

# EMPLOYEE ENGAGEMENT ADVANCED REPORTING

Advanced Reporting provides the ability to dynamically generate views of results based on items, demographics, or permissioned report groups. Based on the selections made for columns and rows, users can select metrics or other data display options. Results are limited to the report groups and hierarchy that users are permissioned to access. A CSV file export that provides all scores and user selections is available for permissioned users.

## Creating a Report

To create a report which contains a customized selection of items, item groups, units and demographics select the Advanced Reporting page.



## MAKING YOUR SELECTIONS

As you work through the options in Advanced Reporting, radial buttons indicate you can make a single selection while check mark boxes indicate you can make multiple selections.

<input type="checkbox"/>	1. This organization cares about its clients/patients.
<input checked="" type="checkbox"/>	2. The person I report to treats me with respect.
<input type="checkbox"/>	3. I enjoy working with my coworkers.
<input checked="" type="checkbox"/>	4. This organization values employees from different backgrounds.
<input checked="" type="checkbox"/>	5. My ideas and suggestions are seriously considered.

*Multi-select Options*

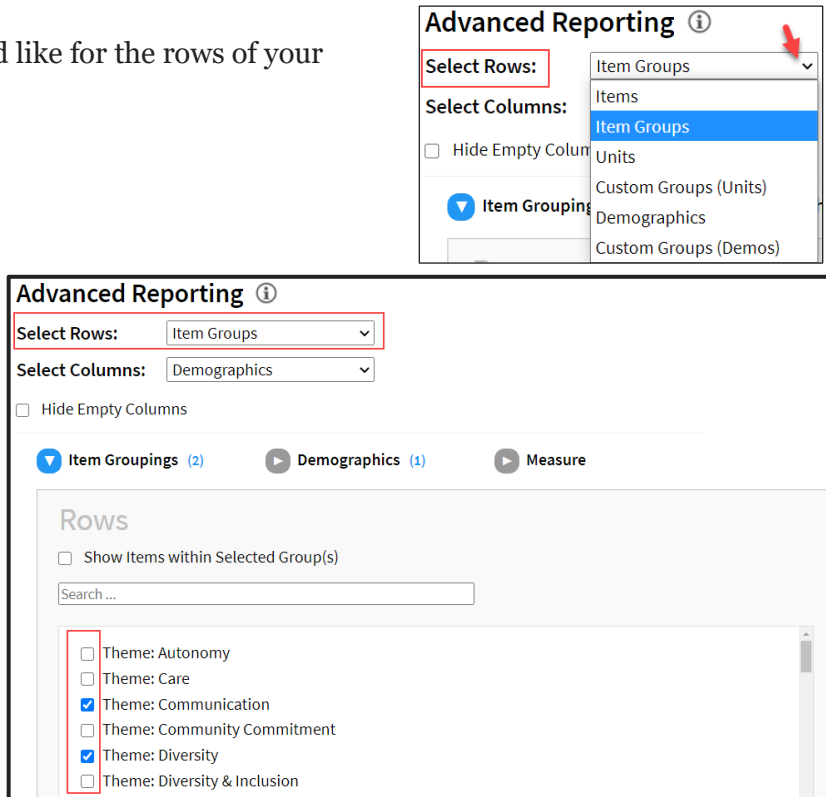
<input type="radio"/>	Performance Score
<input checked="" type="radio"/>	% Favorable
<input type="radio"/>	% Neutral
<input type="radio"/>	% Unfavorable
<input type="radio"/>	Response Count

*Single-select Options*

## SELECT ROWS

Select the information you would like for the rows of your report.

After you select rows, the information below will update for you to make specific selections. For example, this screenshot shows that the user selects Item Groups for their Rows and the themes of Item Groupings of Communication and Diversity.



**Advanced Reporting** ⓘ

Select Rows:

Select Columns:

Hide Empty Columns

Item Groupings (2)  Demographics (1)  Measure

**Rows**

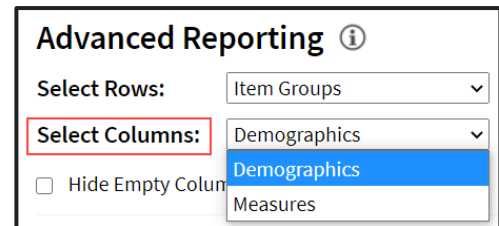
Show Items within Selected Group(s)

Search...

- Theme: Autonomy
- Theme: Care
- Theme: Communication
- Theme: Community Commitment
- Theme: Diversity
- Theme: Diversity & Inclusion

## SELECT COLUMNS

Select the information you would like for the columns of your report. The options made available to you in Select Columns are dependent on your choice in Select Rows. Following our previous example, the screenshot to the right shows the Column options are Demographics or Measures. Make the appropriate selection for your report.



**Advanced Reporting** ⓘ

Select Rows:

Select Columns:

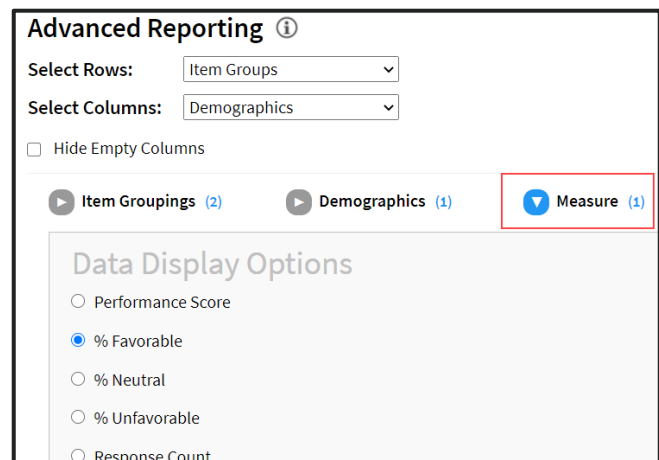
Hide Empty Columns

## SELECTING DATA DISPLAY OPTIONS

You can make selections which will vary based on what was chosen under Select Rows and Select Columns. Using our same example, the user can select Measure.

Measures apply when Items or Item Groups are selected.

Metrics are offered when a user selects population related content for the Rows or Columns like Units, Demographics and Custom Groups.



**Advanced Reporting** ⓘ

Select Rows:

Select Columns:

Hide Empty Columns

Item Groupings (2)  Demographics (1)  Measure (1)

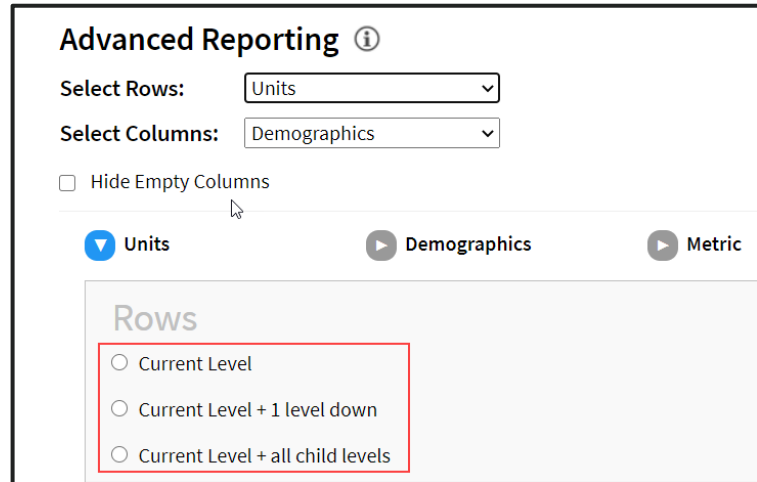
**Data Display Options**

- Performance Score
- % Favorable
- % Neutral
- % Unfavorable
- Response Count

### Choosing Your Unit Display

Choose your Unit display from the following options:

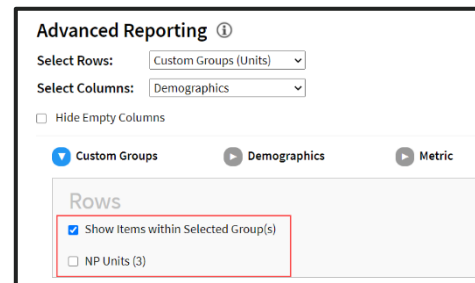
- Current Level: Only the unit selected in the hierarchy
- Current Level + 1 level down: Unit selected plus all units directly reporting to that unit
- Current Level + all child levels: Unit selected and all units directly and indirectly reporting to that unit



### Using Show Items within Selected Group(s)

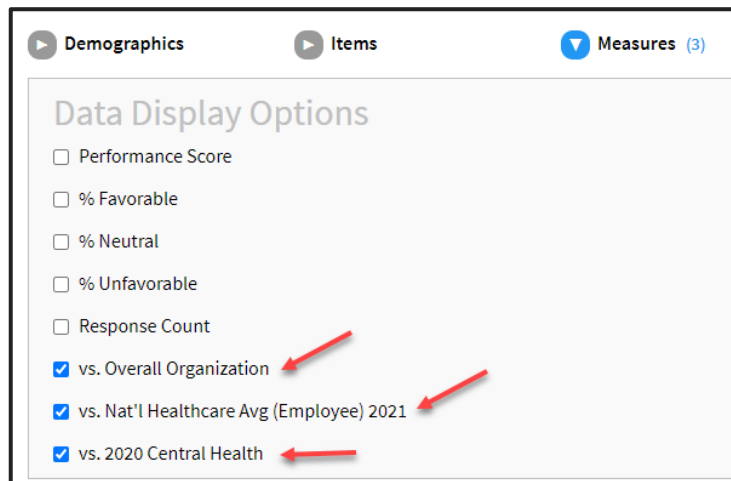
Choose your Custom Groups (Units) display from the following options:

- Show items within Selected Group(s): All units within the Custom Group
- List of Custom Groups created



### HEATMAP

Choose any Row/Column combination with Measures available. Then select “vs. Overall Organization” or “vs. Benchmark” as the Measure. The Data Table is then presented with color-coding based on the difference from the benchmark chosen. Historical data can be included, if available.



#	3. I enjoy working with my coworkers.			5. My ideas and suggestions are seriously c	
	Performance Score	vs. Company Overall	vs. Nat'l Healthcare Avg 2019 (4.39)	Performance Score	vs. Company Overall
<b>:: Comparisons</b>					
Company Overall	4.48	0.00	+0.09	3.98	0.00
<b>NP Units (3)</b>					
NP Units (3)	4.50	+0.02	+0.11	3.79	-0.19
100002 - CM NURSING SUPERVI - Naomi Fowler	4.47	-0.01	+0.08	4.00	+0.02
100003 - CM MED/SURG - Hailey Perkins	5.00	+0.52	+0.61	4.00	+0.02
100003 - CM MED/SURG - Lydia Clark	4.50	+0.02	+0.11	3.66	-0.32

### Color Coding

- Dark Blue: +.20 and above
- Light Blue: +.01 to +.19
- No Color: no difference
- Light Red: -.01 to -.19
- Dark Red: -.20 and below

After you have made all your selections you can select Apply Selections to see the resulting data table at the bottom of your screen.

### Clear Selections and Clear All

Choose Clear Selections to clear the data selections from the carets. Choose Clear All to clear the table and ALL selections made.

### Export to CSV

Export the entire data table to CSV by clicking Export to CSV. Many of the reports you create will have many columns and rows and will be best viewed in the CSV format.



### Report Size

If the report you create is too large to display you will receive the following message and may select to send the report to you via email.

