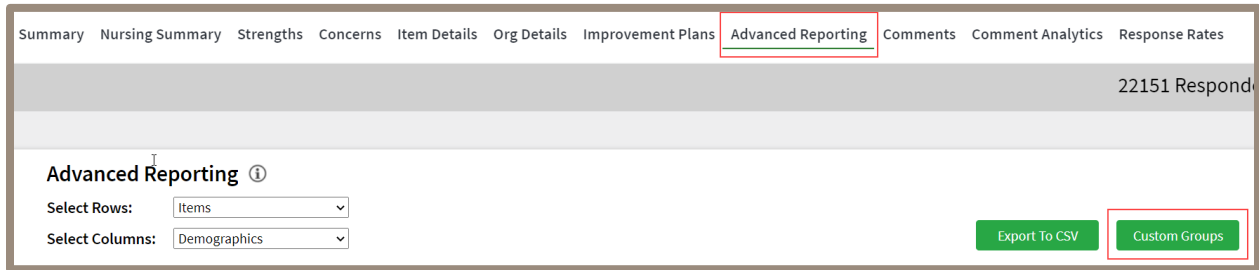![Press Ganey logo]

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.
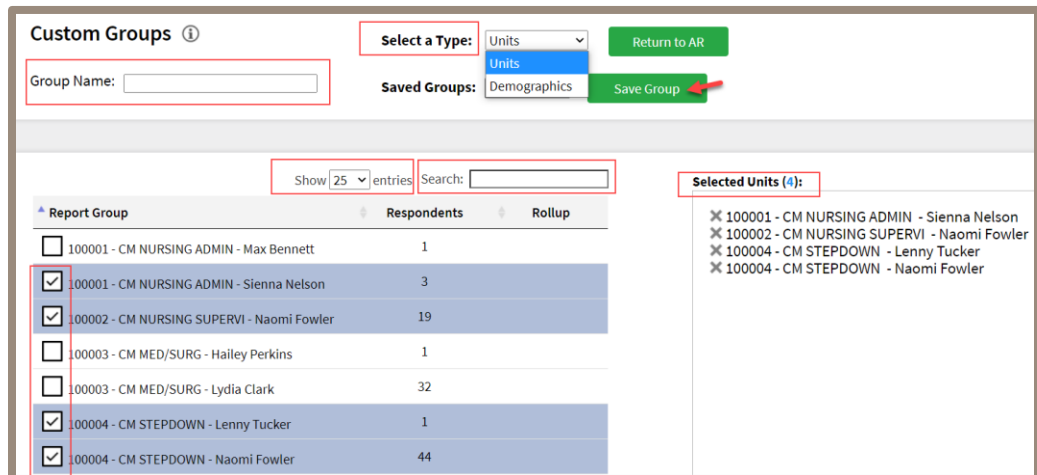
Custom Group by Units

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 Group by Demographics

Enter a Group Name and select the Type: Demographics.

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.

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.

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

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.
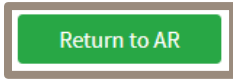
In Advanced Reporting, you will see Custom Groups (Units) and Custom Groups (Demos) as options.
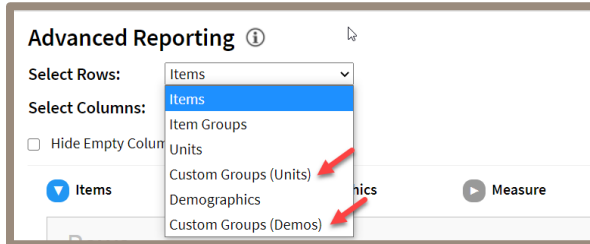
Once you make a selection you will see your Custom Groups for units or demographics appear in the dropdown.