

Other Reports

03/17/2026 2:09 pm CDT

Overview

By generating reports, you can share visual representations of data with stakeholders.

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.

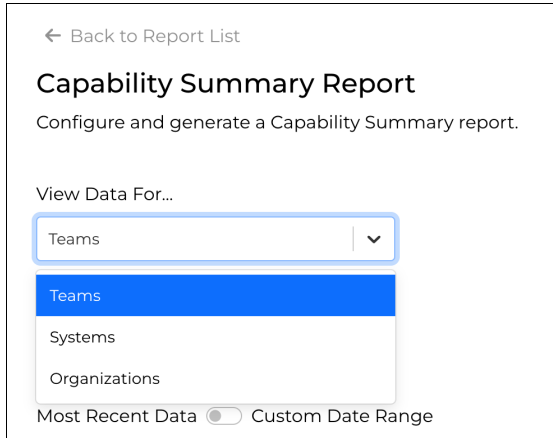
Key User Interface Elements

These reports can be found under the Analyze menu in the main navigation.

Configuration

View Data For

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



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Capability Summary Report

Configure and generate a Capability Summary report.

View Data For...

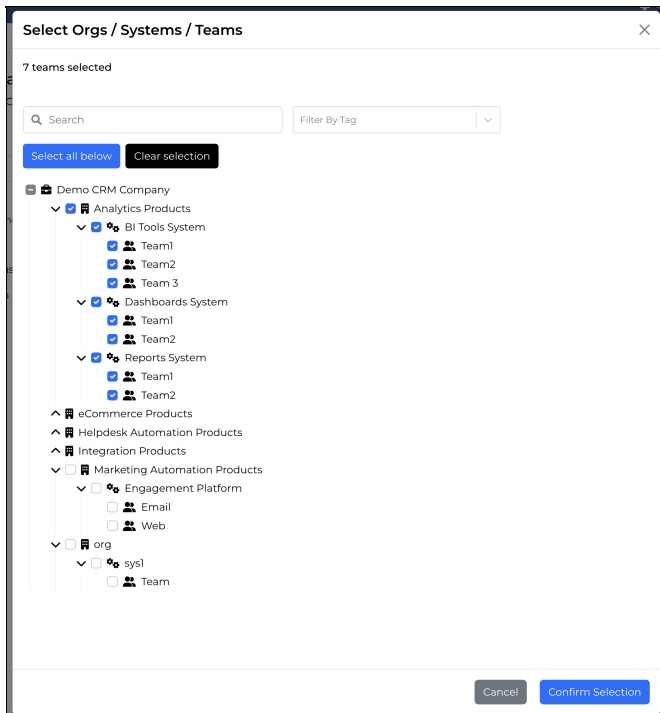
Teams

- Teams
- Systems
- 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 Orgs / Systems / Teams

7 teams selected

Search Filter By Tag

Select all below Clear selection

- Demo CRM Company
 - Analytics Products
 - BI Tools System
 - Team1
 - Team2
 - Team3
 - Dashboards System
 - Team1
 - Team2
 - Reports System
 - Team1
 - Team2
 - eCommerce Products
 - Helpdesk Automation Products
 - Integration Products
 - Marketing Automation Products
 - Engagement Platform
 - Email
 - Web
 - org
 - sys1
 - Team

Cancel 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	<input checked="" type="checkbox"/>	Custom Date Range
Data Start Date		
<input type="text" value="11/27/2023"/>	<input type="button" value="📅"/>	
Data End Date		
<input type="text" value="02/27/2024"/>	<input type="button" value="📅"/>	

Generate Report

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

<input type="button" value="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...

Teams

Orgs / Systems / Teams

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

Select

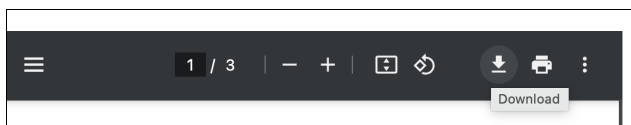
Most Recent Data Custom Date Range

Generate →

The screenshot shows a report viewer interface. At the top, there is a navigation bar with a hamburger menu, page number '1 / 3', and icons for zooming, navigating, and downloading. The main content area features the 'Path to Agility' logo, the report title 'Capability Summary Report', and the subtitle 'Demo - Andy'. Below this, it states 'Generated on Feb 27, 2024 11:25AM'. The report content is titled 'Demo - Capabilities Assessment Prioritization' and lists three systems with their included teams: System 1 (1 team: 1A), System 2 (1 team: 2A), and System 3 (3 teams: 3A, 3B, 3C). At the bottom of the report, it repeats the generation date and time, and shows the page number '1'.

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

