EMPLOYEE ENGAGEMENT NAVIGATION AND EXPORTS

This resource describes how to use common navigation and export features available throughout the tool.
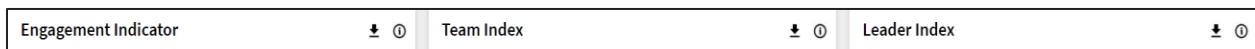
Navigation Menu

In the upper left corner, click on the navigation menu icon to select Dashboard Navigator to switch between hierarchies, access helpful resources, or logout.

Exports

From the Summary page, exports can be made by using the Export icons. This will export the summary tile you are viewing into a JPEG format.

You can export all pages with item or work unit grids to a CSV (or Excel) file. These pages include:

- Strengths and Concerns
- Item Details
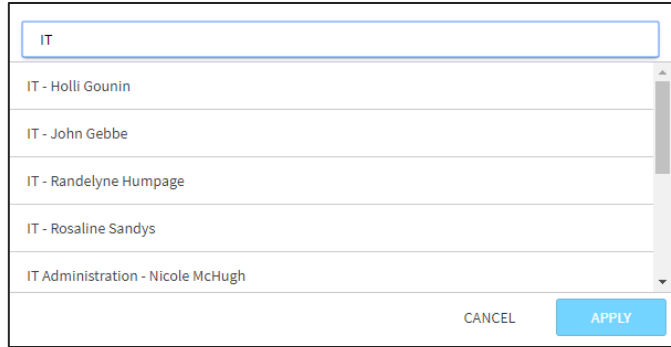- Org Details
- Comments
- Response Rates

Hierarchy Navigation

To navigate the organizational hierarchy, click on the organization name in the upper left corner.
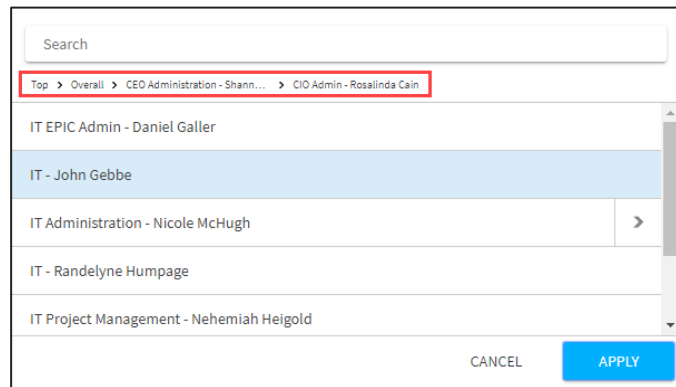
In the popup window that displays, use the search feature to search for keywords from a unit name or manager name. When you search, a list of the units with that keyword will appear below it for you to select from.

In this example, the search term IT has been used.

Follow the breadcrumbs at the top to see where you are in the hierarchy. Make note that in order to go back through the hierarchy, you must use the breadcrumbs as there is not a back button.

To expand the hierarchy, use the right-facing arrow to the side of the unit to drill down in to it.
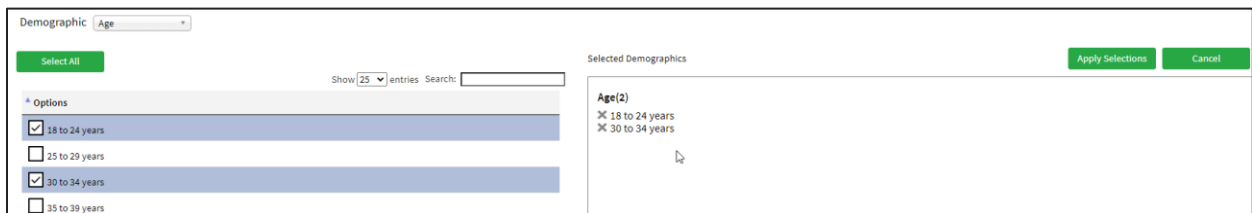

Click the unit you'd like to view and then click **Apply** at the bottom of the popup.

Filters

To filter the data on any page, click the **Filters** button from the upper right corner of the screen. This will open a new page where you can select and apply filters.

Each of the demographic items appear as tabs on the left side of the screen. When you click a tab, the middle of the screen will show all the possible response options.

Search response options by using the Search bar to type keywords.

Place a check in the box next to each response option you would like to use as filters. You can also click the **Select All** to select all options.

Once you have selected the desired filters, click **Apply Selections**. This will take you directly back to the page you were on when you clicked the **Filters** button.

Filters will remain on until you turn them off. To turn off Filters, click **Clear Filters** next to Filter Results.

Options

Options to limit the information on a specific page view appear on the Item Details and Org Details pages.

To select an option, click the right-facing arrow next to each one. Place a check in a box next to the selections you'd like to make.

Click **Apply Selections** on the right side of the screen to apply your selections. To clear all your selections and start over, click **Clear All**.

Sibling Module Navigation

When two or more units appear at the same level within the hierarchy, those units are considered sibling units. A hierarchy manager who supervises sibling units will have access to a Sibling Navigation Module. If you have that access, upon selecting the hierarchy from the Dashboard Navigator, you are taken to the unit with the highest n size.

Use the **Change Branch** link next to the breadcrumbs to open the Sibling Navigation Module. The module lists the highest-level units you have access to and the n size.

By selecting the current unit, the default hierarchy navigator will appear. You can search the sibling nodes to which you have access and select units knowing the n size.