EMPLOYEE ENGAGEMENT
ORG DETAILS

The Org Details page allows you to view all the information about each unit in your hierarchy.
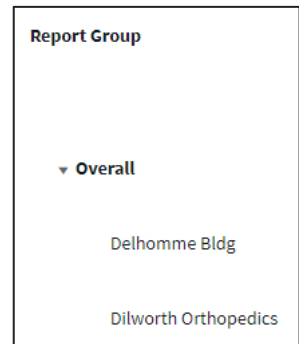

Navigating the Hierarchy

To navigate through all the units in your hierarchy, you have a couple of options on this page, which are explained below.
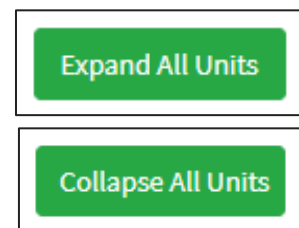
EXPANDING THE REPORT GROUP

Clicking the down icon next to the word "Overall" allows you expand and contract the hierarchy in the center of the screen. This makes it possible to view Report Group units in a format similar to the hierarchy export.

You can also use the green buttons at the top of the screen to expand all units or collapse all units. Selecting to **expand all** units will expand all units of the hierarchy; it will not remove rollup groups. Selecting to **collapse all** units will collapse the tree back down to the top level.
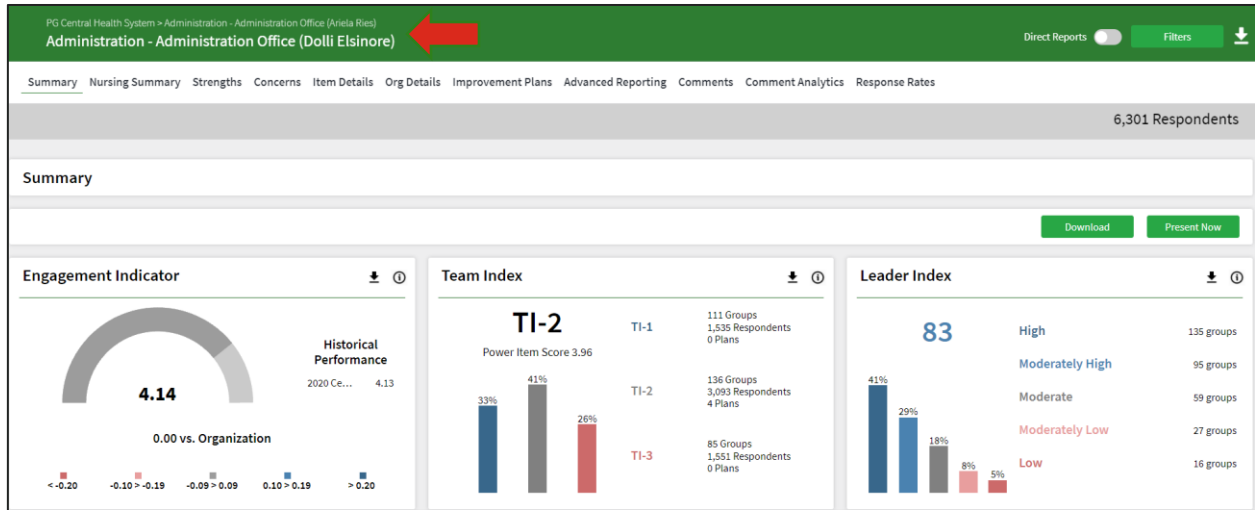

DIRECT LINK TO REPORT GROUP SUMMARY PAGE

When you hover over a Report Group, the option to Select will appear.

When you click on Select, you will be taken to the Summary page for that group.

Explanation of Table

The table displays scores for each unit. You'll see the Engagement Indicator score for each unit, the difference of the unit score from the overall organization, and the national average comparison.

Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg
4.09	0.00	-0.03
4.08	-0.01	-0.04

Additionally, the table displays the Power Item score that determines the Team Index, as well as the Team Index group (1, 2, or 3).

Power Item	Team Index
3.94	2
3.94	2

Next, you'll see the Leader Index score on a 100-point scale and the number of respondents in each unit.
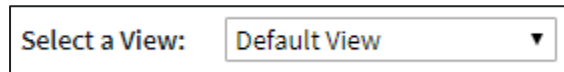
Leader Index	Responses
85	2817
85	2804

Finally, the Rollup column indicates when a unit includes all individuals rolling up to that leader, the leaders direct and indirect reports. A group marked as a rollup can expand to show all groups under it.
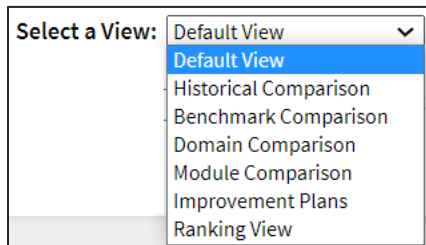
Rollup
*

Selecting a View

At the top of the page, you can choose the view of the Org Details page. There are six different views you can choose from.

Select a View:	Default View ▼

DEFAULT VIEW

The Default View is what you will likely use most.

Select a View: Default View ▼
Default View
Historical Comparison
Benchmark Comparison
Domain Comparison
Module Comparison
Improvement Plans
Ranking View

Org Details: Default View ⓘ   Select a View: Default View ▼   Expand All   Collapse All   Export to CSV

▶ Team Index   ▶ Leader Index   Group by: ▼   ▶ Add Columns   ☐ Hide Too Fews   Clear All   Apply Selections
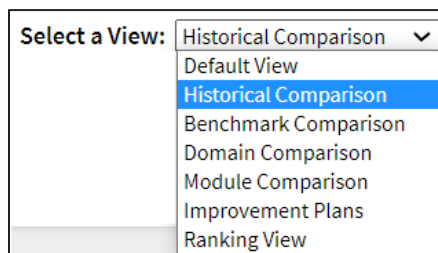
Sort by Columns ⬤

Show 25 ▼ entries   Search: [   ]

Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Power Item	Team Index	Leader Index	Respondents	Rollup
Overall Current Group	4.09	0.00	-0.03	3.94	2	85	2817	*
CEO Administration - Shannon West	4.08	-0.01	-0.04	3.94	2	85	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	+0.08	4.07	2	88	304	*

HISTORICAL COMPARISON VIEW

The Historical Comparison view shows the previous Engagement Indicator, Power Item, Team Index, and Leader Index scores for comparison purposes.

Select a View: Historical Comparison ▼
Default View
Historical Comparison
Benchmark Comparison
Domain Comparison
Module Comparison
Improvement Plans
Ranking View

Org Details: Historical Comparison ⓘ Select a View: [Historical Comparison ▾]   Expand All | Collapse All | Export to CSV

▶ Team Index ▶ Leader Index Group by: [▾] ▶ Add Columns ☐ Hide Too Fews   Clear All | Apply Selections

Sort by Columns ⬤

Show [25 ▾] entries   Search:

Report Group	Engagement Indicator	Power Item	Team Index	Leader Index	Eng (2018)	Power Item (2018)	T.I. (2018)	L.I. (2018)	Eng (2017)	Power Item (2017)	T.I. (2017)	L.I. (2017)	Respondents	Rollup
Overall [Current Group]	4.09	3.94	2	85	3.00	3.01	3	51	2.99	2.99	3	51	2817	*
CEO Administration - Shannon West	4.08	3.94	2	85	3.00	3.01	3	51	2.99	2.99	3	51	2804	*
CFO Administration - Melinda Geggie	4.20	4.07	2	88	2.97	3.03	3	51	2.97	3.00	3	51	304	*

BENCHMARK COMPARISON

The Benchmark Comparison view shows all the benchmarks you chose for your survey: the score for each average and the difference between the unit score and the national average score.

Select a View: [Benchmark Comparison ▾]
- Default View
- Historical Comparison
- **Benchmark Comparison**
- Domain Comparison
- Module Comparison
- Improvement Plans
- Ranking View

Org Details: Benchmark Comparison ⓘ Select a View: [Benchmark Comparison ▾]   Expand All | Collapse All | Export to CSV

▶ Team Index ▶ Leader Index Group by: [▾] ▶ Add Columns ☐ Hide Too Fews   Clear All | Apply Selections

Sort by Columns ⬤

Show [25 ▾] entries   Search:

Report Group	Engagement Indicator	vs. Overall Organization	Nat'l Healthcare Avg 2019	vs. Nat'l Healthcare Avg 2019	Nat'l Registered Nurse Avg 2019	vs. Nat'l Registered Nurse Avg 2019	Nat'l Resilience Avg	vs. Nat'l Resilience Avg	AHA-1 Employee Avg 2019	vs. AHA-1 Employee Avg 2019	Respondents	Rollup
Overall [Current Group]	4.09	0.00	4.12	-0.03	4.05	+0.04	-	-	3.98	+0.11	2817	*
CEO Administration - Shannon West	4.08	-0.01	4.12	-0.04	4.05	+0.03	-	-	3.98	+0.10	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	4.12	+0.08	4.05	+0.15	-	-	3.98	+0.22	304	*

DOMAIN COMPARISON VIEW

The Domain Comparison view shows the scores for each unit for all the Employee Engagement domains.

Select a View: [Domain Comparison ▾]
- Default View
- Historical Comparison
- Benchmark Comparison
- **Domain Comparison**
- Module Comparison
- Improvement Plans
- Ranking View

Org Details: Domain Comparison ⓘ Select a View: [Domain Comparison ▾]

| Expand All | Collapse All | Export to CSV |

▶ Team Index   ▶ Leader Index   Group by: [▾]   ▶ Add Columns   ☐ Hide Too Fews

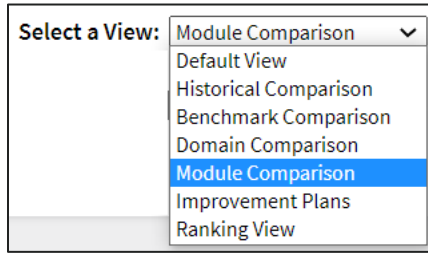| Clear All | Apply Selections |

Sort by Columns 🔵

Show [25 ▾] entries   Search: [   ]

Report Group	Engagement Indicator	vs. Overall Organization	Organization	Manager	Employee	Respondents	Rollup
Overall Current Group	4.09	0.00	3.86	4.05	4.06	2817	*
CEO Administration - Shannon West	4.08	-0.01	3.86	4.05	4.06	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	3.99	4.21	4.11	304	*

MODUE COMPARISON VIEW

The Module Comparison view shows the scores for each module used by your organization.

Report Group	Engagement Indicator	vs. Overall Organization	Diversity	Resilience	Safety Culture	Respondents	Rollup
▼ PG Central Health System [Current Group]	4.14	0.00	3.99	4.19	4.01	8,860	*
▼ Administration - Administration Office (Ariela Ries)	4.14	0.00	3.99	4.19	4.01	8,859	*
▼ Strategy Bus Dev - Administration Office (Anthia Malvino)	4.22	+0.08	4.10	4.03	4.01	16	*
Strategy Bus Dev - Administration Office (Ginnie Frodi)	-	-	-	-	-	Too Few Responses	
Enterprise Project Mgmt Office - Administration Office (Halette Pitt)	4.23	+0.09	4.04	4.05	3.96	12	
▼ Foundations Administration - Administration Office (Averyl Emmaline)	4.09	-0.05	3.99	4.22	4.14	30	*
▼ Foundation Development Srvc - Marion South Building (Doralynne Sherfield)	4.46	+0.32	4.17	4.46	4.46	12	*
Foundation Development Srvc - Marion South Building (Concettina Evvie)	-	-	-	-	-	Too Few Responses	

IMPROVEMENT PLAN VIEW

The Improvement Plan view will show you the number of plans created for each unit, as well as an overview of the plans organized by their status: Draft, On Hold, In Progress, Completed.
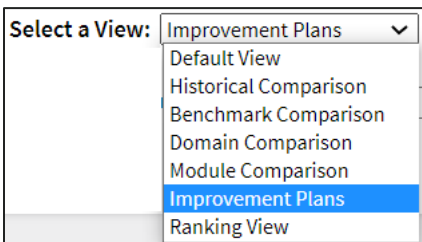
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Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Draft	On Hold	In Progress	Completed	Respondents	Rollup
Overall [Current Group]	4.09	0.00	-0.03	6	4	5	4	2817	*
CEO Administration - Shannon West	4.08	-0.01	-0.04	1	1	1	0	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	+0.08	0	1	0	0	304	*

RANKING VIEW

Finally, the Ranking view will show you a flat list of units in the hierarchy. Ranking view organizes these units in a ranked order based on the item chosen in the Ranking Item dropdown menu. This dropdown menu includes all items on the survey, as well as all metrics, domains, themes, and modules. The default will be lowest score to highest score, but you can sort to show highest to lowest by clicking the column header.
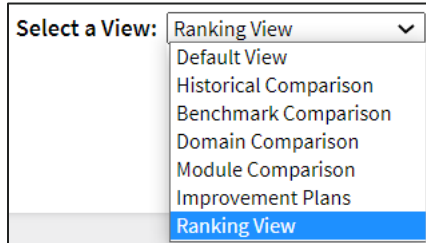
Page Features and Options

SORTING BY COLUMNS

To sort by the columns in the table, you can use the **Sort by Columns** toggle to turn this feature on or off.
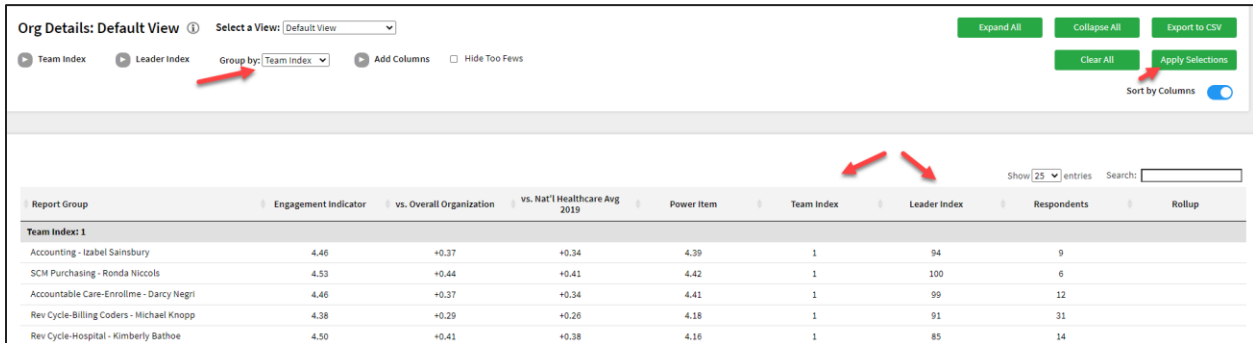
In Org Details, when you turn this feature on, you will be shown a flat list of units that does not include any rollups. You will then be able to click the header of each column to sort by largest to smallest or vice versa for score columns, or alphabetical order for the Report Group column.

GROUP BY TEAM OR LEADER INDEX

To group by the team or leader index value, use the dropdown at the top of the screen, then apply your selection.
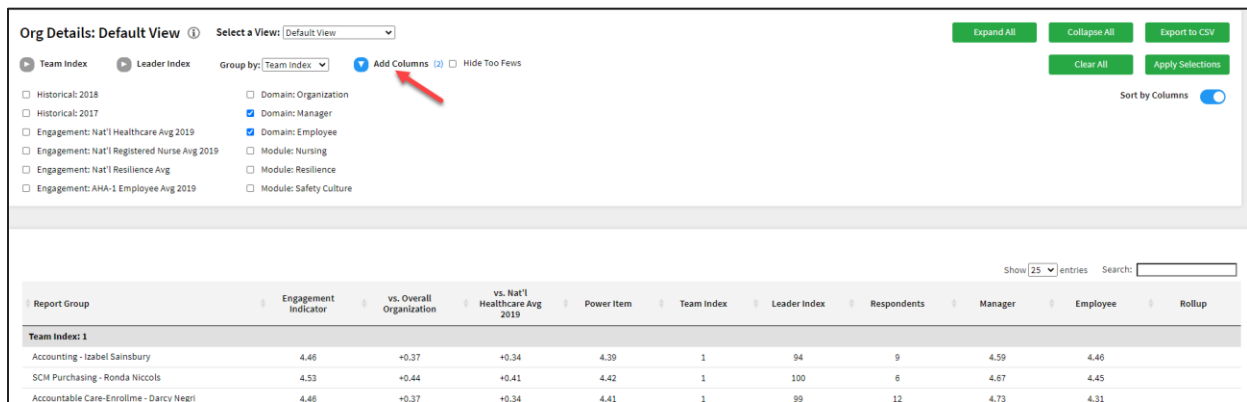

HIDE TOO FEWS

To hide data when there are five or fewer responses, check the Hide Too Fews checkbox.
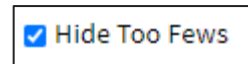
ADD COLUMNS

Use the Add Columns option to add additional information to the Org Details displayed. Make your selections and Apply Selections. Note that additional columns may need to be displayed on additional pages. Exporting to CSV will be the best way to view additional columns.
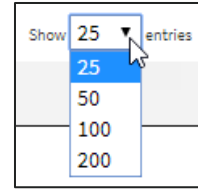

SEARCHING

The Search feature can be used to search the page for keywords. Simply type any words you'd like to find into the search field.
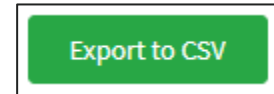
NUMBER OF SEARCH ENTRIES TO SHOW

In your search, you can choose to show 25, 50, 100, or 200 units on a page at a time.

EXPORTING TO CSV

The entire page can be exported to CSV by clicking the Export to CSV button.

GROUP BY

Responses can be grouped by Leader Index or Team Index. Make your selection from the Group by dropdown menu and Apply Selections.

FILTERING SELECTIONS

You can also use the options at the top of the page to narrow down the units that appear on the page. Select any desired Team Index or Leader Index options, and then click the **Apply Selections** button (on the right side of the screen) to apply your selections.
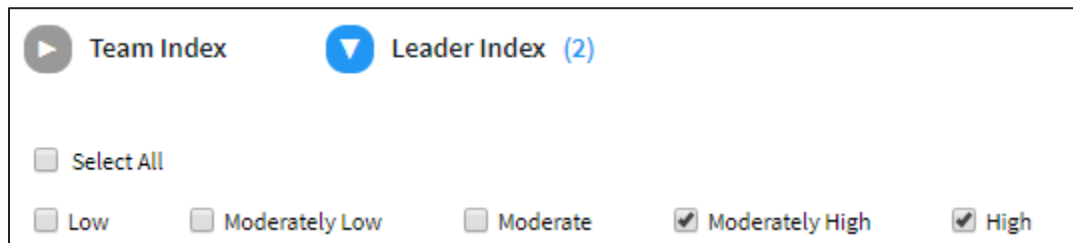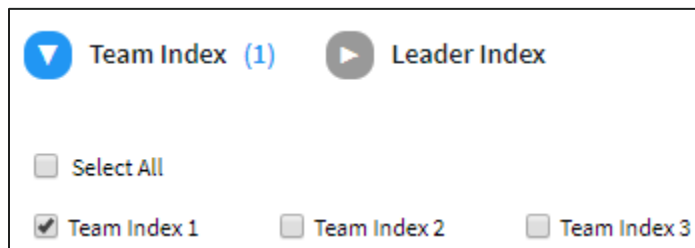
Be sure to click on Apply Selection so you your Filters are applied.