

Lifecycle — 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.

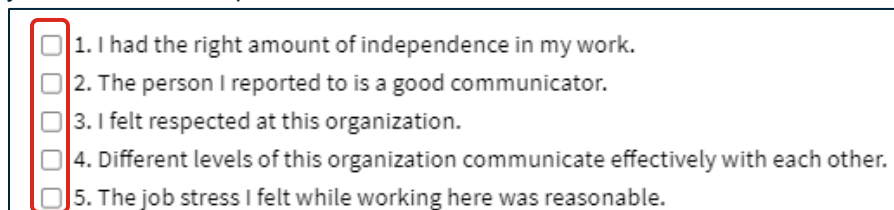
Creating a Report

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

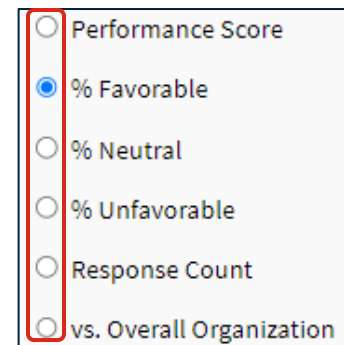


Making Your Selections

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



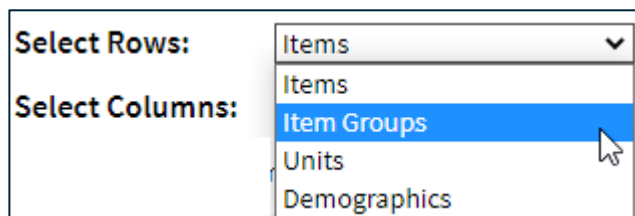
Multi-select Options



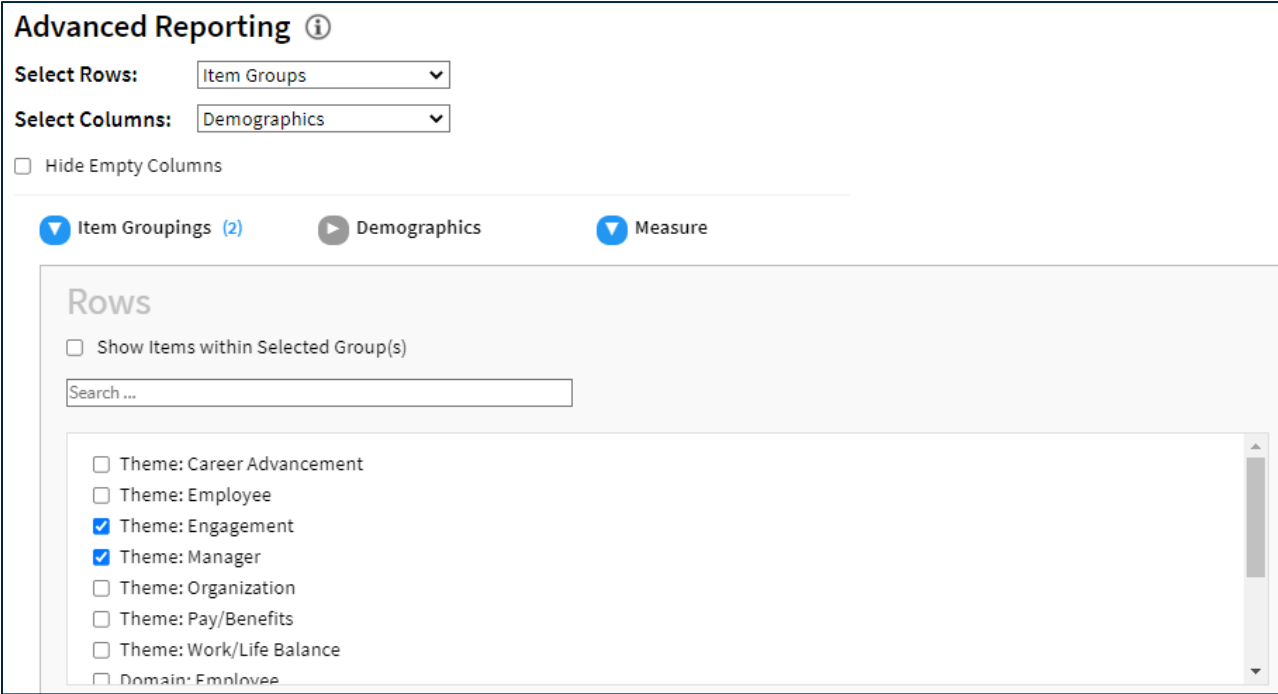
Single-select Options

Selecting Rows

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



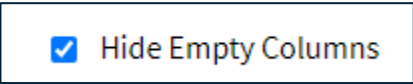
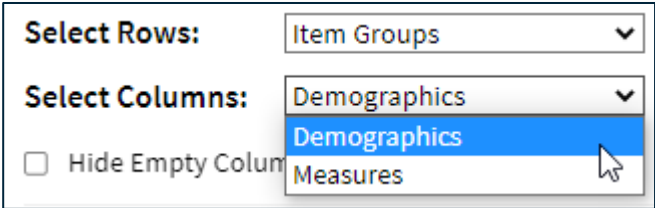
After you select rows, the information below will update for you to make specific selections. For example, this screenshot shows that the user selects Item Groups for their Rows and the themes of Manager and Engagement.



Selecting 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.

You can choose to hide any 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.

The screenshot shows the 'Advanced Reporting' interface. At the top, there are two dropdown menus: 'Select Rows:' set to 'Item Groups' and 'Select Columns:' set to 'Demographics'. Below these is a checked checkbox for 'Hide Empty Columns'. A navigation bar contains three buttons: 'Item Groupings (2)', 'Demographics (1)', and 'Measure (1)'. The 'Measure (1)' button is selected. Below the navigation bar is a section titled 'Data Display Options' with several radio button options: 'Performance Score', '% Favorable' (which is selected), '% Neutral', '% Unfavorable', 'Response Count', and 'vs. Overall Organization'.

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

The screenshot shows the 'Advanced Reporting' interface. At the top, there are two dropdown menus: 'Select Rows:' set to 'Units' and 'Select Columns:' set to 'Demographics'. Below these is an unchecked checkbox for 'Hide Empty Columns'. A navigation bar contains three buttons: 'Units' (selected), 'Demographics', and 'Metric'. Below the navigation bar is a section titled 'Rows' with three radio button options: 'Current Level', 'Current Level + 1 level down', and 'Current Level + all child levels'. The 'Current Level + all child levels' option is highlighted with a red box.

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

The screenshot shows the 'Advanced Reporting' interface. At the top, there are two dropdown menus: 'Select Rows:' set to 'Custom Groups (Units)' and 'Select Columns:' set to 'Demographics'. Below these is an unchecked checkbox for 'Hide Empty Columns'. A navigation bar contains three buttons: 'Custom Groups' (selected), 'Demographics', and 'Metric'. Below the navigation bar is a section titled 'Rows' with two radio button options: 'Show Items within Selected Group(s)' (which is selected and highlighted with a red box) and 'NP Units (3)'.

Note: See the “Advanced Reporting Using Custom Groups” job aid for more information on Custom Groups.

Heatmap

Choose any Row/Column combination with Measures available. The Data Table is then presented with color-coding based on the difference from the overall organization. Historical data can be included, if available.

Advanced Reporting ⓘ

Select Rows:

Select Columns:

Hide Empty Columns

▶ Items (6) ▶ Measures (2)

Items x Measures

Show entries Search:

#	Overall Organization	Territory 1	
	Performance Score	Performance Score	vs. Overall Organization
ITEMS			
2. The person I reported to is a good communicator.	3.03	3.00	-0.03
4. Different levels of this organization communicate effectively with each other.	3.01	4.00	+0.99
5. The job stress I felt while working here was reasonable.	3.14	3.20	+0.06
9. I would recommend this organization as a good place to work.	3.18	2.40	-0.78
10. I would recommend this organization to family and friends who need care.	3.17	-	-
12. I would consider working at this organization again in the future.	2.97	2.00	-0.97

Showing 1 to 6 of 6 entries

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

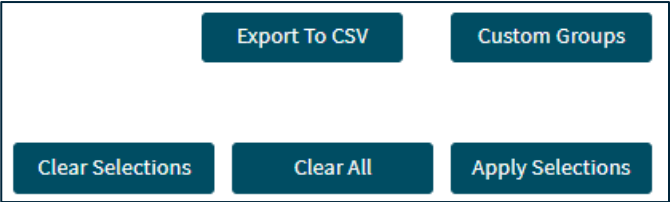
After you have made all your selections you can select Apply Selections to see the resulting data table at the bottom of your screen.

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.

