Recognition Toolbox Training
Budget Report: Reports that show a budget overview summary as well as reports that show all transactions that have been tracked by the budget.

Rules Report: Shows activity generated by system activity rules. Shows what outcomes come from the rule points deposited, emails sent, rules are set, etc.

Points Summary Report: A report to see points received and points redeemed for each nominee.

Redeemed Activity Report: A report to see all points received. This report shows all monetary awards (monetary, memorandum, monetary + thanks, reward codes, group activity, rule deposits, etc.)

Issued Activity Report: This report shows all monetary awards (monetary, memorandum, monetary + thanks, reward codes, group activity, rule deposits, etc.)

Transaction Report: A report to see all transactions that have been sent or received. You will be able to filter the report based on the fields defined by the filter.

Order Activity Report: A report based on the redemption. This report will show all order activity information, including pending awards.

Nomination Report: Will display all award nominations. Tier level, status, and details. A report based on nominations activities for the current program.

Trending Report: Will visually and numerically demonstrate trends for utilization, reach, activity given, and activity received.

Live Stats: A visual report that displays some day activity as of midnight local time.

Reports Options

(Not all report options will apply. You may not have access to a report that is not relevant to your program.)
Same manner. This example will walk you through the basics of running a Nomination Report. Most reports are built and run in the same manner.

From the recognition site, select Toolbox.

How to navigate to reports.
Select a report of your choice.
Your view may vary from what is shown in the image below.
In the reports landing page you will have a view to all of the reports that are applicable to your program.

How to run a report
All specific report landing pages will house any previous reports whether active (downloadable) or inactive (not downloadable). On this page you will also be able to create new reports, as well as re-run inactive reports in the list.
How to run a report

Report building screen
How to schedule a report
open up a search field.

options in creating a new report screen.

How to run a report
Items have been selected. Select the report with the "Report Selected" option. Once the information is moved over the "Select" option, highlight the needed item and information. If you are wishing to view specific

Report filters automatically default to show all available

Department, Division, etc.

For example:

Criteria supplied on data file.

Filters can be added based on the content and

scope for each report.

By using filters, you're able to narrow down the

Filters

Options in creating a new report screen

How to run a report
How to run a report

- Completed reports that are ready to download will have a symbol that looks like a checkmark.

- Added report will be at the bottom of the list with a status of "Pending", represented by a symbol of a clock.

- Once you have filled out all of the desired fields, click save at the bottom of the report. You will then be directed to the report's landing page and see a confirmation at the top of the page that says "Report created successfully."
To access the newly created report, select the 'Refresh' button from this page.

Accessing new report

How to run a report
How to run a report:

1. Report data is refreshed every morning by 7 am MST.
2. A pop-up box will appear that will allow you to open or save your report.
3. Once report is ready, click on selected form of Download, CSV, XLS, or ZIP file.
This will direct you back to the main reports landing page.
To change report types at any time you can click on "Smart Reports" to the left of the screen.

How to run a report
Current vs Historical

Current

- Real-time transactions
- Transactions from current business
- Recent activity

Historical

- Export of data
- Detailed view of transactions
- Archival of data
- Transactions from past business
- Historical data

Note: Without the current reports, neither "Current" nor "Historical" will yield the same output.
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Engaging Workplace Cultures