

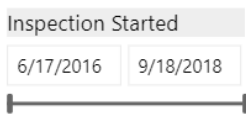



# Dashboard User Guide

## About the Dashboard

The Inspect analytics dashboard is a robust feature for performing dynamic reporting on various data points. Users can analyze statistics and trending issues to improve program compliance. Data displayed on the dashboard can be exported in multiple reports to meet your business needs.

## Dashboard Controls

Use the dashboard controls to view different data layers based on your business needs.

Dashboard Controls	Description
	<p>Displayed on every dashboard tab, there are a variety of filters for dynamic reporting on various data points. Filters allow users to analyze statistics and quickly identify trends to improve program compliance.</p>
	<p>Drill down the data by clicking on any chart or using the buttons in the upper corners when hovering over a chart.</p> <ul style="list-style-type: none"> <li>• Double arrow – expands data across all programs</li> <li>• Single arrow – groups all locations by date (e.g., year, FY quarter, month, and days)</li> </ul>
	<p>Select the <b>Focus Mode</b> button to expand a view.</p>
	<p>To export tables to Comma Separated Value (CSV) format, click the ellipsis and click. <b>Export data.</b></p>

## Inspect Dashboard Tabs

A variety of tabs allow a user to view data at the bottom of the screen.

## Overview

- Provides users with the total number of inspections and findings across all locations for campus/organization. Each bar shows a breakdown of the compliant, not compliant, and not applicable responses. The line graph across the top shows overall weighted compliance
- The system default tab of the analytics dashboard
- Drill down levels include, year, FY quarter, month, day, program, inspected, configuration, and category
- The data displayed is static but is refreshed nightly, the last update is listed in the upper right corner
- Focus numbers across the top of the screen provide a quick summary of the number of inspections and quantity of findings, including the percentage of compliance
- The left-hand filters allow for analyzing compliance within a specific date range, for one or multiple checklists, for one or multiple subjects of inspection (department, unit, equipment, building, etc.), and by inspector

## Overview: Data logic and calculations

- Data calculated on the initial result of the inspection report
- Multiple findings per checklist item(s) are included in the equation, but weighted
- “Percentage (%) Compliant (Weighted)”: Count the total occurrences of the checklist item. For each finding, divide by total occurrences to get the weighted value. By summing the weighted value of only Compliant findings, divide by the count of Checklist Items to get % Compliant (Weighted)

## Top

- Provides an analysis of most identified non-compliant items for a specific location for a specific period
  - To get more specific, adjust the filters on the left. Adjust for a specific date range, select one or multiple programs, one or multiple checklists, by subject of inspection (building, department, group, etc.), or by category.
- System default displays the top three findings in order from least to most compliant; users can choose the number of items to view or use the eraser to see all checklist items ranked in this order
- Rank by Findings allows users to identify significant non-compliances or trending issues for a program/location, from most to least compliant
- Findings Detail shows all instances (unit of inspection) where the ranked findings have been identified with all associated captured data
- The data displayed is static

### Top: Data logic and calculations

- Data calculated on the result of non-compliant findings per inspection and not the current resolution status of the finding
- Multiple findings per checklist item(s) are included in the equation, but weighted
- “Percentage (%) Compliant (Weighted)”: Count the total occurrences of the checklist item. For each finding, divide by total occurrences to get the weighted value. By summing the weighted value of only Compliant findings, divide by the count of Checklist Items to get % Compliant (Weighted)
- “Ranking Score”: Count the number of total occurrences of the checklist item. For each finding, divide by total occurrences to get the weighted value. Find non-compliant ones by summing the weighted value of findings.

### All Items

- Provides a comprehensive list of all checklist questions, filterable by date range and the subject of the inspection (department, location, shop, lab, etc.)
- Displays the number of times the question was answered (or skipped), the quantity of non-compliant findings per question, the quantity of instances for each, and the percentage of compliant
- System defaults for all data entered into the system for the organization based on role permissions
- The data displayed is static

### All Items: Data logic and calculations

- Comprehensive data dump for all information entered into Inspect for the organization and based on lefthand filter selection
- Multiple findings per checklist item(s) are included in the equation, but weighted
- Percentage (%) Compliant (Weighted): Count the total occurrences of the checklist item. Divide by total occurrences for each finding to get the weighted value. By summing the weighted value of only Compliant findings, divide by the count of Checklist Items to get % Compliant (Weighted)

### Unresolved

- Provides the total number of unresolved inspections, number of checklist items, and findings that are incomplete during a specific period
  - Provides the total number of inspections with unresolved findings, number of questions with unresolved findings, and the total number of unresolved findings (items) during a specific period

- Use the filters on the left to select a specific date range, program(s) or checklist(s), subject of inspection (lab, building, department, etc.), and category
- Use the Exceeding filter to view findings exceeding a number of days overdue.
- The system defaults to an annual comparison
- Drill down levels include year, FY quarter, month, and day
- “Unresolved Findings Detail”: Allows users to identify significant unresolved or open findings, ranked from most to least, easily identifying trending issues for a program/location for a calendar year
- Data displayed is static, updated nightly, based on status and not the initial report finding values

### **Unresolved: Data logic and calculations**

- Data calculated on the results of an inspection report, checklist items, and findings
- Multiple findings per checklist item(s) are included in the equation
- “Unresolved Inspections”: Calculates the number of incomplete inspections, including all inspections with unresolved findings or outstanding items (based on lefthand filter selection)
- “Unresolved Checklist Items”: Calculates the number of open or unresolved checklist items for all inspections entered in the system (based on lefthand filter selection)
- “Unresolved Findings”: Calculates the number of open or unresolved findings for all inspections entered in the system (based on lefthand filter selection)
- “Exceeding Filter”: Allows the user to select a numerical range to identify items that remain unresolved beyond (exceeding) the number of Days To Resolve associated with an item

### **Resolved**

- Provides the total number of resolved inspections, number of checklist items, and findings completed during a certain period
- The system defaults to an annual comparison
- Drill down levels include year, FY quarter, month, and day
- Use the filters on the left to select a specific date range, program(s) or checklist(s), subject of inspection (lab, building, department, etc.), and category
- Use the Days Resolved filter to view findings resolved within a set number of days
- Resolved Findings Detail allows users to identify the most significant findings resolved, ranked from most to least, easily identifying trending issues for a program/location for a calendar year
- Data displayed is live, based on status and not the initial report finding values

### Resolved: Data logic and calculations

- Data calculated on the results of an inspection report, checklist items, and findings
- Multiple findings per checklist item(s) are included in the equation
- “Resolved Inspections”: Calculates the number of complete inspections (based on lefthand filter selection)
- “Resolved Checklist Items”: Calculates the number of resolved checklist items for all inspections entered in the system (based on lefthand filter selection)
- “Resolved Findings”: Calculates the number of resolved findings for all inspections entered into the system (based on lefthand filter selection)
- “Days Resolved Filter”: Allows the user to select a numerical range to identify resolved items between the number of days

### Percentage (%) Resolved

- Provides data that can determine whether findings are being resolved within a specific period, are unresolved but are not overdue, or are unresolved and overdue
- The system defaults to an annual comparison and comparison by subject of inspection
- Drill down levels include year, FY quarter, month
- Use the filters on the left to select a specific date range, program(s) or checklist(s), subject of inspection (lab, building, department, etc.), and category
- Use the Resolved Within filter to view findings resolved within a set number of days.
- Data displayed is live, based on status and not the initial report finding values
  - Data is updated nightly, so it does not reflect live/current data

### Percentage (%) Resolved: Data logic and calculations

- Data calculated on the result of non-compliant findings per inspection
- By inspected locations and # findings at location
- “% Resolved Within Count of Findings”: That were resolved days within the filter (Resolved Within (Day)) divided by “Total Non-Compliant Findings” for the period
- “% Not Resolved (Within)”: Count of findings that were not resolved days within but still within the “Filter (Resolved Within (Day))” divided by “Total Non-Compliant” findings for the period
- “% Not Resolved (Not Within)”: Count of Findings that were not resolved days within and not within the Filter “(Resolved Within (Day))” divided by “Total Non-Compliant Findings” for the period
- “Findings”: The total “Non-Compliant” findings for the period

### Comprehensive

- Provides a full analysis of inspection data for an organization

- System defaults for all data entered into the system for the organization based on role permissions
- Drill down levels include location, year, FY quarter, month, day, program, inspected, configuration (checklist), and category
- Use Dashboard features to scope data for analysis
- This tab is most commonly used to export data and analyze outside RSS
- The data displayed is static but is refreshed nightly

### **Comprehensive: Data logic and calculations**

- Comprehensive data dump for all information entered into Inspect for the organization
- “Percentage (%) Compliant (Weighted)”: Count the total occurrences of the checklist item. For each finding, divide by total occurrences to get the weighted value. By summing the weighted value of only “Compliant” findings, divide by the count of “Checklist Items” to get % Compliant (Weighted)

## Inspect Admin Dashboard

Located at the bottom of the screen are various tabs allowing a user to view data from different vantage points within the analytics dashboard. Tab description and functionality are included below:

### Location Lists & Managers

- Provides an exportable list of all inspection subjects (building, lab, unit, equipment, etc.) associated with the checklist and the responsible person(s) for each with associated emails
- Use lefthand filters to scope to correct checklist(s)

### Checklists

- Provides checklist categories, questions, and action plans in an exportable format
- Use lefthand filters to scope to correct checklist(s)

### Planning

- Provides all subjects of inspection (building, lab, unit, equipment, etc.) inspected, including inspection units that have not been inspected, for a given date range
- Useful for a quick snapshot of where you are in your inspection cycle
- Use lefthand filters to scope to correct checklist(s) and date range
- The data displayed is live
  - Data is updated nightly, so it does not reflect live/current data
- Focus numbers across the top of the screen provide a quick summary of the total number of locations in the system for an organization, the total number of inspections to

date, the total number of locations not inspected, and the total percentage (%) inspected for a given date range and checklist(s) and program selection

**Planning: Data logic and calculations**

- “Percentage (%) Inspected”:  $\text{Inspected} / \text{Total Unit} * 100$

**Historical Comparisons**

- Provides information on all completed inspections and findings completed for an organization within a specified date range
- The system defaults to overall program results (inspections and findings) by unit of inspection (lab, department, building, etc.), including the ability to display side-by-side data comparisons for a given date range
- Drill down levels include year, FY quarter, month, and day as well as compare year over year compliance information for each unit of inspection for which there is data
- Use lefthand filters to scope to correct checklist(s) and program
- Use to identify trends easily
- The data displayed is static
  - Data is updated nightly

**Historical Comparisons: Data logic and calculations**

- Data calculated on the result of non-compliant findings per inspection