

# Reports

08/21/2024 2:03 pm CDT

## Overview

P2A Navigator's Reports feature allows you to "Tell a good story" - #openness and #transparency

By generating reports for Organizations, Systems, and Teams, you can share visual representations of data with stakeholders.

## Report Types

All available reports are displayed, grouped by type, with a thumbnail and description. There are currently 3 types of reports.

### Capability Summary Report

The capability summary report shows data about each capability at the given capability level for the selected nodes (Organizations, Systems, or Teams), but aggregates all of the nodes into one view. It is useful to have a streamlined at-a-glance view that summarizes where the selected group is at in their Path to Agility.

### Capability Detail Report

The Capability Detail report shows each capability at the given capability level for the selected nodes, displaying each capability score for each node within an Agile Outcome. It also displays trends for each score, which is another difference from the Capability Summary report above. It can be used to dig deeper into trends between teams within an organization, and surface systematic issues that may be present.

### Assessment Summary Report

The Assessment Summary report is intended for a single node (Organization, System, or Team) to export for their team that lists all capabilities, sorted by P2A Index, and their descriptions, acceptance criteria, and any Action Items or notes that the team has added. It is beneficial to export it after an assessment, so that team members that might not be within the tool can still read through where the team is at currently.

### Notes Report

The Notes report exports all notes on a specific level of capabilities (organization, system, or team) for a selected set of nodes (organizations, systems, or teams). It is useful to identify trends of impediments between teams. This report is unique from the others, as it exports to a CSV file, which begins

downloading when the report is generated.

## Key User Interface Elements

Access Reports functionality by clicking the **"Reports"** in the main navigation, then selecting the report type you would like to use.

## Configuration

### View Data For

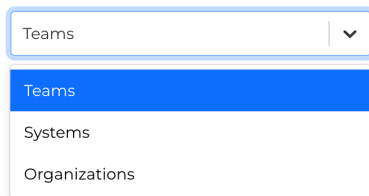
Once you've clicked on a report type, use the **"View Data For..."** selector to choose from the available options:

[← Back to Report List](#)

### Capability Summary Report

Configure and generate a Capability Summary report.

View Data For...



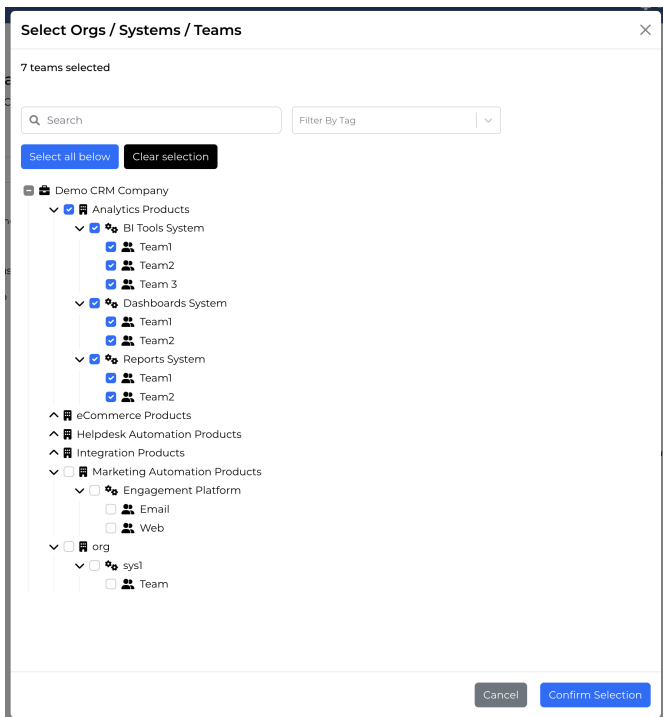
A dropdown menu with a light blue border. The selected item is 'Teams', which is highlighted with a blue background. Below it are 'Systems' and 'Organizations'.

Most Recent Data  Custom Date Range

### Select Individual Items

Then **"Select"** the individual items to be included in the report and then click "Confirm Selection"





## Select Data Range



Note: Reports will include data from **both** published and unpublished assessments.

Report configurations default to "Most Recent Data".

Choose a Custom Date Range to override the default:

Most Recent Data  Custom Date Range

Data Start Date

11/27/2023



Data End Date

02/27/2024



## Generate Report

Click "Generate" to generate the report based on the settings.

Generate →

A report preview will be created. Scroll through pages, zoom in, etc. In the case that you have selected more than 50 nodes to use within the report, there will instead be a link to open the report instead of the preview.

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## Capability Summary Report

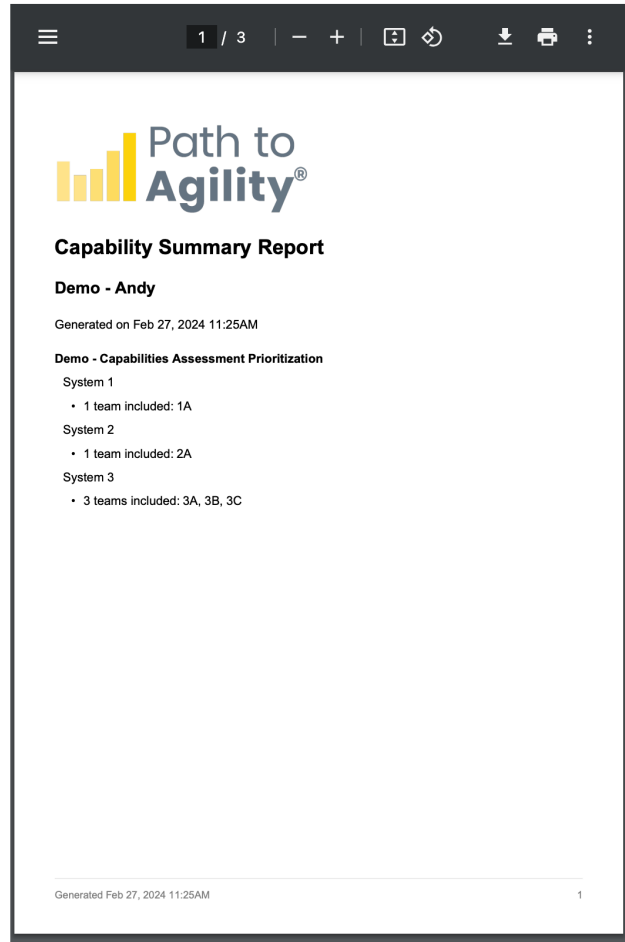
Configure and generate a Capability Summary report.

View Data For...

Orgs / Systems / Teams

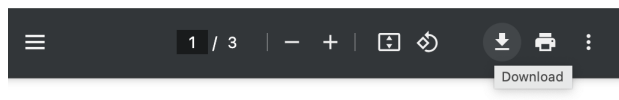
1A, 2A, 3A and 2 more teams

Most Recent Data  Custom Date Range



## Download Report

Use the download function to save the report locally.



Note: Due to software updates over time, there may be variations between screenshots, icons,



buttons, and navigational elements in our online support documents and the Path the Agility Navigator platform

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