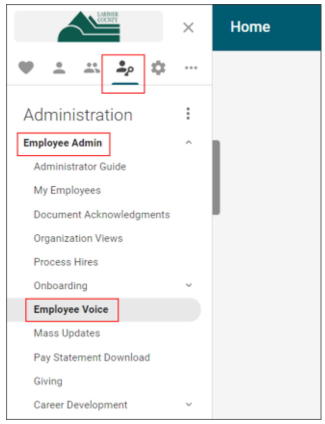
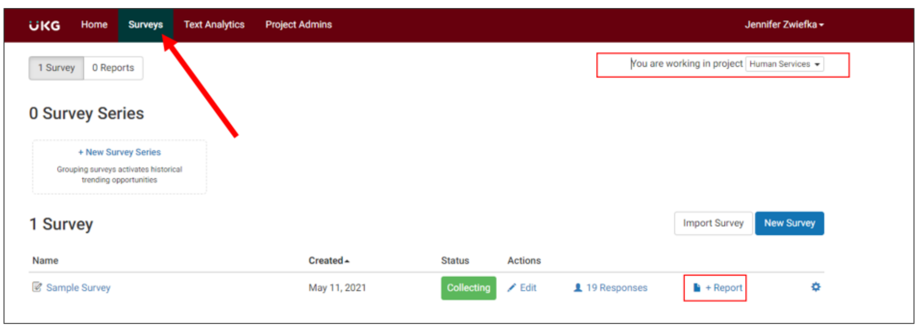
Creating a Survey Report in Employee Voice

1. Open Up Employee Voice – Go to Administration, expand Employee Admin, then click on Employee Voice.



2. Click on Surveys, make sur you are in the correct project – in this example it is Human Services, then click on the "+ Report" next to the survey for which you are building a report. You can create multiple reports for one survey. A great thing to note is that you do not have to wait until your survey closes to create your report! We like building them right away for our surveys so we can start viewing results and see our response rate.

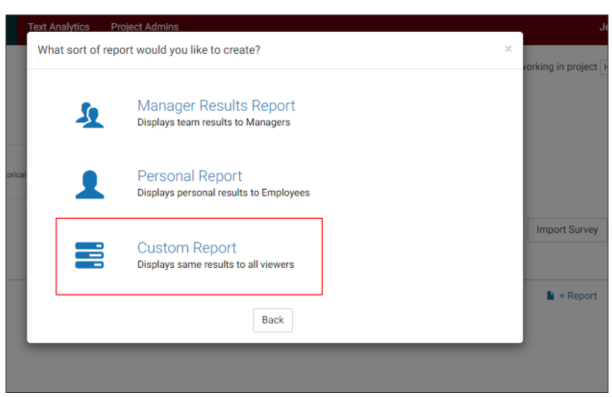


3. Select the report type you wish to build. There are 3 report types:

    a. Manager Results Report – Only shows the manager their direct reports (shared with them, you only need to create 1 report for many managers). You are unable to share a report with a manager if they do not meet the minimum threshold of responses on the report.

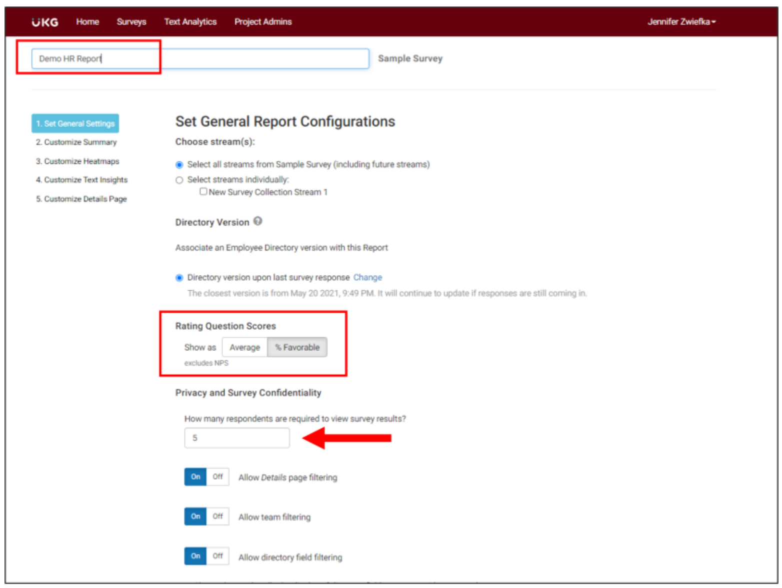
    b. Personal Report – This would be a report to let the employee submitting the survey view their responses.

    c. Custom Report – this is the most flexible of the reports. Anyone you share the report with will view the same results. This is the report used in this guide.

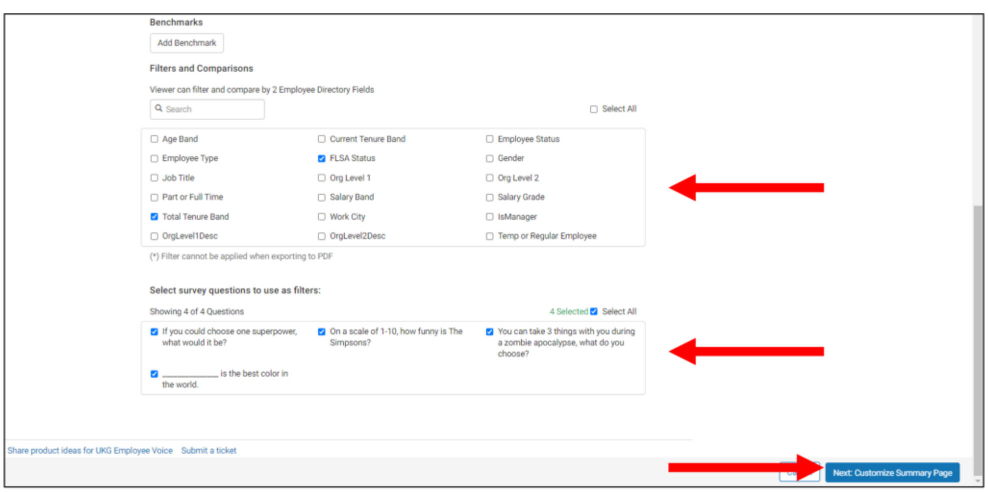


4. Report Configurations: These general report configurations can be edited after you create the report, so you can always tweak them if you don't like the way you initially set it up. These next slides highlight the areas HR typically adjusts, there are many setting left at the default and you can always reach out if you have questions.

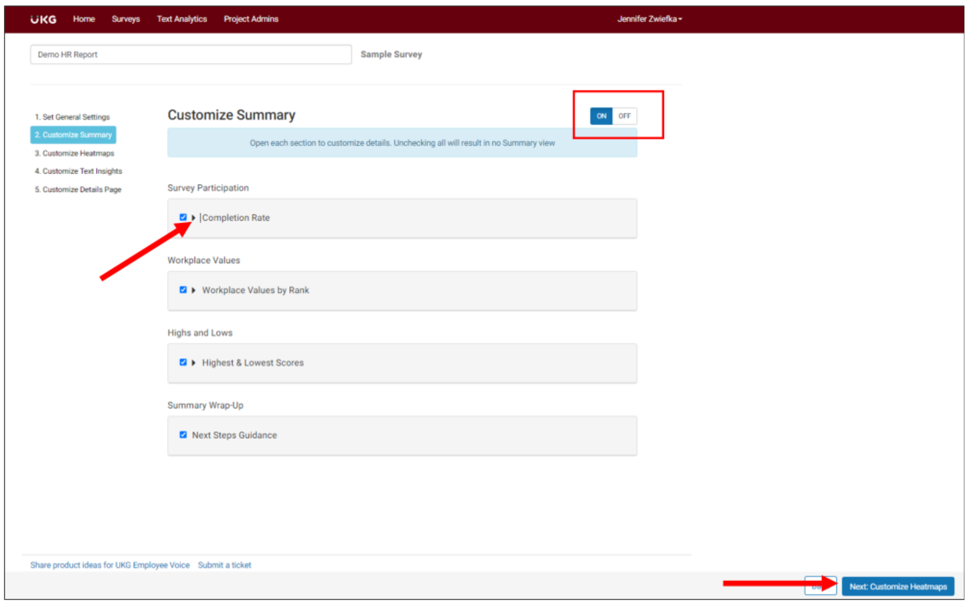
    a. Rename your report to something easily identifiable, especially if you are creating multiple reports so you can find it easily. The default selection for rating is average. HR typically uses % favorable because we find it is less confusing to the report viewer. For the Privacy and Survey Confidentiality, the lowest threshold we allow is 5 responses to protect employees confidentiality. This means that there needs to be at least 5 responses or no information will be visible. You can always increase this threshold, you just cannot drop below 5.



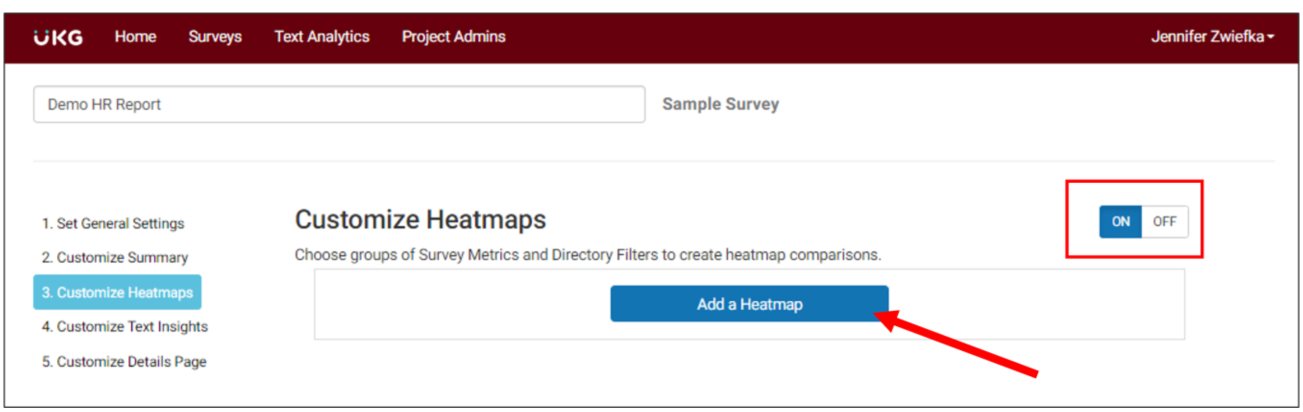
    b. You can select filters that look use employee metadata (it cannot be an anonymous survey). One thing to note is the heatmaps tab on the report only works if there is a filter selected. If you set up questions to use as filters when building your survey, you can enable them here. Click the Customize: Summary Page to continue to the next page.



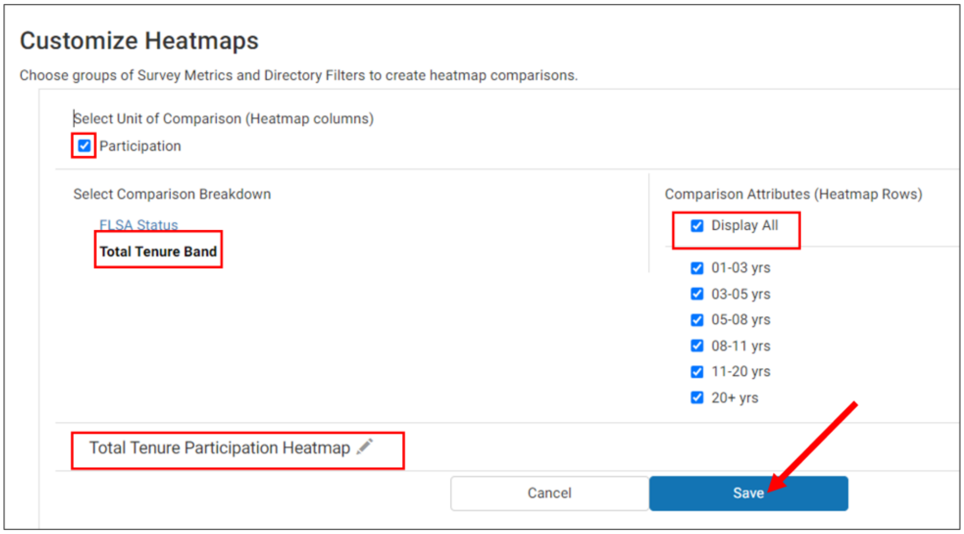
c. The summary is the first page of the report and can be turned off using the toggle at the top of the page if you don't need it on a report. You can expand the sections by clicking on the carrot. We leave these on and at their default settings, you can hide parts or change thresholds though if you would like. Click Next: Customize Heatmaps to continue building the report.



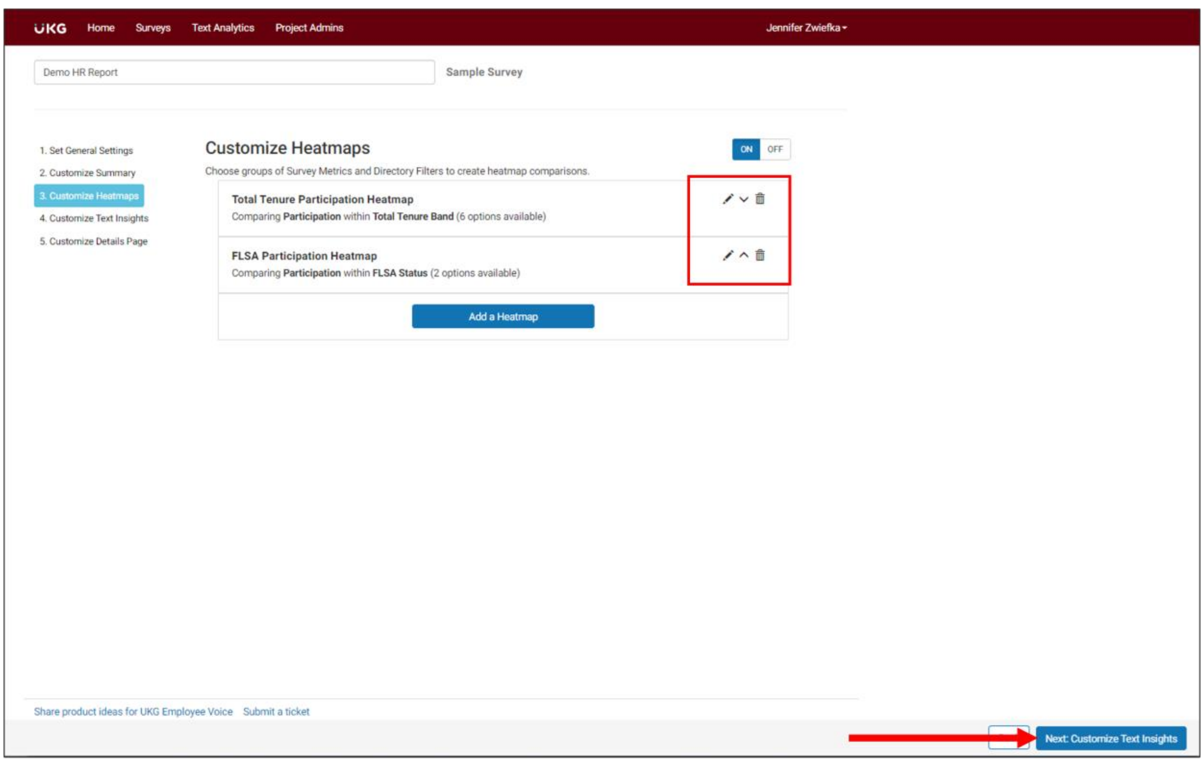
d. The next page defaults to on and is to customize Heatmaps – you need to have filters from the employee metadata section to build a heatmap. You can click the back button at the bottom of the page if you want to add one but didn't select metadata. These can be a helpful visual and can add value to the report viewer. For this particular report, only participation is an option. Click the Add a Heatmap button to begin.



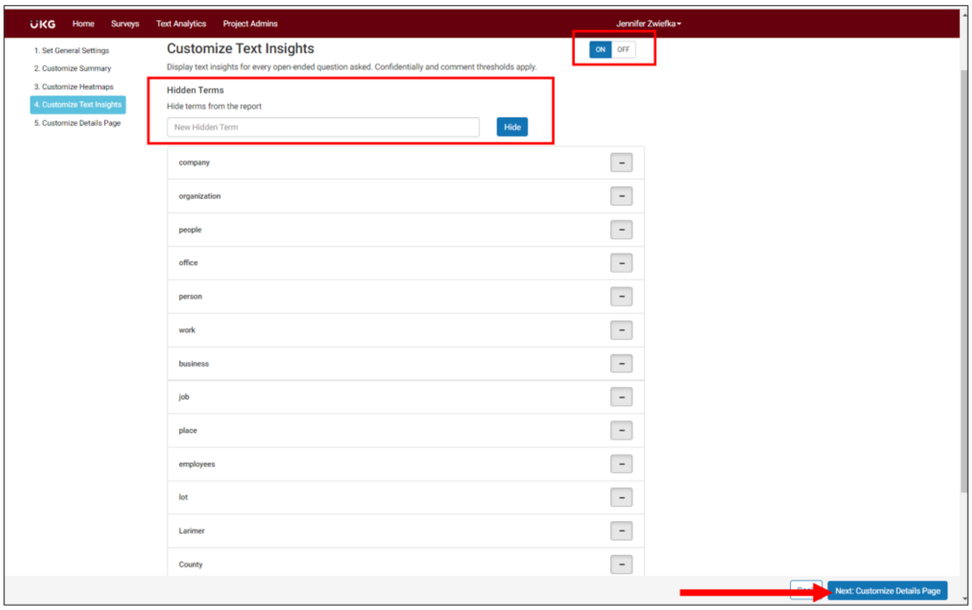
e. Check the unit of comparison, then select the metadata you wish to use for the heatmap. Next, click on the Display All for the comparison attributes. Rename your heatmap – I typically use the naming convention of filter and unit of comparison (Total Tenure Participation Heatmap in this example) so I can easily identify them. Click Save and add any other heatmaps you would like to view.



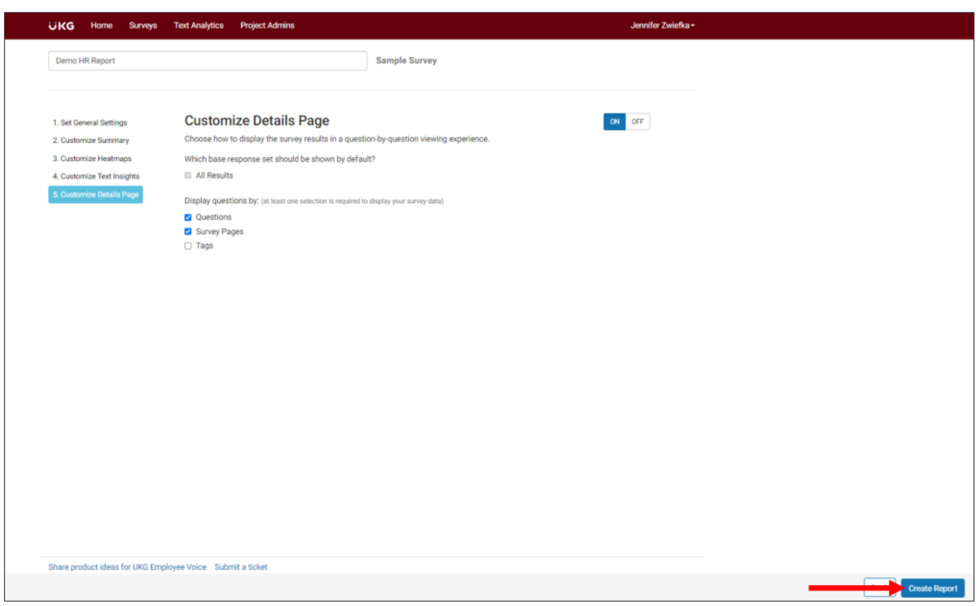
f. Once you have added heatmaps you can edit (pencil), adjust order (up/down carrot), or delete (trashcan). Click Next: Customize Text Insights to continue to the next section.



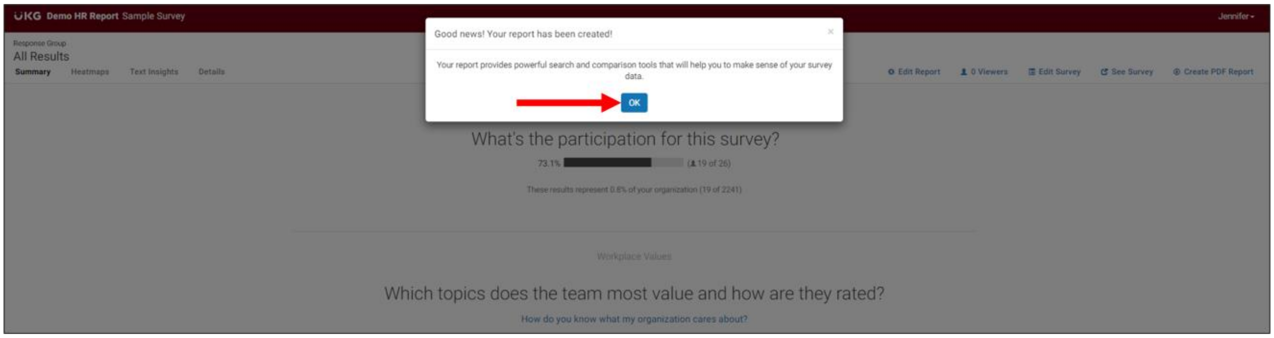
g. Text Insights always defaults to the off position, so if you want this page it is recommended to toggle it on first so you don't forget. The customization is visible in the off position so it's easy to miss. The hidden terms allows you to add terms that "muddy" up text analytics and distract from the important words you want to see – for example, we don't want "job" to be identified as a frequent term, we would expect that to be a frequent term in our surveys. The common words to hide automatically populate in the list (you can always click the "-" if you want one to not be hidden). We typically add ones specific to the County - Larimer, County, Department. You can always come back and add others if you realize there are some adding noise. Click Next: Customize Details Page to continue.



h. The customization gives you the ability to add different views. With the settings of questions and survey pages selected, this report will give the report view the option to view the report by question or change the view to see if by page. If you have metrics on your survey, this will be an option as well. You are done customizing everything - click Create Report to view it to make sure you like how it looks! No matter the report type selected, it is still only visible to you at this point.

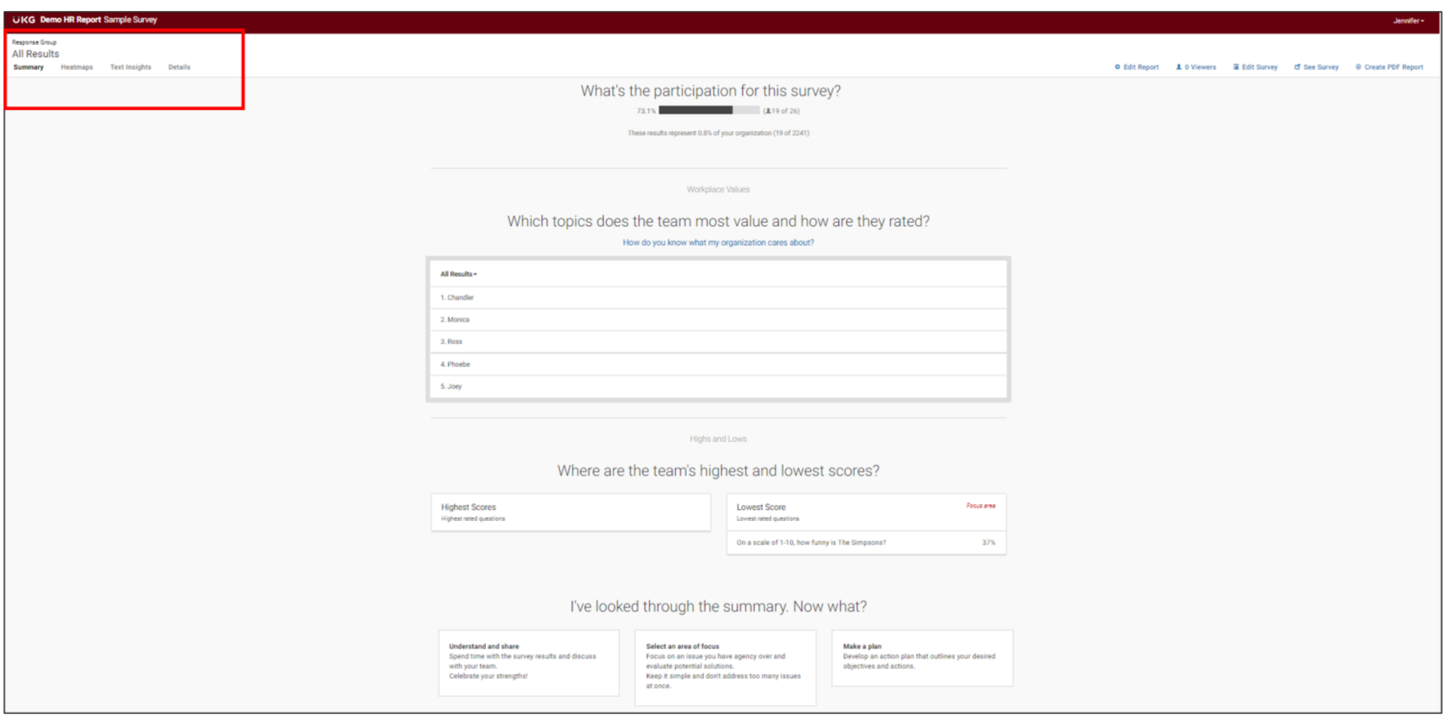


5. A confirmation message pops up, click Ok to continue.

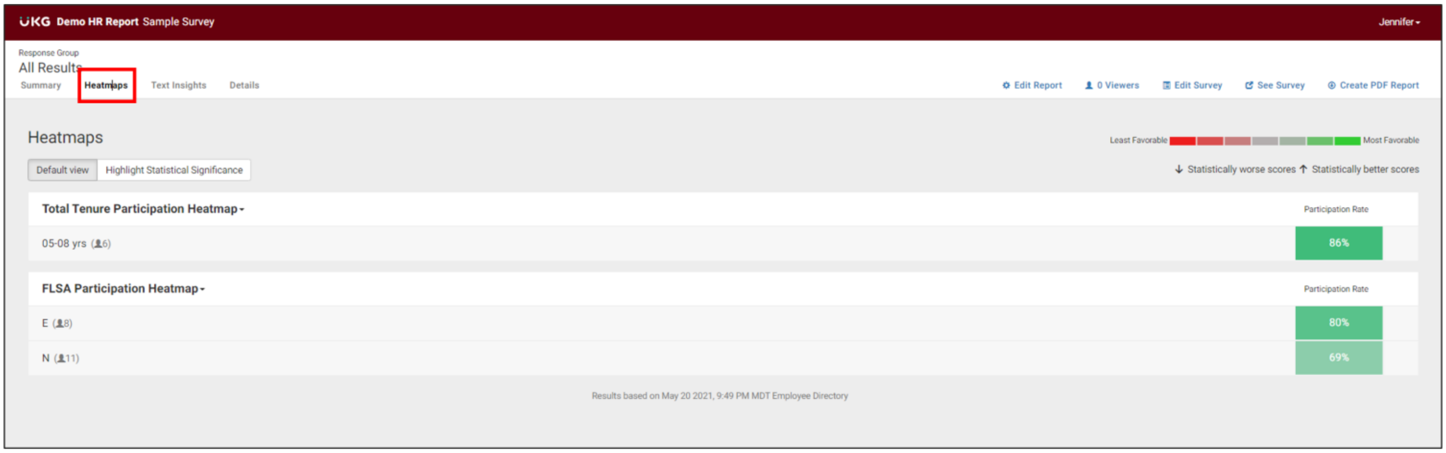


Viewing your Newly Created Employee Voice Report

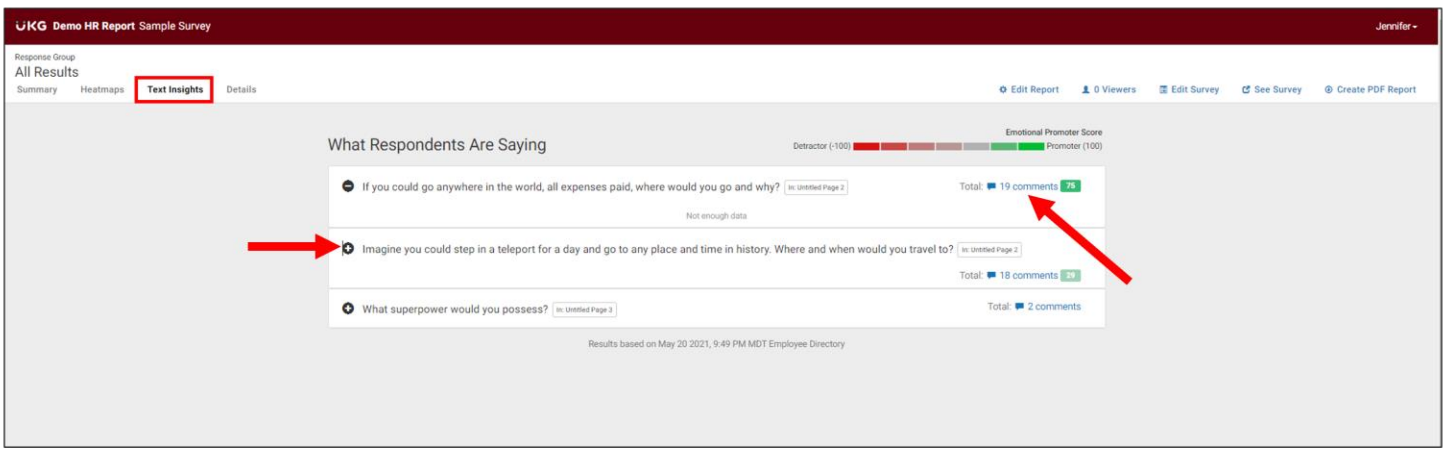
1. You can view the pages using the navigation tabs on the upper left corner. This gives a high level view of the report. If you have metrics on your report, you will also see these here and will be able to drill down into them. The sections from top to bottom are:
    a. Participation rate – shows a response number and percent.
    b. Workplace Values – this one is a bit tricky – Xander, the AI determines what to show here, and it's a complex algorithm. It may or may not be helpful, and if you don't find value you can always uncheck the box (Workplace Values in the Customize Summary)
    c. High and Low Scores – this section calls out your highest and lowest scored questions to help you identify areas of opportunity and areas to celebrate.
    d. Now What – This gives guidance to help you utilize the survey.

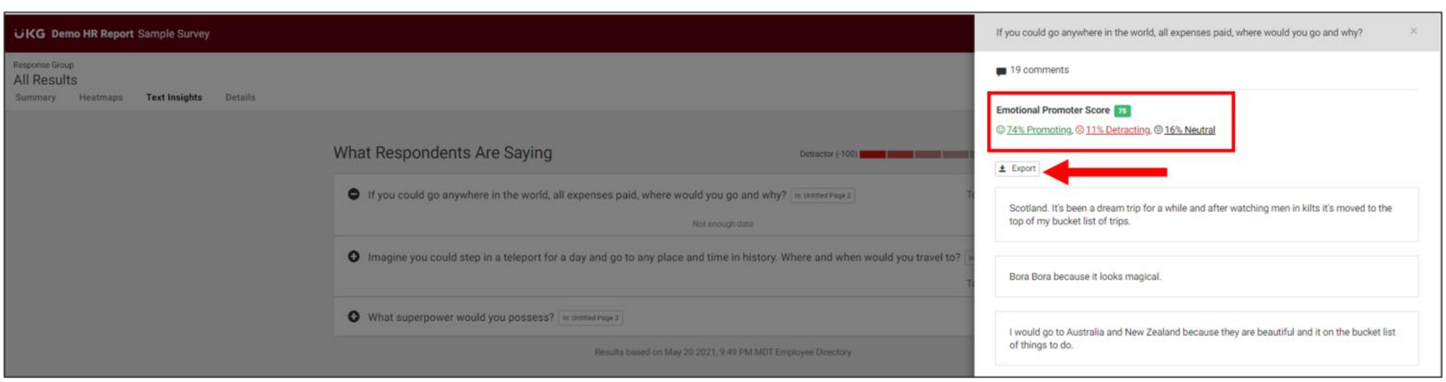


2. The Heatmaps tab of the report will show you the participation rates based on the metadata you selected. You will only see heatmap results that meet the threshold – we had 19 responses to this survey, and only the 5-8 yrs for total tenure had at least 5 responses. As more responses get submitted, any that meet that threshold will become visible.

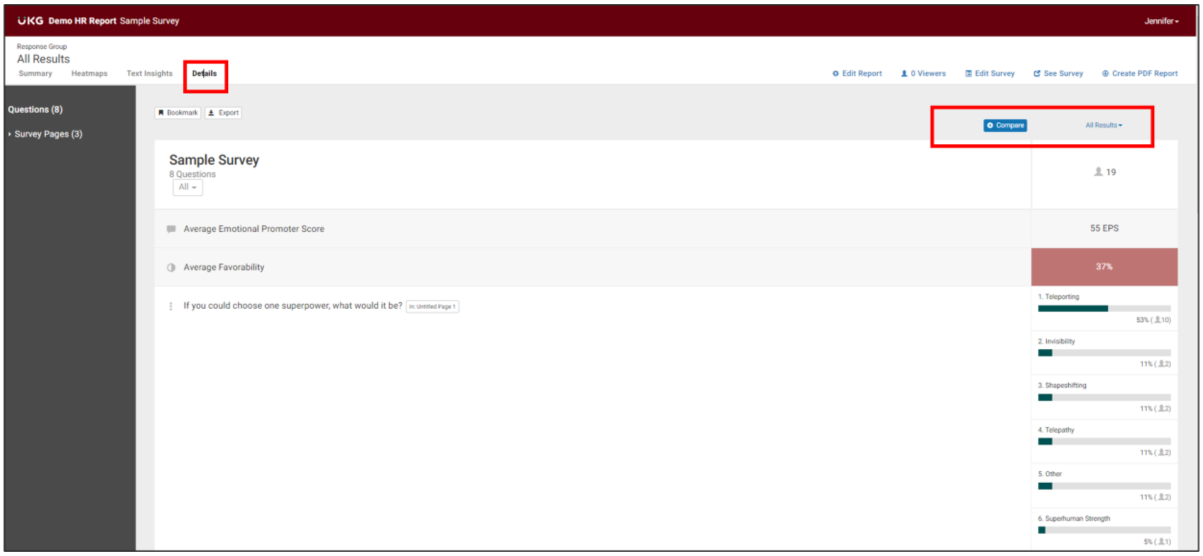


3. Text Insights provides analytics into tones and themes of word use. There won't always be data, it will depend on the volume of responses and whether or not there are any common themes or frequently used words. Click on the "+" sign to expand and check for analytics. You can view comments by clicking on the blue comments, comments will not be visible if there are less than 5 responses. Once comments are open, you can filter them by promoting, detracting, or neutral. You can also export the comments by question on this page.

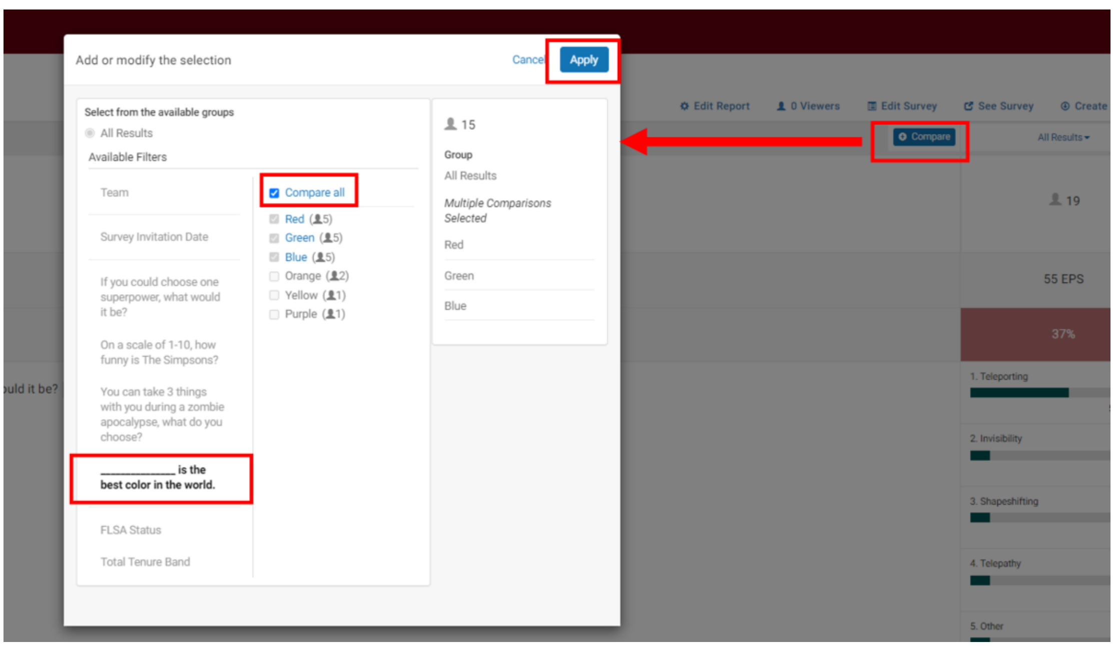




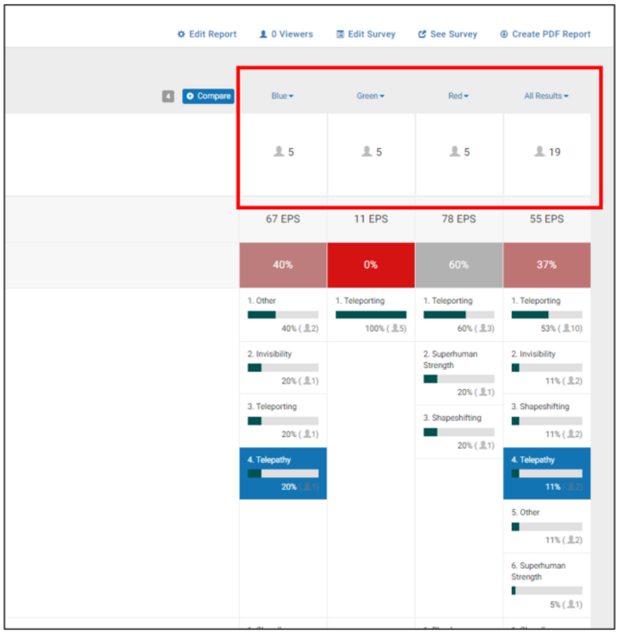
4. The last page of the report is the Details page. The default view is to show all results. The blue “+ Compare” allows you to break apart the views on the report using the meta data and question filters selected when creating the report.



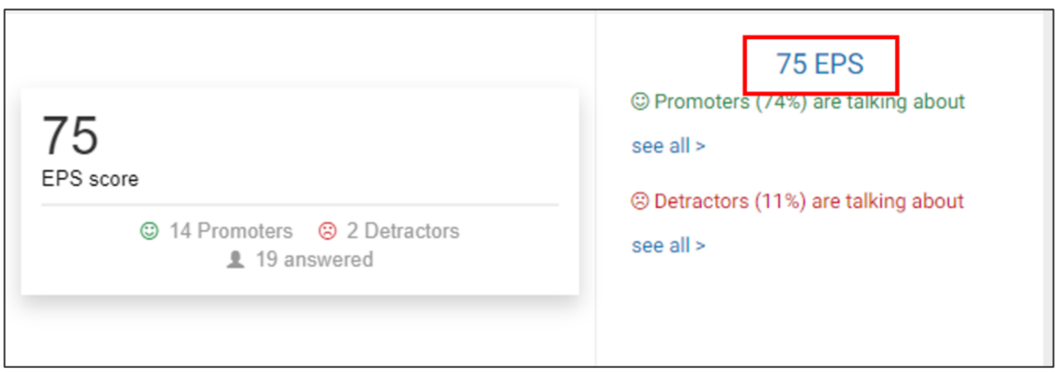
5. If you click on “+ Compare” you can view the different filters available to split apart the data. In this example, I have selected to compare responses by the question asking about the best color in the world, and because not all colors had at least 5 responses, I will only be able to view Red, Green, and Blue. It is Important to check the Compare all box if you want responses to be a side by side comparison. If you check the Red, Green, and Blue, the 3 colors will be combined into one column showing a combination of the 3 responses compared to All Results. Once you make your selection, click Apply.



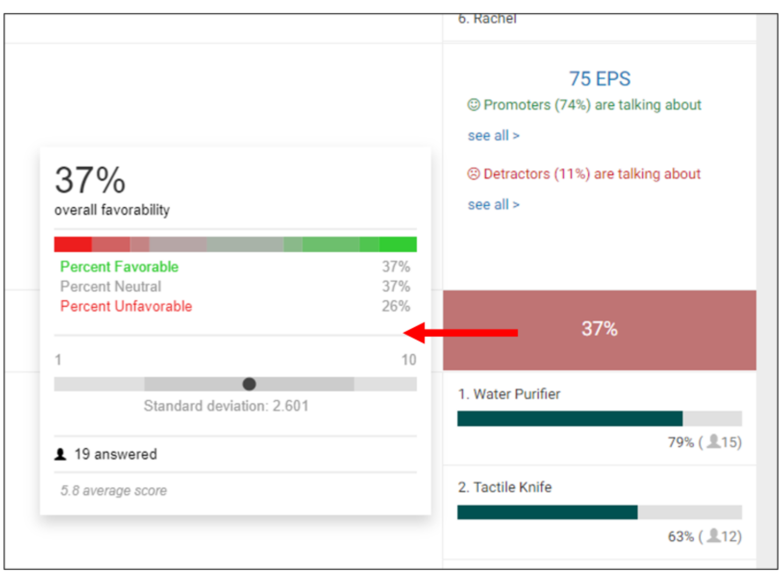
6. The report will update to show 4 columns – Blue, Green, Red, and All Results. You can now see responses by question and compare them against eachother.



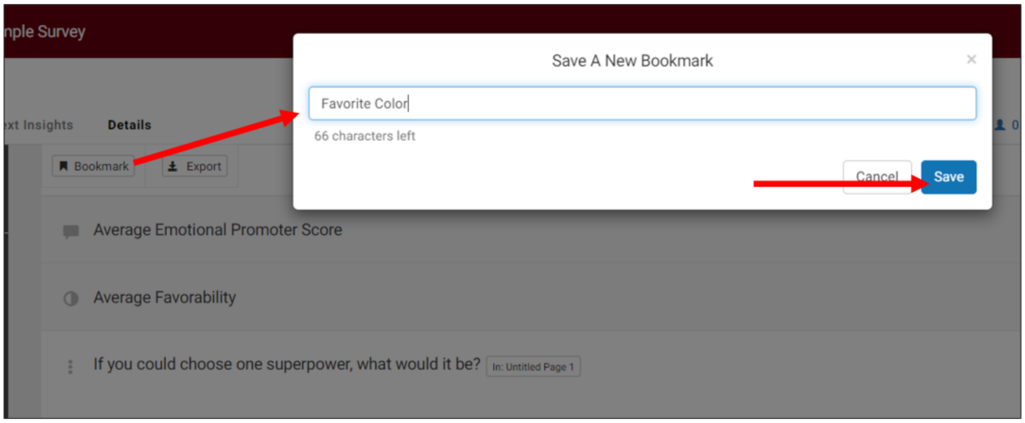
7. The EPS Score is the Emotional Promoter Score. This is determined by Xander analyzing the responses.

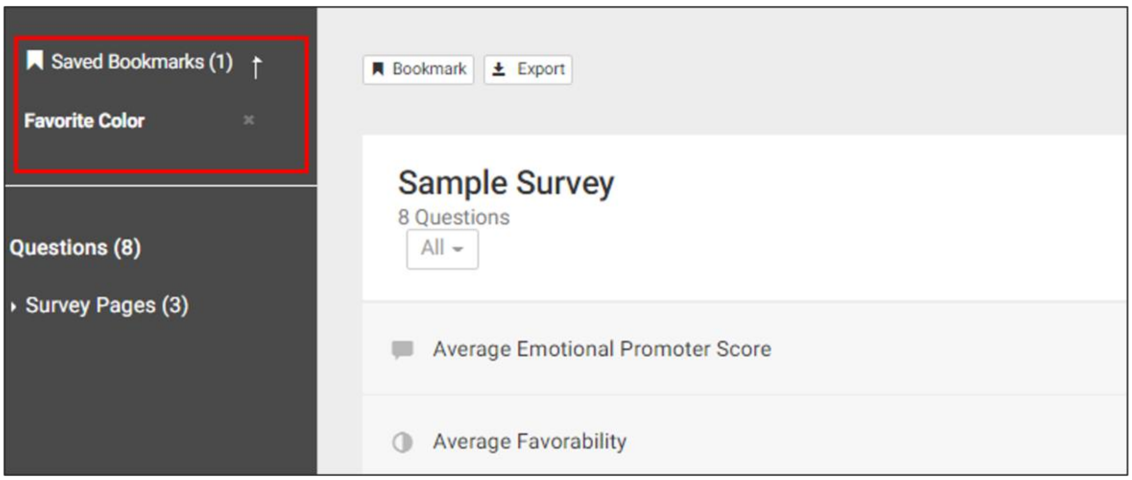


8. As you scroll through the report, you can over the heatmap coloring to view more insight into the data. You can see where the responses fall on the favorability scale and also view the standard deviation.



9. Save the view you created by clicking on Bookmark, then name it and click save. The bookmark can only be accessed by the user that created it, not by everyone that is given access to the report. Access your bookmarked view by clicking on Saved Bookmarks.





10. The tool bar on the right side of the screen gives you the ability to:

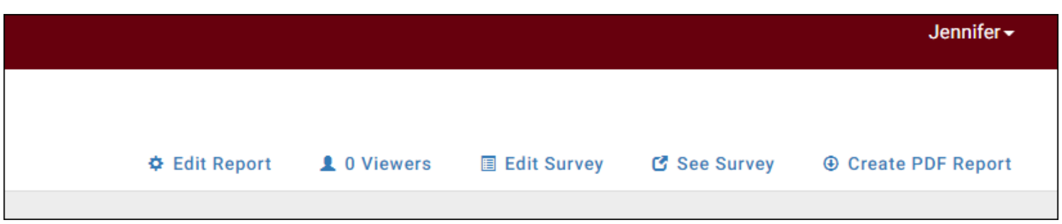
    a. Edit the report – make an adjustments to how you set up the report.

    b. Add viewers – lets you add anyone that needs to view the report. See Step 11 for steps to add a viewer.

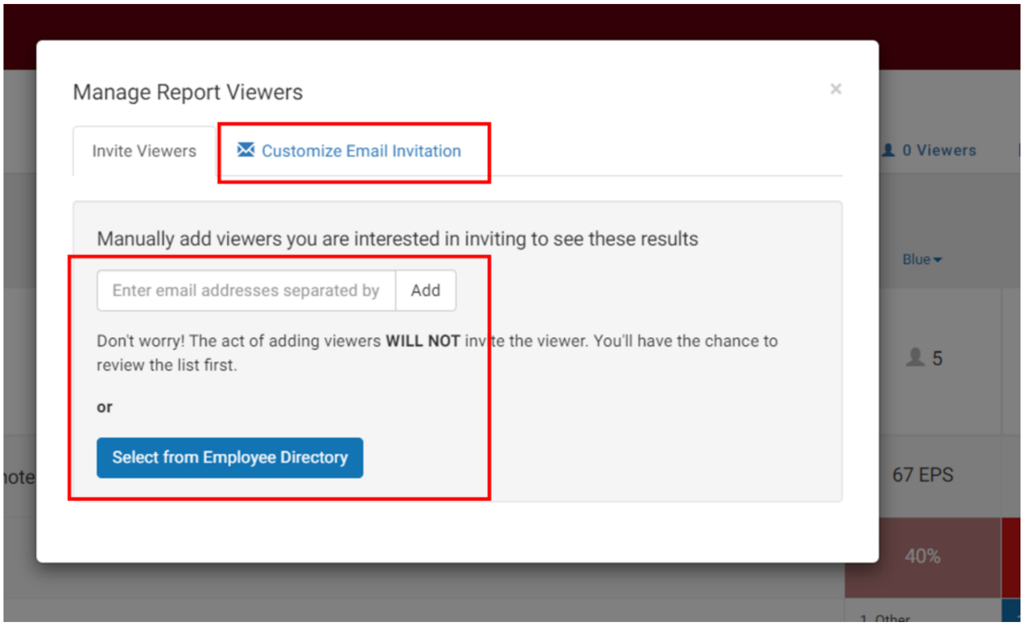
    c. Edit Survey - takes you back to where you created the survey. You will have limited functionality if the survey is live and has any responses.

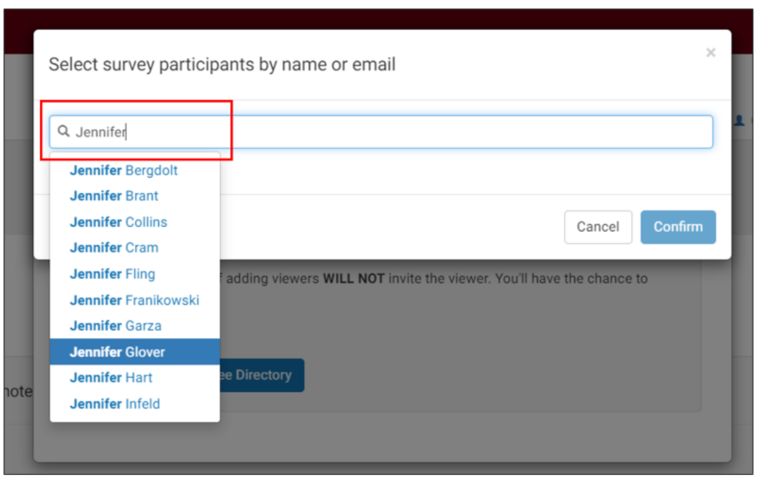
    d. See Survey – takes you to the survey

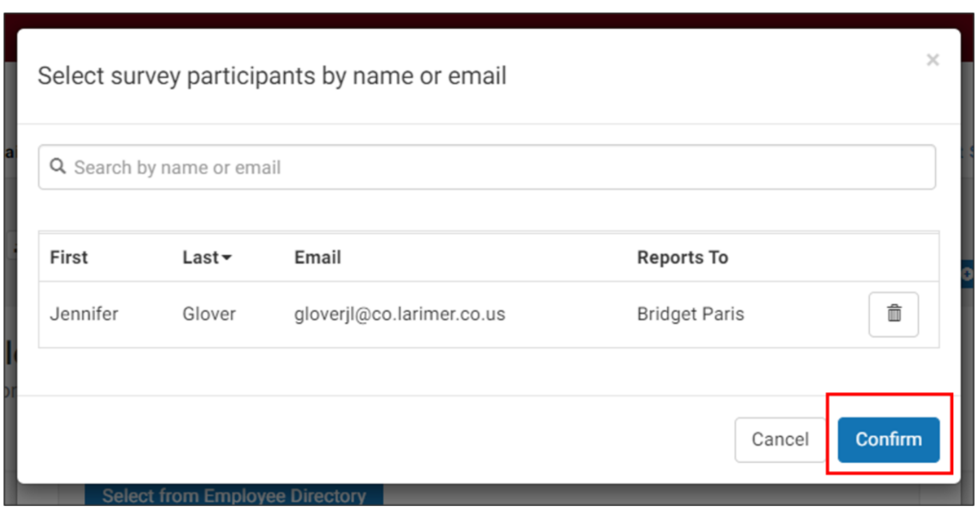
    e. Create PDF Report – Creates a PDV version of the report. There is limited visibility in the PDF format, it is high level. Employee Voice reporting is designed to be interactive, so the exported reports have minimal functionality. See step 12 to export a PDF report.



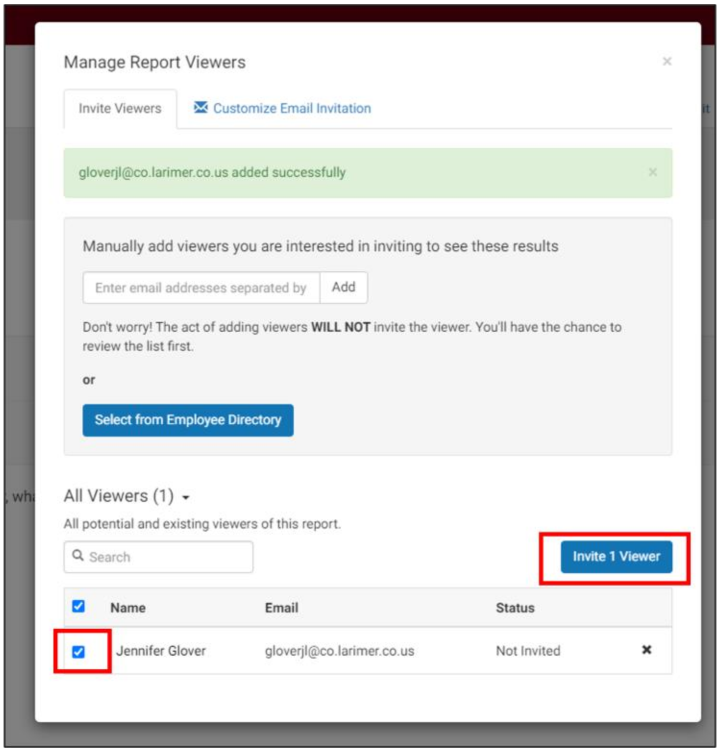
11. Add viewers by clicking on the person icon with the number of current viewers. You can customize your email invitation messaging at the   I find it easiest to select from Employee Directory – click on Select from Employee Directory, search by name or email to find the name (you can add multiple users at a time), then click confirm. This does not share the report with the user yet.







The final step to share the report is to check the name of the user you selected, and then click the Invite 1 User button.



12. To get a PDF version of the report, click on Create PDF Report, then Create PDF to have a copy emailed to you. Depending on the complexity of your survey, you may have additional sections listed and you may find some of it to be repetitive – this is a basic one so there is just Questions Detail.