RIVAL PERFORM

ADVANCED ANALYTICS

USER GUIDE

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Overview

Perform Advanced Analytics is central to the system admin experience in Rival Perform. It delivers real-time, no-code reporting that removes the hassle of manually pulling key insights.

With Advanced Analytics, admins can access both an **Overview Dashboard** and a **Custom Dashboard**, providing visibility into employee and manager **Goals, Expectations, Check-ins, and Review activity**—all in one place.

Admins can use these dashboards to monitor progress, track engagement, and inform data-driven decisions.

(Interactive Feedback Sentiment analysis will be introduced in a future release.)

Key Capabilities

- **Overview Dashboard** – Get instant visibility into key performance metrics—no setup required.
- **Custom Dashboards & Reports** – Build tailored reports in a few clicks to meet unique business needs.
- **Visual Analytics** – Spot trends and track performance with interactive, easy-to-read visualizations.
- **Scheduled & Automated Reports** – Deliver recurring insights to leaders and stakeholders automatically.
- **Advanced Filters & Drill-Downs** – Narrow your view with flexible filters to focus on the most relevant data.
- **Data Exports & Sharing** – Download or share insights easily for cross-team collaboration.

Access

System Administrators have access to Perform Advanced Analytics immediately upon launch. For data privacy and security reasons, **managers, employees, and non-system admins** do not have access to these analytics.

To open the dashboards:

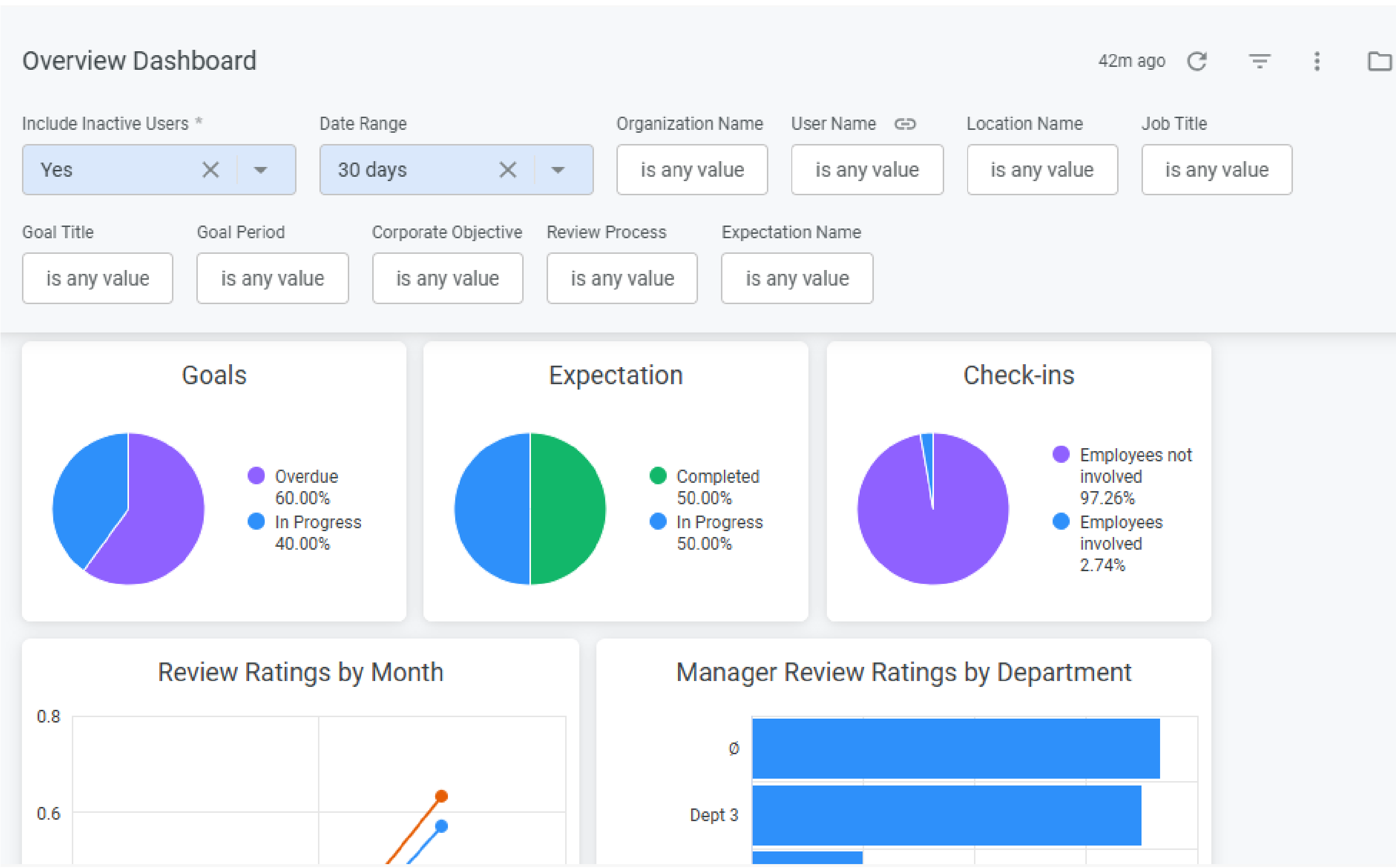
1. From the main menu, select **Reporting & Analytics**.
2. Choose either **Overview Dashboard** or **Custom Dashboard**.

Overview Dashboard

The **Overview Dashboard** provides an organization-wide snapshot of performance and engagement metrics across your workforce. It helps System Admins track progress toward goals, identify participation trends, and surface department-level insights.

Filters at the top of the dashboard—such as *Date Range, Organization, User, Location, Job Title, Goal Title, Goal Period, Corporate Objective, Review Process*, and *Expectation Name*—apply to all visualizations. Adjusting any filter updates every chart on the page, so you can instantly narrow results to the segment you care about.

Each chart is interactive. Selecting a data point or segment opens a detailed report in **Custom Dashboard (Explore)**, retaining the filters you've already applied.

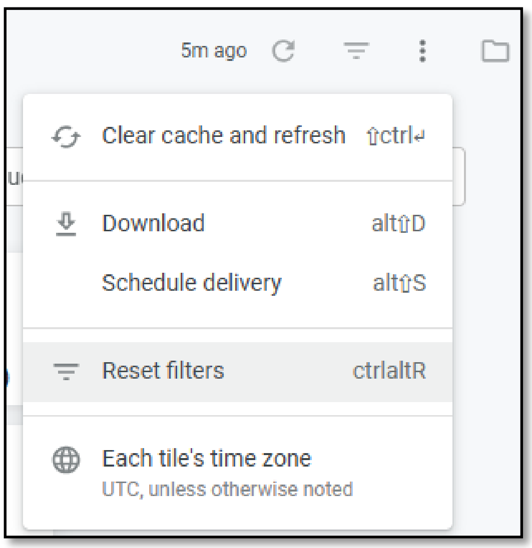


Key Metrics

The dashboard includes interactive charts that display the following metrics:

- **Goal Progress:** Tracks completion rates across current goal cycles.
- **Expectation Status:** Measures how employees and teams are progressing against defined expectations.
- **Employee Engagement:** Shows participation in check-ins and feedback sessions, highlighting teams that may need attention.
- **Review Ratings Over Time:** Compares manager and self-review ratings by month to visualize performance trends.
- **Department Performance:** Averages review ratings by department to identify strengths and outliers.

Use the **More Options** menu (⋮) in the top-right corner of each visualization to refresh data, download a copy, schedule delivery, or reset filters.

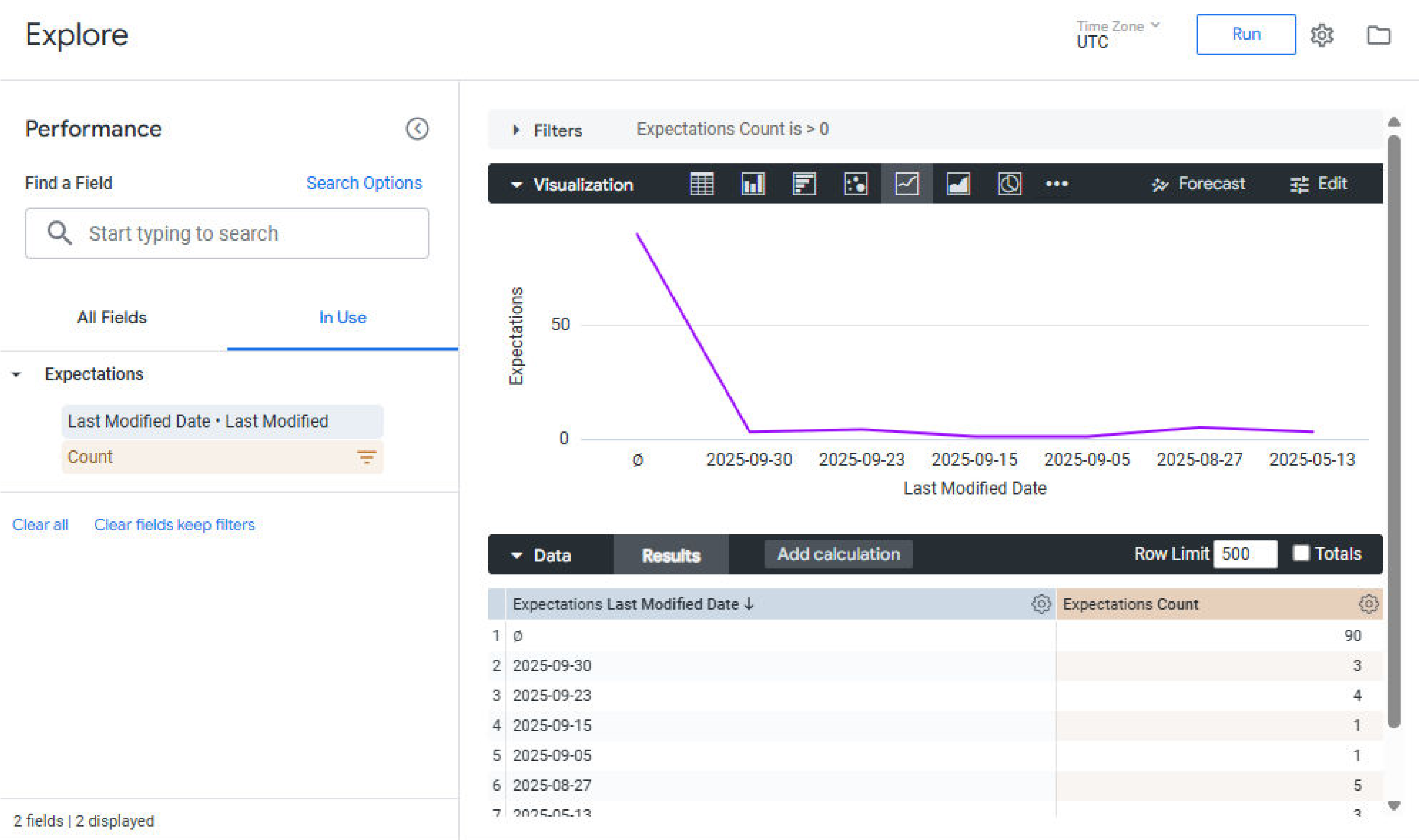


The Overview Dashboard helps System Admins monitor engagement levels, performance consistency, and department trends—supporting proactive talent and process management.

(Coming soon: Review Feedback Sentiment, a text-based analysis feature that identifies positive, negative, and neutral feedback across reviews to reveal organizational and manager-level trends.)

Custom Dashboard (Explore)

The **Custom Dashboard** (Explore) lets System Admins build flexible, ad-hoc reports using all available performance data. It's ideal for tracking progress, analyzing review outcomes, or creating department-level dashboards that align with business objectives.



Build a Custom Report

1. Go to **Reporting & Analytics > Custom Dashboard** from the Admin Portal.
2. Select **fields** to include in your report (e.g., *User Name*, *Job Title*, *Goal Title*, *Completion Status*, *Review Rating*).
3. Add **filters** to focus your results (e.g., *by Department*, *Manager*, *Goal Period*, or *Date Range*).
4. Choose a **visualization** type (table, bar chart, or trend line).
5. Click **Run** to generate your results.
6. Review or export the data table below your visualization.
7. Click **Save** to reuse the report or add it to a shared dashboard for ongoing access.

Working with Fields, Filters, and Visuals

Fields represent the data points available in Perform, such as user information, goal progress, check-in participation, and review ratings. Use them to define what appears in your report or as filters to refine your analysis.

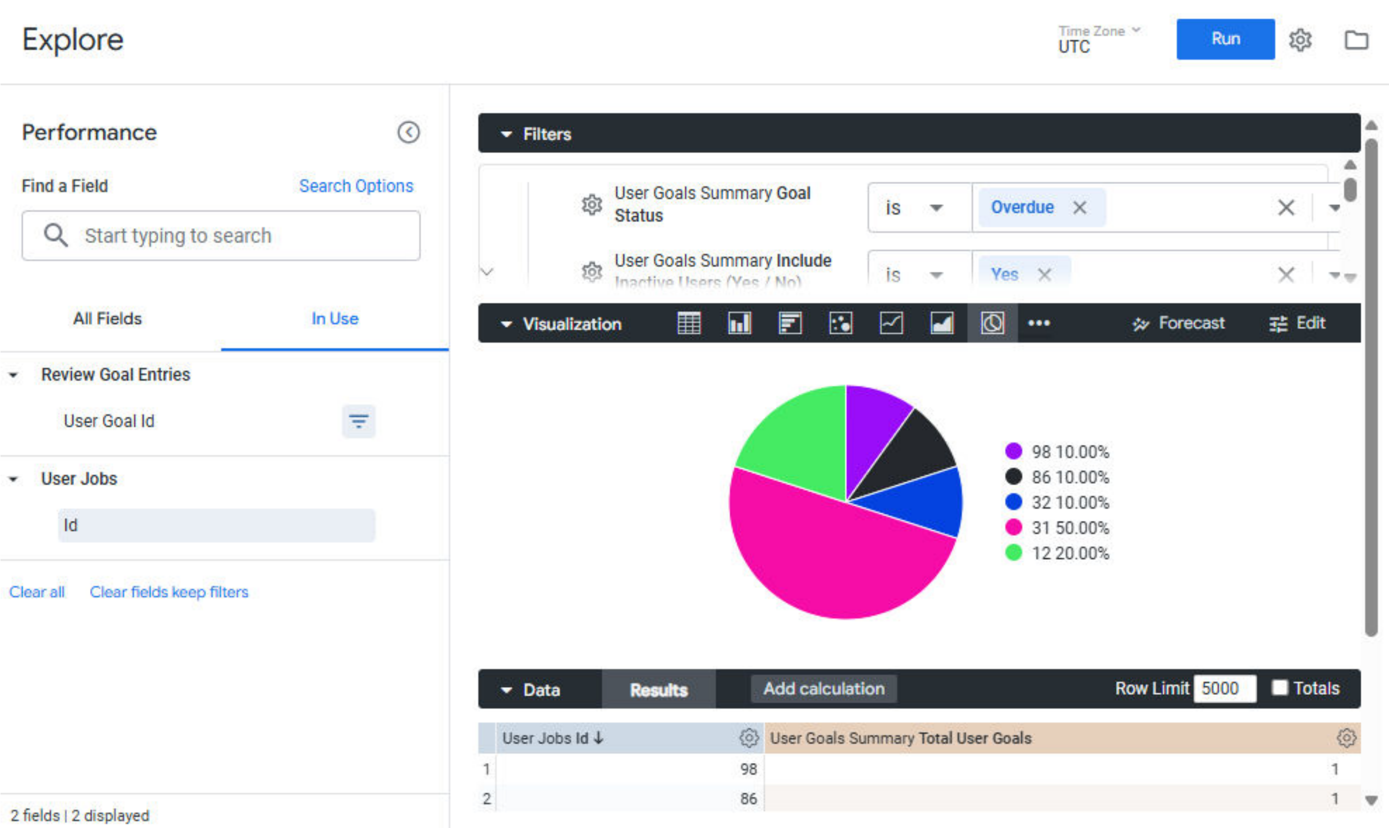
Common field types include:

- **User:** Name, Job Title, Manager, Location
- **Goal:** Title, Period, Status, Completion Date, Corporate Objective
- **Expectation:** Name, Progress, Start/End Dates
- **Check-In:** Participant, Completion Status, Date
- **Review:** Process, Manager Rating, Self-Rating, Department
- **Organization:** Department, Cost Center, Business Unit

After running your query, select the visualization that best communicates your results:

- **Bar or Line Charts** – Show trends over time
- **Pie Charts** – Show proportions or distribution
- **Tables** – Provide detailed, exportable breakdowns

At the bottom of the Explore screen, the data table displays the numbers behind each visualization. You can sort columns, inspect rows, or download results as CSV or Excel.

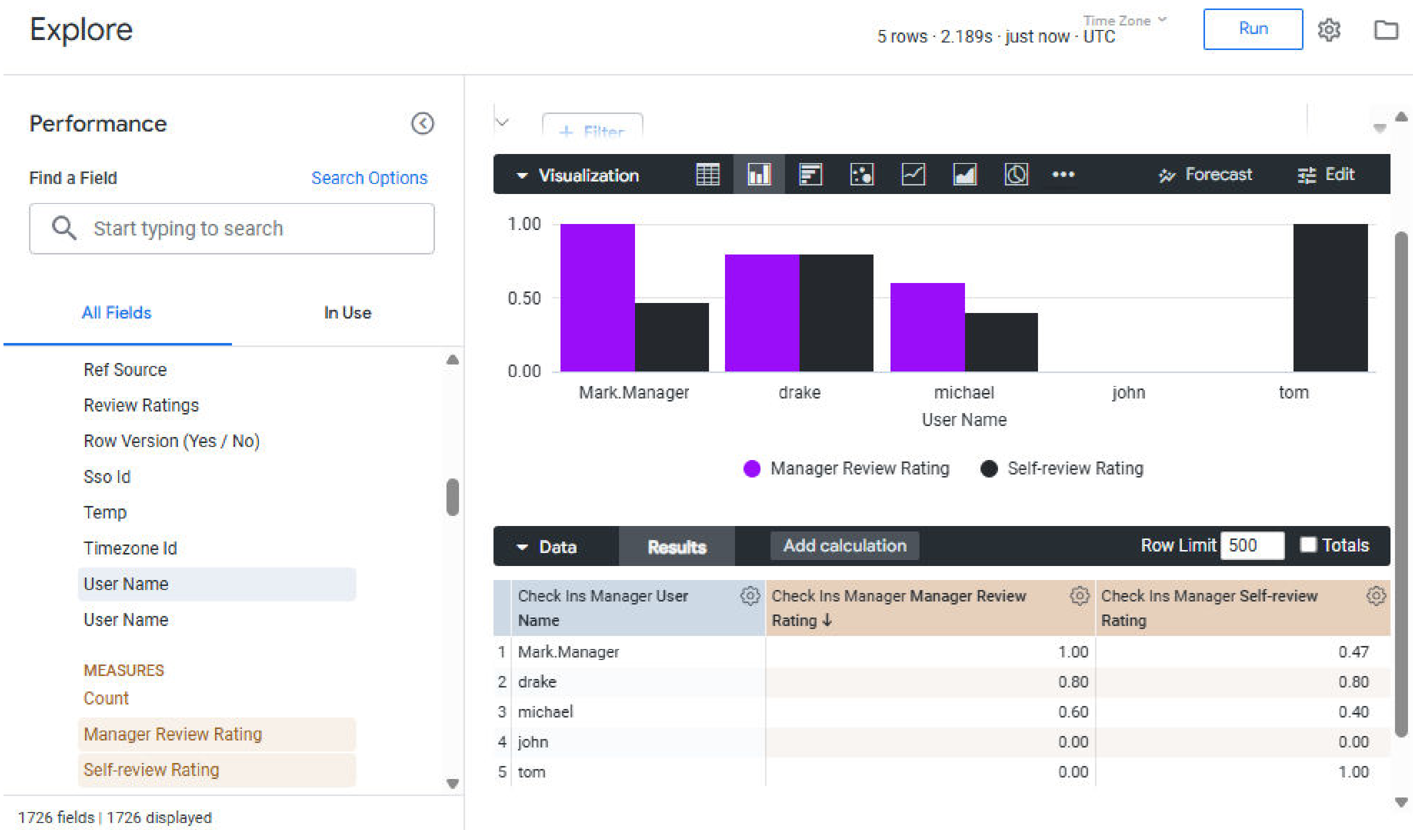


Jumpstart Your Reporting: Common Use Cases

If you're new to Explore, these examples can help you get started quickly. Each report highlights a common business question and the type of data it draws from.

Report Name	***What It Shows***	***Use This When You Want To…***	
User Detailed Report	User-related data and details	Track user-level details and change managements related to user profiles	1. Pick username from users 2. Pick job title from Jobs I18n 3. Pick display name from location. 4. Pick department from Organization Units I18n.
Goal Summary Report	Overall progress and status of goals by goal period/title	Track organizational alignment and identify where progress is stalling	1. Pick name from goal period 2. Pick title from goal revisions 3. Pick state and progress from user goal revisions
User Check-In Status Report	Participation rates in employee check-ins	Monitor feedback engagement and spot teams with low interaction	1. Pick username from users 2. Pick check-in id or request message from check-ins 3. Pick comment from check in comments
Manager Review Report	Self-review and manager review ratings for a given user	Evaluate consistency in manager review assessments	1. Pick username from users 2. Pick name and review process id from review process 3. Pick manager review rating and self-review rating from check ins manager
Review Process Summary Report	Progress and status of goals by each review process	Track organizational alignment and identify where progress is stalling for a specific review process	1. Pick name and review process id from review process 2. Pick name, state and state ref name from review processes 3. Pick rating, state, state ref name from reviews

💡 *Tip: Start with one of these reports, then customize filters or add visualizations to focus on the segments that matter most.*



Explore
Time Zone
5 rows · 2.189s · just now · UTC
Run
Performance
Find a Field
Search Options
Start typing to search
All Fields
In Use
Ref Source
Review Ratings
Row Version (Yes / No)
Sso Id
Temp
Timezone Id
User Name
User Name
MEASURES
Count
Manager Review Rating
Self-review Rating
1726 fields | 1726 displayed
+ Filter
Visualization
Forecast
Edit
1.00
0.50
0.00
Mark.Manager
drake
michael
john
tom
User Name
Manager Review Rating
Self-review Rating
Data
Results
Add calculation
Row Limit
500
Totals
Check Ins Manager User Name
Check Ins Manager Manager Review Rating ↓
Check Ins Manager Self-review Rating
1 Mark.Manager 1.00 0.47
2 drake 0.80 0.80
3 michael 0.60 0.40
4 john 0.00 0.00
5 tom 0.00 1.00

Advanced Features

Perform Advanced Analytics includes several powerful features to help you build and manage custom dashboards:

- **Create Forecasts:** In a line chart, open ⚙️ *Visualization Settings* and enable **Forecast** to project trends.
- **Table Calculations:** After running a query, click ⚙️ next to a column → **Add Table Calculation** → enter a formula (e.g., ${goals_completed} / ${goals_assigned}) → *Save*.
- **Drill Overlays:** Click any metric in a chart to view row-level data behind the visualization.
- **Save Content:** Click ⚙️ → **Save As** to store dashboards in shared or personal folders.
- **Schedule Reports:** Use ⚙️ → **Schedule Deliveries** to send dashboards by email or integration (Slack, Teams, CRM, etc.).
- **Send Externally:** Deliver scheduled reports via Webhook, Amazon S3, or SFTP.
- **Embed Dashboards:** Copy an embed URL to share your dashboard externally or within other platforms.
- **Clear Cache & Refresh:** Refresh data at any time to ensure up-to-date results.
- **Create Alerts:** Hover over a dashboard tile, click 🔔, and define a trigger (e.g., *goal_completion_rate < 80%*).

💡 **Tip:** Schedule a one-time send to test delivery. Avoid using **Test Now**, which is intended for backend validation only.

Best Practices

- Start with the **Overview Dashboard** to identify trends before exploring deeper.
- Use **consistent filters** across reports to keep comparisons accurate.
- **Preview visualizations** before saving to confirm readability.
- **Name and organize dashboards clearly** for easy team use.
- **Schedule recurring reports** to keep leaders and HR informed automatically.
- **Export visuals** for presentations or compliance tracking.

Help & Support

For additional assistance, please reach out to your Rival CSM or support@rival-hr.com, or visit the Perform Admin Help Center for troubleshooting or configuration guidance. For more complex reporting options, see Explore documentation (note: not all Looker functions are supported in Perform).

Glossary

Dashboard
A collection of saved data visualizations and tables, organized to provide a comprehensive view of performance activity and trends.

Explore (Custom Dashboard)
A customizable reporting tool where admins can build their own dashboards and reports using selected fields, filters, and visualizations.

Field
A data point (such as user name, job title, goal status, or review rating) that can be selected when building reports.

Filter
A way to narrow your data results by selecting criteria such as date ranges, completion status, or assigned groups. Filters affect all tiles and visuals in a dashboard.

Look
A saved table or chart created from a custom query. Looks can be added to dashboards, shared with others, and scheduled for delivery. When a Look is updated, any dashboards using it will also reflect the changes.

Run Query
An action in Explore that generates results based on the fields and filters you've selected. Required to preview and save your custom reports.

Smart Visual
A saved visualization (like a chart or graph) that combines filters, data, and formatting to display a trend or performance insight.

Visualization
A chart or graph (e.g., bar, line, or pie) that highlights patterns or comparisons in performance data.