



Applicant Tracking System Training Reporting Guide

Updated April 2023

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REPORTING OVERVIEW

Reports are contained in one central location in the Applicant Tracking System, making it easy to access information about multiple postings at once. Your permission group and Job Card Role will determine the reports you can view for a particular posting.

Search Committee Members

Search Committee Members listed on the Job Card can run the following reports for that posting when it is active:

- Applicant List (Posting)
- Event Bookings
- Reference Checks

In addition to the reports listed above, the Search Chair listed on the posting can run the following report for that posting when it is active:

- Committee Ratings (Search Chair)

Staffing Coordinators:

Staffing Coordinators listed on the Job Card can run the following reports for that posting:

- Applicant List (Posting)
- EEO Summary (Dept)
- Background Checks
- Event Bookings
- Onboarding: Employee Task Audit
- Onboarding: Supervisor Task Audit
- Reference Checks
- Sourcing & Referrals

In addition to the reports listed above, the Primary Staffing Coordinator listed on the posting can run the following report:

- Committee Ratings (Prim Staff Coord)

Dean/VP/Directors & Dean/VP/Director Delegates

Users with Dean/VP/Director or Dean/VP/Director/Delegate permission group can run the following reports for all postings created within their MAU in the last 18 months:

- EEO Summary FAS (DVP)
- EEO Summary SS (DVP)
- EEO Summary TOC (DVP)
- Sourcing & Referrals (DVP)

ACCESSING THE REPORTING MODULE

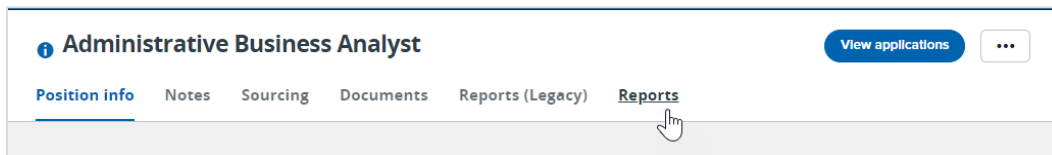
Reports are stored on the Job Card or on the Dashboard for Dean/VP/Director and Dean/VP/Director Delegates

1. **Job Card:** Job Card Reports are automatically filtered by the selected posting. Reports on the Job Card are intended to be downloaded on a posting-by-posting basis.
2. **Dashboard:** Dean/VP/Directors and Dean/VP/Director Delegates have access to reports on the Dashboard. Reports are added to the Dashboard if the data spans across postings.

JOB CARD REPORTS

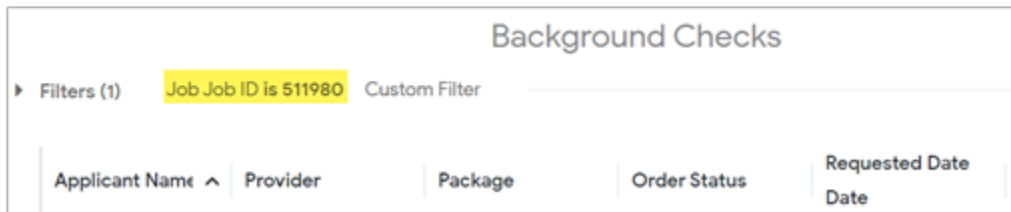
To run a posting-specific report:

1. Navigate to the Job Card for a specific posting
2. Click on the 'Reports' tab



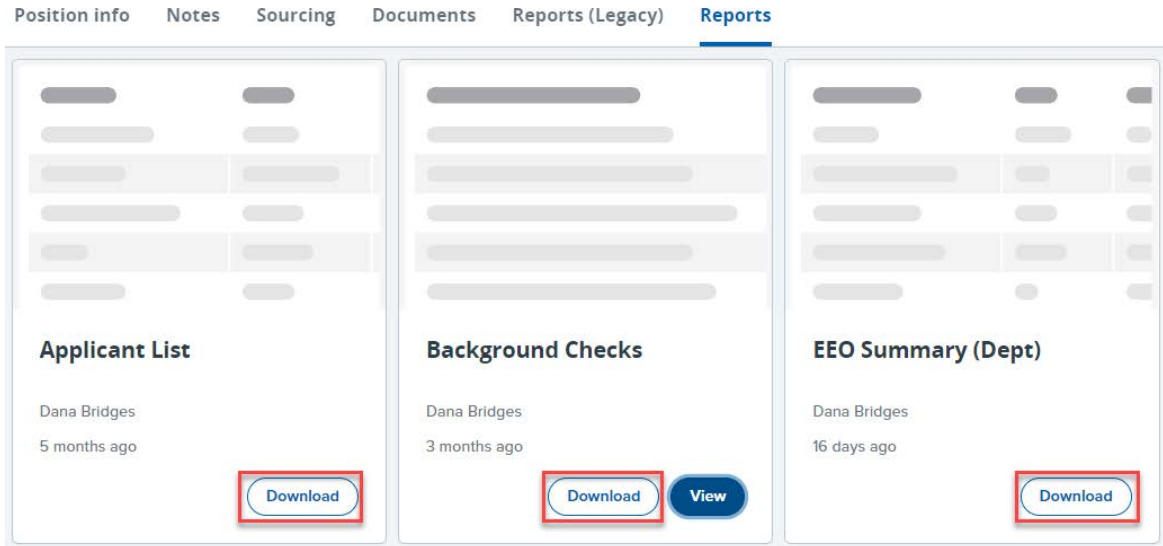
Job Card Reports are automatically filtered by Job ID. **Please do not edit this field** as the Job ID refers to the technical Job ID that is created by PageUp and does not match our Posting/Reference #. If this field is edited the report may error or unintended results will occur.

- For example: Posting # 804425 has a Job ID of 511980. At the top of the report, you'll notice the Job ID filter reflects 511980 and not 804425.



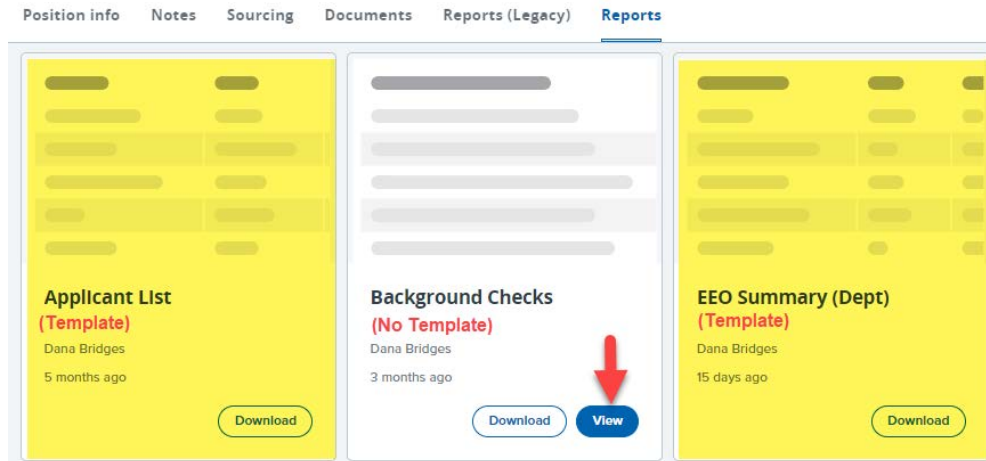
Downloading Job Card Reports

To download reports from the Job Card, click on the 'Download' button at the bottom of the report tile. *Note: Reports with templates will automatically be downloaded into the Excel template.*



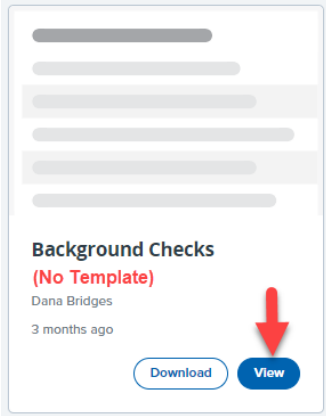
Job Card Templated Reports

Templated reports on the Job Card only have the option to 'Download' the report into the template (see highlighted reports below).



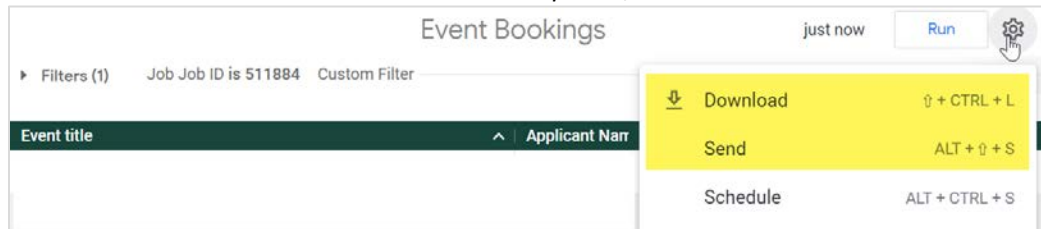
View a report from the Job Card

To view the report data in the browser, click 'View'.



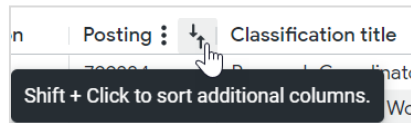
Note:

- Templated reports do not have the option to 'View' data in the browser.
- Reports have a default row limit of 500 rows when viewing the data in the browser. To view data beyond 500 rows:
 - Click on the gear icon in the upper right corner of the report
 - Select 'Download' or 'Send'
 - Choose 'All Results' under the Advanced Options/Row inclusion criteria

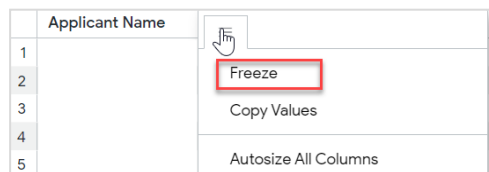


Modify report view in the browser

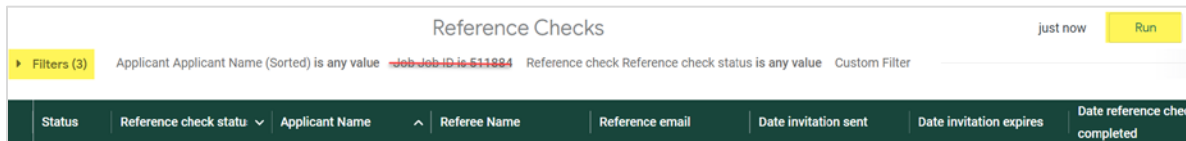
- **Sort Columns:**
 - Click on the arrow icon in any column to sort by that column.
 - To sort by multiple columns, 'Shift + Click'



- **Freeze Columns:** If a report has many columns and you'd like to freeze certain columns at the beginning of the report to stay in place, click on the vertical ellipses next to the column name. A menu will appear, select 'Freeze'



- **Reorder Columns:** Drag and drop to reorder columns.
- **Modify Filters:** Click on 'Filters' to expand the report filters. If a custom filter is set against the report, it *cannot* be edited. All other filters displayed will be editable, *but please refrain from changing the Job ID filter*. Once a filter has been adjusted, click 'Run' to display the results.




DASHBOARD REPORTS (DVP & DELEGATES)

Dean/VP/Directors and Dean/VP/Director Delegates have access to reports on the Dashboard for data that spans across postings. To access the Enhanced Reporting Dashboard, click on the 'Reports' tab in the blue header and select 'Enhanced Reporting'.

The Enhanced Reporting Dashboard contains 2 tabs:

1. **Reports:** A listing of all reports created and customized for MSU. All of the reports that have been transitioned from Legacy reporting will be found on this tab.
2. **Schedules:** A listing of report schedules created and managed by you to email reports on a recurring schedule.

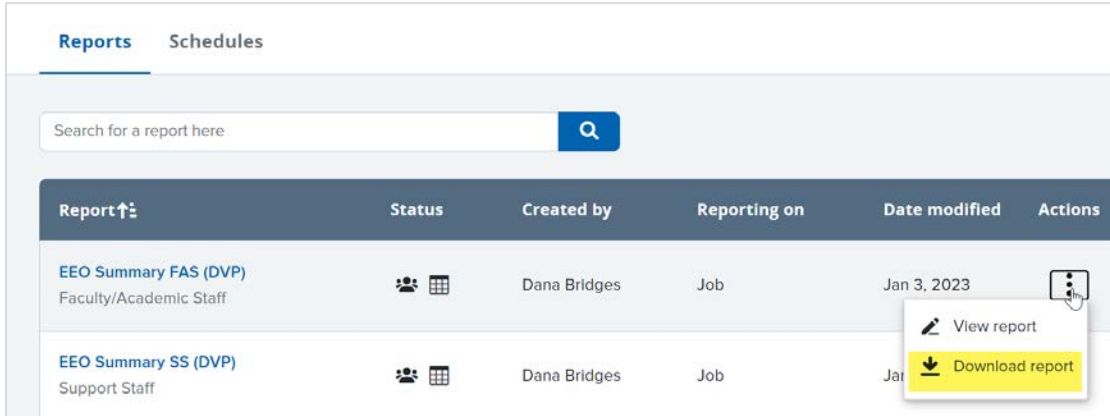
All DVP reports utilize an Excel template, which aggregates and formats data in a meaningful way when downloaded to Excel. Templated reports are denoted by the  symbol. In order to view the templated report data in Excel, it is recommended that all DVP dashboard reports be downloaded using the ['Preferred Method'](#) below.

Downloading Dashboard Reports

Recommended Method:

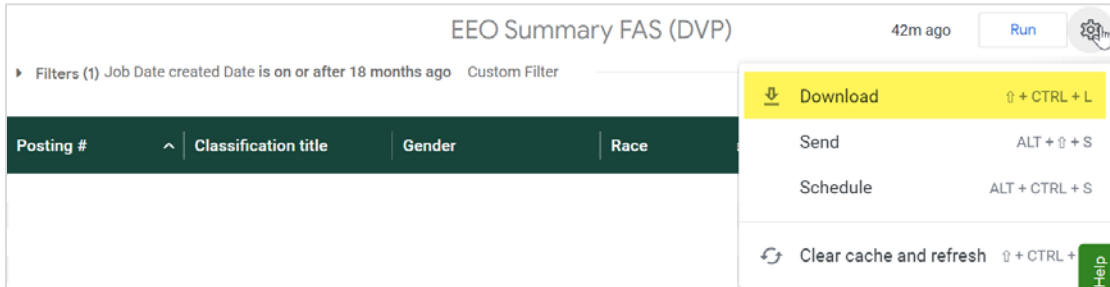
To download reports from the Report Dashboard click on the vertical ellipses in the Actions column and select 'Download report'. By default, reports will pull data for any posting created in the last 18 months for your MAU.

Note: This is the preferred method for downloading DVP reports as it will ensure all data is populated into an Excel template which aggregates and formats data in a meaningful way.



To download reports after viewing the report in the browser, click on the gear symbol and select 'Download'.

Note: Reports will NOT be downloaded into the Excel template when downloading from this page. Only raw data will be returned. The report must be downloaded via the main dashboard using the preferred method above to populate the data into the Excel template. Alternatively, if filters need to be adjusted, the report can be scheduled or sent to email and the report will be populated into the Excel template.

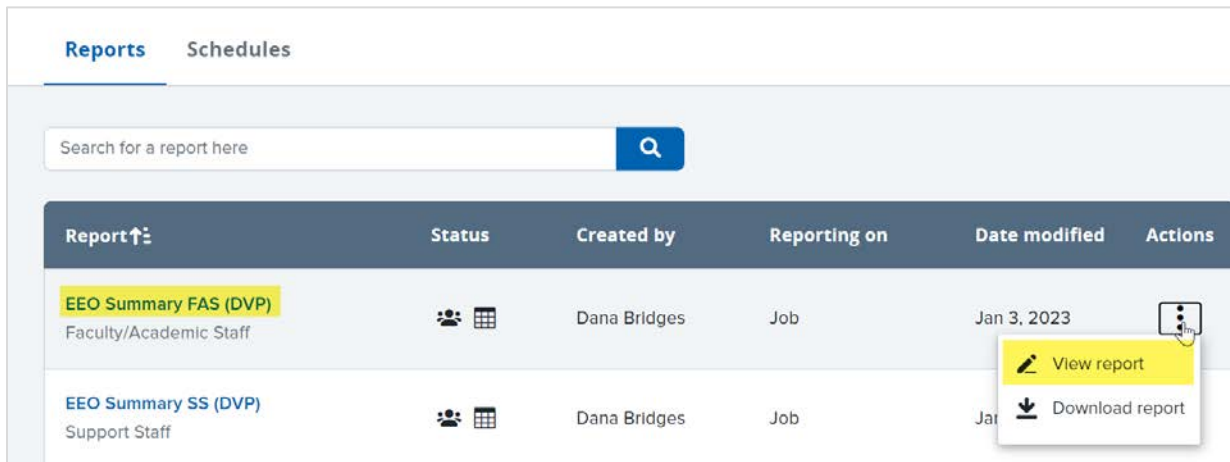


View a report from the Dashboard

While it is recommended to download all DVP reports using the ['Preferred Method'](#) to populate the customized Excel template, there is the option to view the raw data in the browser and modify the report filters. To view the raw data in the browser:

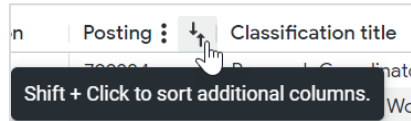
1. Click on the name of the report OR
2. Click 'View Report' from the **Actions** menu

Note: Reports have a default row limit of 500 rows when viewing the data in the browser. To view data beyond 500 rows, download or send the report via email and select 'All Results'.

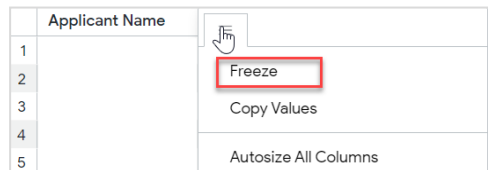


Modify report view in the browser

- **Sort Columns:**
 - Click on the arrow icon in any column to sort by that column.
 - To sort by multiple columns, 'Shift + Click'



- **Freeze Columns:** If a report has many columns and you'd like to freeze certain columns at the beginning of the report to stay in place, click on the vertical ellipses next to the column name. A menu will appear, select 'Freeze'



- **Reorder Columns:** Drag and drop to reorder columns.
 - *Note: This should not be performed for templated reports that you plan to send/schedule. The template will break if the columns are not in the order displayed on initial viewing.*

- Modify Filters:** Click on 'Filters' to expand the report filters. If a custom filter is set against the report, it cannot be edited. All other filters displayed will be editable. Once a filter has been adjusted, click 'Run' to display the results.

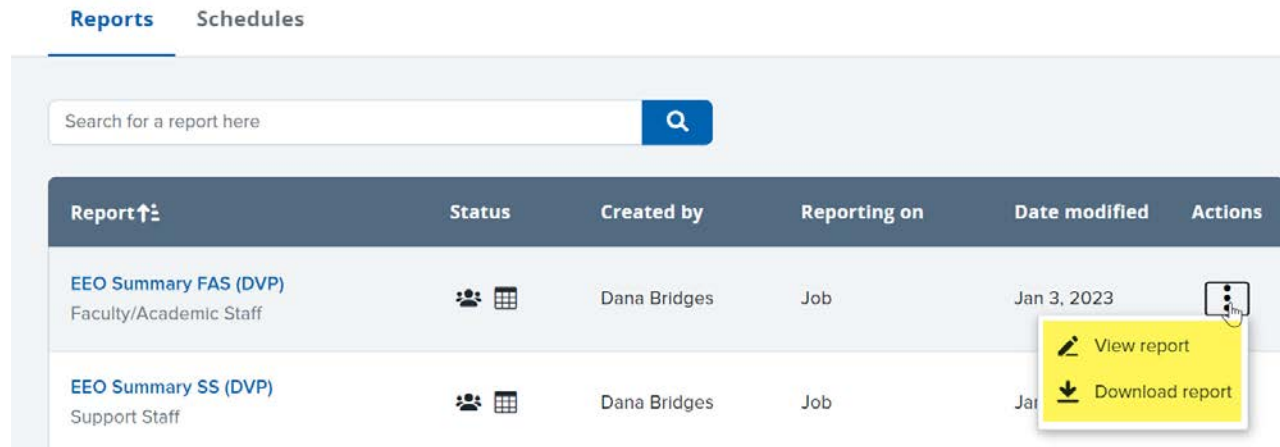


Report Dashboard Templated Reports

Templated reports on the Report Dashboard can be downloaded into the template OR raw data can be viewed in the browser.

Note: To download the report into the template, the 'Download report' button must be selected on the main page of the dashboard. However, if there is a need to edit filters before downloading into the template, the following steps are needed:

- View the report in the browser.
- Edit the filters.
- Select the gear icon and select 'Send'.
 - Note: If 'Download' is from the gear icon, the report will not be downloaded into the template.



SENDING/SCHEDULING REPORTS

Any user in the system with access to reports can:

- **Send:** Email reports outside of the system on an ad hoc basis
- **Schedule:** Create a schedule to send reports on a recurring basis via email

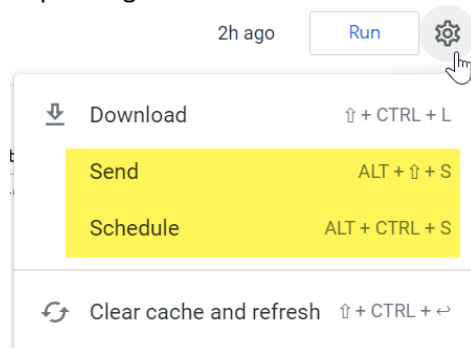
Important Notes:

- Templated reports on the Job Card cannot be scheduled/sent
- All reports that are emailed via the Send/Schedule function will come from PageUp Analytics (no-reply@pageuppeople.com). Please add no-reply@pageuppeople.com to your 'Safe Senders List'
- Reports can be sent/scheduled to individual or team emails.

Note: *If sending to a distribution list, the email will not be received if the distribution list has the setting enabled to "require that all senders are authenticated".*

Schedule or send a report

1. View the report
2. Click on the gear icon in the upper right corner of the report. Select 'Send' or 'Schedule' depending on desired action.



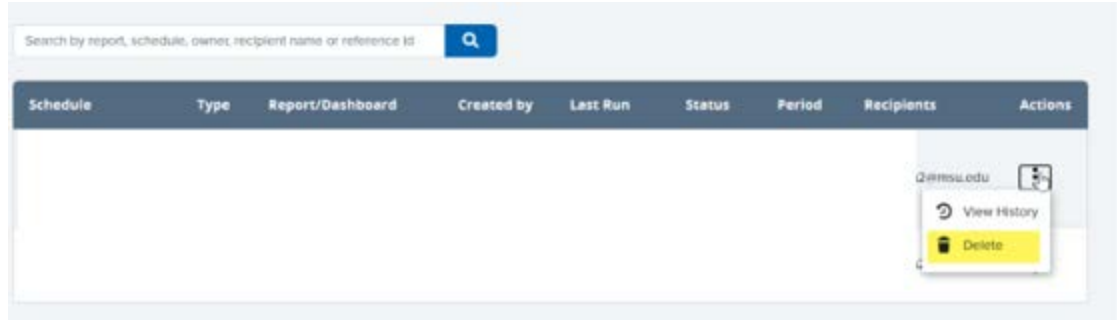
3. Enter the following information:
 - a. **Title:** Pre-populates with the name of the report. Modify as needed.
 - b. **Email:** Enter email address(es) of recipients. If sending to a distribution list, the email will not be received if the distribution list has the setting enabled to "require that all senders are authenticated".
 - c. **Email Content:** Modify the body of email as desired.
 - d. **Format data as:** Recommend selecting XLSX (MUST select this option if report is templated)
 - e. **Trigger (Scheduled report ONLY):** Select 'Repeating interval'
 - f. **Deliver this schedule (Scheduled report ONLY):** Select desired interval and time.
 - g. **Filters:** Modify filters as needed
4. **Advanced Options:** Recommend to change limit to 'All results'. Leave 'Apply visualization options' and 'Formatted data values' checked.
5. To test the report schedule, click the 'Send Test' button to send a test report immediately to the recipients identified in the schedule.
6. Once you are satisfied with the set-up of the schedule, click 'Save All'.

Modify or delete an existing schedule

1. Click on the 'Reports' menu in the dark blue toolbar. Select 'Enhanced Reporting'.
2. Click on the 'Schedules' tab to view all active schedules

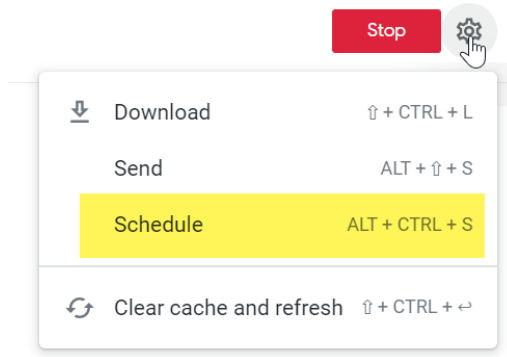
To delete a schedule:

- a. Click on the ellipses and select 'Delete'



To modify a schedule:

- a. Click on the name of the report
- b. Click the gear icon in the upper right corner and select 'Schedule'



- c. A list of the schedules associated with the report will be captured on the left sidebar.
- d. Modify schedule as desired or create a new schedule by clicking the 'New' button in the left sidebar.