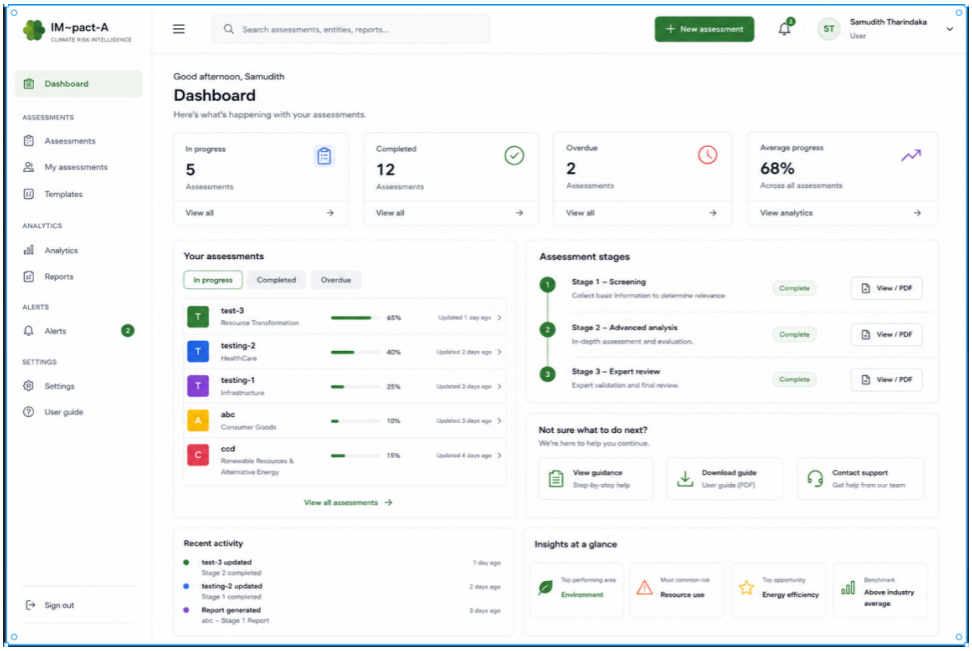
IMPACT-A

Guide 3 — Analytics, Reports & Alerts

Learn how to understand results, open reports, review alerts, and use the information for decisions.



Purpose: A simple, step-by-step guide written so a first-time user can follow it without technical knowledge.

1. Why Use Analytics and Reports?

After an assessment is completed, you may need to understand the results, communicate them to others, or keep a record. Analytics helps you understand patterns and performance. Reports turn assessment results into a document that can be viewed or shared.

2. View Analytics

Step 1: Open Analytics

Use Analytics in the left navigation menu.

Step 2: Choose what you want to understand

Look for the relevant assessment, entity, category, or time period. The available filters depend on your system setup.

Step 3: Read the results

Focus on patterns rather than one number. Compare areas, identify high-risk or weak areas, and look for opportunities to improve.

Step 4: Use the results

Use the findings to decide what needs attention, what is performing well, and what should be reviewed next.

> Remember
>
> Analytics supports decisions; it does not replace professional judgment. If a result looks unusual, open the related assessment and verify the source information.

3. Open an Assessment Report

Step 1: Find the assessment

Open Assessments or My assessments and select the required assessment.

Step 2: Wait until the report is available

A report may be available after the relevant assessment stage has been completed or after the report has been generated.

Step 3: Select View / PDF

On the Dashboard, the Assessment stages area can show a View / PDF button. Select it to open the available report.

Step 4: Read the report

Start with the summary, then review key findings, risks, opportunities, and supporting details.

Step 5: Save or share if allowed

Use the PDF viewer's save or share option if your organization permits this. Follow your organization's document-handling rules.

4. Understand a Simple Report

Part	What to look for
Summary	The main result in a short form.
Key findings	Important observations from the assessment.
Risks	Areas that may create problems or require attention.
Opportunities	Areas where improvement may create value.
Benchmark	A comparison against a reference or industry level, when available.
Recommendations	Suggested actions or next steps, when included.

5. Manage Alerts

Step 1: Open Alerts

Select Alerts from the left navigation menu or use the notification bell at the top.

Step 2: Read the alert

Check what happened, which assessment is affected, and whether an action is required.

Step 3: Open the related item

If the alert links to an assessment or report, open it and complete the requested action.

Step 4: Clear the issue

Once the required action is completed, check whether the alert disappears or changes status.

6. Recent Activity

The Dashboard's Recent activity area gives you a quick history, such as an assessment being updated, a stage being completed, or a report being generated. Use it to understand what changed recently without opening every assessment.

7. Turning Insights into Action

Step 1: Identify the important result

Start with the biggest risk, weakest performance area, or most important opportunity.

Step 2: Find the related assessment

Open the assessment behind the result so you can see the information that produced it.

Step 3: Check the evidence

Confirm that the underlying information is correct and current.

Step 4: Decide the next action

Assign a responsible person, define the improvement needed, and set a realistic follow-up date according to your organization's process.

Keep reports organized

Use clear assessment names and consistent categories. This makes analytics and reporting easier to understand later.

8. Quick Troubleshooting

Report button is unavailable: The assessment or required stage may not be complete yet. Check the assessment status.

Report information looks incorrect: Open the related assessment and verify the source data before relying on the report.

I have too many alerts: Open each alert and complete the required action. If an alert remains after the action is complete, contact support.

I cannot find an old report: Use Reports and search/filter by the assessment or entity name.