



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

11/25/2024 10:13 AM

## NAME OF PROCESS

## Export PDFs of Existing Reports [RolePlay]

*Use Case / Objectives*

This guide will walk you through how to generate a PDF for a report previously generated/executed in the RolePlay system. **NOTE:** this process is the same regardless of the report type.

*Configuration, Training, and Reporting*

Before you can generate/view report PDFs in RolePlay, a member of InTempo's Customer Care team will need to set up access to the Standard Forms for the User in the GreenScreen environment.


Menu options to access:

Main Operations => Manage My Files

*Reporting*

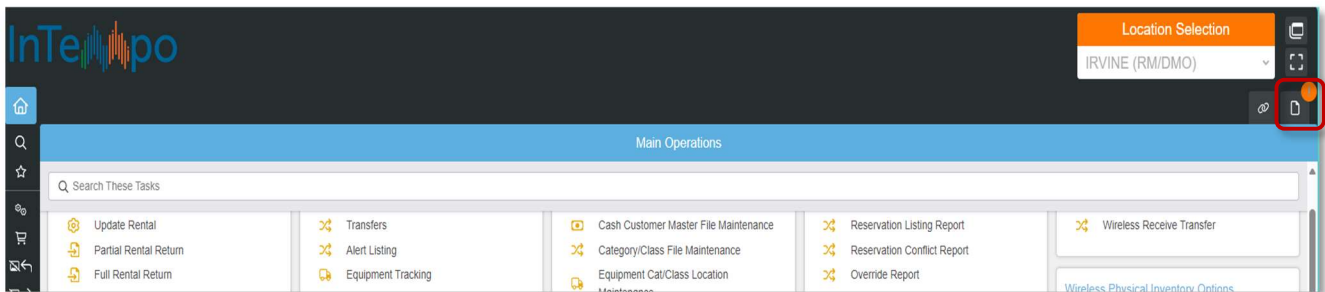
Any reports in the RolePlay environment that a customer has access to generate.

## Export PDFs of Existing Reports [RolePlay]

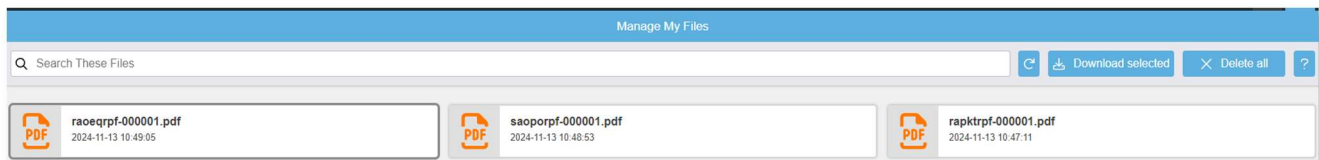
1. Log into the [RolePlay](#) environment using your credentials.
2. Once you have logged into the system, regardless of the screen displayed, if you have newly run reports in your **Manage My Files** queue, an indicator icon  will display next to the **Manage My Files** icon.

**NOTE:** Whether or not the indicator icon is displayed, if you have any reports in your **Manage My Files** queue, the process to view them is the same.

3. Click on **Manage My Files** to open the report queue.





- a. The **Manage My Files** screen opens, displaying any user-run reports in the system that have not been deleted.



4. Hover over the desired report.
  - a. Three action icons display on the right side of the report:
    - i. Open
    - ii. Download
    - iii. Delete



5. Click on the **Open** icon  to view and print the report PDF.

6. Click on the *Download* icon  to download the report PDF to your computer and share it with others.
7. Click on the *Delete* icon  to remove the report from your **Manage My Files** queue.