week, or within a particular date range. This filter is mandatory: you'll need to select a date range to run your report. For scheduled reports, use one of the predefined date ranges, such as this week or last month.

- **Pipeline Stages**: only include candidates in a specific pipeline stage. You can choose multiple stages across any of your saved pipelines here.

- **Scheduled By**: only include jobs managed by specific users within your Criteria platform.

- **Tests**: only include specific tests in your report.

- **TestMaker tests**: similar to the tests filter, you can choose to only include specific TestMaker tests in the report.

- **Labels**: only include candidates with specific labels attached to them.

- **Application filters**: if you've created **results** filters for your job applications, so that only people who provide a specific answer or set of answers to particular questions are returned in a search, you can select them here to further filter your report. You can create results filters in **Manage > Job applications > Manage application filters**.

- **Event status**: choose to only include candidates whose assessment event status is invited, completed or pending. In most cases, customers only want to include candidates who have completed testing.

- **Include private candidates**: include candidates who have been individually marked as "private". Private candidates are only visible to Admin users.

6. In the **Choose your Columns** section, choose the information you want to include in your report. Click the + sign to the right of each column to add it to your report. You can then drag and drop the columns on the right to change their order.

Choose Your Columns:

Candidate Data ⌄

Criteria's Test Portfolio ⌄

CAST ⌄

CBST ⌄

CCAT ⌄

CLIK ⌄

CMRA ⌄

Cognify ⌄

Arrange Your Columns (Drag and Drop to Reorder):

| First Name |
| Last Name |
| Email Address |
| Test Date |
| Position |
| Score Ranges Met |
| Scheduled By |
| Includes Copied Results |
| Cognify Percentile |
| Cognify Problem Solving |
| Cognify Numerical Reasoning |
| Cognify Verbal Knowledge |

- **Candidate Data**: select the candidate information you want to include, such as first and last name, position, whether they met the score ranges for the job, and who scheduled their testing. In most cases, you'll want to include first and last name and email address. If you haven't put a testing status filter in place above, we recommend also including test status in your report so you can identify which candidates have completed testing or are in progress.

- **Criteria's Test Portfolio**: specify the data points you want to include for each Criteria test. In most cases, this includes all of the data points that are provided in the Criteria score reports. In the example above, the report would include columns for the overall Cognify percentile, as well as individual scores for problem solving, numerical reasoning and verbal knowledge.

- **TestMaker Tests**: if you've created your own TestMaker tests, you can also choose which information is included in your report.

7. Choose whether to run or save the report, or both.

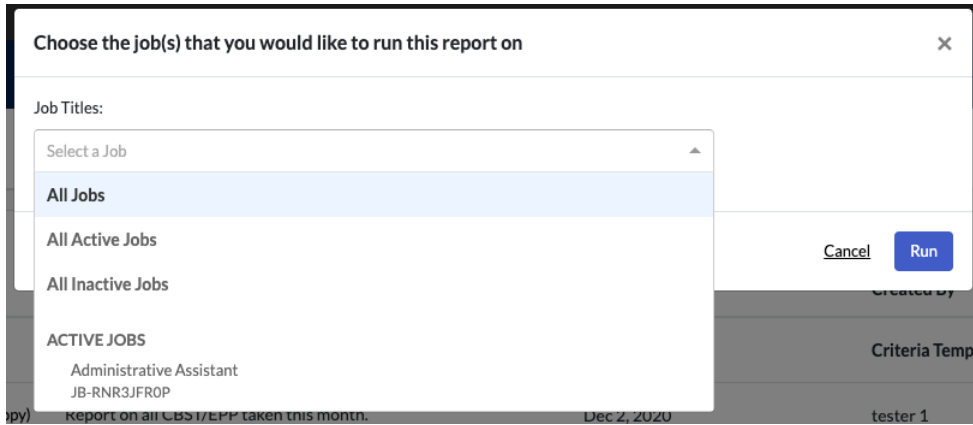Cancel | **Run Report Without Saving** | **Save Report** | **Save Report and Run Now**

- **Run Report Without Saving**: use this option if you want to simply generate the report now and don't want to save it to use again.

- **Save Report and Run Now**: this option will run the report now and also save it to run again in future.

  Note: For both of the options above, you can choose which jobs you want to include in the report in the next screen.

- **Save Report**: this option will save the report to be run again in future. This option will be greyed out (appears as light blue) for scheduled reports.

8. In the next screen (unless you selected **Save Report**), you can choose which jobs you want to run your report for. This allows you to set up your reports to include the data you need, and then run them for different jobs as required.

9. Once you've selected the appropriate jobs, click **Run** to run the report, which will be generated and displayed for you. You can sort the data by clicking the column headings.

10. If required, you can use the **Download Results** button to export the report as a .csv file, which you can then manipulate as required.

Create an aggregate data report

1. Go to **Manage > Reports**

2. Click **Create report** and select **Test Data Report**.

3. Enter a name for your report and, if required, a description.

4. If your organization has an Enterprise or Professional subscription, you will see the **Schedule Reports** section, where you can specify if you want to make this a recurring report that will run automatically at the specified times. All scheduled reports will run at 12 am Pacific Time (PST/PDT).

Schedule Reports:

Monthly (1st of month) ▾

Note: Scheduled reports cannot be saved across user accounts.
in order to avoid this.

5. In the **Filters** section, select a date range for your report. For scheduled report, select a predefined range, such as this week or last month.

6. Choose whether to run or save the report, or both.

Cancel   **Run Report Without Saving**   **Save Report**   **Save Report and Run Now**

    a. **Run Report Without Saving**: use this option if you want to simply generate the report now and don't want to save it to use again.

    b. **Save Report and Run Now**: this option will run the report now and also save it to run again in future.

       Note: For both of the options above, you can choose which jobs you want to include in the report in the next screen.

    c. **Save Report**: this option will save the report to be run again in future. This option will be greyed out (appears as light blue) for scheduled reports.

7. Once you've selected the appropriate jobs, click **Run** to run the report, which will be generated and displayed for you. You can sort the data by clicking the column headings.

TEST NAME	NUMBER OF TESTS
TOTAL:	70
Employee Personality Profile	23
Criteria Basic Skills Test	13
Criteria Cognitive Aptitude Test	11

8. If required, you can use the **Download Results** button to export the report as a .csv file, which you can then manipulate as required.

Organize and manage test data reports

-   To view a list of reports, go to **Manage > Reports**.
-   Scheduled reports will have a stopwatch icon on the left. You can see the frequency of scheduled reports in the Scheduled column.

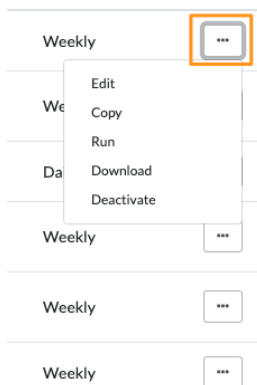- Use the filter options on the left to refine your report list. If you only want to view scheduled reports, select Scheduled Only on the left.
- Click the three dots (…) to the right of a report's name to view additional options.

- **Edit**: change the settings and jobs for the report. If you're editing a scheduled report, your changes will apply to all future reporting.
- **Copy**: create a duplicate of the current report. Your user settings will apply, so the report will only include jobs and data you have access to.
- **Run**: run the report now.
- **Download**: download the report data now.
- **Deactivate**: delete the report. If it's a scheduled report, it will no longer run in the future.