

Tracker reporting tools: *What's available?*

Part of the power of UBT Tracker is the ability to view and/or extract just the information and data you want. You can choose from pre-formatted reports with basic team information, generate run charts on Tests of Change, or opt to extract raw data in Comma Separated Value (CSV) files, which can then be worked with in programs like Excel, Access or Statit.

FIGURE A

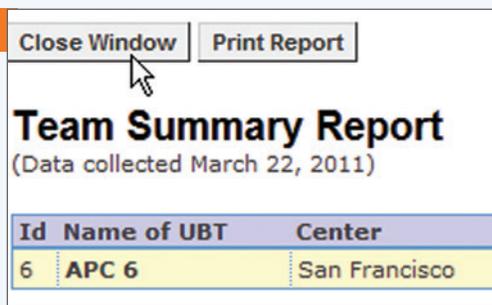


FIGURE B



See reverse for instructions on how to get these reports. More information is also available in the UBT Tracker User Guide, which can be downloaded at LMPartnership.org/tools/ubt-tracker-user-guide.

Questions? Email UBTtracker@kp.org.

Preformatted reports

The primary difference between the Team Summary and the Team Detail reports is the amount of detail you get about the team's performance improvement projects.

(see figures A and B)

TEAM SUMMARY	TEAM DETAIL
name of team	name of team
location	location
number of teams	number of teams
team ranking	team ranking
team leadership	team leadership
one-line summary of each performance improvement project	all data from the Project Details tab

Test of Change run charts

Teams that make use of the **TEST DATA** tool can generate simple run charts that show how their tests of change are impacting their outcomes. (see figure I on reverse)

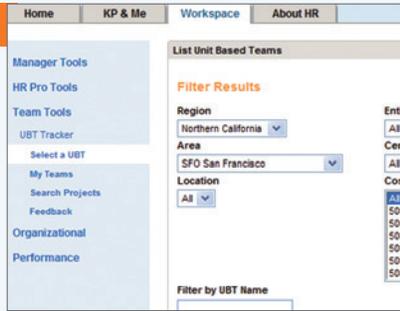
Raw data extracts

Using this option, you can develop a variety of different reports, including:

- the details of performance improvement projects,
- tests of change,
- basic information about unit-based teams, including whether the teams are using huddles, what their ranking is on the Path to Performance and who their sponsors are, and
- how many employees in a given area are in UBTs.



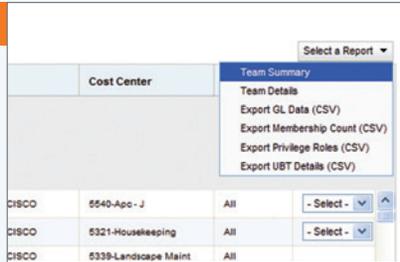
FIGURE C



How do you get a report on multiple teams or projects?

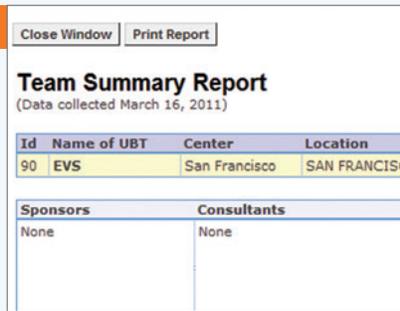
1. Get a list of the teams you're interested in by using the filters on the **SELECT A UBT** or **SEARCH PROJECTS** pages, or go to your **MY TEAMS** page. (see figure C)
2. From the **SELECT A REPORT** tab on the right-hand side of the screen, choose what you want from the drop-down menu. (Two CSV extracts, Membership Counts and Privilege Roles, can only be accessed from the **SELECT A UBT** screen.) (see figure D)

FIGURE D



- If you choose one of the preformatted reports, it will appear immediately; you can print it out by clicking on the print button in the upper left of the screen. (see figure E)
- If you choose a CSV report, a dialogue box appears and you can then save the file to your hard drive. (see figure F)

FIGURE E



How do you get individual team/project reports or test of change run charts?

Navigate to the **PERFORMANCE IMPROVEMENT PROJECT** page by clicking on the team name (from the **SELECT A UBT** or **MY TEAMS** pages) or on a project name (from the **SEARCH PROJECTS** page).

1. Look on the right-hand side of the screen for the **TEAM REPORTS AND EXPORTS** or **PROJECT REPORTS AND EXPORTS** buttons. From their respective drop-downs, select which preformatted report or CSV data export you want. (see figure G)
2. To get a test of change run chart: Use the **PROJECT REPORTS AND EXPORTS** drop-down and choose the **TEST DATA CHARTS** option. (see figures H and I)

FIGURE F

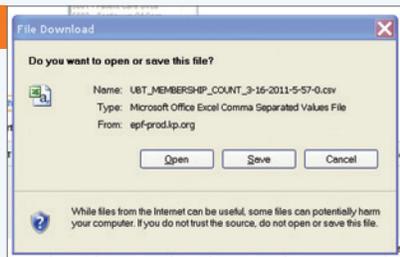


FIGURE G



FIGURE H

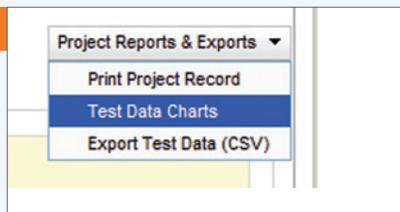


FIGURE I

