# Ad Hoc Reporting

Ad Hoc Reporting is designed to allow users to dive deeper on the Awareness, Recall, Image, and Preference metrics f rom the Brand Dashboard. View data by age, gender, ethnicity/ race, presence of children, insurance, and income. Trend multiple metrics together to see patterns in upticks of preference. Understand the unique preferences of different demographic segments.

HOW TO NAVIGATE THE DASHBOARD

Selecting your Brand

Your organization has the opportunity to determine how you want to represent your **brand**. You may want to show your entire health system (aggregate level), individual facilities, and/or additional groupings. When viewing the brand dashboard, you can toggle between these different brands.

Choose an available **Brand** to see a summary of what is happening for this area of your organization.
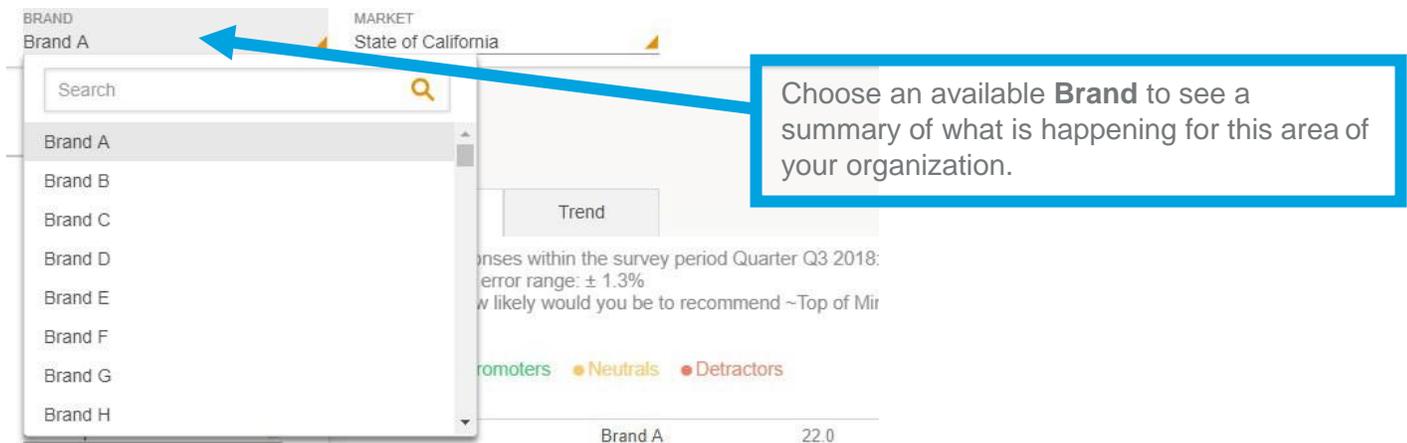
Additional brands can be added upon request.

Selecting your Market

Upon selecting your brand, your organization has the opportunity to determine the market in which you want to see your brand represented. The amount of markets you may have listed are unlimited, but they are based upon state, county codes and/or zip codes.

Choose an available **Market** to choose the market you wish to see your brand represented.

*Additional markets can be added upon request.*

Selecting your Time Period

Your organization has the opportunity to determine the time period reflecting within your dashboard. This allows you to choose the amount of time represented in each data point (month, quarter, year, etc.) as well as the last time period that should be shown.

Choose a **Time Period** to determine how much data should reflect in each data point, as well as the last date that should be included in the reporting period.
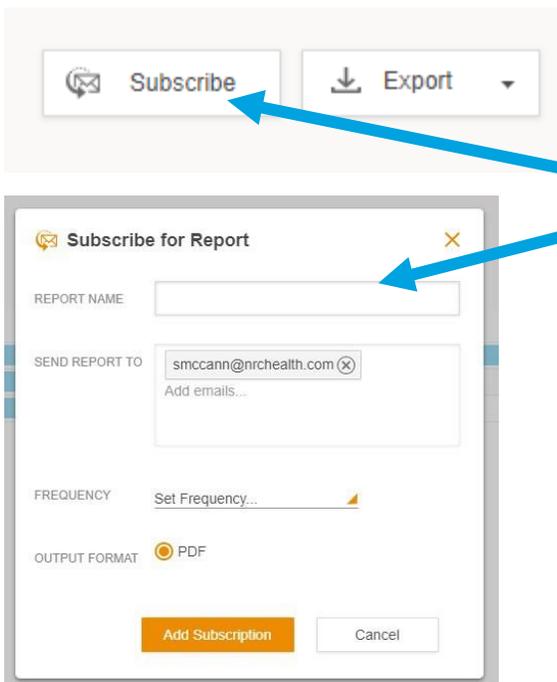
Exporting your Data

All dashboard information may be exported into a number of different formats, including: PDF, Image and CSV.
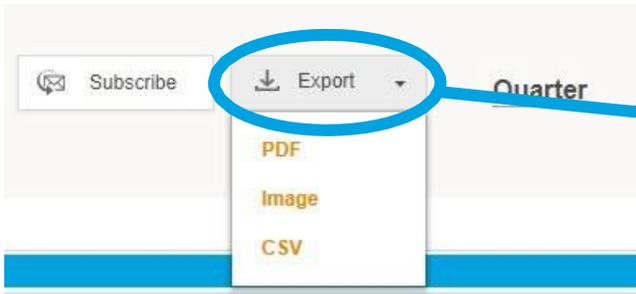
Select **'Export to PDF'**, '**Export to Image**' or '**Export to CSV**' to export dashboard data into the format of your choice.

Subscribing to the Dashboard

Each user has the opportunity to set up dashboard **subscriptions** – which allow the dashboard to be emailed directly to selected users per your preferred frequency.

Select '**Subscribe**' to set up subscriptions for yourself and your team. Choose who the report should be sent to, how frequently, and what format is most appropriate.

Understanding the Profile View

Within the Ad Hoc Reporting, you can split the data for a specific time frame by age, gender, race, children, income and insurance for the time period you have selected.

Select from the drop down the demographic you would like to use to segment the data.

The colored bar graph represents your team and your competitor scores. This is showing the percentage of consumers mentioning you (or your competitor) as first choice.

After selecting an option within the 'Split By' section, the profile view updates to expand that view.

Similar to the 'Split By' section, you may also select a multitude of additional filtering features, including: age, gender, ethnicity/race, presence of children, insurance, and income. Multiple filters may be selected at one time.

Showing/Hiding Competitor Data

Your organization has the opportunity to pre-select up to five competitors per entity per market. This allows you to see how your brands are doing in comparison with their direct peers. Competitor data, by default, is shown in Ad Hoc Reporting. You may elect to show the competitor data or hide data.

Select **'Show Competitors'** to include competitor data within your dashboard.

After selecting 'Show Competitors', click **'List of Competitors'** to pick and choose with competitors you would like to have reflected in your dashboard.

Interpreting the Data

Each graph provides information regarding **score**, **number of market responses**, and **error range**. This can be found by hovering over a specific data point as show below.

Hover over any metric to view score, market responses, and error range for that timeframe.

Understanding the Trend View

Within the Ad Hoc Reporting, you have the ability to split the data by brands, question, age, gender, race, children, income and insurance for the time period you have selected.

The colored line graph represents the score of your team and your competitor scores. This is showing the percentage of consumers mentioning you (or your competitor) as their choice.
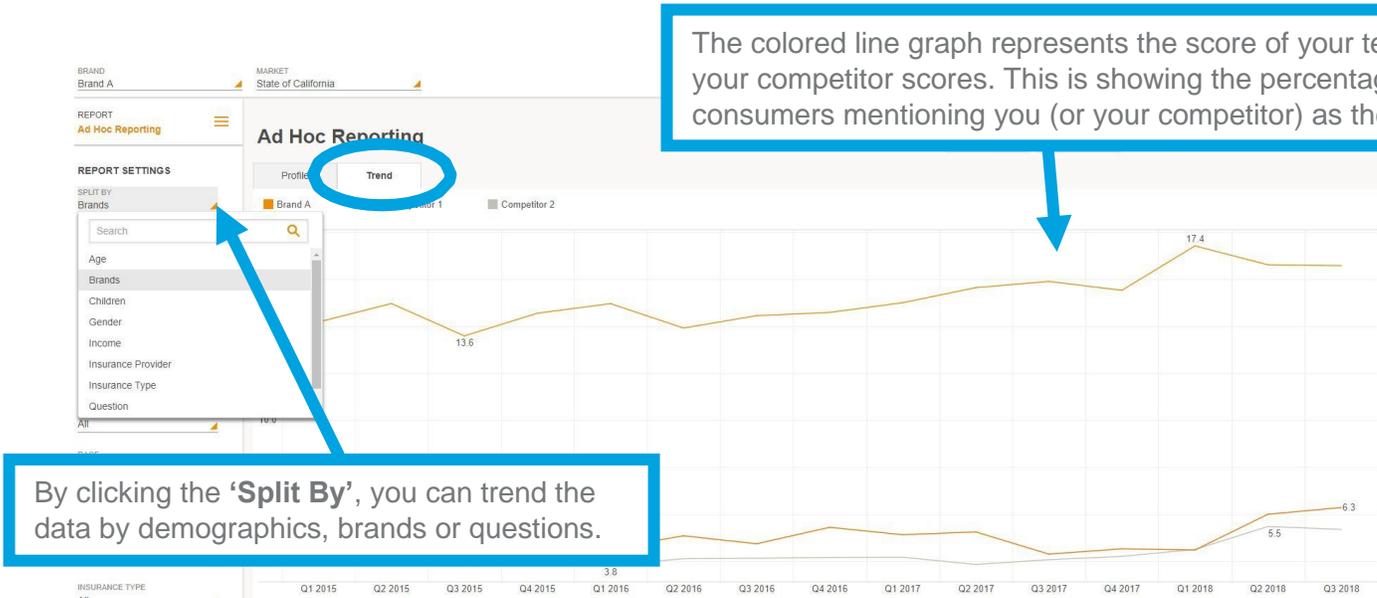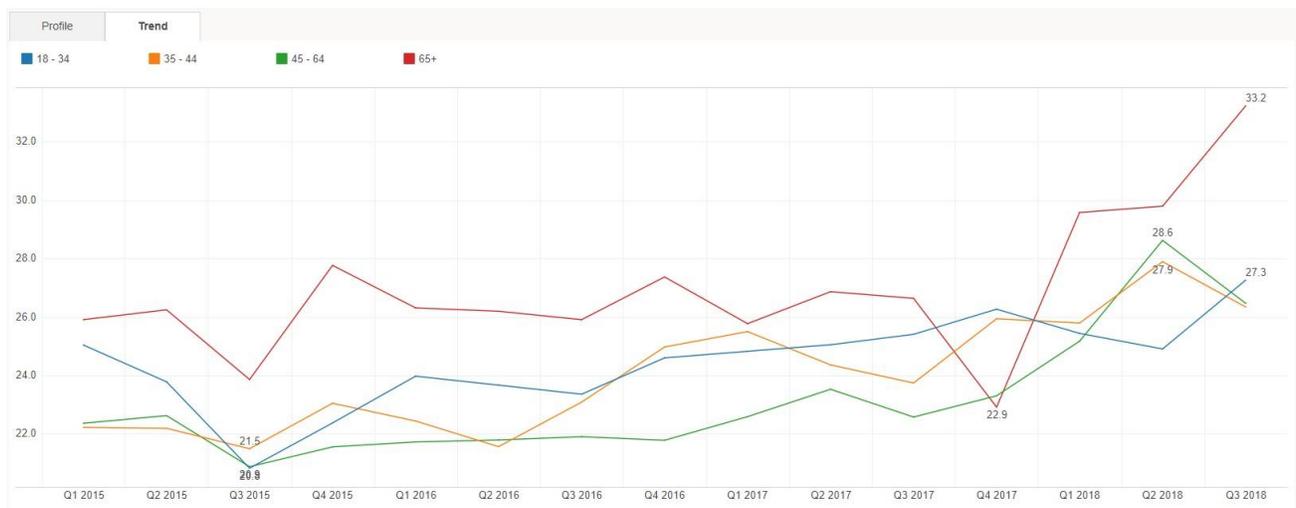
By clicking the **'Split By'**, you can trend the data by demographics, brands or questions.

After selecting an option within the 'Split By' section, the profile view updates to expand that view.

Similar to the 'Split By' section, you may also select a multitude of additional filtering features, including: age, gender, ethnicity/race, presence of children, insurance, and income. Multiple filters may be selected at one time.

Selecting Questions

Ad Hoc Reporting allows you to dig into Awareness, Recall, Image, and Preference metrics. Start by selecting the **'Question Type.'** You have the ability to select more than one question type at a time.

REPORT SETTINGS

SPLIT BY
Age

COMPETITORS
All

QUESTION TYPE
Image

Once you have selected the **'Question Type(s)'** you would like to view, click **'Apply.'**

After you have selected the question type you would like to view, you can now select the question/s you would like to analyze.

REPORT SETTINGS

Profile

SPLIT BY
Age

☐ 18 - 34

COMPETITORS
All

QUESTION TYPE
Image

32.0

QUESTION NAME
Best Doctors

30.0

Search 🔍

☐ All
☐ Best Accommodations/Amenities
☐ Best Community Health Programs
☑ Best Doctors
☐ Best Image/Reputation
☑ Best Nurses
☐ Best Overall Quality
☐ Care For Those Unable To Pay
☑ Highest Patient Safety

Apply   Cancel

Once you have selected the **'Question Name(s)'** you would like to view, click **'Apply.'**