



Using the PAN System

CREATING PERSONALIZED REPORTS

Updated: April 12, 2017

Before You Begin



- With our “Personalized Reports” tool, you can build a custom report using:
 - Scores from one or more publisher reports and/or
 - Your self-authored assessments
- Only scores from publishers’ assessments that are available on the PAN system can be used - interpretive text from publishers’ reports cannot be used in your personalized report. You can, however, add your own text to the reports you create.
- Personalized reports can only be used as part of a user-defined battery* that includes:
 - The personalized report and
 - The assessment(s) from which the report is generated

* A battery is a group of assessments which are combined to streamline administrative activities as well as enhance the candidate experience. Instead of ordering and assigning multiple assessments to a candidate, one “product” is ordered and assigned, and candidates only receive one link to complete multiple assessments.

Helpful Resources

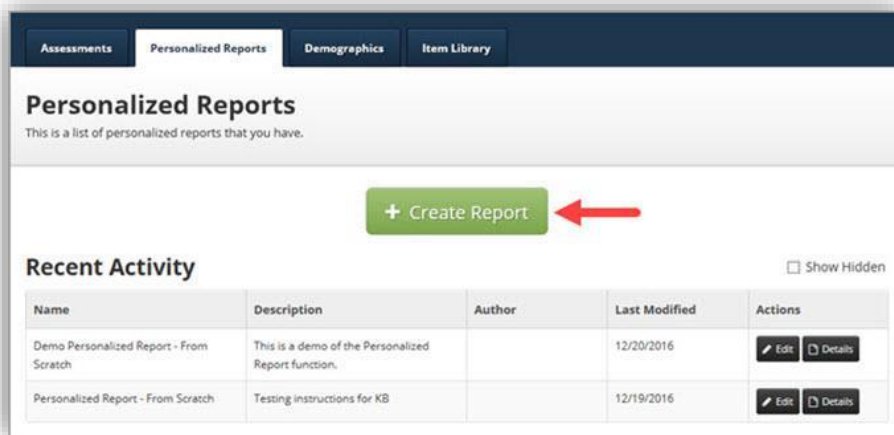


- Slides – The following slides will guide you step-by-step in creating your personalized report.
- Online – Should you need additional assistance as you create your personalized report, CLICK the “?” in the upper right-hand corner of your screen.
- Personal – PAN also offers one-on-one or group training. Contact your account manager for more information and pricing.
- **REMINDER: Frequently SAVE your work to avoid losing it!**

Name the Report



1. Locate the "Authoring" tab and click on "Personalized Reports."
2. Click "Create Report."



Name the Report

A screenshot of a software dialog box titled "Create Personalized Report" with a close button (X) in the top right corner. The dialog is divided into two sections. The top section, "From Scratch", is selected with a radio button and has a red arrow pointing to it. Below this section, there is a "Name" label with a red arrow pointing to an empty text input field. Underneath the "Name" field is a small italicized note: "At least five characters and must be unique." Below that is a "Description" label with a red arrow pointing to a larger empty text area. Underneath the "Description" area is another small italicized note: "Required." The bottom section, "From Existing Report", is unselected. At the bottom right of the dialog, there is a green "Create Report" button with a red arrow pointing to it, and a blue "Close" link next to it.

3. Select "From Scratch"
4. Input the report's "Name" and "Description"
5. Click "Create Report."

Specify the Assessment(s) & Scores



Name	Description	Author	Last Modified	Actions
Demo Personalized Report - From Scratch	This is a demo of the Personalized Report function.		12/20/2016	Edit Details

1. On the next screen, locate the report name and click "Edit"
2. In the "Find Assessments" bar, search for the first assessment whose scores you wish to use.

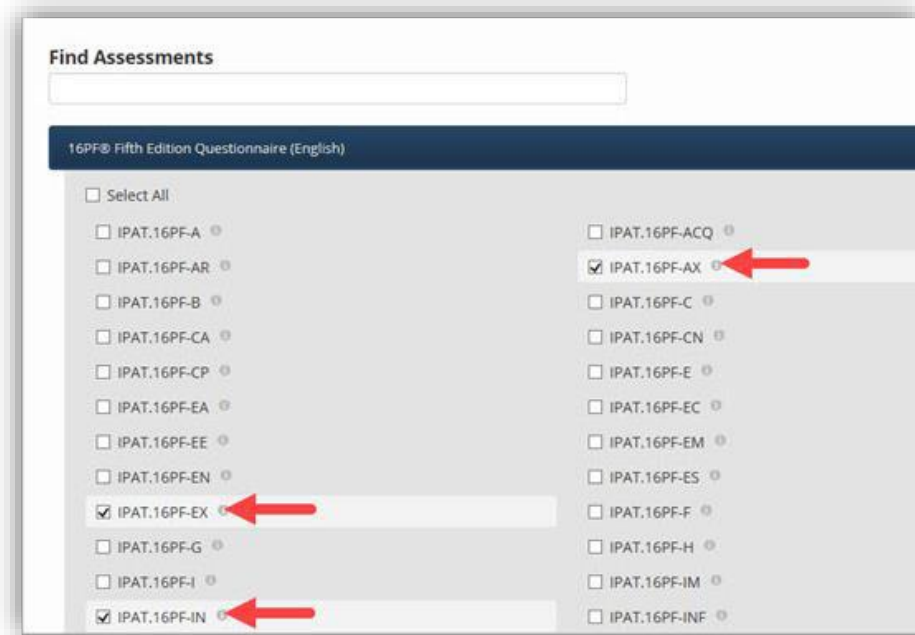
Assessments Scores Report

test_demo

Find Assessments

- 16PF® Fifth Edition Questionnaire (Portuguese-European)
- 16PF® Fifth Edition Questionnaire (German)
- 16PF® Fifth Edition Questionnaire (Greek)
- 16PF® Fifth Edition Questionnaire (Norwegian)
- 16PF5 English (C)
- 16PF5 English (C) - (16PF5)

Specify the Assessment(s) & Scores



3. All of the available scores will be displayed for the selected assessment.
4. Choose the scores you want to include in the report by clicking the box to the left of the score.

NOTE: the score names here may be abbreviations of those found in the publisher's report.

Specify the Assessment(s) & Scores



5. Repeat this process for each assessment whose scores you are going to use in your personalized report.
6. If you are simply pulling scores from a publisher's assessment for your personalized report, proceed to the "Design the Report" section.
7. If you are using scores from a publisher's assessment to create custom scores, proceed to the next section, "Create Custom Scoring."

Create Custom Scoring



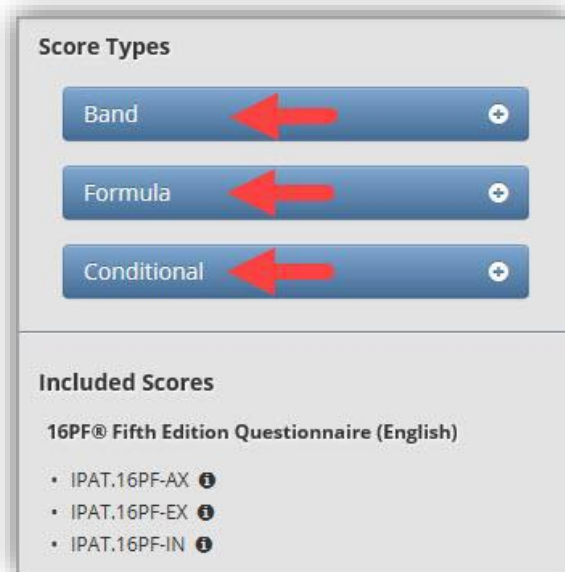
- After selecting the assessment scores to be displayed, click the "Scores" tab to customize the scores.



Create Custom Scoring



- Familiarize yourself with the 3 types of custom scores – Band, Formula, and Conditional
- Explanations and examples are provided on the following slides.





- This score type allows you to generate a text output based upon a score range.
- Example: You can create text outputs of:
 - “High” if candidates score more than 50
 - “Medium” if candidates score from 26-50
 - “Low” if candidates score from 0-25.



- Formula scores can be created using a mathematical formula.
- Example: You can add two assessment scores together for a combined score
 $\text{Assessment 1 Score} + \text{Assessment 2 Score} = \text{Total Score}$
- Example: Or, you can weight how much an assessment is worth relative to another test:
 $(2 * \text{Assessment 1 Score}) + \text{Assessment 2 Score} = \text{Total Score}$



- This score type allows you to specify a desired result based upon an ordered list of logical conditions.
- Conditional scores work similar to band scores, but instead of defining score ranges you define conditions that can use other scores as variables.
- The first condition that evaluates to true will return the corresponding result.

Score Type: Conditional (cont'd.)



- Example: Your test consists of two scores - **'algebra_total_correct'** and **'geometry_total_correct.'**
- You want a score with a result of 'Pass' if the tester scored over 70 for each of these two scores. For scores 70 or less, the score should return 'Fail'.
- To accomplish this, configure a conditional scorer with a condition of: **(algebra_total_correct > 70) AND (geometry_total_correct > 70)** with a result of 'Pass'.
- You can then add another condition that is blank (which will evaluate to true) and a result of 'Fail'.

Create Custom Scoring



Now that you're familiar with the
3 types of custom scores,
let's create yours.

Create Custom Scoring



1. In the left column, click the "+" next to the type of score you want to add.

- When creating a **Band** score, a list of available scores to be used in the calculation will be visible under "Calculate for Score." The selected score is what is used to define the score ranges.

- Here is an example of a way to use the Band score type.

Create Custom Scoring

A screenshot of a software interface titled "Sample FORMULA Score". The interface is divided into several sections: "Name" with a text box containing "Sample FORMULA Score" and a green checkmark; "Variable Name" with a text box containing "Extraversion" and a green checkmark; "Description" with a text box containing "This is an example of a way to use the formula score type." and a green checkmark; "Formula" with an empty text box and a wrench icon; and "Rounding" with a dropdown menu set to "Rounding", a "to" label, and another dropdown menu set to ".0". Two red arrows point to the wrench icon in the "Formula" field and the "Variable Name" field.

- When using a **Formula** score type, click the wrench icon to create the formula.
 - The "Variable Name" is what will be used when choosing scores in a custom formula, so make it recognizable.
 - The "Formula" field is where you create the mathematical formula that determines how the custom score is calculated.

Create Custom Scoring





Sample **CONDITIONAL** Score


Name
Sample CONDITIONAL Score ✓

Description
This is an example of a conditional score type. ✓

Variable Name
Independence ✓

Conditions

Condition  Result 





Sample **CONDITIONAL** Score



Name
Sample CONDITIONAL Score ✓


Description
This is an example of a conditional score type. ✓

Variable Name
Independence ✓

Conditions


Condition (Dominance > 75) AND (Social Br  Result: PASS 

Condition (Dominance < 75) OR (Social Bol  Result: FAIL 



Condition Builder

Condition
(Dominance > 75) AND (Social Boldness > 60)



Numbers

7	8	9
4	5	6
1	2	3
0	.	

Operators

+	-	<	>
*	/	<=	>=
()	==	!=
		AND	OR

Functions

Abs()	Normsinv()
Min()	Max()
Power()	Sqrt()
If()	In()

- When creating a **Conditional** score, click the wrench icon to build the condition.
- Here is an example of a way to use the **Conditional** score type.
 - Participants can only pass the Independence scale if they score 75 or higher on the Dominance scale AND 60 or higher on the Social Boldness scale

Create Custom Scoring



2. Remember to "Save" your work after providing the required information for each custom score.

Design the Report



1. Click the "Report" tab to begin designing how the finished report will look.
2. To add a header and/or footer, click "Edit Header."

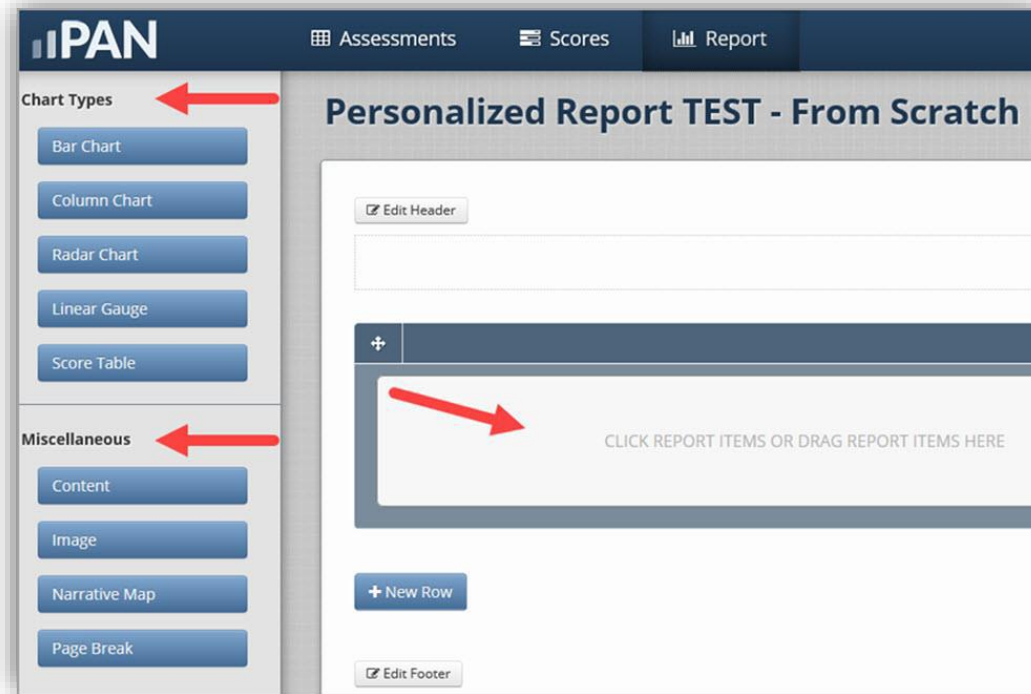


Design the Report

A screenshot of a software interface titled "Edit Header and Footer". The interface is divided into two main sections: "Header" and "Footer". Under the "Header" section, there is a "Text" field with a red arrow pointing to it from the left. Below the text field is a "Clear Header" link. To the right of the text field is a link labeled "Available Header Tokens" with a red arrow pointing to it from below. Below the text field is a "Height" field with a red arrow pointing to it from the left, followed by the word "inches". Below the height field is a note: "NOTE: Defaults to 1 inch if text or image exists, otherwise defaults to .5 inch." Under the "Image" section, there is an "Add Image" button with a red arrow pointing to it from the left. The "Footer" section has a "Text" field.

3. Type the header and footer in the "Text" boxes
4. Or, click "Available Header Tokens" and "Available Footer Tokens" for a listing of ready-to-use headers and footers.
5. Adjust the "Heights" and add "Images," as desired.
6. Click "Finish" in the lower right corner.

Design the Report



Drag the desired "Chart Types" or "Miscellaneous" options to the main canvas, e.g., the area that reads "CLICK REPORT ITEMS OR DRAG REPORT ITEMS HERE."

(see screen shot on next slide)

Design the Report

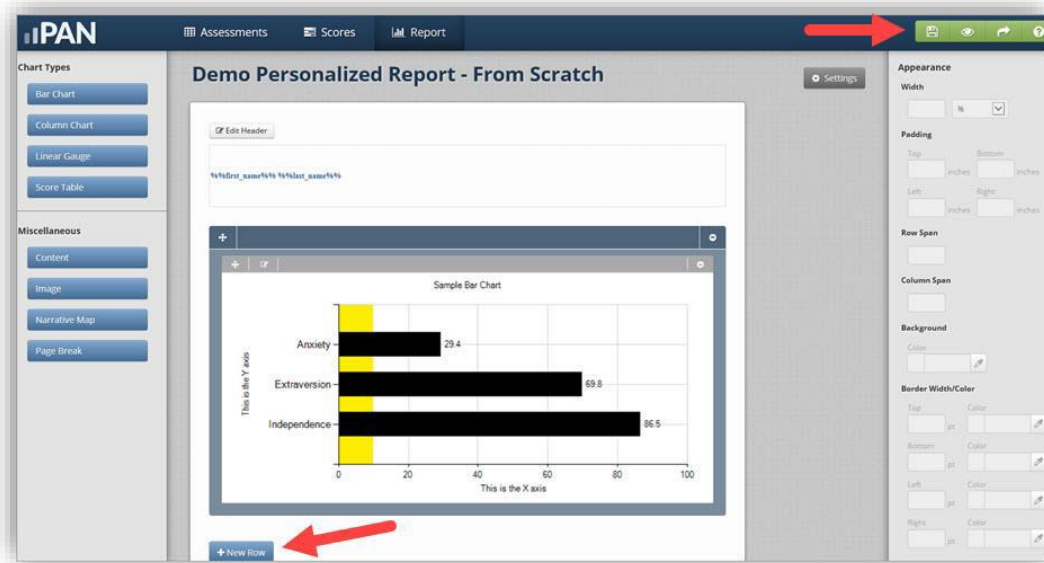


Start	End	Background	Select
0	10	Solid #ffed00	<input type="checkbox"/>

8. Once you finish the design of your chart, click "Finish"
9. Edit width, padding, border, etc. of each "Chart Type" or "Miscellaneous" option via the "Appearance" section on the right side of the screen.

Category	Value
Anxiety	29.4
Extraversion	69.8
Independence	86.5

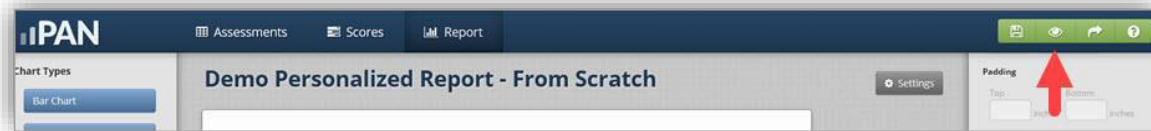
Design the Report



10. Add additional options by clicking "New Row" or by dragging options to an existing row.

11. After all the charts and other content are added and customized, click "Save."

Design the Report



12. To preview the personalized report as a finished product, click the "eye" icon in the upper right corner of the screen.

– The "Preview" screen provides an excellent opportunity to confirm that all components of the report have been entered correctly.

Test the Report



Preview Report [X]

Enter sample score values for your report or use the 'Generate Random Values' button and we'll enter them for you.

Generate Random Values ←

16PF® Fifth Edition Questionnaire (English)

IPAT.16PF-AX ⓘ	<input type="text"/>	←
IPAT.16PF-EX ⓘ	<input type="text"/>	←
IPAT.16PF-IN ⓘ	<input type="text"/>	←

→ **Preview Report** Cancel

1. To test the report, you have two options: a) Manually enter sample scores, or b) Use the “Generate Random Values” option to test your personalized report.

Test the Report



Preview Report [X]

Enter sample score values for your report or use the 'Generate Random Values' button and we'll enter them for you.

Generate Random Values

SDE Intern Hurdle 1 (Aspiring Minds - No Remote Proctoring)

cqTotal ⓘ	PASS	←
logicalAbilityScore ⓘ	FAIL	←

Preview Report Cancel

Band	Value
Code_Fix_Band	PASS
Overall_Score	PASS
Reasoning_Band	PASS

2. If testing with sample scores:

- Input the scores as shown here
- Click the “Preview Report” button
- Review the report to ensure it is working properly

One or more errors occurred while creating this report. Some information may be missing and/or incorrect.

*** Error Rendering Graphic and/or Text ***

3. If no sample scores are provided for the test (and “Generate Random Values” is not used), “Preview Report” will produce this error message:

Publish the Report



1. When you are satisfied with how your report looks and the test results, click the "Publish" icon (arrow) to make the personalized report accessible for your user-defined battery.

1. Be cautious with post-publication changes

- Do not modify the assessment(s) associated with your personalized report once the report is published and assigned to candidates as this will break the report for candidates currently in progress.
- You can modify, however, the appearance of the report widgets or tweak the custom scores, if desired.

Add the Report to a Battery



1. Login to your PAN account
2. Click on the "Catalog" tab, then click "Batteries"
3. Follow the instructions to create the battery
 1. First, add the assessment(s) to the battery
 2. Next, click on "Personalized Reports" in the Search dropdown menu and click the "Search" button to find the personalized report.
 3. Click "Add Selected Products"
4. The battery is now available for purchase in your catalog.



Using the PAN System

CREATING PERSONALIZED REPORTS

QUESTIONS?

Contact Your PAN Account Representative