# **Enhanced Reporting**

Open PageUp and select the *Reports* tab quick link in the top header. Click *Enhanced Reporting* from the dropdown.

Jobs People Reports A stitings Recent items V Quick search Q JAM	IE v ? v
Enhanced Reporting	•
Primary teams & users	~

**\*\*Note**: If you don't see the tab, reduce the screen size until more selections are visible.

## OR

From the side "hamburger" menu select More...  $\rightarrow$  Enhanced Reporting

×
Search
Applicant search
Applicant search
Dashboard
New task
Dashboard
Jobs
My Interview Panel Jobs
Manage Jobs
My Jobs
My sourced jobs
My job approvals
Manage position descriptions
Applicants
New applicant
Manage applications
My applicants
Shortlisted applicants
Manage offer approvals
My new hires
My new hire tasks
Manage reference check requ
More
Documents
Enhanced Reporting
Enhanced Reporting

#### Features:

Reports <sup>3</sup> Dashboards <sup>4</sup> Sched	ules				
earch for a report here		Q Create M	lew Report	II My Reports	Shared
Report†i	Status	Created by	Reporting on	Date modified	Actions
<b>Applicant Flags</b> Provides detail on applicant flags	* 4	PageUp Administrator	Job	Jun 23, 2023	:
EEO	* 8	Allen Blair	Applicant Search / All	Mar 30, 2023	:

- 1. Help click to load the Knowledge Portal topic of Enhanced Reporting.
- 2. **Reports** tab view of all the accessible reports. \*Displays by default.
- Dashboards tab click to manage your dashboards.
   Note: Available for Advanced Analytics clients only
- 4. Schedules tab click to manage report run schedules.
- 5. **Search** use to search for reports.
- 6. **Create New Report** button to create a new report.
- 7. All, My Reports, Shared buttons click to filter the report list. \*All is the default.
- 8. Report list displays drafted and published reports.
  - The following column headings can be clicked to sort by ascending or descending Report; Created by; Reporting on; Date modified.
  - Actions (three black dots in each report row) can include: View report; Download report;
     Create draft; Configure; Publish draft; Assign Owner; Share.
    - NOTE: The options in the action's menu will vary depending on the report you select.

Click the name of the report in the *Report* column to view it.

#### **Creating a report**

From the Enhanced Reporting home page, click *Create New Report*.

Reports	Dashboards	Schedules			
Search for a	report here			٩	Create New Report
Report† <u>+</u>			Status	Created by	Reporting on
<b>Applicant F</b> Provides d	<b>-lags</b> etail on applican	t flags	* 9	PageUp Administrator	Job

In the new report pop-up window, select a general category or area of report that you wish to start with.

**\*\*Note**: The category selected will not restrict the fields you can use for your report. It is a tool that provide options for pre-built reports in each category commonly used in PageUp.

elect an area to view its descri	otion		
Agency Contact			9
Applicant Search / All Candidates			
Employee			
Flexible Forms			
Job			
Job Referral			
Job via Position			
Job via Sourcing			
Position Description with Jobs			

Once a category is selected, click *Create*.

Select an area to v	iew its description	
Job		~
· · · · · · · · · · · · · · · · · · ·	ur starting point for most Recruitment reporting. Starts with all Jobs, and ster lications submitted against those jobs, offers for those applications, the oles, etc.	ms o

In the center of the screen there may be *Quick Start* reports that are pre-built by PageUp.

Hover over any of the report blocks to view a brief description.

Click on a block to use any of the quick start reports as is or use them as templates for building your own reports.

Job ©	Quick Start					
Q. Start typing to search	Explore from a prebuilt analys	is in Job	Qu	ick start showing currently jobs wi have been filled in the last 4 week	hich s	
All Fields In Use	Applicant offers made	Dpen Jobs	Current Recruitment	Filled Jobs	I New Starters	
Custom Fields     + Add		Report on jobs which are not closed including number of	Quick start showing currently open jobs created within th	Quick start showing currently jobs which have been filled _	Quick start showing applicants who's start date	
Agency Agency Contact Communication						
Agency:Documents	Offers Accepted and Declined	Opened Jobs Quick start showing jobs	Recruitment Activity Quick start jobs where	Sourcing (Overall) Quick start showing number		
Applicant	Quick start showing applicants who've accepted	opened this month	applications have been_	of applications by		
Applicant Category	-					
Applicant Education						
Applicant Employment Profile						
Applicant Language Proficiency						
Applicant Notes						
Applicant Residency						
Applicant SMS						

By selecting a quick start report, the report will be loaded and is available for viewing and/or editing on the *Explore* screen view. You can also choose to build a report from scratch and start adding fields using the fields listed on the left of the screen.

## **Explore screen**

The Explore screen can be divided into 6 areas:

Explore	0 rows - 0.659s - 16m app - Rum 6
Job Ø © Find a Field Q. Start typing to search	Filter (2)     Outrom Filter     Outrom Filter     Outrom Filter     Outrom Filter
All Fields In Use	© Job Job status is equal to Filed ★ × + Visuelization
Custom Fields     + Add     **Current User**     Agency	Requisition Numer Title Job status Full name Date created Date 🗸 Date job approved Date Date needed Date Date Job Filled & Closed Date Days Since Job Open
Agency Contact Communication     Agency:Documents	No Results
Applicant     Applicant Category	
Applicant Education     Applicant Employment Profile     Applicant Language Proficiency	Lata     Results     Add calculation     Totals     Sob of the set of the s
Applicant Notes     Applicant Residency	Full Date Date
Applicant SMS     Applicant Social Media     (fields	()

- 1. Fields
- 2. Filters
- 3. Visualization
- 4. Data
- 5. Run
- 6. Report Actions menu

**Fields** – All available fields are shown and can be browsed through when the *All-Fields* tab is selected. Search for specific fields using the top *Find a Field* search bar. The fields are categorized into sections. Determine the best selection based on the category headings returned in the results.

To add a field to the report, click it. When it is added, it will be highlighted grayish blue. The field will also be added as a column in the *Data* viewing area.





**\*\*Note**: To access a PageUp field data dictionary with frequently used reporting fields, click here.

**Filters** – The top of the screen in the main viewing panel of screen. This is where you can edit existing filters and / or create new ones.

To filter on a specific field in your report:

- 1. Find the field in the column in the data area of the screen.
- 2. Click the cog in the field column heading to see the field data options. Select *Filter* from the drop down.
- 3. Define your filter in the top *Filters* section, based on your specific criteria.

						100		Custom Fi
Employee Archived (Yes / No)		is	No	×				
Employee permission groups Permissio	an Group	contains	Role	e 2 ×	×			
	OR	contains	Role	e 1 x	×			
	OR	contains	Role	e 3 x	×			
	OR	contains	Role	e 4 x	× +			
Employee login Latest Login Date	3	is null		× +				
Asualization	-	is in the past is on the day						
		is in range is before is on or after				2		Row Limit 5000 Totals Subtota
								Row Limit 5000 Totals Subtot
		is in the year						
Row limit reached. Results may be inco		is in the year	e st	Employee Position title	Employee permission groups      Permission Group	Emplos Employee Posit Position Branc Brand Code	<ul> <li>Employee Position ( Position Number</li> </ul>	2
Row limit reached. Results may be inco	omplete © Employee @	is in the year is not is any time is not null matches a user attribut	e st	Employee Position title	<ul> <li>Employee permission groups </li> <li>Permission Group</li> </ul>	Posit Position	<ul> <li>Employee Position ( Position</li> </ul>	Employee     O     Employee logn     Remove     Filter
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Row limit reached. Results may be inco Engloyee E wall † 1 2 3	omplete © Employee @	is in the year is any time is not null matches user attribut matches (advanced)		-	Permission Group	Posit Position Branc Brand Code	<ul> <li>Employee Position ( Position Number</li> <li>2</li> </ul>	Employee     O     Employee     Create filtered measure

#### OR

- 1. Select the In Use field tab.
- Find the field you wish to filter and click the *Filter by field* icon with three horizontal lines.
- 3. The field will be added to the *Filters* section and from there you can adjust the filter as needed.

Explore						
Employee 🖗	٢	▼ Filters (1)				
ind a Field		Job Agency	is equal to	3		$\times$ +
Q job organiza	×				Agriculture & Consumer Svcs	<u>^</u>
					Augusta Correctional Center	
All Fields	Use				Baskerville Correctional Cntr	
		Visualization			Bland Correctional Center	
Job	5	▼ Data Results	Add calculation		Buckingham Correctional Center	
DIMENSIONS					Center Children & Adolescents	_
<ul> <li>Organizational hierarchy</li> </ul>		Job Position title 🛞	Position Description Created Date	🎯 Job	Central State Hospital	Job: Recruiter Fi
Agency 2	Ŧ				Coffeewood Correctional Center	-
Agency - Parent						
Application						
Brand Code						
Department						

## Visualization

Refer to <u>Knowledge Portal article</u> for more information.

## Saving a report

- 1. In the Explore view, use the top right cog to view the report menu options.
- 2. Click Save
- 3. Click As a Look (This means it will display the visualization you selected whenever you initially load the report)
- 4. In the Save Look pop-up window enter your report *Title* and optional *Description*
- 5. Save by clicking one of the buttons at the bottom of the screen





## Clone an existing report

- 1. Open the report you wish to clone and edit
- 2. The report view screen will begin to load.
  - \*\*If you don't need to view the visualization, press the red *Stop* button in the top right of the screen. It may take a few seconds to appear.



3. Click the cog at the top right of the screen to open the report menu. Select Save  $\rightarrow$  Save As...



4. A pop-up *Save* window appears. In the *Title* field rename the report. Save the report.

Save Look	Applicant Hace
Cave Look	^
Title	Applicant Flags for My Jobs
Description optional	Provides detail on applicant flags for only the jobs I manage.
Folder	My folder
My folder	Filter by title
	Positione Requested Last 7 Days - TEST
	Save & View Lock

- 5. If you wish to edit the report, go to the same cog menu and select edit (Cog  $\rightarrow$  Edit)
- 6. To delete the report, select  $Cog \rightarrow Move \ to \ trash$

## Actions menu

- The report menu options vary based on who created it, who owns it, and whether it is shared or a draft.
- The reports you have created and shared cannot be edited unless a draft is created, or the report is unshared. This prevents changes to be made while others are viewing the report.
- Reports can be scheduled to run on a regular basis in your format of choice and sent to multiple email recipients.

Report †1	Status	Created by	Reporting on	Date modified Actions
Employment Opportunity Plan Report	*	Allen Blair	Applicant Search / All Candidates	Aug 22, 2023
Minimum and Additional Consideration Scoring	* 41	PageUp Administrator	Job	Jun 30, 2023
Position Description - Incorrect Workflow Used to located position descriptions submitted	총	John Tester	Position Description with Jobs	May 9, 2023
Positions Approved with Job Posting and Filled Date Approved positions with job card approval date,	훕	John Tester	Position Description with Jobs	Jul 3, 2023
Positions Requested Last 7 Days - Draft Draft (so it can be edited). We can use this to up		John Tester	Position Description with Jobs	Apr 28, 2023
Positions Requested Last 7 Days	*	John Tester	Position Description with Jobs	May 8, 2023
Positions Requested Last 7 Days - TEST			Position Description	Apr 28 2022

For additional reporting information, see Knowledge portal articles <u>here</u>.

Additional PageUp resources are on DHRM's Talent Acquisition page <u>here</u>.