

REVIEW **SNAP**TM

Performance Management System
Reference Guide – Reporting

REVIEWSNAP™

A Product of Applied Training Systems, Inc

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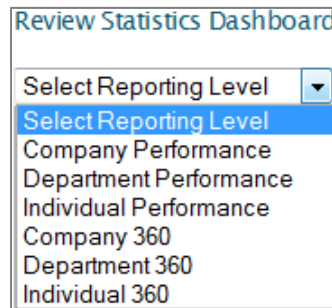
Reporting

Statistics Dashboard

Note

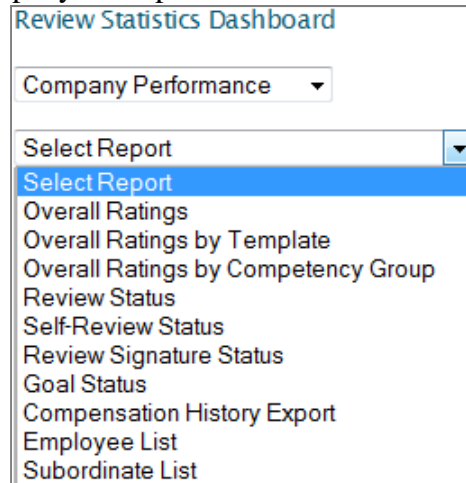
The **REVIEWSNAP™** performance management system Statistics Dashboard is a set of standard reports. Graphs and data can be viewed in the system and exported in PDF or Excel format. Start with these standard reports to determine if they will meet your reporting needs.

Navigate to Reporting / Statistics Dashboards where the following reporting levels are available:



Company Performance

Company-level performance data can be analyzed from these perspectives:



- Overall Ratings
 - o Report Parameters: Start Date and End Date
 - o Data Returned: Line chart and data regarding the counts of overall performance review ratings

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Statistics Dashboard, Continued

Company Performance,
(continued)

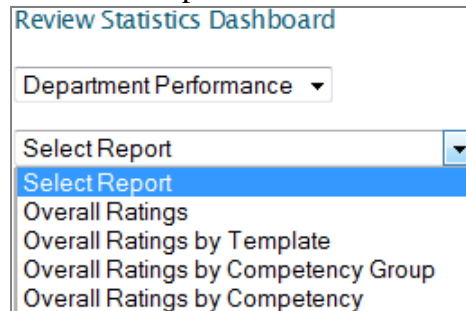
- Overall Ratings by Template
 - Report Parameters: Start Date, End Date, and Template(s)
 - Data Returned: Bar chart and data regarding the average overall performance review ratings by template
- Overall Ratings by Competency Group
 - Report Parameters: Start Date, End Date, Location(s), and Competency Group(s)
 - Data Returned: Bar chart and data regarding the average performance review ratings by competency group
- Review Status
 - Report Parameters: Review Period and Location(s)
 - Data Returned: Pie chart and data regarding the status of all manager reviews for the selected review period and location(s)
- Self-Review Status
 - Report Parameters: Review Period and Location(s)
 - Data Returned: Pie chart and data regarding the status of all self-reviews for the selected review period and location(s)
- Review Signature Status
 - Report Parameters: Review Period
 - Data Returned: Data regarding the status of signatures for any performance reviews that are in the signature stage
- Goal Status
 - Report Parameters: Review Period and Location(s)
 - Data Returned: Pie chart and data regarding the number of goals entered per employee
- Compensation History Export
 - Report Parameters: Review Period(s), Department(s), and Location(s)
 - Data Returned: Data regarding the compensation increases recommended and/or approved for each employee
- Employee List
 - Report Parameters: Department(s) and Location(s)
 - Data Returned: List of employees, including profile data
- Subordinate List
 - Report Parameters: Manager(s)
 - Data Returned: List of direct reports, including job title and department

Continued on next page

Statistics Dashboard, Continued

Department Performance

Department-level performance data can be analyzed from these perspectives:



The screenshot shows a web interface titled "Review Statistics Dashboard". It features a dropdown menu labeled "Department Performance" and another dropdown menu labeled "Select Report". The "Select Report" dropdown is open, showing four options: "Select Report", "Overall Ratings", "Overall Ratings by Template", "Overall Ratings by Competency Group", and "Overall Ratings by Competency".

- Overall Ratings
 - o Report Parameters: Start Date, End Date, and Department(s)
 - o Data Returned: Bar chart and data regarding the counts of overall performance review ratings by department
- Overall Ratings by Template
 - o Report Parameters: Start Date, End Date, Department(s) and Template(s)
 - o Data Returned: Bar chart(s) and data regarding the average overall performance review ratings by template and by department
- Overall Ratings by Competency Group
 - o Report Parameters: Start Date, End Date, Department(s), and Competency Group(s)
 - o Data Returned: Bar chart and data regarding the average performance review ratings by competency group and by department
- Overall Ratings by Competency
 - o Report Parameters: Department(s) and Competencies
 - o Data Returned: Data regarding the average rating for each competency by department

Continued on next page

Statistics Dashboard, Continued

Individual Performance

Individual performance data can be analyzed from these perspectives:

The screenshot shows a web interface titled "Review Statistics Dashboard". At the top, there is a dropdown menu currently set to "Individual Performance". Below this is another dropdown menu labeled "Select Report". This menu is open, displaying a list of report options: "Select Report", "Overall Ratings by Review Period", "Overall Ratings by Template", "Overall Ratings by Competency Group", "Overall Ratings by Competency", "Overall Rating Comparison by Review Period", "Manager/Self-Review Rating Comparison by Review Period", "Lifetime Rating Comparison by Competency Group", "Manager Overall Rating Comparison", and "Subordinate Review Status".

- Overall Ratings by Review Period
 - o Report Parameters: Employee and Review Period
 - o Data Returned: Bar chart and data regarding the employee's overall performance review rating for the review period
- Overall Ratings by Template
 - o Report Parameters: Employee and Template(s)
 - o Data Returned: Bar chart(s) and data regarding the employee's overall performance review rating by template
- Overall Ratings by Competency Group
 - o Report Parameters: Employee and Competency Group(s)
 - o Data Returned: Bar chart and data regarding the employee's performance review ratings by competency group
- Overall Ratings by Competency
 - o Report Parameters: Employee and Competencies
 - o Data Returned: Data regarding the employee's performance review ratings by competency
- Overall Rating Comparison by Review Period
 - o Report Parameters: Employee(s) and Review Period(s)
 - o Data Returned: Bar chart and data for comparison of overall performance review ratings by employee and/or review periods
- Manager/Self-Review Rating Comparison by Review Period
 - o Report Parameters: Employee and Review Period(s)
 - o Data Returned: Bar chart and data for comparison of manager review and self-review overall ratings by review period

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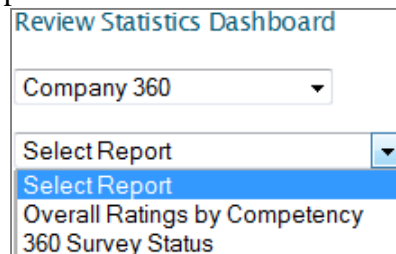
Statistics Dashboard, Continued

Individual Performance, (continued)

- Lifetime Rating Comparison by Competency Group
 - o Report Parameters: Start Date, End Date, Employee, and Competency Group(s)
 - o Data Returned: Bar chart and data for comparison of employee competency group ratings to those of their peers, department, and the company
 - Manager Overall Rating Comparison
 - o Report Parameters: Start Date, End Date, Manager, and Comparison Manager(s)
 - o Data Returned: Bar chart and data for comparison of a manager's average overall rating of their employees to those of other managers
 - Subordinate Review Status
 - o Report Parameters: Manager and Review Period
 - o Data Returned: Pie chart and data regarding the status of performance reviews for the selected manager and review period
-

Company 360

Company-level 360 degree survey data can be analyzed from these perspectives:

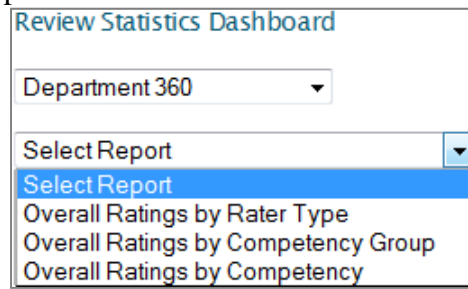


- Overall Ratings by Competency
 - o Report Parameters: Start Date, End Date, and Competency Group(s)
 - o Data Returned: Data regarding the average 360 degree survey ratings by competency group
 - 360 Survey Status
 - o Report Parameters: Start Date and End Date
 - o Data Returned: Pie chart and data regarding the status of 360 degree surveys
-

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Statistics Dashboard, Continued

Department 360 Department-level 360 degree survey data can be analyzed from these perspectives:



Review Statistics Dashboard

Department 360

Select Report

- Select Report
- Overall Ratings by Rater Type
- Overall Ratings by Competency Group
- Overall Ratings by Competency

- Overall Ratings by Rater Type
 - o Report Parameters: Start Date, End Date, and Department(s)
 - o Data Returned: Bar chart and data for comparison of 360 degree survey average overall ratings by department and by rater type
- Overall Ratings by Competency Group
 - o Report Parameters: Start Date, End Date, Department(s), and Competency Group(s)
 - o Data Returned: Bar chart(s) and data for comparison of 360 degree survey average competency group ratings by department and by rater type
- Overall Ratings by Competency
 - o Report Parameters: Start Date, End Date, Department(s), and Competencies
 - o **Note:** There is also an option to break the data out by rater type.
 - o Data Returned: Data for comparison of 360 degree survey average competency ratings by department

Continued on next page

Statistics Dashboard, Continued

Individual 360

Individual 360 degree survey data can be analyzed from these perspectives:

Review Statistics Dashboard

Individual 360

Select Report

- Select Report
- Overall Ratings by Rater Type
- Overall Ratings by Competency Group
- Overall Ratings by Competency
- Number of Raters

- Overall Ratings by Rater Type
 - o Report Parameters: Start Date, End Date, and Employee
 - o Data Returned: Bar chart and data for comparison of 360 degree survey overall ratings by rater type for an employee
 - Overall Ratings by Competency Group
 - o Report Parameters: Employee and Competency Group(s)
 - o Data Returned: Bar chart(s) and data for comparison of 360 degree survey average competency group ratings by rater type for an employee
 - Overall Ratings by Competency
 - o Report Parameters: Start Date, End Date Employee, and Competencies
 - o **Note:** There is also an option to break the data out by rater type.
 - o Data Returned: Data for comparison of 360 degree survey average competency ratings for an employee
 - Number of Raters
 - o Report Parameters: 360 Survey
 - o Data Returned: Pie chart and data regarding the number of raters assigned to a 360 degree survey by rater type
-

Manage Reports

Notes

Navigate to Reporting / Manage Reports to create Ad-Hoc reports using the **REVIEWSNAP™** Report Wizard.

The Report Wizard will prevent you from creating an ad-hoc report that will not work or that contains data that is not compatible. The validation will not allow you to activate a report that is in violation of one or more of the following rules:

- Cannot create a report that contains both performance review fields and 360 degree survey fields
 - Must have at least one visible column
 - Cannot have an aggregate function on a non-numeric field
 - Cannot have an aggregate function selected without having at least one grouping column
 - Must define at least one report permission
-

Starting an Ad-Hoc Report

Start from scratch or copy one of the standard Statistics Dashboards:

- Click Add to create a new report from scratch.



- The following standard Statistics Dashboards are available to be copied. Just click the copy icon to begin.

System Templates	
Template Title	
360 Company Competency Ratings by Competency	→ +
360 Department Competency Ratings by Competency	+
360 Department Competency Ratings by Competency Group	+
360 Department Overall Ratings by Rater Type	+
360 Employee Competency Ratings by Competency	+
360 Employee Competency Ratings by Competency Group	+
360 Employee Overall Ratings by Rater Type	+

Continued on next page

Manage Reports, Continued

Starting an Ad-Hoc Report, (continued)

Company Competency Ratings by Competency Group		
Company Overall Ratings		
Company Overall Ratings by Template		
Department Competency Ratings by Competency		
Department Competency Ratings by Competency Group		
Department Overall Ratings		
Department Overall Ratings by Template		
Employee Competency Ratings by Competency		
Employee Competency Ratings by Competency Group		
Employee List		
Employee Overall Ratings by Review Period		
Employee Overall Ratings by Template		

Ad-Hoc Report Wizard

Regardless of whether you start from scratch or copy one of the standard templates, the steps in the Ad-Hoc Report wizard remain the same.

- Report Information
- Data Columns
- Filters
- Sorting & Grouping
- Permissions
- Charts
- Preview / Activate

Continued on next page

Manage Reports, Continued

Report Information

Use the report information step to:

- Name and describe your report

Report Information

* Report Title: Goal Count by Review Period

Description: This report returns a list of all employees and the number of goals they have set by filtered by review period.

SAVE SAVE & CONTINUE

- Click Save to save changes and remain on this screen
Click Save & Continue to save changes and move to the next step

Data Columns

Use the data columns step to add, edit, or delete columns:

- Add a column
 - o Click the add icon
 - o Select additional data columns and/or aggregate fields/functions

Select Data & Aggregate Columns

Add Report Columns

Select Data Columns

Select Aggregate Fields Count

SAVE CANCEL

Continued on next page

Manage Reports, Continued

Data Columns, (continued)

Note: An aggregate function is a function where the values of multiple rows are grouped together as input on certain criteria to form a single value of more significant meaning or measurement such as averages, counts, sums, etc...

- o Click Save to save changes and exit the window
Click Cancel to exit the window without saving changes
- Edit a column
 - o Click the edit icon

Goal Description	COUNT of Goal Description	Yes
------------------	---------------------------	-----

- o Update the column information

Edit Report Column ✕

Data Field: Goal Description

Column Title:

Aggregate Function: Count ▾

Display on Report

Filtering is NOT allowed on this Field.

Column is NOT used in Report Grouping.

Column is NOT used in Report Ordering.

Note: The system was built to allow fields to be used in the report, but not displayed on the report. An example of this is pulling in a performance review completion date and only using that field as a filter and not displaying it on the report.

- o Click Save to save changes and exit the window
Click Cancel to exit the window without saving changes
- Delete a column
 - o Click the delete icon

Goal Description	COUNT of Goal Description	Yes
------------------	---------------------------	-----

- o Confirm or cancel the deletion

Are you sure you want to delete this field?

Continued on next page

Manage Reports, Continued

Filters

Select fields you wish to use as search filters:

- Check the checkboxes

Select Filters

Filterable	Title	Fieldname	Filter Type
<input type="checkbox"/>	Employee ID	Employee ID	Text Search
<input type="checkbox"/>	Employee Last Name	Employee Last Name	Text Search
<input checked="" type="checkbox"/>	Employee Department	Employee Department	Drop-down
<input checked="" type="checkbox"/>	Employee Location	Employee Location	Drop-down
<input checked="" type="checkbox"/>	Employee Job Description	Employee Job Title	Text Search
<input type="checkbox"/>	Manager Last Name	Manager Last Name	Text Search
<input type="checkbox"/>	Manager Employee ID	Manager Employee ID	Text Search
<input checked="" type="checkbox"/>	Review Period Start Date	Review Period Start Date	Text Search
<input checked="" type="checkbox"/>	Review Period End Date	Review Period End Date	Text Search

- o Click Save to save changes and remain on this screen
- o Click Save & Continue to save changes and move to the next step

Notes:

Selecting the following date fields as filters will result in the behavior described:

- Review Period Start Date or Review Period End Date
 - o If Anniversary Date Review Periods are used then a start/end date filter will display
 - o If Custom Review Periods are used then a list box of review periods will display
- Review Complete Date or Survey Complete Date
 - o A start/end date filter will display

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Manage Reports, Continued

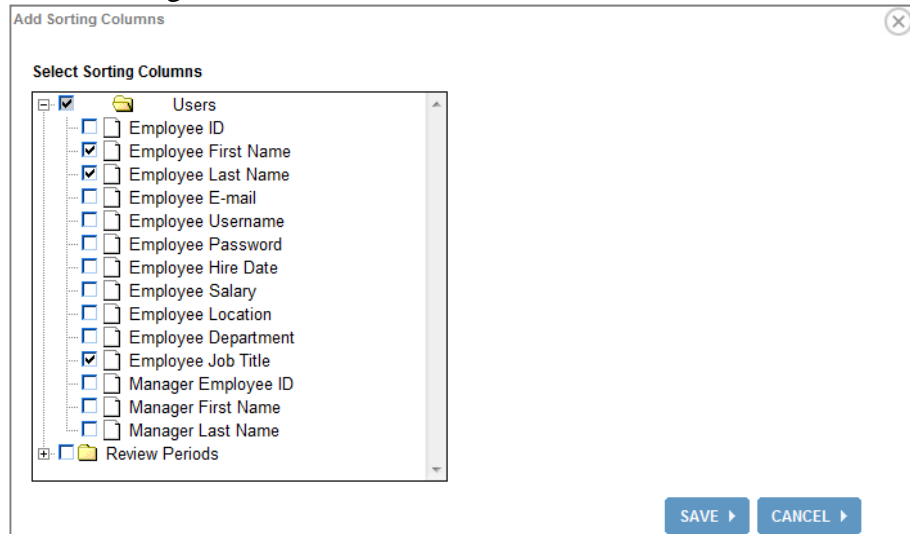
Sorting & Grouping

Organize your output by using the sorting and grouping features:

- Sort the data
 - o Click the add icon



- o Select sorting columns



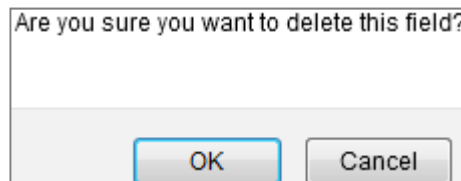
- o Click Save to save changes and exit the window
- o Click Cancel to exit the window without saving changes
- o Select the sort direction

Title	Fieldname	Direction
Employee Job Description	Employee Job Title	Ascending Ascending Descending

- o Click the delete icon to remove a sorting field

Employee First Name	Employee First Name	Ascending	
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- o Confirm or cancel the deletion



- o Drag and drop sorting columns to determine the order in which they are applied

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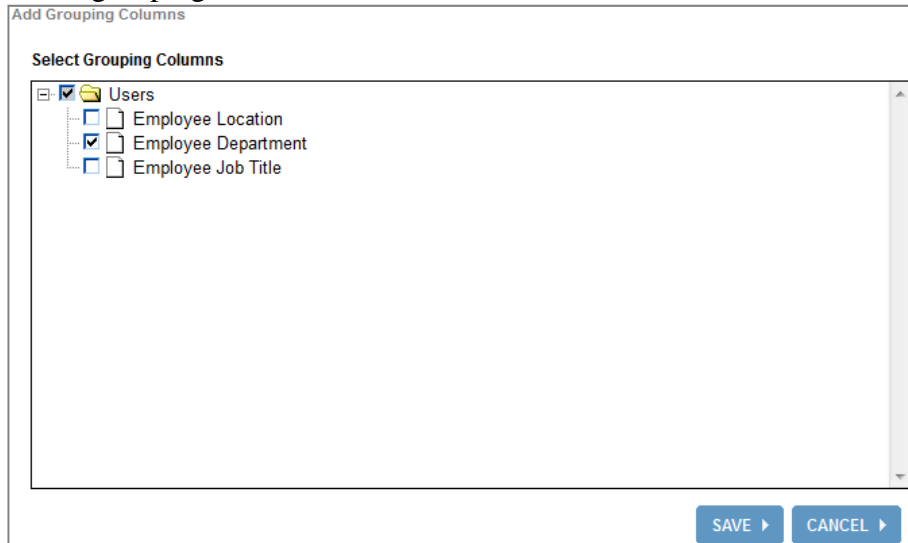
Manage Reports, Continued

Sorting & Grouping, (continued)

- Group the data
 - o Click the add icon



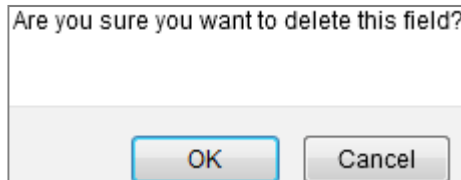
- o Select grouping columns



- o Click Save to save changes and exit the window
Click Cancel to exit the window without saving changes
- o Click the delete icon to remove a grouping field



- o Confirm or cancel the deletion



- o Drag and drop grouping columns to determine the order in which they are applied

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Manage Reports, Continued

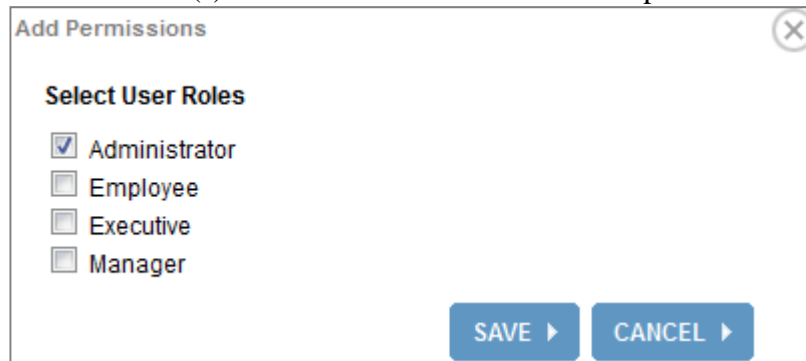
Permissions

If a user role is given permission to run the report, anyone with that role will be able to run the report. Administrators can further restrict access to the actual data that the role can access.

- Add permission to run the report
 - o Click the add icon



- o Select the role(s) that should be able to run this report



- o Click Save to save changes and exit the window
- o Click Cancel to exit the window without saving changes
- o Use Filter Restrictions to determine what data is returned when a user with this role runs the report



Options that show up in the Filter Restriction drop-down will depend on what fields are selected as columns for the report. Here are the different restriction types:

- None
Unrestricted view and is the default
- Department Specific
Report returns data for users in their department only
- Location Specific
Report returns data for users in their location only
- Employee Specific
Report returns data for their direct and indirect subordinates only

Continued on next page

Manage Reports, Continued

Charts

The **REVIEWSNAP™** Report Wizard also gives you the option of developing charts for your reports.

- Add a chart to the report
 - o Click the add icon
 - o Make chart selections

Chart Type: Vertical Bar

Chart Data Column: Goal Count

Data Column Title: Number of Goals

Start (bottom) Value: 0

End (top) Value: 5

Increment (Step): 1

These values defined the scale of the Data axis on the Chart.

Chart Label Column: Employee Last Name

Label Column Title: Employee

Display with Report

SAVE CANCEL

- o Click Save to save changes and exit the window
- o Click Cancel to exit the window without saving changes

Notes:

- The Chart Data Column is the numeric value being graphed.
 - o The drop-down list for the Chart Data Column is pulled from the available columns that are of numeric type.
 - o The Data Column Scale gives you control over how the graph points are displayed on a report-by-report basis.
- The Chart Label Column data defines the other chart axis.

Continued on next page

Manage Reports, Continued

Preview / Activate

Preview and activate your report.

- Preview the report and then click Activate to make it available to those who have permission to run it

Preview/Activate Report

[Click Here](#) to preview the report you just created. If you need to make any changes or correct any errors, use the navigation on the left side to get to any section and make your changes. When you are finished and the report looks right, use the button below to activate the report and make it available to your employees.

ACTIVATE ▶

- Once a report has been activated it may be deactivated, edited, copied, and deleted

Report Title	Description	Status	
Custom Employee List	This is a customized copy of the standard employee list report.	Active (deactivate)	  

Run Reports

Run and Schedule Reports

Navigate to Reporting / Run Reports to view reports that you have permission to run.

- Click the report title to run the report

Report Title	Description	Schedule
Custom Employee List	This is a customized copy of the standard employee list report.	

Note: Reports can be exported in PDF and Excel formats.

- Click the add icon to schedule the report to run automatically

Report Title	Description	Schedule
Custom Employee List	This is a customized copy of the standard employee list report.	

- Schedule automatic delivery to specific email addresses

Add Schedule ✕

* E-mail Address(es):
Separate multiple addresses with commas.

* Schedule Base Date:

* Reoccurrence: day(s)

- o Click Save to save changes and exit the window
 Click Cancel to exit the window without saving changes

- Once a schedule has been saved it can be edited and deleted

Report Title	Description	Schedule
Custom Employee List	This is a customized copy of the standard employee list report.	every 7 day(s) starting 7/12/11