**Slide 1**

Welcome to this Micro Learning Session on Custom Reports for Managers.

Let’s get started

**Slide 2**

From the e-VA Dashboard Landing Page, start by clicking on “Reports” (Step 1), Once the page displays, hover your mouse over the “General” tab (Step 2). Once the dropdown list appears, select “Manage Report Groups” (Step 3).

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From the Manage Report Landing Page, click on the “Add Report Group” button (Step 4) on the far-right hand corner of the page

The Report Group Pop-up Window will appear. Within the “Group Name” field box, type the name you want for your group as the report name (Step 5). For Example, “Team Rock Stars”.

**Slide 4**

**The Add Report Group Pop-Up Window will appear.**

Select the Names of Staff for your Team from the “Staff Not Included in Group list” on the left (Step 6) and move them over with the arrows to the “Staff Included in Group List” on the right and click on the “Save” button (Step 7) at bottom right of pop-up window.

**Slide 5**

Now we will watch a demonstration of Creating a Custom Report (Step 1 thru 7) begin completed. From the e-VA Dashboard Landing Page, start by clicking on “Reports” (Step 1), Once the page displays, hover your mouse over the “General” tab (Step 2). Once the dropdown list appears, select “Manage Report Groups” (Step 3). From the Manage Report Landing Page, Click on the “Add Report Group” button (Step 4) on the far-right hand corner of the page. The Report Group Pop-up Window will appear. Within the “Group Name” field box, type the name you want for your group as the report name (Step 5). For Example, “Team Rock Stars”. Select the Names of Staff for your Team from the “Staff Not Included in Group list on the left (Step 6) and move them over with the arrows to the Staff Included in Group List on the right and click on the “Save” button (Step 7)

**Slide 6**

From the Report Dashboard landing page, go to the upper right-hand corner of the page and select Change Office/Report Group (Step 1). The Change Office/Report Group pop-up window will appear. Click down arrow on the View Reports to use the search field or use the dropdown list to find your Team (i.e Team Rock Star) (Step 2).

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After you select “Team Rock Star” from the dropdown list, Click “View Report Selection” Button (Step 3). Now when you view any of the Reports in e-VA, your direct report’s will be part of the displayed report data based on your custom report. You can use the custom report to get a general view of your direct report’s performance and targets on how to better support them**.**

**Slide 8**

Now we will watch a demonstration of Setting Your Report View (Step 1 thru 3). From the Report Dashboard landing page, go to the top right side the page and select Change Office/Report Group (Step 1). The Change Office/Report Group pop-up window will appear. Click the down arrow on the View Reports section to use the search or use the dropdown list to find your Team (i.e Team Rock Star) (Step 2). After you select “Team Rock Star” from the dropdown list, Click “View Report Selection” Button (Step 3).

**Slide 9**

Click on the Performance Tab on blue banner to see the available performance report metrics. This will be the Performance Time Series (Step 1) and Performance Summary (Step 2). Only Performance Time Series and Performance Summary Reports (Step 2) will be available from the Manage Report Groups. The illustration below displays the steps to access each report. You can use the To and From date fields to pull any period of time, then click submit button. The report will show your Staff’s logins, activity,

**Slide 10**

Now we will watch a demonstration of Performance Time Series (Step 1). From the Report Dashboard Landing Page, Select or hover your mouse over the Performance tab. A drop down will appear then click Performance Time Series. The Performance Time Series report will appear below. On the top left of the screen, you see “showing Team Rock Stars” You can use the To and From date fields to pull any period of time, then click the submit button. The report will show your staff’s performance categories in Logins, Activity, Client /Scheduled, Unviewed Alerts, Alert Actions, Communications and Entered Employment by the times series charts.

**Slide 11**

Now we will watch a demonstration of Performance Summary (Step 2). From the Report Dashboard Landing Page, Select or hover your mouse over the Performance tab. A drop down will appear then click Performance Summary. The Performance Summary report will appear below. On the top left of the screen, you see “showing Team Rock Stars”. You can download the report by 3 methods displayed ( Excel, CCSV or Print). The report will show a quick overview of your staff’s name, title, number of logins, number of activities, caseload size, number of idle cases in eVA, percentage of idle cases, number of red, yellow, and black alerts, number of alerts viewed, number of actions taken, client initiated contact to staff, staff initiated contact with client, number employed and placement percentage. The report also totals all the categories as the overall team at the bottom of the report.