Creating a Survey Report in Employee Voice

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



 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.

UKG Home	Surveys	Text Analytics	Project Admins				Jen	nifer Zwiefka -	
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+ New Sur Grouping surveys trending of	rvey Series activates histori pportunities	ical							
1 Survey							Import Survey	New Survey	
Name			Created -	Status	Actions				
Sample Survey			May 11, 2021	Collecting	🖍 Edit	19 Responses	+ Report	٥	

- 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.

UKG Home Surveys	Text Analytics Project Admins	Jennifer Zwiefka -
Demo HR Report	Sample Survey	
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	on off Allow team filtering on off Allow directory field filtering	

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.

Benchmarks Add Benchmarks Filters and comparisons Vewer can filter and comparisons Q. Issurch					-				
Add Benchmark Filters and Compare by 2 Employee Directory Fields		Benchmarks							
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Viewer can offer and compare by 2 Employee Directory Fields Gasch Select All Age Band Current Tenure Band Employee Status Employee Type FLSA Status Greder Job Trife Org Level 1 Org Level 2 Pet or the Time Org Level 1 Org Level 2 Pet or the Time Org Level 2 Pet or the applied when exporting to FOF Select stations 4 Selectorsi Select All If the words Select all 1:10, how furry is The Select 3 Select 4 Pet words Select 4 Select 4		Eiltere and Comparisone							
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Select survey questions to use as filters: 4 Select All If you could choose one superpower, what would it be? If no a scale of 1-10, how furwy is The Simpsons? If you can take 3 things with you during a zomble specalypse, what do you choose? If you can take best color in If the world If you can take 3 things with you during a zomble specalypse, what do you choose?		(*) Filter cannot be applied when exporting	to PDF						
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		If you could choose one superpower, what would it be?	On a scale of 1-10, how funny is The Simpsons?	You can take 3 things with you during a zombie apocalypse, what do you choose?					
		the world.							
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re product ideas for UKG Employee Voice Submit a ticket								Next: Customize Sur	Next: Customize Summary Pa
re product ideas for UKG Employee Voice Submit a ticket									

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.

Set General Harding Calculations Calculations <th>Demo HR Report</th> <th></th> <th>Sample Survey</th> <th></th>	Demo HR Report		Sample Survey	
	1. Set General Settings 2. Cutatorital Butmary 3. Cutatorital Butmary 4. Cutatorital Text Insights 5. Cutatorital Details Page	Customize Summary Copen each section to custom Survey Participation Completion Rate Workplace Values Workplace Values by Rank Workplace Values by Rank Highs and Lows C + Highest & Lowest Scores Summary Wrap Up Next Steps Guidance	nze details. Unchecking all will result in no Summary view	

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.

UKG Home	Surveys	Text Analytics	Project Admins		Jennifer Zwiefka -
Demo HR Report				Sample Survey	
1. Set General Setting	s	Custom	ize Heatmaps	re to grate bostone comparisons	ON OFF
2. Customize Summa 3. Customize Heatma 4. Customize Text Ins	ry ps ights	Choose group	is of Survey Metrics and Directory Filt	Add a Heatmap	
5. Customize Details	Page				

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.

Customize Heatmaps Choose groups of Survey Metrics and Directory Filters to create he	atmap comparisons.
Select Unit of Comparison (Heatmap columns)	
Select Comparison Breakdown FLSA Status Total Tenure Band	Comparison Attributes (Heatmap Rows) C Display All Ol-03 yrs Ol-03 yrs Ol-05 yrs Ol-05 yrs Ol-05 yrs Ol-05 yrs Ol-08 yrs Ol-08 yrs Ol-01 yrs Ol-01 yrs Ol-02 yrs Ol
Total Tenure Participation Heatmap 🖋	
	Cancel Save

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.

JKG Home Surveys	Text Analytics Project Admins		Jennifer Zwietka +	
Demo HR Report		Sample Survey		
1. Set General Settings	Customize Heatmaps	v Eiltere to create beatman comparisons	CN OFF	
3. Customize Heatmaps 4. Customize Text Insights	Total Tenure Participation Heatman Comparing Participation within Total Ten	o nure Band (6 options available)	✓ ±	
5. Customize Details Page	FLSA Participation Heatmap Comparing Participation within FLSA St	atus (2 options available)	Z ^ 11	
		Add a Heatmap		
hare product ideas for LIKC Em	nlovaa Voine - Suhmit a tinkat			
nare product fuelds for UKG EIII	proyee role - Source a licket		Next: Customize 1	Text Ins

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.

UKG Home Surveys	Text Analytics Project Admins	Jennifer Zwief
1. Set General Settings 2. Customize Summary	Customize Text Insights Display text insights for every open ended question asked. Confidentially and comment thresholds apply.	ON OFF
3. Customize Heatmaps 4. Customize Text Insights 5. Customize Details Page	Hidden Terms Hide terms from the report New Hidden Term Hidde	
	company	-
	organization	-
	people	-
	office	-
	person	-
	work	-
	business	-
	job	-
	place	-
	employees	-
	lot	-
	Larimer	-
	County	-

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.

UKG Home Surveys	Text Analytics Project Admins	Jennifer Zwiefka *
Demo HR Report	Sample Survey	
1. Set General Settings	Customize Details Page	ON OFF
2. Customize Summary	Choose how to display the survey results in a question-by-question viewing experience.	
3. Customize Heatmaps	Which base response set should be shown by default?	
4. Customize Text Insights	All Results	
5. Customize Details Page	Display questions by: (at least one selection is required to display your survey data)	
	Survey Pages	
	🗆 Tags	
ale and a later for the first	de un blaine - A berte stalant	
share product ideas for UKG Em	proyee voice Submit a ticket	

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

UKG Demo HR Report Sample Survey						Jennifor -
Response Grisp All Results Summary Heatmans Text Incipitis Datalla	Good news! Your report has been created! X Your report provides powerful search and comparison tools that will help you to make sense of your survey	O. Edit Report	1 0 Viewers	E Edit Survey	C See Survey	Create PDF Report
	What's the participation for this survey?					
	73.1% (a 19 of 26)					
	These results represent 0.6% of your organization (19 of 2241)					
Whic	ch topics does the team most value and how are they r	rated?				
	How do you know what my organization cares about?					

Viewing your Newly Created Employee Voice Report

- 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.
 - 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.

Regonan Grup All Result Summany Heatmaps Text Insights Details						• Edit Report 1 0 Viewers	Edit Survey	ග් See Survey	Create PDF Report
	What's	the participatio	on for this surve	ev?					
		73.1%	(£19 of 26)	·					
	These results represent 0.8% of your organization (19 of 2241)								
		Workplace	Values						
	Which topics does	s the team mos	t value and how	/ are they rated?					
		How do you know what my o	organization cares about?						
	All Results -								
	1. Chandler								
	2. Monica								
	3. Ross								
	4. Phoebe								
	5.009								
	Highs and Lows								
Where are the team's highest and lowest scores?									
	Highest Scores Lowest Score Assume Highest millione Lowest score Assume Lowest mellionetime				ana				
	On a scale of 1-10, how formy is The Simpsons? 37%								
	I've look	ed through the	summary. Now	what?					
	Understand and share Spend time with the survey results and discuss with your team. Celebrate your strengths!	Select an area of focus Focus on an issue you ha evaluate potential solutio Keep it simple and don't at once.	ive agency over and ins. address too many issues	Make a plan Develop an action plan that outlines your der objectives and actions.	ired				

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.

UKG Demo HR Report Sample Survey	Jennifer -
Response Group All Results Summary Heatmaps Text Insights Details	O Edit Report 🧘 O Viewers 💿 Edit Survey 🕑 See Survey 🐵 Create PDF Report
Heatmaps Default view Highlight Statistical Significance	Least Favorable ▲ Most Favorable ↓ Statistically worse scores ↑ Statistically better scores
Total Tenure Participation Heatmap - 05-08 yrs (1.6)	Participation Rate
FLSA Participation Heatmap -	Participation Rate
E (1 ,8)	80%
N (±11)	69%
	Results based on May 20 2021, 9-49 PM MDT Employee Directory

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.

UKG Demo HR Report Sample Survey	Jennifer-			
Response Group AII Results Summary Heatmaps Text Insights Details	🌣 Edit Report 💶 O Viewers 🛛 Edit Survey 🕐 See Survey 🐵 Create PDF Report			
What Respondents Are Saying	Emotional Promoter Score Promoter (100)			
If you could go anywhere in the world, all expenses paid, where would you go and why? [in Statistic Page 2] Not enough data	Total: = 19 commenta 33			
Imagine you could step in a teleport for a day and go to any place and time in history. Where and when would you travel to? in contract Page 2 Total: = 18 comments = 1				
What superpower would you possess? In: United Page 3	Total: 🗰 2 comments			
Results based on May 20 2021, 9-49 PM MDT Employee Directory				
UKG Demo HR Report Sample Survey	If you could go anywhere in the world, all expenses paid, where would you go and why? $\hfill \hfill \hfil$			
Response Group All Results Surromary Heatmaps Text Insights Defails	19 comments Emotional Promoter Score 33			

What Respondents Are Saying

O What superpower

If you could go anywhere in the world, all expenses paid, where would you go and why?

Imagine you could step in a teleport for a day and go to any place and time in history

© 74% Promoting, © 11% Detracting, © 16% Neutral

Bora Bora because it looks magica

Scotland. It's been a dream trip for a while and after watching men in kilts it's moved to the top of my bucket list of trips.

I would go to Australia and New Zealand because they are beautiful and it on the bucket list of things to do.

± Export

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.

UKG Demo HR Report Sample Survey Jernifer-					
Response Group All Results Summary Heatmaps	Fert Insights Defails 0 Edit Report 1 0 Verses	🖀 Edit Survey 🛛 🖉 See Survey 💿 Create PDF Report			
Questions (8)	totomak (& topor)	Compare All Results -			
	Sample Survey 8 Questions All -	<u>19</u>			
	Average Emotional Promoter Score	55 EPS			
	() Average Favorability	37%			
	: If you could choose one superpower, what would it be? [minimer/regin]	1. Teleporting 53% (息10)			
		2. Invisibility			
		3. Shapeshifting			
		4. Telepathy			
		5. Other			
		11% (上2) 6. Superhuman Strength 5% (上1)			

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.

	Add or modify the selection		Cance Apply				
ould it be?	Select from the available groups All Results Available Filters Team Survey Invitation Date If you could choose one superpower, what would it be? On a scale of 1-10, how funny is The Simpsons? You can take 3 things with you during a zomble apocalypse, what do you choose? Is the best color in the world. FLSA Status Total Tenure Band	 ✔ Compare all Red (\$.5) Green (\$.5) Blue (\$.5) Orange (\$.2) Yellow (\$.1) Purple (\$.1) 	1 15 Group All Results Multiple Comparisons Selected Green Blue	© Edit Report	Edit Survey	C See Survey	Create Il Results - Il 19 S5 EPS 37%

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.

75 EPS score © 14 Promoters © 2 Detractors 19 answered	75 EPS © Promoters (74%) are talking about see all > © Detractors (11%) are talking about see all >

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.

nple Survey	Save A New Bookmark	-
xt Insights Details	Favorite Color 66 characters left	. 0
Average Emotional Promoter	Score	
Average Favorability		
: If you could choose one super	rpower, what would it be? In: Untitled Page 1	

Saved Bookmarks (1) †	Bookmark ± Export
Questions (8)	Sample Survey 8 Questions
Survey Pages (3)	Average Emotional Promoter Score
	Average Favorability

- 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.

	Managa P	eport View	Vore		×
l	Invite View	vers 💌	Customize Email Invitation		1 0 Viewers
note	Manually Enter er Don't worr review the or Select f	y add viewe mail addresse ry! The act of e list first.	rs you are interested in invitir es separated by Add adding viewers WILL NOT invite t e Directory	ng to see these results the viewer. You'll have the chance to	Blue →
note	Select survey p Q. Jennifer Jennifer Brant Jennifer Collins Jennifer Collins Jennifer Collins Jennifer Franiko Jennifer Franiko Jennifer Garza Jennifer Glover Jennifer Infeld	articipants b It It adding	y name or email	Cancel Confirm u'll have the chance to	1 Other
	Select surve	y particip	ants by name or email		×
a	Q Search by name or email				
l	First	Last -	Email	Reports To	
Ie	Jennifer	Glover	gloverjl@co.larimer.co.us	Bridget Paris	â
br	Select fi	rom Employ	ee Directory	Cancel	Confirm

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.

