

# System Reporting

### Summary

This *Customer Support Bulletin* describes how to use system reports designed to make administering your SWAC participation easy. It provides detailed instructions regarding the use of these reports to track member enrollment and financial transactions, and extract members that meet specific criteria or work site requirements.

All reports are accessed from links located in the bottom right portion of the **Home** page.

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The following standard reports are accessible to all authorized system users:

☐ **Member Enrollment Report** – Provides enrollment details including membership status, certification level and detailed transaction information for given date and company selections.

**Member Certification Report** – Generates a list of members that satisfy the user-selected certification criteria (e.g. access level) for a selected date range. PLEASE NOTE: An individual's certification must meet the selected criteria for the entire date range selected in order to be listed on the report output.

**PLEASE NOTE:** SWAC does not represent or guarantee that system reports will satisfy the requirements of any specific agency. Please verify the <u>current</u> requirements with participating agencies to assure your organization's compliance with security reporting or reimbursement.



### **Member Enrollment Report**

To access this report, click the **Member Enrollment Report** link at the bottom right of the Home page.

Select the required report parameters, i.e. **Company**, **Begin Date** and **End Date** from the selection menus and click **Run Report**.

You can also filter this report by entering a partial or full **Contract #** that may have been entered by individuals submitting applications sponsored by your organization.

Additional filters relating to the status of program requirements such as presentation of **Identity Documents**, completion of **Background Check**,

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MEMBER ENROLLME	ENT REPORT						
Company: Real-	Time Technology Group			$\mathbf{i}$			
Begin Date: 8/10/	2010	Identity D	ocs: Doesn't matte	-			
End Date: 8/31/	2010	Background Ch	sck: Uoesn't matte				
Contract #:		SWAC ID Card Issu	ed: Doesn't matte				
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1710-IXGWHR	Jones, Edward	AnyTown, A.	CONG OCC #	8/13/2010	Identity bocs	background check	SWAC ID Card
				7/10/50/5			
E SWAC Memb	errhin Application: Edward 1	lones. III		\$134 37	Yan	PTDN1123543886	8/13/2010
1610-200231	Inner Ine	Anitown MV		8/10/2010	142		0/10/2010
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Item	en percura e	December 1	22.0	Amount	Paid	Transaction #	Date
E P.V & Criminal	Background Check: Jason Jo	ones, IVI High Access L	eve	\$1.00	Yes	PTRN4084270350	8/10/2010
D.W.A.C. Hemb	ership Application: Jason Jo	nes, IV		\$134.37	Yes	PTRN0240407040	0/10/2010
1610-7WR2JI	Jones, Joe	Anytown, NY		8/10/2010	~		
Item				Amount	Paid	Transaction #	Date
S.W.A.C. Memb	enship Application: 1 lones,	1./		\$134.37	Van	PTRN1506283211	8/10/2010
1510-GBVADW	Square, Bob	Atlantis, OK		8/11/2010	~	~	
Item				Amount	Paid	Transaction #	Date
S.W.A.C. Hemb	ership Application: SpongeB	Sob SquarePants		\$134.37	Yes	PTRN3370469040	8/11/2010
P:V & Criminal	Background Check: Sponge	Eob SquarePants: High	Access Level	\$152.00	Yes	PTRN1066823940	8/11/2010
1710 YCQNHI	Williama, Edward	Anytown, NE		8/12/2010	~	4	
Item				Amount	Paid	Transaction #	Date
E S.W.A.C. Memb	ership Application: Edward 1	Williams, 1		\$134.37	Yes	PTRN1231726601	8/12/2010
PIV & Criminal	Background Check: Edward	Williams, I: High Acces	s Level	\$240.00	Yes	PTRN1597022360	8/16/2010
Email Address:		Email Receipts (	of checked items on	CY1			
	62063-2010 R	Iral-Time Tech Group, Pate	nt Pendina.				

and finally, the issuance of a SWAC Membership ID card are also provided for your convenience.

## How to Email Duplicate Receipts from the Member Enrollment Report

#### Run the Member Enrollment Report

for the desired period and report parameters. Please see instructions provided above.

After locating the desired transactions, select the checkbox to the left of each individual transaction for which a receipt is desired. At the bottom of the report output, enter an email address to which SWAC will send the selected transaction receipts.

110-10/041115	Jones, Edward	ArvTown, AL	8/13/2010			
tem			Amount	Paid	Transaction #	Date
S.V.A.C. Mem:	pership Application: Ecward	Jones, III	\$134.37	Yes	FTRN1123543866	8/13/2010
610-YWRZ11	Jones, Joe	Arytown, NV	0/10/2010	×	4	
Item			Amount	Paid	Transaction #	Date
PIV & Criminal	Background Check: Jason J	ones, IV: High Access Lavel	\$1.00	Yes	FTRN4084270350	8/10/2010
S.W.A.C. Mem	pership Application: Jason Jo	ines, IV	\$134.37	Yes	FTRN6546407640	8/10/2010
610-YWRZI	Jones, Joe	Arytown, NV	8/10/2010	4		
Item			Amount	Paid	Transaction #	Date
S.W.A.C. Mem:	pership Application: J Iones,	IV	\$134,27	Yes	FTRN1206283211	8/10/2010
510-GBVACW	Syuare, Bub	Alantis, OK	8/11/2010	*	*	
Item			Amount	Paid	Transaction #	Date
S.W.A.C. Mem:	pership Application: Spongel	Bob SquarePants	\$134.37	Yes	FTRN3370469040	8/11/2010
I PIV & Griminal	Background Check: Sponge	Bob SquarePants: High Access Level	\$152.00	Yes	FTRN1066823940	8/11/2010
710-YCQ/HI	Williams. Edward	Arytown, NE	8/12/2010	5	<i>u</i>	
Item			Amount	Paid	Transaction #	Date
S.W.A.C. Membership Application: Ecward Williams, I			\$134.27	Yes	FTRN1231726601	8/12/2010
S.W.A.C. Memo						

# **CUSTOMER SUPPORT BULLETIN**



#### Member Certification Report

To access this report, click the **Member Enrollment Report** link at the bottom right of the Home page.

Select the required date range during which all individuals must be certified, i.e. **Begin Date** and **End Date**.

Select the desired **Certification(s)** for analysis. Use CTRL and Click to select more than one certification.

For **Certification Match Logic**, select '**AND**' if all certifications selected must be met, select '**OR**' if any of the selected certifications will satisfy your requirements.

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MEMBER CERTIFICATION RE	PORT		
Start Date	:		
End Date	:		
Certification(s)	High Access Level A High Access Level - TWIC Low Access Level TWIC Medium Access Level		
Certification Match Logic	: O AND O OR		
Has Certification?	: 🖱 YES 🔘 NO		
For Members in Company(ies)	Shawn Corp Shawn Test Corp II : Shawn Test Corp III Shawn Test Corp IV Shawn Test Inc		* (EI)
	Run Report		

For the question **Has Certification?**, select '**YES**' if the certifications selected are required to satisfy the report criteria, select '**NO**' when searching for individuals whose certifications will not be valid during any part of the selected date range.

Select one or more of the companies listed and click **Run Report** to generate the results.

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EMBER CERTI	FICATION REPO	RT			Export	Results (Excel)	Cancel
age 1 of 1 [ 1 ]							
ontrol #	Last Name	First Name	Organization	Certification	Eff Date	Exp Date	
10EUZPJE	Krantz	Daniel	Real-Time Technology Group	High Access Level	10/27/2009 1:19:21 PM	10/27/2010 1:19:21	PM
510CCVMLV	Wood	Shawn	Real-Time Technology Group	High Access Level	10/27/2009 3:59:02 PM	10/27/2010 3:59:02	PM
510CCVMLV	Wood	Shawn	Real-Time Technology Group	High Access Level	5/20/2010 8:16:48 PM	5/20/2011 8:16:48 P	M
10ALBISC	Hanson	George	Real-Time Technology Group	High Access Level	8/6/2010 9:39:32 PM	8/6/2011 9:39:32 PM	
10YCQNHI	Williams	Edward	Real-Time Technology Group	High Access Level	8/9/2010 4:09:28 PM	8/9/2011 4:09:28 PM	E.
10YWRZJI	Jones	Joe	Real-Time Technology Group	High Access Level	8/10/2010 5:16:24 PM	8/10/2011 5:16:24 P	M
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10GBVADW	Square	Bob	Real-Time Technology Group	High Access Level	8/11/2010 6:15:40 PM	8/11/2011 6:15:40 P	M
10YCQNHI	Williams	Edward	Real-Time Technology Group	High Access Level	8/16/2010 2:33:33 PM	8/16/2011 2:33:33 P	M
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