



# GeniusMethods

Examples of Various Report Views

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# Workflow Dashboards

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Dashboard

My Account | Help



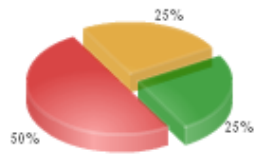
You are logged in as: LOG OUT

Session ends: 01:59:05

- Dashboard
- Checklists
- Tasks & Actions
- Reports

- My Actions (8)
- My Tasks (10)
- My Sign-offs (2)
- Tasks To Generate (24)

## Overview



Overdue Due Soon On Time

## Filter

Keyword search:

Due Date:

From:  To:

Status:

(SHOW ALL)

Parent Task: (SHOW ALL)

Clear All

## My Actions

Status	Ref No	Name	Task Reference	Parent Task	Dur	Due
NOT STARTED	P1.A01b.FA1.NAVCHECK.2	Download Benchmarks	Fourth Download Benchmarks	P1.A01.FA1.NAVCHECK NAV Monitoring	20 mins	21 Sep 09 by C O B
NOT STARTED	P1.A01e.FA1.NAVCHECK.5	Compare and Flag Warning	Fourth Compare and Flag Warning	P1.A01.FA1.NAVCHECK NAV Monitoring	5 mins	21 Sep 09 by C O B
NOT STARTED	P1.A01b.FA1.NAVCHECK.2	Download Benchmarks	New task Download Benchmarks	P1.A01.FA1.NAVCHECK NAV Monitoring	20 mins	21 Sep 09 by C O B
NOT STARTED	P1.A01c.FA1.NAVCHECK.3	Prepare Benchmarks	New task Prepare Benchmarks	P1.A01.FA1.NAVCHECK NAV Monitoring	10 mins	21 Sep 09 by C O B
NOT STARTED	P1.A01a.FA1.NAVCHECK.1	Download Information	090922 Download Information	P1.A01.FA1.NAVCHECK NAV Monitoring	30 mins	22 Sep 09 by C O B
NOT STARTED	P1.A01b.FA1.NAVCHECK.2	Download Benchmarks	090922 Download Benchmarks	P1.A01.FA1.NAVCHECK NAV Monitoring	20 mins	22 Sep 09 by C O B
NOT STARTED	P1.FA1.SWINGCHECK.1	Check flow	Client No 2 Check flow	P1.A02.FA1.SWINGCHECK Swing check	10 mins	24 Sep 09 by C O B
NOT STARTED	P1.FA1.SWINGCHECK.2	Investigate discrepancies	Client No 2 Investigate discrepancies	P1.A02.FA1.SWINGCHECK Swing check	10 mins	24 Sep 09 by C O B

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Right-Click above for more options



# Working screens

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## Tasks & Actions

System Admin | My Account | Help



You are logged in as: CSD SLC  
LOG OUT

Session ends: 01:59:34

Dashboard

Checklists

Tasks & Actions

Reports

Project Control

Template Data

### Select a Task:

Only my tasks

Search by Group:

(SHOW ALL)

Search Tasks:

	Status	Ref No./Reference/Name	Due	Owner
	IN PROGRESS	<a href="#">Rec Info / Fusion</a> Receive information	29 Jan 10	SLC
	IN PROGRESS	<a href="#">Rec Info / Client Murray</a> Receive information	28 Feb 10	MM
	IN PROGRESS	<a href="#">Rec Info / Dynamyx</a> Receive information	19 Mar 10	SM1
	IN PROGRESS	<a href="#">Rec Info / Richard</a> Receive information	31 Mar 10	SLC
	NOT STARTED	<a href="#">Rec Info / Fusion Test</a> Receive information	20 Apr 10	SLC
	IN PROGRESS	<a href="#">APPR.P / ABC City Ltd</a> Approved Persons	11 Jun 10	SLC
	IN PROGRESS	<a href="#">BCP Ret / BCP REF JUNE a</a> BCP Retention	18 Jun 10	SLC
	IN PROGRESS	<a href="#">Rec Info /</a> Receive information	30 Jun 10	SLC
	NOT STARTED	<a href="#">Rec Info / Client DEF</a> Receive information	30 Jun 10	SLC

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Right-Click above for more options

### Task Detail:

[View Actions for Selected Task](#)

#### Parent Details:

Project: [ACD WM: Wealth Manager ACD Tasks](#)  
 Policy: [P1: ACD Tasks](#)  
 Checklist: [P1.A.FA1: Fund accounting check list](#)

#### Task Details:

Ref. No: P1.A03.FA1.INVMANCHECK      Owner: AM1  
 Reference:  
 Status: AWAITING SIGN-OFF  
 Due Date: 23 Sep 09  
 Name: Asset pricing check  
 Description: Investment manager to check the pricing of every underlying holding  
 Start Date: 23 Sep 09      Time to complete: 1 hour

### Task Sign Off:

User	Role	Notes	Satisfaction	Sign Off Date	Action
SLC	USER	Satisfied but too slow	MED	23 Sep 09	
AT1	MANAGER			NOT DONE	



# Example of a list report

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System Admin | My Account | Help

Dashboard

Checklists

Tasks & Actions

Reports

Project Control

Tem

## Status Report by User

Report Date: 26 Jun 2010 08:6pm

Date Range: From 01<sup>st</sup> Jun 2010 to 01<sup>st</sup> Jul 2010

### Working Tasks

User Name	Qty Not Started	Qty In Progress	Qty Awaiting Sign-off	Qty Completed	Total Tasks	Qty Overdue
CSD SLC	1	3	0	0	4	2

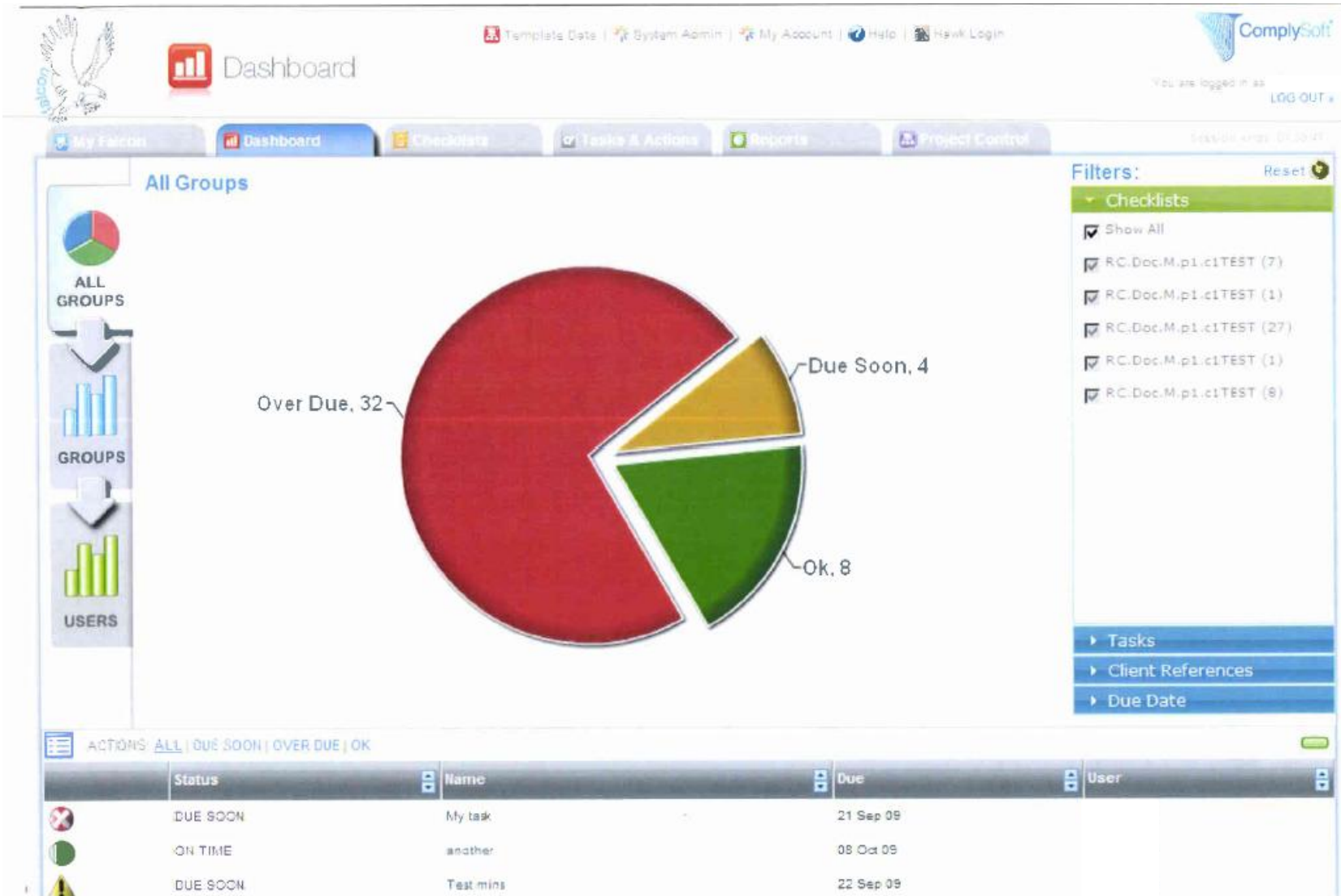
### Working Actions

User Name	Qty Not Started	Qty In Progress	Qty Completed	Total Tasks	Qty Overdue
CSD Demo 1	2	0	0	2	1
CSD Demo 2	2	0	0	2	
CSD Manager 2	1	0	0	1	1
CSD Manager 1	3	0	0	3	2
CSD Compliance 1	1	0	1	2	1
CSD Sales Director	2	0	0	2	
CSD Salesman 2	1	0	0	1	
CSD SLC	18	1	3	22	5
Murray MacDonald	0	1	0	1	1



# Example of an interactive report

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# Example of an drill down report

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Product Name : PBS - Client Immigration Audit - Employee File Record

Version Name :

Sub-section Title	Result		Total Number of Questions	Number of Questions Answered	Percentage Complete	Number of Non-Zero Answers	Number of Zero Answers
	Value	Category ?					
1. <u>Staff member details</u>	10.00	Green	2	2	100.00%	1	1
2. <u>Staff member's initial documents</u>	4.60	Red	5	5	100.00%	5	0
3. <u>Staff member's ongoing immigration / employment documents</u>	1.25	Dark Blue	4	4	100.00%	4	0
4. <u>Staff member's documents relevant to role</u>	0	White	2	2	100.00%	0	2
5. <u>Information re CoS holders</u>	2.50	Red	7	7	100.00%	6	1
6. <u>Record Keeping</u>	3.00	Red	1	1	100.00%	1	0
7. <u>Notes</u>	0	White	1	1	100.00%	0	1
<b>Totals</b>	3.29	Red	22	22	100.00%	17	5

Please email [support@complysoft.com](mailto:support@complysoft.com) if you wish further questions added to the assessment.

When you have completed your assessment, please submit it by pressing the "Submit Assessment" button.

File is in breach	Dark Blue
File is unacceptable	Red
File is in Reasonable Order	Orange
File is in Good Order	Green



# Example of an comparative report



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Analysis of 19 Respondents  
Executive Members compared  
against Voluntary Members

Question	Primary Group				Comparison Group				Primary less Comparison
	Lowest	Highest	Average	Closest	Lowest	Highest	Average	Closest	
	Population of 8 Executives				Population of 11 Voluntary Members				
Board & Council	5.4	8.8	6.73		2.9	9	6.69		0.04
1. The role of council is defined as - broad strategic & policy oversight	6.00	10.00	8.25	Agree in Principle	8.00	10.00	8.73	Agree in Principle	-0.48
2. The council represents the membership's views	6.00	8.00	6.50	Partially Agree	1.00	8.00	5.73	Partially Agree	0.77
3. Council informs board of the wider views of the membership	4.00	8.00	6.25	Partially Agree	2.00	8.00	5.82	Partially Agree	0.43
4. Council agendas are appropriate to their central role	6.00	10.00	7.00	Partially Agree	1.00	10.00	6.64	Partially Agree	0.36
5. Council debate is high-level	4.00	8.00	5.75	Partially Agree	1.00	6.00	4.64	Disagree	1.11
6. Board develops & oversees strategy, policy and direction	6.00	10.00	8.25	Agree in Principle	6.00	10.00	9.45	Fully Agree	-1.2
7. The interface between council, board & executive is positive	6.00	8.00	6.25	Partially Agree	6.00	10.00	7.64	Agree in Principle	-1.39
8. Board & Council work well together	6.00	8.00	6.50	Partially Agree	1.00	10.00	6.90	Partially Agree	-0.4
9. Trust & mutual respect make the current interfaces work	6.00	8.00	6.75	Partially Agree	1.00	10.00	6.45	Partially Agree	0.3
10. Board effectiveness is constrained by Council	4.00	10.00	5.75	Partially Agree	2.00	8.00	4.91	Disagree	0.84

All highlighted areas need to be reviewed and either understood or solved

This signifies that the Executive have a **lower** result than the voluntary members

This signifies that the Executive have a **higher** result than the voluntary members

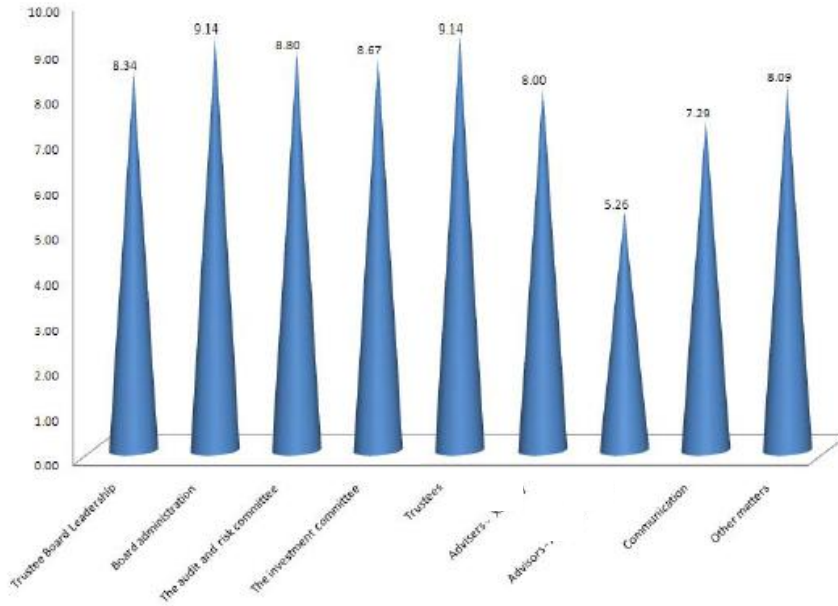


# Two examples of analysis reports

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Averages for each of the sub-sections of the Assessment



Percentage times a specific answer is given

