



Lunchtime Webinar

Top tips – An overview of Reporting

Wednesday, 24 October 2018

Agenda



1

Standard & Analytical Qlik Reports

2

User roles required for reporting

3

Live Listings

4

Ad-hoc report top tips

5

Mapping reports

6

Troubleshooting/questions

Standard & Analytical Reports



High level figures – quick



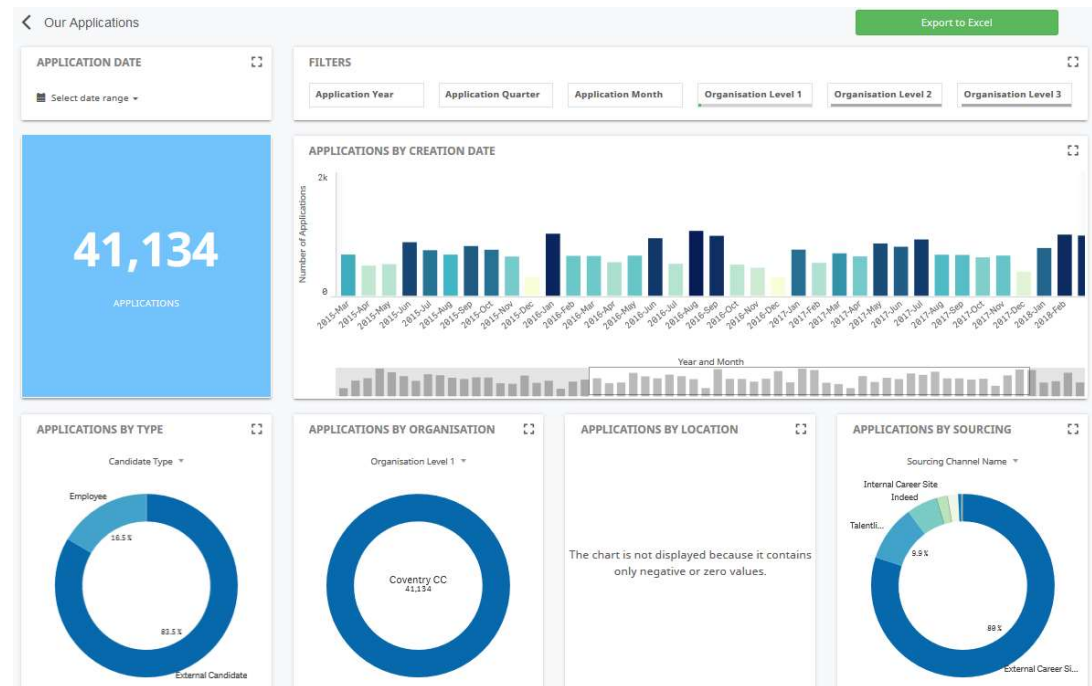
Restricted filtering



Often top level volume or % type reports



Useful where overview information is required



Standard & Analytical Reports



'My' Reports
Accessible for all users



'Our' Reports
Accessible only for users with special rights to launch 'our' reports

STANDARD AND ANALYTICS	ADHOC REPORTS	REFERRALS
SELECT REPORT		DESCRIPTION
STANDARD REPORTS		
My Applications		Number of applications linked to a job opening I'm in charge of, grouped per month of application.
My Candidates		Number of candidates I'm in charge of, grouped by Month of creation.
My Hires		Number of hires linked to a job opening I'm in charge of, grouped per month of hire.
My Job openings		Number of job openings I'm in charge of, grouped per month of creation.
My Job postings		Number of job postings linked to a job opening I'm in charge of, grouped per month of posting.
Our Applications		Number of applications linked to a job opening of the selected organisation, grouped per month of application.
Our Candidates		Number of candidates grouped by Month of creation.
Our Hires		Number of hires linked to a job opening of the selected organisation, grouped per month of hire.
Our Job openings		Number of job openings in the selected organisation, grouped Month of creation.
Our Job postings		Number of job postings linked to a job opening of the selected organisation, grouped per month of posting.
ANALYTIC REPORTS		
Analytic Report - Cost Per Hire		Analytic Report - Cost Per Hire
Analytic Report - Operations Follow-Up		Analytic Report - Operations Follow-Up
Analytic Report - Recruiting Channels Effectiveness		Analytic Report - Recruiting Channels Effectiveness
Analytic Report - Time Performance		Analytic Report - Time Performance
Application Process Traffic Analysis		Application Process Efficiency Report
Diversity Report		Diversity Report
Front Office Search Traffic Analysis		Front Office Search Efficiency Report

Roles Required



ROLE	PURPOSE
Access to Adhoc reports Access to new Adhoc reports	Ability to access, create and schedule report templates
Access to Live Listing	To access and run reports for live job postings, openings and applications
Access to My Standard Reports	Generate reports for jobs you are added to
View diversity information in candidate file	To access equal opportunities data
Manage Tags	To create named tags for ad-hoc reports
DSS Full Access	View reports (analytic, my and our standard, custom)
Access to Qlik Reports	Allows you to view the enhanced display of reports



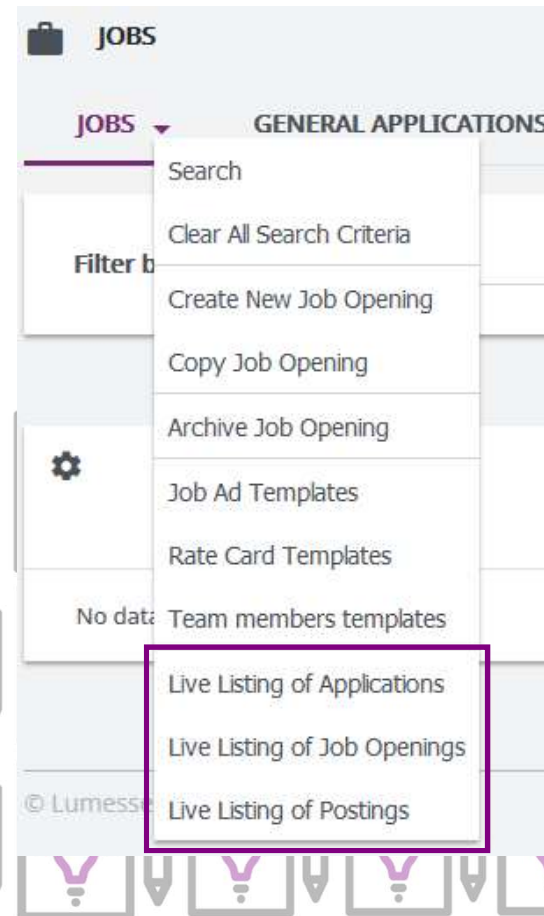
Live Listings



'Live Listings' sits under the 'Jobs' tab, not 'Reporting'



Able to access Applications, Job Openings and Postings



Ad Hoc Reports



Copy details of an **existing** report

You are able to copy details of a report with your environment to save you time building a report from scratch, making it easier to mirror reports with small amendments

You can create a 'Unique Copy' which will be a report in it's own right or a 'Cloned Copy' which will evolve with the original report when changes are made

DEFINE ADHOC REPORT SETTINGS - STEP 1/7

[Import configuration from existing report](#)

Define report details

Report Name *

Description

Language of extraction * English (UK)

Number of files retained in the history * 3 (Max 15)

Report format * Excel (.xls)

Timezone * User

Define data type

Define type of report *

- ☐ Application, Selection and On boarding Follow up
Used to monitor the application received and follow up activity related to selection and hiring process.
For example: Weekly listing of meeting to schedule, Monthly report on performed interviews, Monthly report on short-listed candidates
- ☐ Current Contracts and Timesheets
Current Contracts and Timesheets Description
- ☐ Job Opening and Job Posting Follow up
Used to monitor the activity related to job opening creation, approval process and job posting.
For example: Weekly report of new job openings, Monthly follow up on approved jobs, Activity report on published job advertisements
- ☐ Pending Contract and Hires Follow up
Used to monitor the activity in contract definition, negotiation or extension.
For example: Weekly report of contracts to approve, Monthly report on Starters, Monthly report on proposed extensions
- ☐ Activity Logs
SMS Activity Log description
- ☐ Sessions
Used to monitor the activity related to interview sessions. For example: weekly report on sessions booking, monthly report on sessions location

IMPORT REPORT CONFIGURATION

Copy configuration from * -- Please select --

Define the type of copy *

- ☐ Unique Copy
The new version will no longer have links to the original report, and can evolve independently of the original report
- ☐ Cloned Copy
The new version will continue to have a link to the original report, and will evolve in line with the original report

* Required Field



Useful if you want to make similar reports, for example, **safeguarding** and **non-safeguarding** reports



Gives you a good starting point for new reports

Ad Hoc Reports



Number of files **retained**

This is important to note for GDPR purposes - if a number is stated in this field, you will be able to see history reports in your Ad Hoc Report overview

Set this to '0' to stop copies of the report being stored in your Ad Hoc report overview

Lumesse TalentLink - Google Chrome

https://global3.mrtedtalentlink.com/private/rem/rem_adhoc_details.cfm?step=START&ahreportId=0

DEFINE ADHOC REPORT SETTINGS - STEP 1/7

[Name/Desc](#) [Columns](#) [Column Order](#) [Filters](#) [Scheduling](#) [Sharing](#) [Distribution](#)

[Import configuration from existing report](#)

Define report details

Report Name *

Description

Language of extraction * English (UK)

Number of files retained in the history * (Max 15)

Report format * Excel (.xls) ▼

Timezone * User

LAST UPDATE

03/09/2018 08:32 Europe/London

[view previous](#)



This only relates to the Ad Hoc report overview – if copies of a report are being distributed to users, **this has no affect on this function**

Ad Hoc Reports



Use Template Data

Template Data allows you to report on questions which are captured in your Forms, Questionnaires and Profiles within TalentLink

You can use Template Data on your report, whilst capturing standard information from the system and also, custom fields on your Job Requisition or Conditions Form

DEFINE ADHOC REPORT SETTINGS - STEP 2/7

Report Column Definition

Select domain

Application Data Candidate Data Cost Job Content data Job Workflow History **Template Data** Referrals Selection Process History

Add new question into the adhoc report

Template Name	Question Label	Question Type

BACK NEXT CA

Generic Form Preview - Google Chrome

Form name: (Sep16) Application Form
Form description: Part 1 Master Whitebox Safeguarding plus eligibility
Form versions: 22/08/2017 - 10:35:59
09/11/2016 - 15:02:38
22/08/2017 - 10:34:59
22/08/2017 - 10:34:59

Do you have a legal right to live and work in the UK?
☐ Yes
☐ No

Employment History
☒ If you have any gaps in your employment then please detail the reason(s) why.

Education

Memberships of relevant professional bodies

Training

CLOSE ADD



You are able to add up to **15 template data** questions on one report



Make sure you are reporting on the highest form version **in order to capture accurate data**

Mapping Reports



1

Is the data being captured?

2

What fields relate to what information

3

What are you trying to report on?

4

Understand where the data is being captured in the system

5

Understand filters – this drives the data being pulled through

6

Understand the steps in your process

Mapping Reports



- ▶ Category: Screening [Add Step](#)
 - ▶ Prescreening (Default step)
- ▶ Category: CVReview [Add Step](#)
 - ▶ Shortlisting
- ▶ Category: Interview [Add Step](#)
 - ▶ Interview 1
 - ▶ Interview 2
- ▶ Category: Offer [Add Step](#)
 - ▶ Conditional Offer
 - ▶ Offer Checklist
 - ▶ Reference 1
 - ▶ Reference 2
 - ▶ Reference Chase 1
 - ▶ Reference Chase 2

SELECTION STEP	STEP NUMBER
PRESCREENING (DEFAULT)	1
SHORTLISTING	2
INTERVIEW 1	3
INTERVIEW 2	4
CONDITIONAL OFFER	5
OFFER CHECKLIST	6
REFERENCE 1	7
REFERENCE 2	8
REFERENCE CHASE 1	9
REFERENCE CHASE 2	10

Troubleshooting



“ My report isn’t pulling through any data ”



Troubleshooting



1

Do you have a filter on?

2

Are the questions you've selected relate to a form that's being used?

3

Have you selected the highest version on the form?

4

Have you changed your selection process?

5

Have you changed a form?

6

Have you selected the right report type?

Thank you – questions?

Nicola Warner
Resourcing Business Partner



Reports Training



Open House

Workshop Style Training

Training schedule arriving soon!



Lunchtime Webinar

Webinars still remaining in the lunchtime schedule – check out the [Service Centre](#)