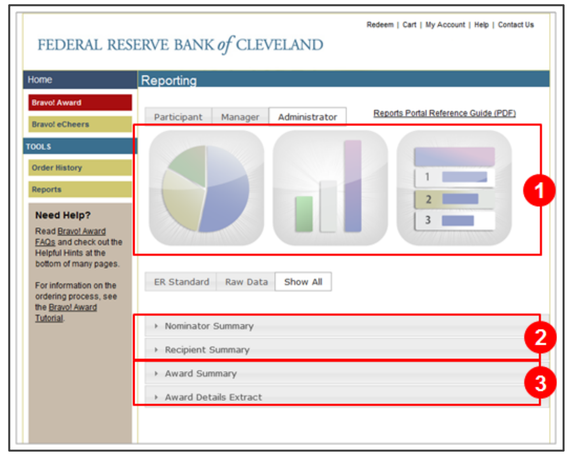
FEDERAL RESERVE BANK *of* CLEVELAND

Reporting Portal Quick Start Guide

Overview of Core Reports

There are three primary types of reports available in the reporting portal: **Dashboard Reports**, **Summary Reports** and **Admin Reports**.

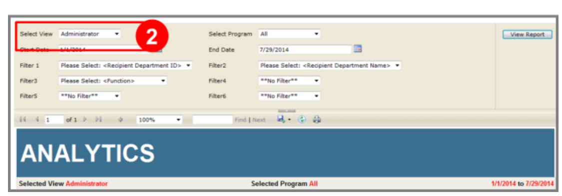


1. Dashboard Reports: Consolidate and summarize **award volume** across all programs. Monitor and assess where and when recognition activity is occurring. Click-through functionality enables users to quickly drill into relevant details.
2. Summary Reports: Provide **detailed nominator and recipient information**. Identify who is actively participating in the programs and how they are getting involved. Drill into specific award details.
3. Admin Reports: Administrators have access to additional **Award Summary** and **Data Extract** reports to help manage participant questions and process data outside of the reporting portal.

Report Views

Report views will vary depending on the role of the user logged into the portal.

- **Administrators** will be able to view ALL program activity across all work groups.
- **Managers** will be able to view all activity for team members that report to/roll up to them (including their own activity).
- **Individuals** will be able to view their personal activity.



Some participants may have two or more roles. If so, they can change their report view one of two ways:

1. On the reporting portal home page they can toggle between views at the top of the page, or…
2. Most reports will provide a drop- down parameter that will allow the use to change their view.

General Navigation and Quick Tips about the Reporting Portal

- To access the reporting portal, click on any program that appears on the left navigation menu of the website, and then click on the **Reports** link listed under the **Tools** section.
- Dashboard reports are set up to default to a year-to-date (YTD) view for all programs, but the parameters for all reports can be modified to refine your report view before launching the report. Leaders with direct manager reports can also select a manager view to segment the results for a specific team.
- Summary reports will require you to indicate a desired date range for the initial report view. However, the report parameters may be changed within the report view itself to further refine the results.
- Many of the graphs have hover-over and click-through functionality to allow you to see more detail.
- Most columns in the tables are sort enabled. Simply click the arrows in the column header to sort columns in ascending or descending order.
- All report views can be exported by clicking the **Export Drop Down Menu** icon ( ) located directly above the report.

Other Tips and Tricks

- When a user drills into the details by clicking on an element of the report, breadcrumb navigation will appear near the top of the report. Simply click on the originating report link to return directly back to the report. *(It is recommended that you use the breadcrumb links to go back to previous report views rather than using your browser's back button since the performance can vary by browser)*.
- Reports will be launched in a new window. Users can navigate back to the reporting portal Home page by exiting the current window, or clicking on the active tab in the browser's navigation.
- If your reporting request does not return results, double-check the report parameters at the top of the report to ensure that your settings reflect the correct criteria you want to pull. If not, simply adjust the report parameters and click the View Report button to refresh the view.
- For more information about navigating through the reports, there is a detailed user guide available as a downloadable PDF from the reporting home screen (See link "1" referenced to the side).