

I. Action Item

- ~~A. Get access to Utilization Dashboard (BI team)~~
- B. The dates in the "Report Date" filter are not active for the two most recent dates prior to current date in Scorecard & Rep tabs (ex. Today's date 12/13, 12/11 & 12/12 are not active to be chosen) Is that by design? **(BI team)**
- ~~C. Enhance the data tables so we can pull outliers from them -- much like the TESP summary reports, ex. three insurance reports (BI team)~~

II. Issues to Resolve

- A. Directors who are no longer part of IS are included in data (Scorecard tab and Rep tab filters) **(BI team)**
- B. Rep averages do not seem to be updating based on selected filters **(BI team)**
 - 1. **Look at averages in both scorecard and rep level view to ensure they are being calculated consistently**
- C. "Ad" of "Ad Loc Nm" filter header needs to be all caps on ALL tabs **(BI team)**
- D. The filter titles for all three tabs (Scorecard, Monthly Trends & Rep) need to either all be spelled out or abbreviated -- **abbr for all and put in same order across all tabs (BI team)**
- E. Director names are duplicated in filter section on Rep tab **(BI team)**
- F. Link to Inside Sales Complio Toolkit on Scorecard and Monthly Trend and Rep tabs does not work look at all 3 views to update **(BI team)**
- G. Rep tab includes "RMC recommends utilizing exception volume rather than percentage as a better indicator to identify opportunity for improvements on the Rep View" **(BI team)**
 - 1. Matt and team to come up with replacement language....
- H. Can "Sort By" be set to correspond with either Volume or Percentage based on the toggled view? **(BI team) --remove**
- I. Can extra space at the bottom of the tabs be removed? **(BI team)**
- J. Remove 5&2s (USWIN/username) from "Rep Name" column in rep-level dashboard **(BI team) - not removing bc rep with same name would roll together**
 - 1. **Look at Kristina Henley and Nariah Baymon that show multiple records with same name and USWIN**
- K. Rep View - Show Target & Definitions "Date Timeframe" does not align with date timeframe in the hover over **(BI team)**