

Running Reports

A. Overview. *CapacityWare*TM is designed to run reports from the most convenient locations within the menu structure. Many reports will run from the Main Menu Reports pull down menu while others will run from the File pull down at the screen for which the report would make the most sense. New report products are always being programmed and would be included in the next version release. Check the web site for the latest version information by "clicking" Visit at the Main Menu.

B. Report Filters. Most of the reports are designed so that the user has maximum control over the report contents. To this end, an interim filter screen will normally intercede in the print selection process so that the user can determine what information is desired on the report. Figure 1 is an illustration of one of the filtering screens.

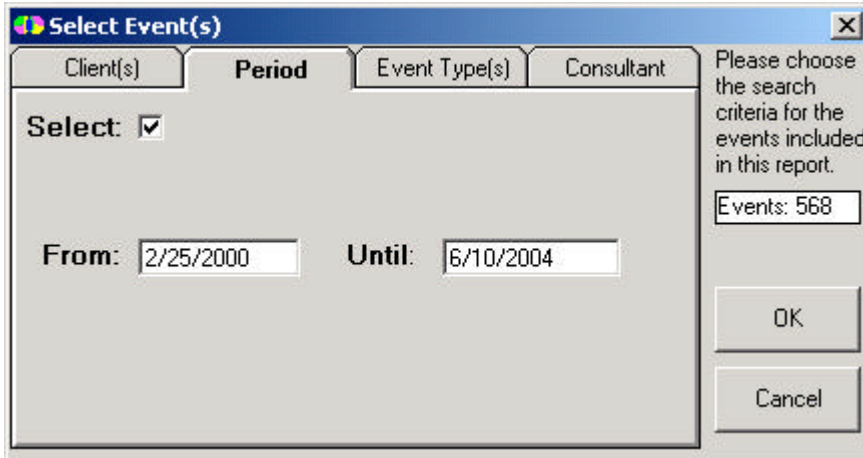


Figure 1 - Sample.

C. Main Menu Reports. The following Reports are currently available from the Main Menu.

1. Anonymous Survey Report. Attachment 2.9.1, Anonymous Survey Report, illustrates this report as requested. Users may specify the client and the period of the report. The results returned will be a count that matches the search criteria. This report is used to determine how many of those who complete an instrument do not use their actual name. The report may be misleading if the input "name" is computer generated so as to bypass respondent identification completely.

2. Client Event Participation. The report illustrated at Attachment 2.9.2, Client Event Participation, lists all Events attended by anyone from a particular organization. The Events need not be internal to the client. Some Events may be mixed client events, for example. The user can determine the level of participation for any client by consulting this report. One Event each calendar month with results reported to the workforce will yield a tenth of a point increase

in the *Quality of WorkLife Index*. *QWLI* improvement rates are tied directly to participation and results reporting.

3. Comprehensive Indexes. The report at Attachment 2.9.3, Comprehensive Indexes, Provides a wealth of information about the cultural capacity of the organization based on responses to a specific survey. A detailed explanation guide can be found at Tab 5 of the Diagnostic Report and Follow-through Manual.

4. Currency of Event Participation. Attachment 2.9.4, Currency of Event Participation Report, lists the last Event participation and the total number of Event participation occurrences that have occurred during the defined period identified by the user. The report allows one to judge the level of participation of individuals during a specific time period.

5. Demographic Count. The user can quickly determine which demographic parts of the organization need the most attention by reviewing Attachment 2.9.5, Demographic Count. This will tell the user how many people responded in each demographic as well as the Adjust-Mean and Aggregate-Mode for each demographic.

6. Demographics. Two reports detail information about demographic options:

a. Respondent Table. Attachment 2.9.6, Demographics for Instruments, lists those instruments that have received responses from each Organizational demographic.

b. Demographics Table. Attachment 2.9.7, Demographic Descriptions, lists the descriptions for each Demographic.

7. Event Participation Record. The Event Participation Record, Attachments 2.9.8.0 through 2.9.8.2, provides a "transcript" of Events in which the individual has participated. The three printing options include Individual, Demographic, and Event (the Event option has three potential options as well). Each printing option can be further refined by a specific period.

8. Event Roster. Attachment 2.9.9, Event Roster, can be produced in two possible configurations. The first includes those who have been invited to the Event, and the second includes those who have been invited but did not attend. The report is used to assist those who will Lead the Event and support the Event with Attendance records.

9. Hand Pie. This option allows the user to create an individual or a comparison RGB graphic report without the benefit of anyone having to take an inventory. No illustration is provided.

10. Items by UHS Category. Attachment 2.9.10, Items by UHS Category, lists the survey items adjacent the UHS category into which results are posted.

11. Periodic Event Activity. Within the parameters set by the user, Attachment 2.9.11, Periodic Activity Report, returns a compilation of activity in 15 potential areas. Users can determine the degree to which activity is sufficient to make projected improvements.

12. QWLI Summary. Attachment 2.9.12, Quality of WorkLife Summary, can be run for any demographic, and any Band combination. The user will be able to determine from the results the populations and range of each Band.

D. Other Reports Available at Specific Menus.

1. Best Practice List (Quotes Found Matching). "Click" on "File" (See Tab 4, Figure 3), then "click" on "Print." Attachment 2.9.20, Tab 9, presents a facsimile of this report. It is used to "capture" the results of a keyword or phrase search. There is also an option to place this information on a clipboard for insertion into any word document.

2. End Comments. When preparing Tab 4, Diagnostic Report and Follow-through Manual, end comments can be produced by "clicking" on "Instruments," then "End Comments," then "Print" from the Main Menu. See Tab 1, Figure 1. This report produces end comments for distribution to holders of the Diagnostic Report and Follow-through Manual as well as for other data feedback Events. Attachment 2.9.21, End Comments, is a facsimile for this product.

3. Event or Initiative Record. From initiation to retirement, Attachment 2.9.22, Event Record, is the complete documentation for an Event of any kind. Information from this record is used in a number of connected files as a means of determining the Activity taking place that might improve capacity. Initiative Records aggregate results of Events that are included with or linked to the identified Initiative. See Tab 7 for additional information. The "Event or Initiative" Records are reached from the Main Menu by "clicking" "Activities" then "clicking" to highlight a specific Event or Initiative, the "clicking" "File" and selecting "Make Report."

4. Event Priorities Report. Work groups and Facilitation Teams using *CapacityWare*TM tend to have specific task assignments related to up-coming and past Events. The Event Priorities Report allows each member of the work group or team to know the progress of Event activity as assigned, undertaken and completed by all members. The "Event or Initiative" Records are reached from the Main Menu by "clicking" "Activities" then "clicking" "File" and selecting "Priorities Report." Attachment 2.9.23, Event (or Initiative) Record, is an illustration of this product.

5. Item Pool Lists. In a large intervention a Survey Design Team is usually selected to help determine what information ought to be collected on an organization-wide survey. The *CapacityWare*TM Administrator can support this Facilitation Team task with copies of Item Pools from the system. From the Main Menu, "click" Instruments, then select "Item Pools," then "click" "Print" and follow the instructions provided. Attachment 2.9.24, Item Pool List, is an illustration of this product.

6. Quality of WorkLife Financial Summary. There are two ways to determine a financial return-on-investment, the first of these methods is to determine a potential loss based on value returned to the organization through payroll. First, a selection of "survey results" must have been selected at the Main Menu. See the instructions at Tab 1, paragraph D.2. Selected

Instrument. Once an instrument has been selected, "click" on "Financials" at the Main Menu, select "Capacity Estimator" (provide and select options) and then select "File" and "Print." The results of the report can be altered by selecting or providing a variety of information options that are detailed in Tab 8. The Quality of WorkLife Financial Summary is illustrated at Attachment 2.9.25.

7. Respondents List. "Click" on "File" from the 5a-Review Responses screen (See Tab 6, Figure 8), then Select "All Respondents." Attachment 2.9.26, Tab 9, presents a facsimile of this report. The report lists all individuals who responded to a selected instrument and provide the Demographics for each respondent listed. The report can be used to identify either respondents or demographics for any specific instrument.

8. Return-on-Investment Report. The second method provides far greater detail. It also requires greater input for the various options available. A complete discussion of this method is contained in Tab 8. Attachment 2.9.27, illustrates the resulting report. From the Main Menu, "Click" on "Financials" then select ROI. When sufficient information has been provided for the program to operate, the "Print" option will become functional. "Click" "Print" to produce the report.

9. Survey Facsimile. "Click" on "Instruments," from the Main Menu, then on "End Comments," then on "Print" (See Tab 1, Figure 1). Attachment 2.9.28, Tab 9, presents a facsimile of this report. It can be reproduced as a handout for feedback. It is used as the source document from which the survey is generated for finalization prior to reproduction and Distribution. See paragraph B.3., Package Finalization, Tab 2, Organization Change System.

E. Instrument Results Options. When viewing any display of results (see Tab 6), "Click" the "File" drop-down menu and select "Print" to print a copy of the results you are viewing. One or more interim screens may present options for the user to select along the way.

1. Individual Results Profile. Individual results isolate the instrument responses to those pertaining to a single individual. Individual profiles are used to understand better the thinking patterns of someone they work with in their organization so that performance can be improved.

2. Comparisons. Comparisons contrast the difference between one individual and another individual or group that can be isolated through a selection of demographics. Comparisons allow the user to display areas of "sameness" and areas of "disparity" between an individual and a group for the purpose of either understanding or predicting interpersonal or cultural. Dialog concerning comparisons are an essential ingredient in the coaching and mentoring routine. The most popular comparison is the UHS "Red Line" Profile that compares an individual with the organization in which they work.

3. Composites. Composites are created for a specific demographic group so that its aggregate (or cultural) behavior can be understood or predicted. The composite is used most effectively to understand the potential highest order needs of a group that must be satisfied to achieve improved performance.

F. Summary. The creation of Reports from *CapacityWare*[™] provides the user with vital information that saves valuable time in compiling data from other sources to manage change. Use the Reports available and suggest additional reports that will be useful to you as the primary front-line user of this Organization Change System.