

# Dashboards and Reports

Dashboards provide a powerful way to gain visibility and oversight into your team's performance.

Dashboards provide supervisors:

- Dashboards - At a glance statistical information in a graphical format.
- Reports - A detailed reporting tool for all the processes in the GPS Tool.

## 1 Get Started

Select the **Dashboards** tab from the tab menu. To interact with Reports, click on the **Reports** tab.

## 2 View Available Dashboards

Use the drop-down menu to select a Dashboard from the list. Dashboards change throughout the year as work progresses. Dashboards include:

- **Summary** - Provides an overview of the status of forms and processes.
- **Goals** - Provides a view into goals and progress towards achievement.
- **Performance** - Provides a view of performance measures and ratings.

## 3 Filter Options

Filter the data to show hierarchical levels, processes, and select the organizational view (Stem, Department, and Location, FLSA, Job Family, or Status).

## 4 Date Options

Use the **Date Options** to select the date range to be displayed in the charts. Only data occurring within your selected date ranges will appear in the Dashboards. Be sure to set the date range wide enough to capture all desired data.

## 5 Update the Data

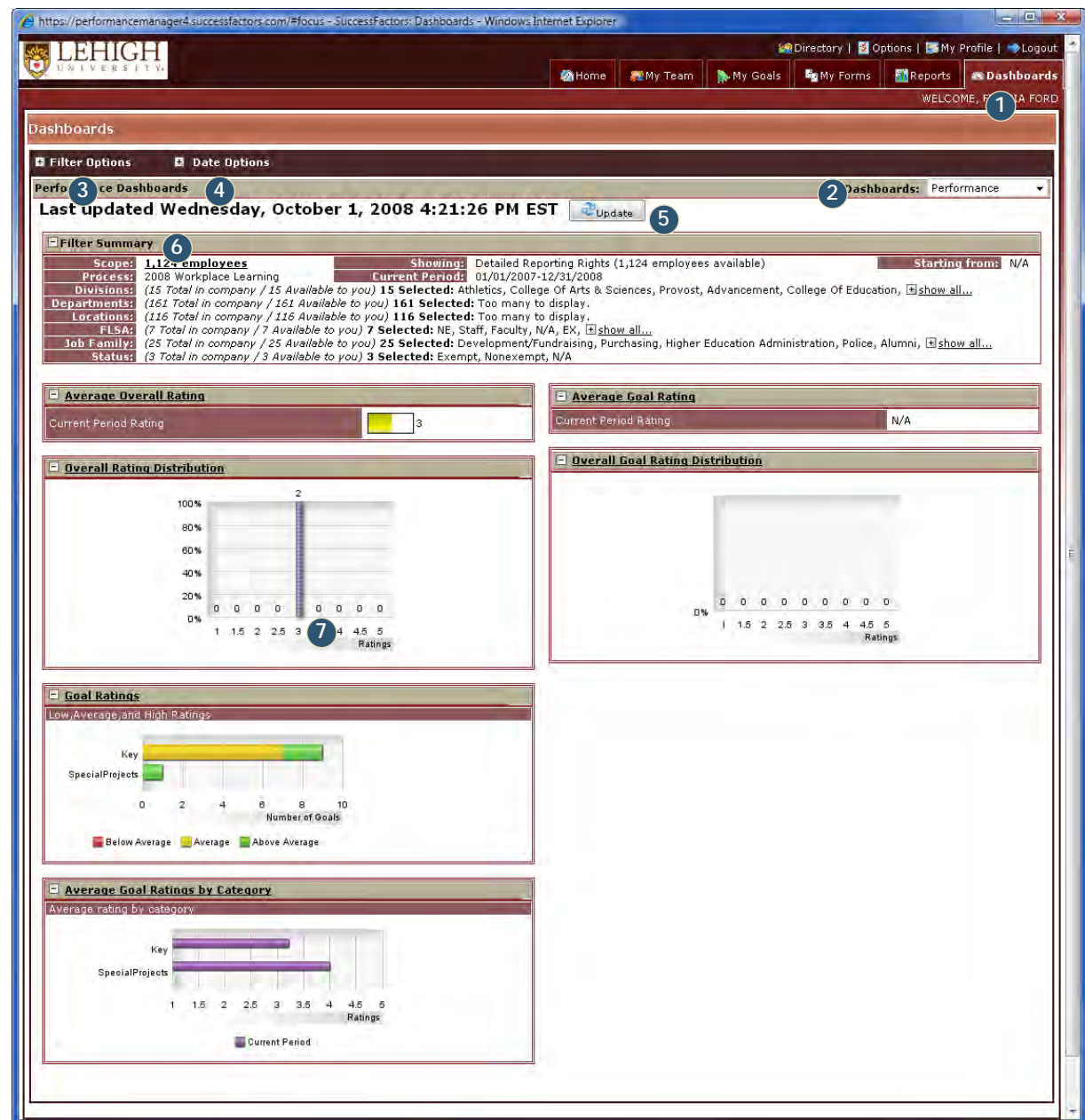
Click the **Update** button to refresh the data displayed in the charts. You must click this button to get the most current data. Notice that the **Last Updated** time and date will change. You should update the data each time you visit the Dashboard.

## 6 Filter Summary

The Filter Summary displays a summary of your filters for review.

## 7 Drill Down Into Details

Dashboards are interactive. Click on a chart segment, underlined text, or chart label on the Dashboard to reveal underlying data in a report format.



The screenshot shows the Lehigh University Performance Management System interface. At the top, there's a navigation menu with 'Dashboards' selected. Below the menu, there's a 'Filter Options' section with a 'Performance Dashboards' dropdown menu. The main content area displays a 'Performance Dashboards' section with a 'Last updated Wednesday, October 1, 2008 4:21:26 PM EST' timestamp and an 'Update' button. Below this, there's a 'Filter Summary' table with columns for Scopes, Process, Divisions, Departments, Locations, FLSA, Job Family, and Status. The table lists various filters and their counts. Below the table, there are several charts: 'Average Overall Rating' (Current Period Rating: 3), 'Average Goal Rating' (Current Period Rating: N/A), 'Overall Rating Distribution' (Bar chart showing 100% for rating 3), 'Overall Goal Rating Distribution' (Bar chart showing 0% for all ratings), 'Goal Ratings' (Horizontal bar chart showing 'Key' and 'SpecialProjects' with 'Number of Goals' on the x-axis), and 'Average Goal Ratings by Category' (Horizontal bar chart showing 'Key' and 'SpecialProjects' with 'Ratings' on the x-axis).

## 8 Results Table

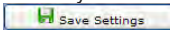
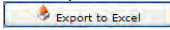

The Dashboard automatically generates a table on the Reports View. This enables supervisors to access chart details in a table format that lists the total number of records from the chart.

## 9 Change Information Displayed on Table

Select the **Display Options** on the Report menu to change the columns displayed on the table.

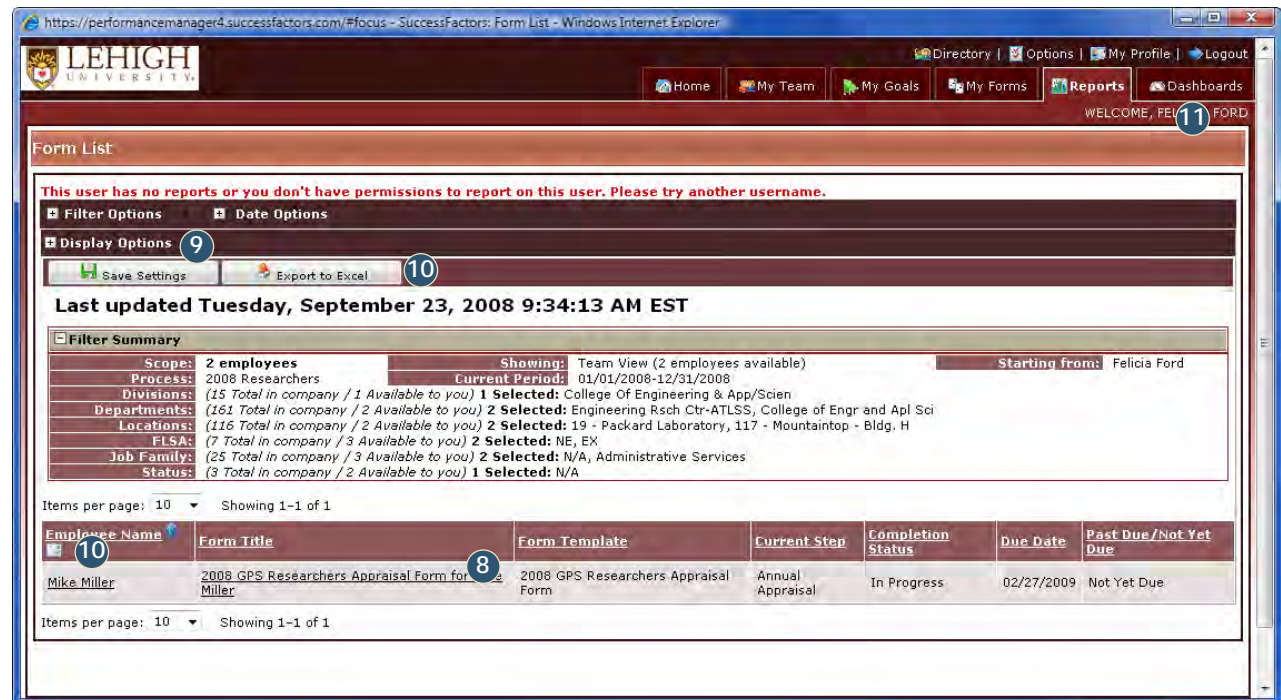
## 10 Take Action

From the results table you have these helpful options:

- Click the  button to save the report to Microsoft Excel where you can manipulate data as needed (create pivot tables, build macros, sort, etc.).
- Click the  button to download the report to Microsoft Excel.
- Click the  icon on the column heading to send an email to everyone listed on the column.


## 11 Return to the Dashboard

To return to the Dashboard, click on the **Dashboards** tab.



## How to Filter Dashboards and Reports

Filter and Date options allow supervisors to filter Dashboards and Reports results by date, team, process, and areas of the organization. Filtering the analysis enables supervisors to spot trends and exceptions within the data. Filter results display data based upon options chosen. To use filters:

- Click the **+** expand button(s).
- Select the reporting structure to report on using the **Show** criteria.
- Use the process drop-down menu to select the performance processes. **NOTE:** Make sure that the process selected matches the Dashboard selected.
- Use filters to select different populations.
- Enter the date range for the Dashboard. Only data occurring within your selected date ranges will appear in the Dashboard.
- Click the  button to reflect the criteria selected. Your selections are summarized in the Filter Summary area.

The Dashboard and Report update to reflect the criteria selected. Your selections are summarized in the Filter Summary area.

