## **¬**PressGaney

# Lifecycle Dual Onboarding – 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 Custom Filter

#### **Create a New Custom Group**

To create a new Custom group, go to Advanced Reporting and select Custom Groups.

Summary Item Deta	ils Org Details Advanced Re	porting Comments	Comment Analytics	Response Rates	
Effective Date Ra	nge Total Filt Date Ran	ers: 0 ge » 2/10/2022 to 2/10/20	023	Respondents:	New Hire: 218 Acclimation: 249
Advanced Re Select Rows: Select Columns:	porting (i) Items ~ Demographics ~	Select Survey: N	ew Hire 🗸		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 Groups ③ Select a Group Name: Saved Gr	Units	Return to AR	
	Show 25 🕶 entries Searc	h:	Selected Units (3):
A Report Group	Respondents	Rollup	× Administration (Kittie Othilia)
Accounting Svcs (Joelly Dawkins)	0		<ul> <li>Administration (Lonnie Alwin)</li> <li>Administration - Administration Office (Ariela Ries)</li> </ul>
Accounting Svcs - Administration Office (Petronia Hessler)	0	*	
Accounts Payable - Eastway Building (Winny Bearnard)	0		
Acute Care Therapy - Central Hospital - East (Fred Olympium)	0		
Acute Care Therapy - Fall Hills Community Hospital (Talya Terenci	o) 0		
Acute Care Therapy - Magnolia Hospital (Giustina MacIntosh)	0		
Administration (Kittie Othilia)	49	*	
Administration (Lonnie Alwin)	40		
Administration (Nadine Hoenack)	0	*	
Administration - Administration Office (Ariela Ries)	248	*	

#### **Custom Group by Demographics**

Enter a Group Name and select the Type: Demographics.

Custom Groups 🛈	Select a Type:	Units 🗸	Return to AR
	1	Units	
Group Name:	Saved Groups:	Demographics	Save Group

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.

Custom Groups 🔋	Select a Type: Demographics  Return to AR	
		Group Name: Save
Demographic Age (15)	¥	
Select All		Selected Demographics
	Show 25 ventrie Search:	Age (4)
Options		🗙 18 to 24 years
Jnder 18 years		X 25 to 29 years X 30 to 34 years
18 to 24 years		🗙 35 to 39 years
25 to 29 years		
30 to 34 years		
35 to 39 years		
40 to 44 years		
45 to 49 years		
50 to 54 years		

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.

Custom Groups (i) Select a Type: Demographics  Return to AR	
Saved Groups:     All Non-Full Time (3)     Update Filter     Delete Filter       Custom Filter Name:     All Non-Full Time	
Demographic Age (15)	
Select All Show 25 v entries Search:	Selected Demographics
🗧 Options	Employment Status (3) X Part-Time
Under 18 years	Casual, Temporary, PRN or Per Diem Leave of Absence
18 to 24 years	
25 to 29 years	

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

Custom Groups ① Group Name: [Falls Hills Nursing Admin]	Select a Type: Units  V Saved Groups: Falls Hills Nursing Ad	Return to AR	oup Delete Group
	Show 25 🗸 entries Search	h:	Selected Units (4):
A Report Group	Respondents	Rollup	✗ Nursing Admin - Fall Hills Community Hospital (Adelle Yate)
Nursing Admin - Fall Hills Community Hospital (Adelle	Yate) 15		<ul> <li>Nursing Admin - Fall Hills Community Hospital (Carmela Junie)</li> <li>Nursing Admin - Fall Hills Community Hospital (Rayna Lorenz)</li> </ul>
Nursing Admin - Fall Hills Community Hospital (Carm	ela Junie) 0		🗶 Nursing Admin - Fall Hills Community Hospital (Suzette Catie)
Nursing Admin - Fall Hills Community Hospital (Rayna	a Lorenz) 0	•	
Nursing Admin - Fall Hills Community Hospital (Suzet	te Catie) 14	*	

### **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.

#### Return to AR

In Advanced Reporting, you will see Custom Groups (Units) and Custom Groups (Demos) as options.

Advanced Reporting ①		
Select Rows:	Items 🗸	
Select Columns:	Items Item Groups	
Hide Empty Colum	Units Custom Groups (Units)	
V Items	Demographics Custom Groups (Demos)	

Once you make a selection you will see your Custom Groups for units or demographics appear in the dropdown.

Advanced Reporting 🛈			
Select Rows: Custom Groups (Demos) 🗸			
Select Columns:	Demographics 🗸		
Hide Empty Columns			
Custom Grou	ps Demographics Detric		
Rows Show Items All Non-Ful	s within Selected Group(s) I Time (3)		