

**CENTRL**

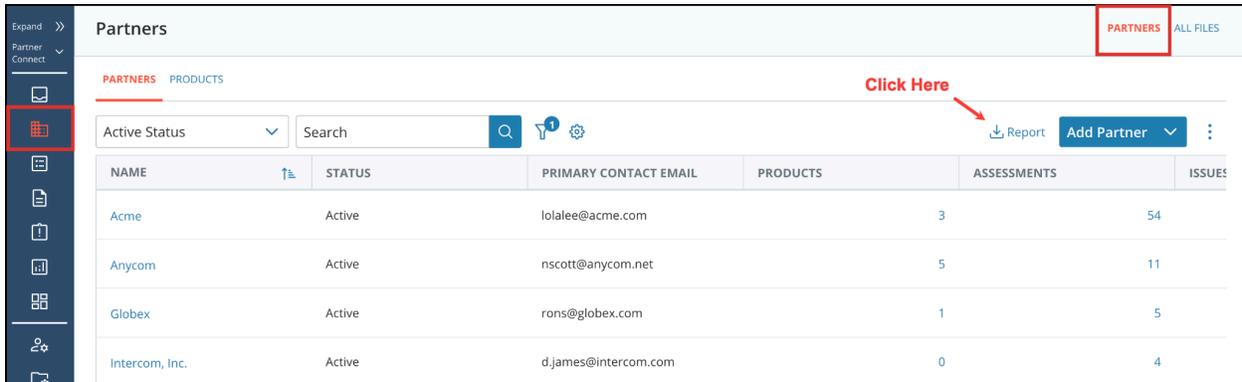
Data Offload Guide

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# Partners Module

## Downloading Reports

1. Users can generate and download a report of their data by selecting the **Download Report** option, as shown below. This will generate an Excel file that contains data from your Partners, Products, and Contacts information that is saved in CENTRL.



The screenshot shows the 'Partners' module interface. At the top right, there are tabs for 'PARTNERS' (highlighted in red) and 'ALL FILES'. Below the tabs, there are two sub-tabs: 'PARTNERS' (active) and 'PRODUCTS'. A search bar is present with a search icon and a settings icon. To the right of the search bar, there is a 'Download Report' button with a red arrow pointing to it and the text 'Click Here' above it. Next to the 'Download Report' button is an 'Add Partner' button with a dropdown arrow. Below these elements is a table with the following columns: NAME, STATUS, PRIMARY CONTACT EMAIL, PRODUCTS, ASSESSMENTS, and ISSUES. The table contains four rows of data:

NAME	STATUS	PRIMARY CONTACT EMAIL	PRODUCTS	ASSESSMENTS	ISSUES
Acme	Active	lolalee@acme.com		3	54
Anycorn	Active	nscott@anycorn.net		5	11
Globex	Active	rons@globex.com		1	5
Intercom, Inc.	Active	d.james@intercom.com		0	4

2. Once the **Download Report** option is selected, a pop-up will appear to confirm the **Export** process. Once you confirm, a link will be sent to the requester's email when the file is ready to download.

**Please Note:** This report can be reuploaded into a new or existing instance after it is amended or left unchanged to bulk add/update data. To learn more about importing partners, products, and contacts, click [here](#).

## Exporting Table views

Users in CENTRL also have the option to export their current table views that they have saved within the system. This will allow you to create a more customized view for the data you wish to save. To download table views for offline viewing you can follow the steps below.

**Please note:** Please ensure all the desired columns are added to the table before downloading the file.

1. Navigate to the desired Table View you wish to export. On the top right of the table, click on the **3 dots** and select **Export to CSV** as shown below.

Partners PARTNERS ALL FILES

PARTNERS PRODUCTS

Data Category  Search    Download Report

Name	Status	Primary Contact Email	Products	Assessments	
Accentra	In Progress	bmartinez@accentra.com	1	20	6
Acme	Active	hinoi@acme.com	0	1	3
Fast Retailing	Active	cnguyen@fastretailing.com	2	54	15

Showing 1 to 3 of 3 entries << < 1 > >> 10

2. In the *Exporting Table Data Window*, click on the **Export** button. You will then receive a download link in your inbox once the file is ready to download.

Exporting Table Data X

An email will be sent to s.plier@sampletech.com with a link to download your file. It can take some time, so check your email after export.

**Click Here**

**Please Note:** You can utilize the Export table feature for the tables in the **Assessments Module** as well.

For more information on exporting table views, see our full help article here: [Export Table View](#)

## Assessments Module

Questionnaire Owners and Questionnaire Administrators can download all files attached to an assessment along with an exported copy of an assessment's question, answer, and evaluation data within the **Assessments Module**.

### Downloading all files attached to an Assessment

1. Navigate to the **Assessments Module** and click on the *Active Assessments Screen*. Click on the **3 dots** on the right of the assessment and select **Download All Files** as shown below.

Active Assessments

MY ASSIGNMENTS **ACTIVE ASSESSMENTS** BULK ASSESSMENTS UPCOMING ASSESSMENTS MANAGE QUESTIONNAIRES QUESTION BANK ANALYSIS

Default Search Add Assessment

NAME	PUBLISHED TO	RECIPIENT EMAIL	PUBLISHED ON	EVALUATION DUE	ANSWERS DUE	ACTIONS
AIMA - Managed Accou...	Globex	rons@globex.com	Jul 6, 2022	Nov 3, 2022	Aug 5, 2022	⋮
AIMA - Managed Accou...	Pide Inc.	margaret@pide.com	Jan 24, 2023	May 24, 2023	Feb 23, 2023	⋮
Due Diligence Question...	Pide Inc.	maggie@pide.com	Jul 7, 2022	Nov 4, 2022	Aug 6, 2022	⋮
Due Diligence Question...	Acme	lolalee@acme.com	Jan 12, 2023	No Data	Jan 12, 2023	⋮
Due Diligence Question...	Pide Inc.	margaret@pide.com	Jan 24, 2023	May 24, 2023	Feb 23, 2023	⋮
MSA Questionnaire	Acme	lolalee@acme.com	Jan 17, 2023	May 17, 2023	Feb 16, 2023	⋮

Click Here

- View Evaluation
- Assessment Analysis
- Download All Files**
- Export
- Edit Custom Fields
- Go To Overview

2. Once the download option has been selected, an Active Downloads widget will appear showing you the download in progress. An email will be sent to the requesters with the link to download the file.

Active Assessments

ASSIGNMENTS **ACTIVE ASSESSMENTS** BULK ASSESSMENTS UPCOMING ASSESSMENTS MANAGE QUESTIONNAIRES QUESTION BANK ANALYSIS

Active Search Add Assessment

Name	Published To	Recipient Email	Published On	↓↑	Evaluation Due	Answers Due	Actions
Google VSAQ - Web App...	Acme	s.plier@sampletech.com	Apr 12, 2024		Aug 30, 2024	Jun 14, 2024	⋮
DDQ Firm & Fund Ques...	Acme	lolalee@acme.com	Apr 11, 2024		Aug 29, 2024	Jun 13, 2024	⋮
DDQ Firm & Fund Ques...	Acme	s.plier@sampletech.com	Apr 10, 2024		Aug 28, 2024	Jun 12, 2024	⋮
DDQ Firm & Fund Ques...	Acme	s.plier@sampletech.com	Apr 9, 2024		Aug 27, 2024	Jun 11, 2024	⋮
Data Security	Acme	lolalee@acme.com	Apr 2, 2024		Aug 20, 2024	Jun 4, 2024	⋮
DDQ Firm & Fund Ques...	Acme	lolalee@acme.com	Apr 2, 2024		Aug 20, 2024	Jun 4, 2024	⋮
DDQ Firm & Fund Ques...	Acme	lolalee@acme.com	Apr 2, 2024		Aug 20, 2024	Jun 4, 2024	⋮

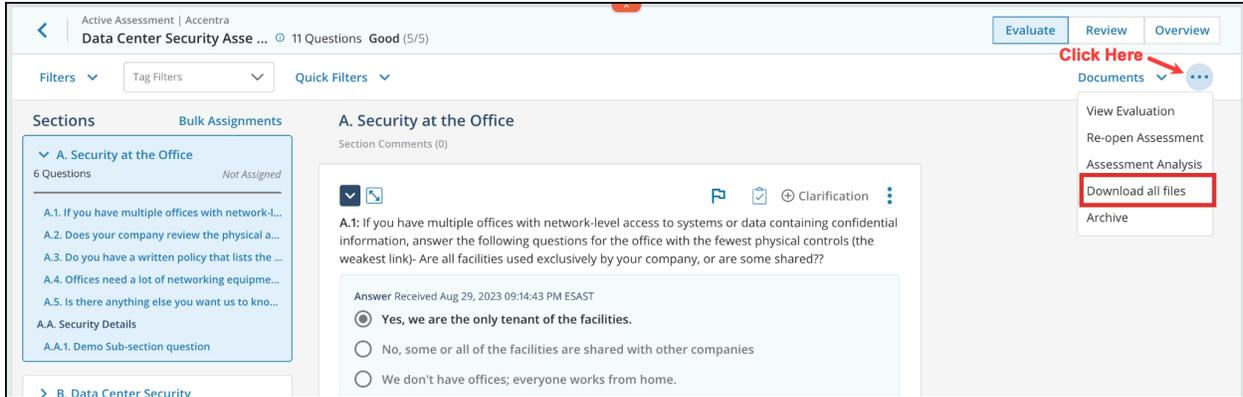
View Status Here

Active Downloads

- Google VSAQ - W... Files In Progress

Showing 1 to 10 of 87 entries

3. Alternatively, you can also download all the files from within the Assessment *Evaluation* Screen by clicking on the **3 dots** and selecting **Download All Files** as shown below.



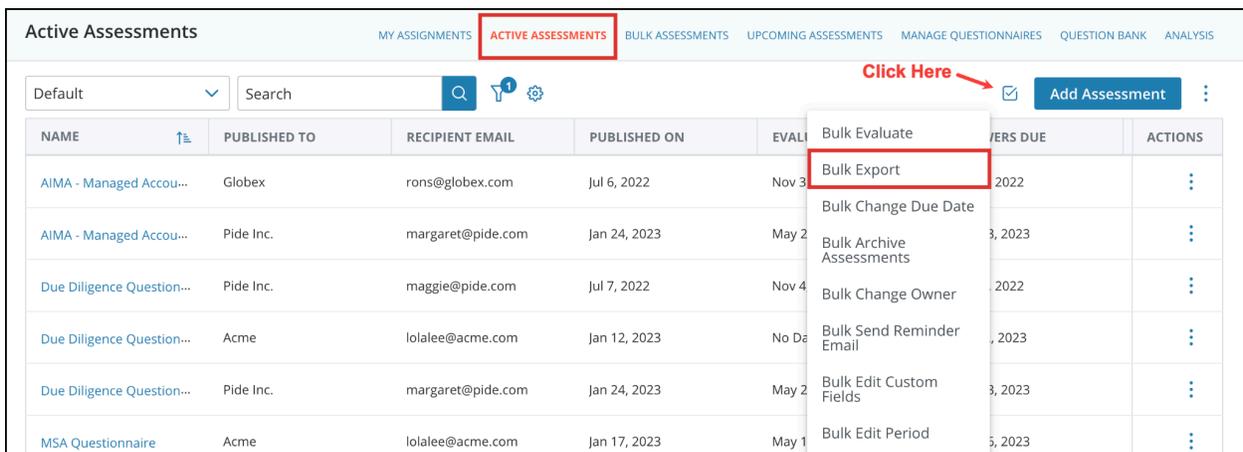
4. An Active Downloads widget will appear showing you the download in progress and an email link to download the file will be sent to the requesters.

The Excel file will show data from the Assessments, such as questions, partner's answers, clarifications, comments, attached files, and more.

For more information regarding this process, you can read our help center article here: [Downloading all files attached to an Assessment](#)

## Bulk Export Assessments

1. Users are also able to bulk export multiple assessments at once from the **Assessments Module**. To do so, navigate to the *Active Assessments Screen* and click on the **Bulk Actions** icon. Then click on the **Bulk Export** option, as shown below.



2. Within the *Bulk Export Window*, select the desired questionnaire you wish to bulk export in the **dropdown** list. Once selected, click on the **Filter** button.

## Bulk Export ✕

You can only bulk export assessments from the same questionnaire. Before selecting individual assessments, please select the questionnaire you wish to bulk export.

Questionnaire \* Managed Account Module Que ▾

Click Here

Filter
Cancel

3. Once filtered, you can select the **Checkboxes** for the assessments you wish to export. Alternatively, you can select the topmost **checkbox** to select all the options on the current page. Once the assessments you wish to export are selected, click on the **Export** button.

Active Assessments

[ASSIGNMENTS](#)
[ACTIVE ASSESSMENTS](#)
[BULK ASSESSMENTS](#)
[UPCOMING ASSESSMENTS](#)
[MANAGE QUESTIONNAIRES](#)
[QUESTION BANK](#)
[ANALYSIS](#)

Select Assessment(s) for Export

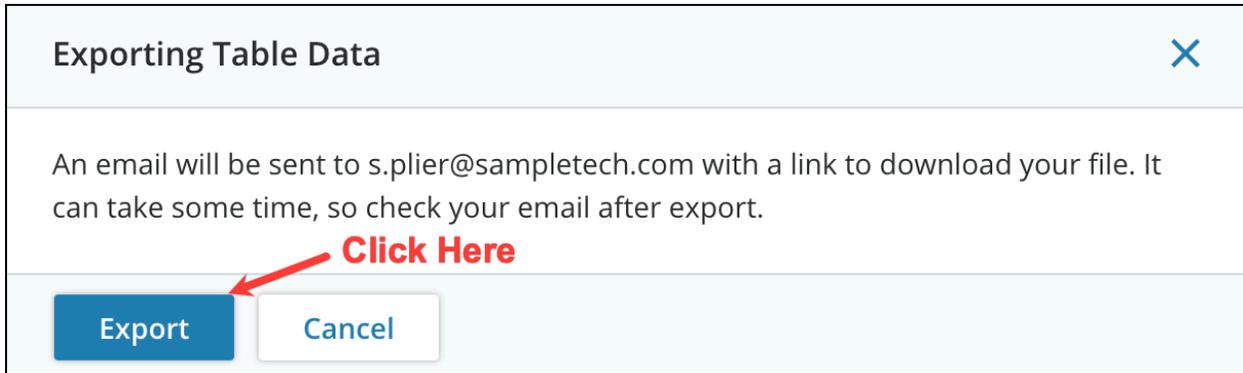
Expand this selection to select all records that match my filters

<input checked="" type="checkbox"/>	← Name →	Published To	Recipient Email	Published On	↓ ↑ Evaluation Due	Answers Due	Eval
<input checked="" type="checkbox"/>	Managed Account Mod...	Acme	guest@acme.com	Jan 9, 2024	May 28, 2024	Mar 12, 2024	0/22
<input checked="" type="checkbox"/>	Managed Account Mod...	Acme	lolalee@acme.com	Nov 27, 2023	Apr 15, 2024	Jan 29, 2024	0/22

Showing 1 to 2 of 2 entries << < 1 > >> 10 ▾

2 Assessment(s) selected.
Export (2)
Cancel

4. A confirmation message will appear in the *Exporting Table Data Window*. Click on **Export** and an email with a download link will be sent to your email.



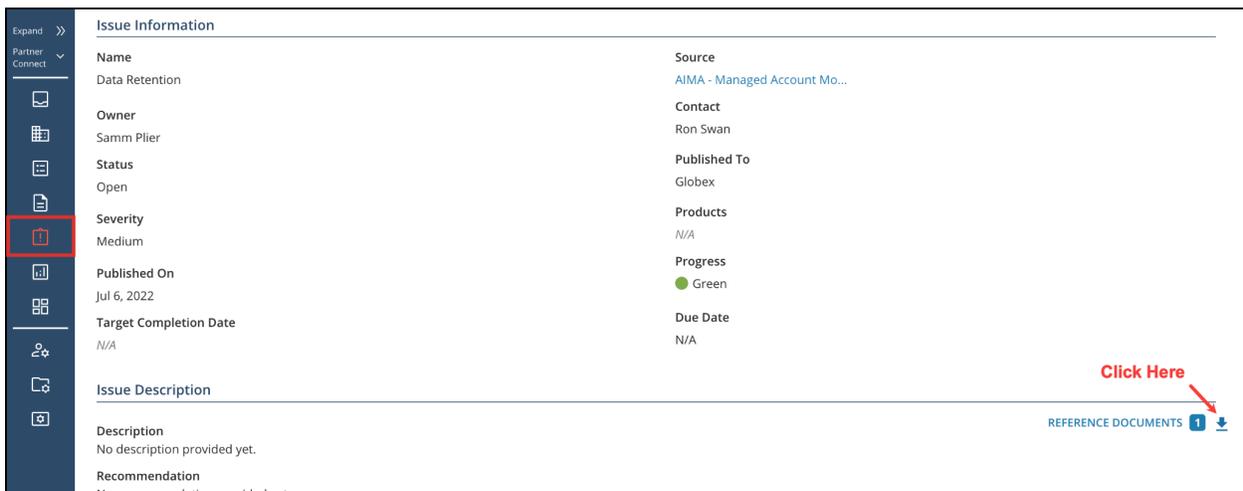
**Please note:** There is a max limit of 15 assessments that you can download in a single bulk export. You will need to bulk export multiple times if you are exporting more than the max limit.

## Issues Module

### Downloading Reference Documents

Within this module, Issue Owners, Issue Administrators, and Issue Collaborators will be able to download any *Reference Documents* that are saved within the Issue Details.

1. Navigate to the *Issue Details Tab* from the **Issues Module** and click on the **Download All** icon next to the Reference Documents link as shown below.



**Please Note:** This will download all the attached reference documents at once.

2. An active downloads widget will appear showing you the download in progress.

You can also read more details in our article here: [Downloading all Reference Documents](#)

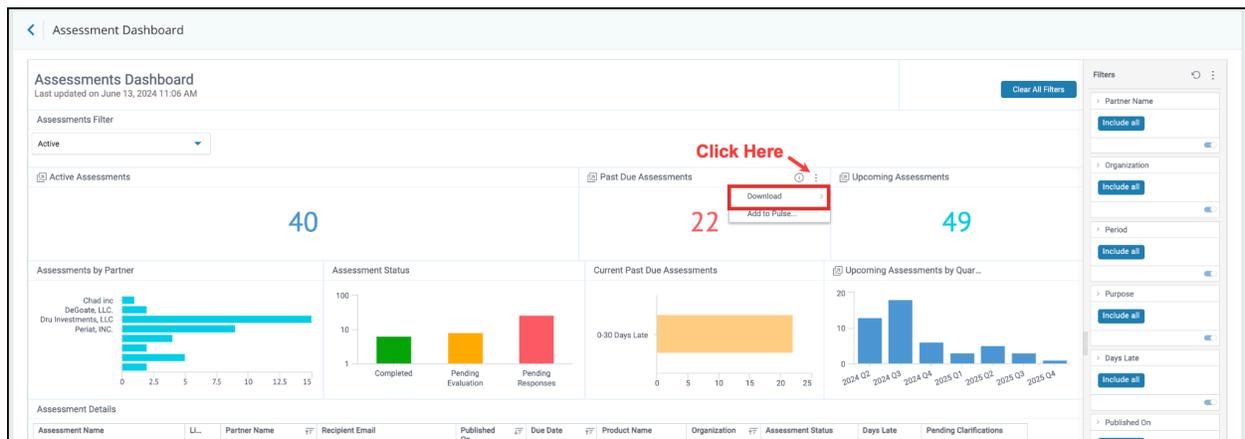
# Analytics Module

For the **Analytics Module**, users are able to download the data they filter for in each report.

1. Within the **Analytics Module**, click on the *Visualizations Screen* on the top right, as shown below.

VISUALIZATION NAME	SOURCE	TAG	DESCRIPTION	ACTIONS
Assessment Dashboard	ASSESSMENT_DASHBOARD	ASSESSMENT_DASHBOARD	Assessment Dashboard	⋮
Deleted Assessments	ASSESSMENT_REPORTS	Other	Shows the Deleted Assessments	⋮
Past Due Questionnaires	ASSESSMENT_REPORTS	Partners	Shows partners with open and past du...	⋮
Issue Dashboard	ISSUE_DASHBOARD	ISSUE_DASHBOARD	Issue Dashboard	⋮
Issues by Questionnaire	ISSUE_REPORTS	Assessments	Shows all the Issues for a selected que...	⋮

2. Select the Visualization name of the desired report/dashboard and navigate to the **3 dots** on a widget to open a dropdown menu with the **Download** option shown below.



You will have to download each widget manually at this time if you would like to download all of the data saved within the dashboards.

# System Admin Module

System Administrators can download summarized reports of the data within the Users, Roles, Partners, Contacts, and Business Unit tabs of the **System Admin Module**, as well as audit logs for any action taken in CENTRL.

## Detailed Reports

1. Navigate to the **System Admin Module** and access the *Users Screen*. Open the **Export Data** option and select **Download Detailed Report** as shown below

Name	Email	Organization	Role(s)	Advanced	Status	Last Login Date
Bob Smith	bsmith@acme.com	Sample Tech			Not Subscribed for Partner Connect	N/A
Chad Baker	cbaker@acme.com	Sample Tech			Not Subscribed for Partner Connect	Sep 28, 2023 05:41 PDT
Juan Rios	jrrios@acme.com	Sample Tech			Not Subscribed for Partner Connect	N/A
Lola Lee	lolalee@acme.com	Sample Tech	User		Subscribed	Jun 11, 2024 01:22 PDT

2. A pop-up notification will appear asking to confirm the **Export** option.

**Export All Users**

An email will be sent to s.plier@sampletech.com with a link to download your file. It can take some time, so check your email after export.

**Click Here**

**Export** **Cancel**

3. Once you confirm, the report will be sent to the requester's email once the file is ready to download.

## Exporting Audit Logs

Users also have the option to download the history of all changes to your company's records within CENTRL. System Admins are able to monitor any changes made within the platform by following the steps provided below.

1. From the **System Admin Module**, navigate to the *Users Screen*. Click on the **Export Data** dropdown and select **Export Audit Logs** as shown below.

Expand >>  
Partner Connect

**USERS** ROLES PARTNERS CONTACTS BUSINESS UNIT DISTRIBUTION ORGANIZATION ADVANCED CONFIG.

Click Here →

Export Data  
Download Detailed Report  
Export Audit Logs

Name	Email	Organization	Role(s)	Advanced C	Status	Last Login Dat
Bob Smith	bsmith@acme.com	Sample Tech			Not Subscribed for Partner Connect	N/A
Chad Baker	cbaker@acme.com	Sample Tech			Not Subscribed for Partner Connect	Sep 28, 2023 05:41 PDT
Juan Rios	jrios@acme.com	Sample Tech			Not Subscribed for Partner Connect	N/A
Lola Lee	lolalee@acme.com	Sample Tech	User		Subscribed	Jun 11, 2024 01:22 PDT

2. A CSV file will be downloaded after the **Export Audit Logs** option is selected. You can also export audit logs for the *Partners Screen* in this module as well.

For more details on what information you can find within audit logs here: [Exporting Audit Logs](#)