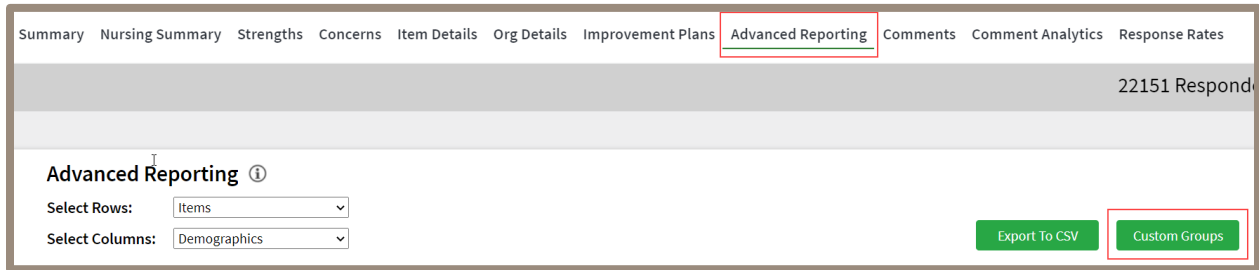


# Employee Engagement Advanced Reporting Using Custom Groups

The Custom Groups feature in Advanced Reporting allows you to group multiple units or demographics and create reports for that combination of units/demographics. You can create Custom Groups based on the report group and demographic permissions you have. The Custom Groups you create are only visible to you and cannot be seen by other users.

## Create a New Custom Group

To create a new Custom Group, go to Advanced Reporting and select Custom Groups.



Summary Nursing Summary Strengths Concerns Item Details Org Details Improvement Plans **Advanced Reporting** Comments Comment Analytics Response Rates

22151 Respondents

**Advanced Reporting** ⓘ

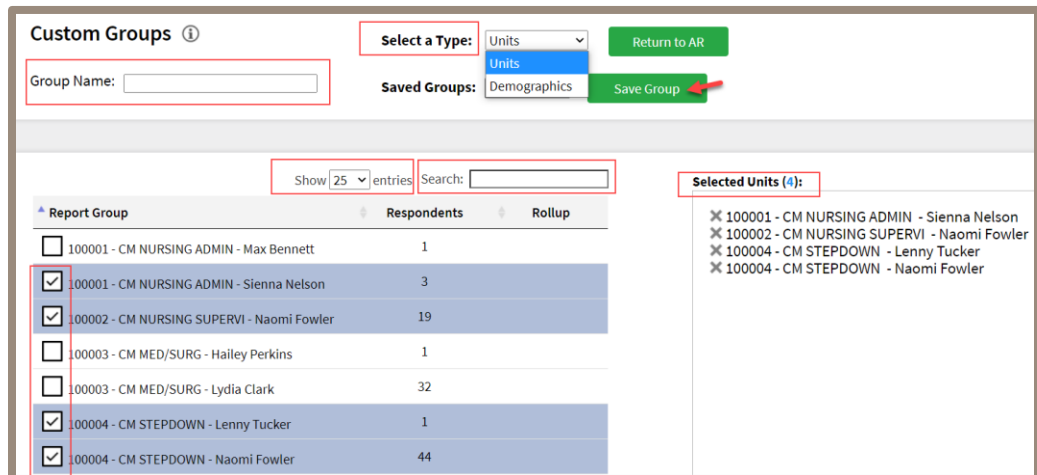
Select Rows: Items

Select Columns: Demographics

Export To CSV Custom Groups

## Custom Group by Units

Enter a Group Name (be sure use a unique naming convention to avoid multiple reports having the same name) and select the Type: Units. Check the boxes next to the Report Groups you want to include. As you make your selections, the names of the Report Groups you choose will appear to the right under Selected Units. The number in parenthesis is the number of units you selected. The number of respondents appears as a column in the report group table on the left. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific report group. When you have made all your selections click Save Group.



**Custom Groups** ⓘ

Select a Type: Units

Group Name:

Saved Groups: Demographics Save Group

Show 25 entries Search:

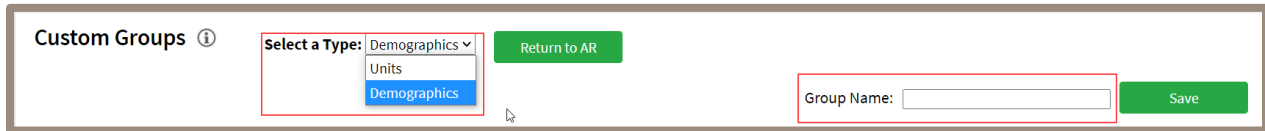
Report Group	Respondents	Rollup
<input type="checkbox"/> 100001 - CM NURSING ADMIN - Max Bennett	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna Nelson	3	
<input checked="" type="checkbox"/> 100002 - CM NURSING SUPERVI - Naomi Fowler	19	
<input type="checkbox"/> 100003 - CM MED/SURG - Hailey Perkins	1	
<input type="checkbox"/> 100003 - CM MED/SURG - Lydia Clark	32	
<input checked="" type="checkbox"/> 100004 - CM STEPDOWN - Lenny Tucker	1	
<input checked="" type="checkbox"/> 100004 - CM STEPDOWN - Naomi Fowler	44	

**Selected Units (4):**

- ✕ 100001 - CM NURSING ADMIN - Sienna Nelson
- ✕ 100002 - CM NURSING SUPERVI - Naomi Fowler
- ✕ 100004 - CM STEPDOWN - Lenny Tucker
- ✕ 100004 - CM STEPDOWN - Naomi Fowler

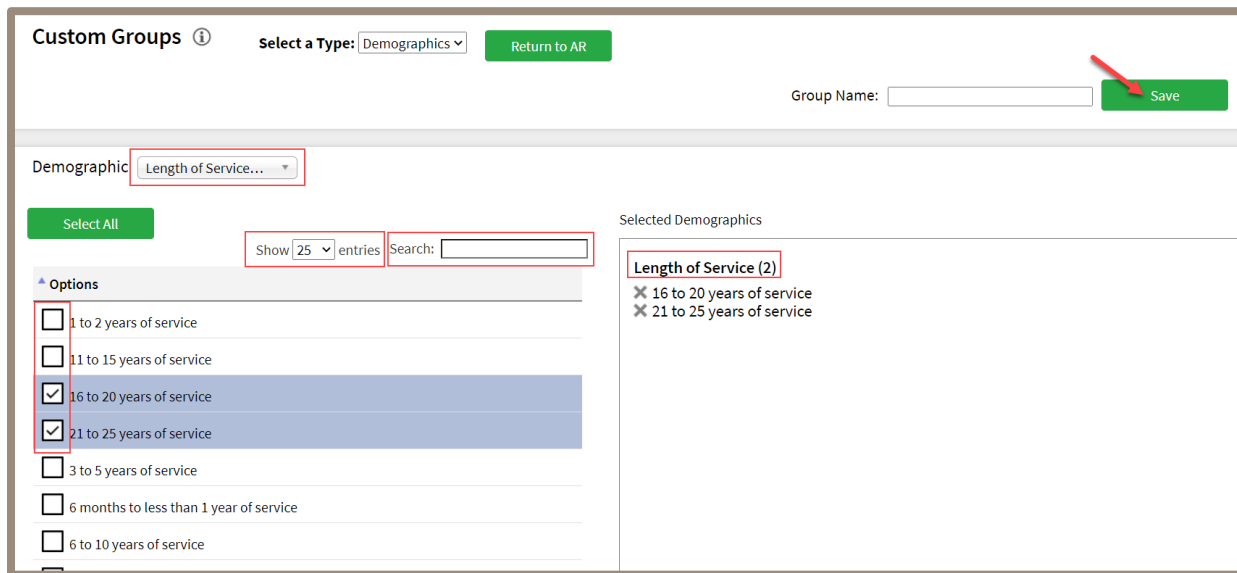
## Custom Group by Demographics

Enter a Group Name and select the Type: Demographics.



The screenshot shows the 'Custom Groups' form. At the top left, there is a 'Custom Groups' header with an information icon. To its right is a 'Select a Type:' dropdown menu with 'Demographics' selected. Further right is a green 'Return to AR' button. On the far right, there is a 'Group Name:' text input field and a green 'Save' button.

Next, select the Demographic dropdown to make your selection. Under Options, check the boxes next to the demographics you want to include. As you make your selections, your choices will appear to the right under Selected Demographics. The number in parenthesis is the number of demographics you selected. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific demographic. When you have made all your selections click Save Group.



The screenshot shows the 'Custom Groups' form with the 'Demographic' dropdown set to 'Length of Service...'. Below this is a 'Select All' button, a 'Show 25 entries' dropdown, and a 'Search:' text input field. The 'Options' section is expanded, showing a list of service length ranges with checkboxes. The '16 to 20 years of service' and '21 to 25 years of service' options are checked. To the right, the 'Selected Demographics' section shows 'Length of Service (2)' with two items: '16 to 20 years of service' and '21 to 25 years of service'. A red arrow points to the 'Save' button in the top right corner.

Once a Custom Group by Demographic is saved, it is also available in Custom Filters. Similarly, Custom Filters will be available in Custom Groups (Demos).

### Edit or Delete a Custom Group

To edit an existing Custom Group, Select a Type, then select the custom group you wish to edit under Saved Groups. To edit, select the pencil icon, make your changes by selecting or deselecting the check boxes and select Update Group/Filter or Delete Group/Filter. To delete the group select Delete Group/Filter.

**Custom Groups** ⓘ

**Select a Type:** Demographics ▼

Return to AR

**Saved Groups:** All Non-FullTime (3) ▼ 

Update Filter

Delete Filter

Custom Filter Name:

---

Demographic

Select All

Options

18 to 24 years

25 to 29 years

Show  entries Search:

**Selected Demographics**  
**Employment Status (3)**  
 Casual, Temporary, PRN or Per Diem  
 Leave of Absence  
 Part-Time

Note: When editing Custom Groups by Unit, select the group from the drop down, make changes, and select Update.

**Custom Groups** ⓘ

**Select a Type:** Units ▼

Return to AR

**Group Name:**

**Saved Groups:** Nursing Admin (4) ▼

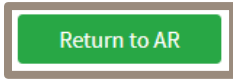
Show  entries Search:

Report Group	Respondents	Rollup
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Max Bennett	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Max BennettNew	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna Nelson	3	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna NelsonNew	3	

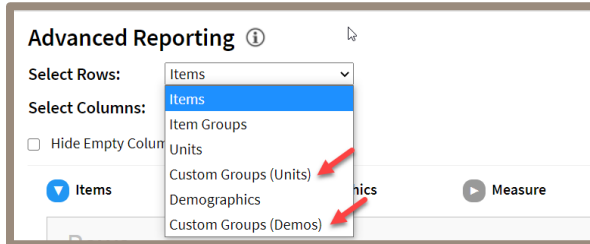
**Selected Units (4):**  
 100001 - CM NURSING ADMIN - Max Bennett  
 100001 - CM NURSING ADMIN - Max BennettNew  
 100001 - CM NURSING ADMIN - Sienna Nelson  
 100001 - CM NURSING ADMIN - Sienna NelsonNew

## Using Custom Groups

After creating the desired Custom Group(s), return to Advanced Reporting by selecting Return to AR and build a report using those Custom Groups.



In Advanced Reporting, you will see Custom Groups (Units) and Custom Groups (Demos) as options.



Once you make a selection you will see your Custom Groups for units or demographics appear in the dropdown.

