



# myUA

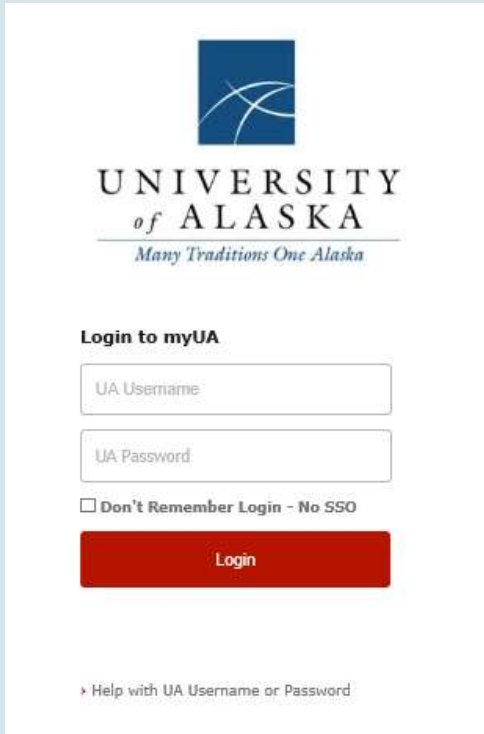
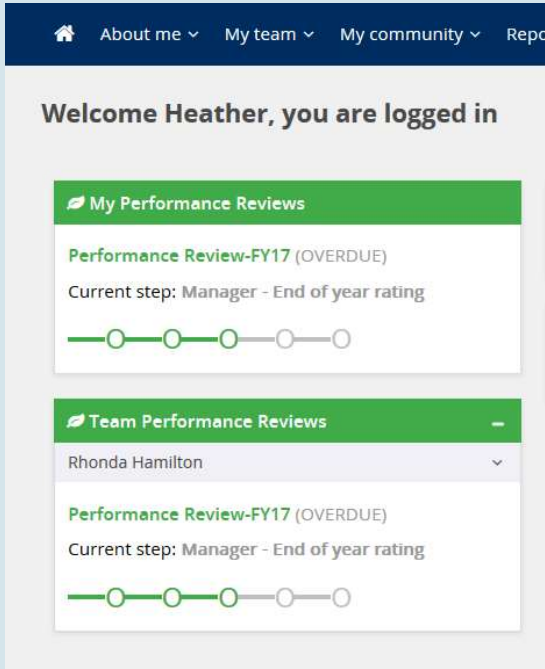
## Performance Evaluation Essentials



Dashboard Recruiting Competency  
Contractor Management Integrated Framework  
SaaS Reporting Performance  
Succession Global Informal Learning Enterprise Cloud  
Onboarding Career Planning Assessment  
Intuitive Development Multilingual

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## Quick Reference Guide – Navigating the myUA Dashboard

What you need to do	What you will see
<p><b>STEP 1: Sign-in to myUA</b></p> <p>Go to <a href="http://myua.pageuppeople.com">http://myua.pageuppeople.com</a></p> <p>Sign-in using your UA Single Sign-on credentials.</p>	
<p><b>STEP 2: View open performance reviews</b></p> <p>Open performance reviews are viewable from the main dashboard performance widgets (green).</p> <p>Your own performance reviews are under the <b>My Performance Reviews</b> widget, and reviews for which you are the supervisor are listed under the <b>Team Performance Reviews</b> widget.</p> <p><b>NOTE:</b> Only current performance reviews display via the widgets. To access historical reviews, see the Accessing Completed Reviews section of the guide.</p>	

<p><b>STEP 3: Alternative ways to access reviews</b></p> <p>To access your own performance review: From the ribbon at the top of the screen, hover over <b>About me</b> and select <b>Performance reviews</b> from the drop-down menu.</p> <p>To access a performance review for a subordinate: From the ribbon at the top of the screen, hover over <b>My team</b> and select <b>Performance reviews</b> from the drop-down menu.</p> <p><b>TIP:</b> If you have supervisors who report to you, you can access their subordinates' reviews by hovering over <b>My team</b> and selecting <b>Organizational chart</b>. You can drill down to their employees by selecting <b>View: Team</b> under their avatar.</p>	  
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## Quick Reference Guide – Create Performance Evaluation

What you need to do	What you will see
<p><b>STEP 1: Select Create</b></p> <p>Hover over Create on the ribbon and select <b>Performance review</b> to initiate your own review or <b>Team member's performance review</b> to create a review for a subordinate</p>	

## STEP 2: Initiate Review

The **Review Start Date** automatically populates with today's date.

Select the appropriate review process from the **Review process** drop-down list. If the employee supervises, please select the review denoted as “**(Supervisory)**”.

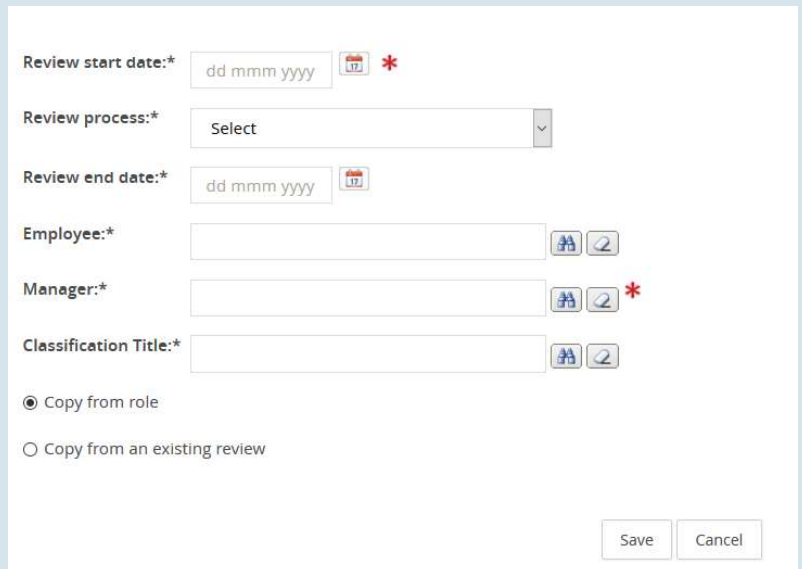
The **Review end date** will auto-complete based on the review process.

To complete the **Employee, Manager, and Classification Title** fields you can type directly into the field, or use the binoculars look-up icon. If you need to make a change, use the eraser icon to clear the field contents.

Once all the fields are completed, select **Save** to initiate the review.

**NOTE:** If you are starting your own review, the **Employee, Manager, and Classification Title** fields are automatically populated.


When starting reviews for subordinates, only the **Manager** field automatically populates, but the **Classification Title** field will auto-complete once the **Employee** field is completed.



The screenshot shows a web form for initiating a review. It includes the following fields and options:

- Review start date:\***: A date input field with a calendar icon and a red asterisk.
- Review process:\***: A dropdown menu with "Select" as the current value.
- Review end date:\***: A date input field with a calendar icon.
- Employee:\***: A text input field with a binoculars icon and an eraser icon.
- Manager:\***: A text input field with a binoculars icon, an eraser icon, and a red asterisk.
- Classification Title:\***: A text input field with a binoculars icon and an eraser icon.
- Copy from role**: A radio button that is selected.
- Copy from an existing review**: An unselected radio button.
- Save** and **Cancel** buttons at the bottom right.

## Quick Reference Guide – Review Discussion Tab (Set Goals step)

What you need to do	What you will see
<p><b>STEP 1: Select Review Discussion Tab</b></p> <p>Click <b>Review Discussion</b> from the breadcrumb trail at the top of the review.</p>	 <p>The breadcrumb trail shows four steps: Start, Review Discussion (highlighted with a chevron), Performance Review, and Next steps.</p>

## STEP 2: Answer Review Discussion Questions

The four questions listed in this tab are to facilitate the review discussion between the supervisor and employee. Prior to meeting with the supervisor, the employee can answer the questions via the text box, as well as upload documents if needed.

### Review Discussion (PLAN PHASE)

The purpose of this tab is to facilitate the supervisor-employee conversation at both the start and end of the review period. The discussion should not be focused on rating performance, but on unleashing employee talent and identify ways to improve.

#### Item title

Title\*

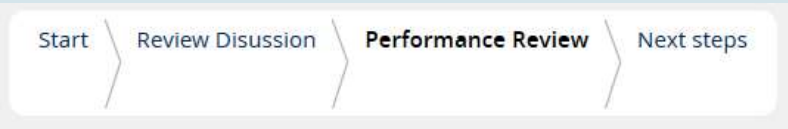







What are some accomplishments since the last review period?

Measure

**B I U** |  |  |  |  |  |  |  Source

To be filled out by employee prior to discussion with supervisor.


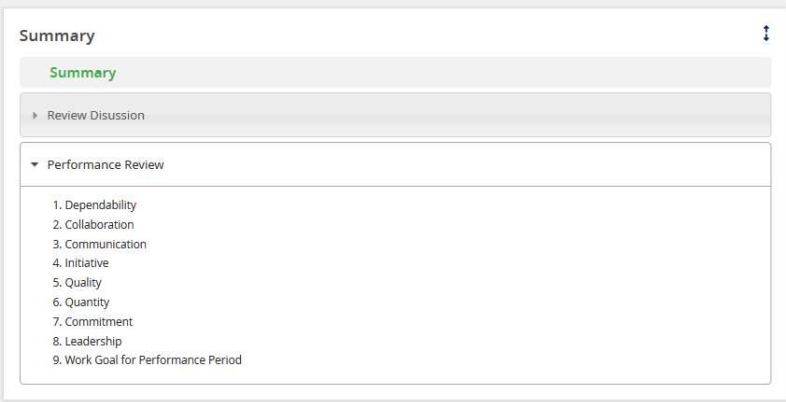
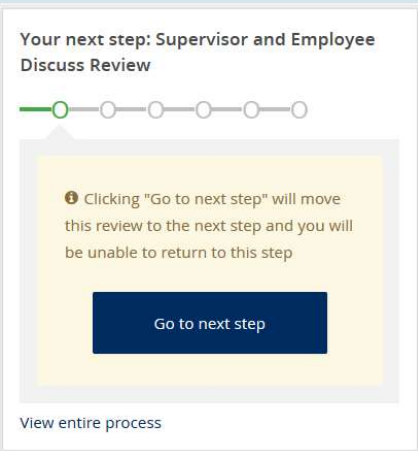
## Quick Reference Guide – Performance Review Tab (Set Goals step)

What you need to do	What you will see
<p><b>STEP 1: Select Performance Review Tab</b> Click <b>Performance Review</b> from the breadcrumb trail at the top of the review.</p>	
<p><b>STEP 2: Review Competencies</b> When reading the competency measures, consider how these attributes specifically relate to your job duties and performance. Supervisor and employee will discuss these to ensure mutual expectations.</p>	<p><b>Employee Performance Review (PLAN PHASE)</b></p> <p>The purpose of this section is to understand key competencies and how they relate to your job duties and performance. Below you will find a list of UA's standard competencies, again required work goal specific to the position. Additional goals can be added.</p> <p><b>Dependability</b></p> <p><b>Measure</b></p> <ul style="list-style-type: none"> <li>• Is punctual in attending</li> <li>• Is reliable and follows</li> </ul>
<p><b>STEP 3: Complete Goal(s)</b> At the bottom of the <b>Performance Review</b> tab, at least one goal for the review period needs to be completed. Enter the goal in the <b>Title</b> field and the measure by which defines success in the <b>Measure</b> text box.</p>	<p><b>Title*</b> [Work Goal for Performance Period] EDIT</p> <p><b>Measure</b></p> <p><b>B I U</b>                      Source</p> <p>Define at least one (1) goal, specific to the position, in the field above. In this box, please list how success for this goal will be measured.</p>

To add more goals, use the **Add Goal(s)** button.

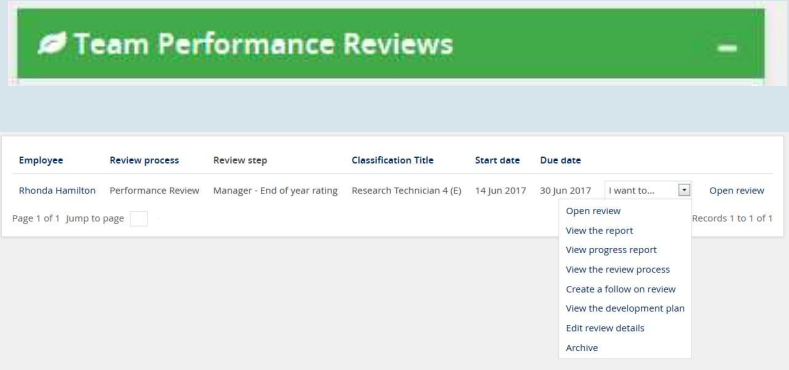
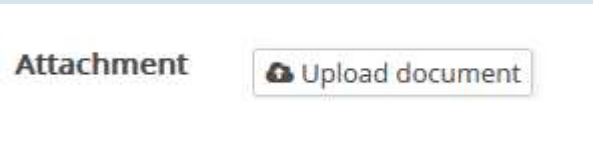



## Quick Reference Guide – Next Steps Tab (Set Goals step)

What you need to do	What you will see
<p><b>STEP 1: Navigate to Next Steps Tab</b> Click <b>Next steps</b> from the breadcrumb trail at the top of the review.</p>	
<p><b>STEP 2: Review Summary</b> An overview of the Review Discussion and Performance Review tabs are displayed in the <b>Summary</b> section.</p>	
<p><b>STEP 3: Move Performance Review to Next Step</b> Once the fields in the other tabs have been complete, the review can be moved to the next step by selecting the <b>Go to next step</b> button.</p> <p>The supervisor will then receive an automated email letting them know that the Set Goals step is complete and they should set up a meeting to discuss the review with the employee.</p> <p>The employee can also send additional communication to their supervisor via the <b>Send e-mail</b> section at the bottom of the <b>Next steps</b> tab.</p>	

Send e-mail

## Quick Reference Guide – Supervisor and Employee Discuss Review

What you need to do	What you will see
<p><b>STEP 1: Set-up Meeting with Employee</b> The supervisor will arrange for a meeting with the employee.</p> <p>The supervisor can choose to work in the review while meeting with the employee, or print the review for reference to the review discussion questions and answers, competencies and goals.</p> <p>To print the report select <b>Team Performance Reviews</b> widget header. Under the employee's review record, select the <b>I want to...</b> drop down list and then select <b>View the report</b>. The review will load as a .pdf file and can be printed from the Adobe viewer.</p>	
<p><b>STEP 2: Document Meeting</b> After the meeting, edits and notes can be made directly into the review items. Additionally, documents can be uploaded against the Review Discussion items.</p>	
<p><b>STEP 3: WAIT and Document Progress</b> The review can wait at this step until the end of the review period, decided on during the supervisor-employee meeting.</p> <p>During this time, you can document progress towards goals, successes, challenges, etc. using the <b>Journal</b> feature.</p> <p>From the ribbon at the top of the screen you can select Journal entry and makes notes that can then later be linked to the performance review. You can also use the</p>	



personalized mail matcher email address listed at the bottom of the journal entry screen to email directly into your journal. Journal items are private unless actively linked into the performance review during the rating steps.

**Add Journal entry**

Journal title

---

Journal entry

**Add**

**My journal mail matcher**

Use your mail matcher address to send journal entries via email: My journal <hr...jj@m.dc4.pageuppeople.com>

### STEP 4: Move Performance Review to Next Step

Once the review period is over, the review can be moved to the next step by selecting the **Go to next step** button.

The employee will then receive an automated email letting them know that the review is ready for them to self-rate.

**Your next step: Employee - End of year rating**

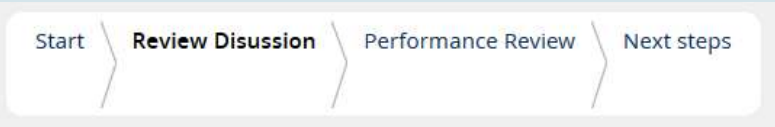

○ — ○ — ○ — ○ — ○ — ○ — ○

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Go to next step**

[View entire process](#)

## Quick Reference Guide – Employee – End of year rating step


What you need to do	What you will see
<p><b>STEP 1: Select Review Discussion Tab</b> Click <b>Review Discussion</b> from the breadcrumb trail at the top of the review.</p>	
<p><b>STEP 2: Add comments regarding next steps</b> Under each question, comments can be added by selecting the <b>Add comment</b> button.</p>	

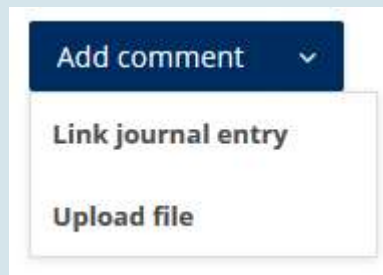
You can save the comment as a draft, or as a personal reminder, you can select the **Save as Private** button. To publish the comment for all users to see, select **Save & Share**.



A screenshot of a comment save dialog box. It features a large empty text area at the top. Below the text area are three buttons: "Save & Share" (dark blue), "Save as Private" (dark blue), and "Cancel" (light gray).

### STEP 3: Link Journal Entries or Documents

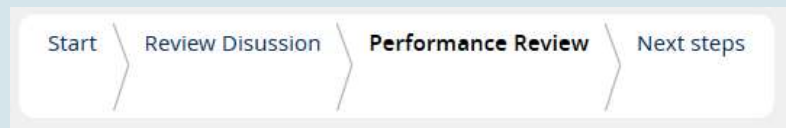
To link a journal entry into a review item, select the  button and select the appropriate option from the drop-down menu.



A screenshot of a dropdown menu. The top button is "Add comment" with a downward arrow. The menu is open, showing three options: "Link journal entry" and "Upload file".

### STEP 4: Select Performance Review Tab

Click **Performance Review** from the breadcrumb trail at the top of the review.



A screenshot of a breadcrumb trail. It consists of four items: "Start", "Review Disussion", "Performance Review", and "Next steps". Each item is separated by a right-pointing chevron symbol. "Performance Review" is highlighted in bold.

### STEP 5: Rate Competencies and Goals

Under each element, use the slider on the right side of the screen to select the rating for each competency and goal. The ratings are as follows:

- Needs Improvement
- Meets Improvement
- Exceeds Improvement

Comments, Journal Entries, and Documents can be added to all elements in this tab. See **STEP 2** and **STEP 3**.



A screenshot of a rating slider for "Heather Arana". The name "Heather Arana" is displayed in bold. Below it is a horizontal slider with a small square handle on the left. The text "Not rated" is displayed below the slider.

## STEP 6: Summary Comments

At the bottom of the Performance Review tab there is an opportunity to enter overall notes about the review period.

### Summary: Performance Review



Heather

**B** *I* U | | | | | | | |

## STEP 7: Move Performance Review to Next Step

After completing the self-rating step, the review can be moved to the next step by selecting the **Go to next step** button.

The supervisor will then receive an automated email letting them know that the review is ready for them to rate.

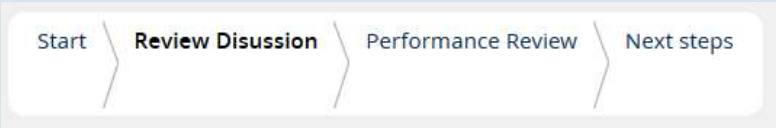



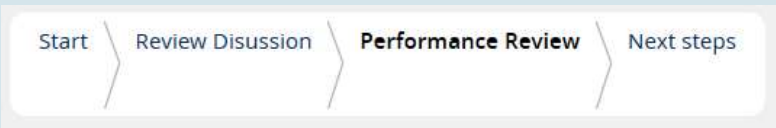
Your next step: Manager - End of year rating

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

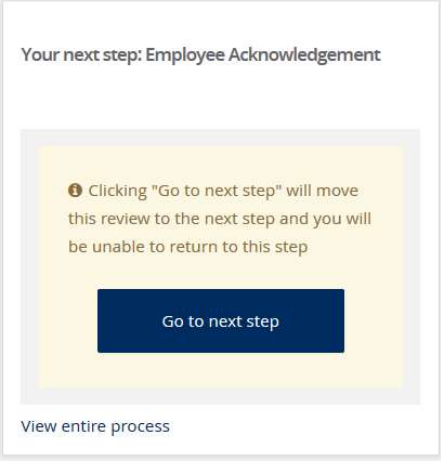
Go to next step

[View entire process](#)


## Quick Reference Guide – Supervisor – End of year rating

What you need to do	What you will see
<p><b>STEP 1: Select Review Discussion Tab</b> Click <b>Review Discussion</b> from the breadcrumb trail at the top of the review.</p>	
<p><b>STEP 2: Add comments regarding next steps</b> Under each question, comments can be added by selecting the <b>Add comment</b> button.</p> <p>You can save the comment as a draft, or as a personal reminder, you can select the <b>Save as Private</b> button. To publish the comment for all users to see, select <b>Save &amp; Share</b>.</p>	
<p><b>STEP 3: Link Journal Entries or Documents</b> To link a journal entry into a review item, select the  button and select the appropriate option from the drop-down menu.</p>	
<p><b>STEP 4: Select Performance Review Tab</b> Click <b>Performance Review</b> from the breadcrumb trail at the top of the review.</p>	



<p><b>STEP 9: Move Performance Review to Next Step</b></p> <p>After completing the rating step, the review can be moved to the next step by selecting the <b>Go to next step</b> button.</p> <p>The employee will then receive an automated email letting them know that the supervisor's ratings are ready for them to review, and that the supervisor will reach out to set up a meeting to discuss the final performance review.</p>	
<p><b>STEP 10: Make an appointment with employee to discuss performance review</b></p>	

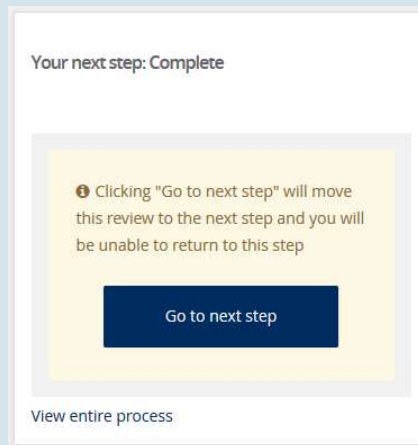
## Quick Reference Guide – Acknowledging Post-Review Discussion

What you need to do	What you will see
<p><b>STEP 1: Employee-Supervisor Meeting</b></p> <p>Employee and supervisor meet to discuss the employee's performance for the review period and next steps for the items in the review discussion tab.</p> <p>This is also an opportunity to discuss goals for the next review period.</p>	
<p><b>STEP 2: Select Next Steps Tab</b></p> <p>Click <b>Next steps</b> from the breadcrumb trail at the top of the review.</p>	


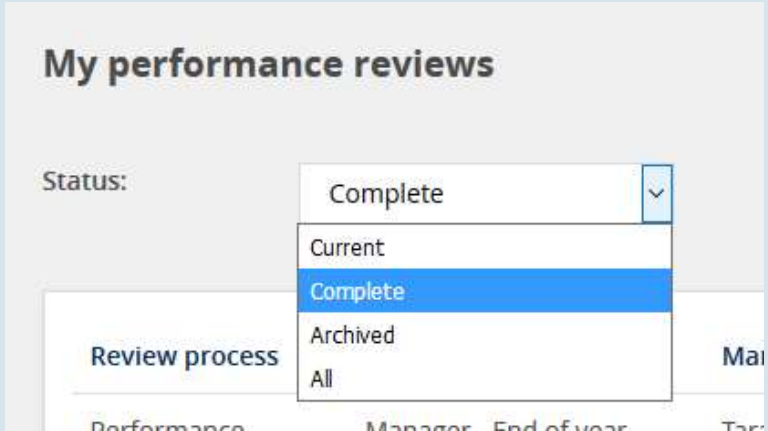
### STEP 3: Move Performance Review to Next Step

After completing the post-review discussion between the employee and supervisor, the review can be moved to the next step by selecting the **Go to next step** button.


The review is now complete. The review for the next performance review period can be initiated.



## Quick Reference Guide – Accessing Completed Reviews

What you need to do	What you will see
<p><b>STEP 1: View All Performance Reviews</b> Select the top of with <b>the My Performance Review</b> or the <b>Team Performance Review</b> widgets.</p>	
<p><b>STEP 2: Select Review Status Filter</b> From the <b>Status</b> drop-down menu, select <b>Complete</b>.</p>	

**STEP 3: Select Action**  
Select the **I want to...** drop down list and then select the desired action.



View the report

View progress report


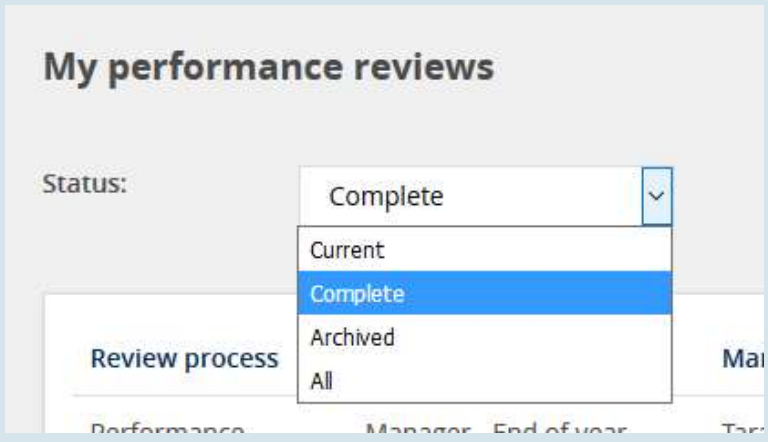
View the review process

Edit review details

Create a follow on review

Archive

## Quick Reference Guide – Printing Reviews

What you need to do	What you will see
<p><b>STEP 1: View All Performance Reviews</b> Select the top of with <b>the My Performance Review</b> or the <b>Team Performance Review</b> widgets.</p>	
<p><b>STEP 2: Select Review Status Filter</b> From the <b>Status</b> drop-down menu, select the appropriate status of the review in question.</p>	



### STEP 3: View/Print Review

Under the employee's review record, select the **I want to...** drop down list and then select **View the report**. The review will load as a .pdf file and can be printed from the Adobe viewer.

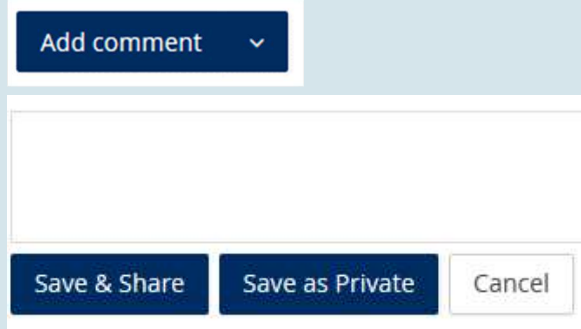


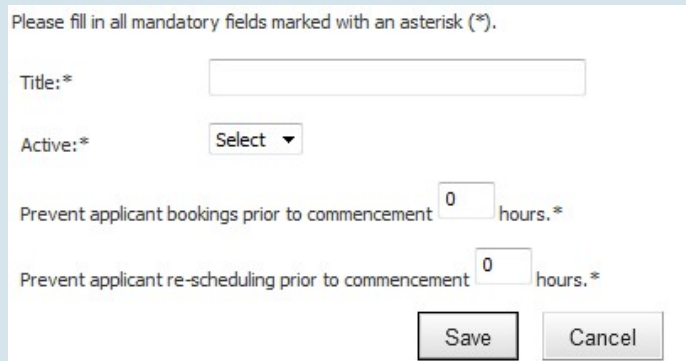


Employee	Review process	Review step	Classification Title	Start date	Due date	
Rhonda Hamilton	Performance Review	Manager - End of year rating	Research Technician 4 (E)	14 Jun 2017	30 Jun 2017	I want to... Open review View the report View progress report View the review process Create a follow on review View the development plan Edit review details Archive

Page 1 of 1 Jump to page

Records 1 to 1 of 1

## Quick Reference Guide – Adding Comments/Uploading Documents

What you need to do	What you will see
<p><b>To Add Comments</b></p> <p>Under each question and review item, comments can be added by selecting the <b>Add comment</b> button.</p> <p>You can save the comment as a draft, or as a personal reminder, you can select the <b>Save as Private</b> button. To publish the comment for all users to see, select <b>Save &amp; Share</b>.</p>	 <p>The dialog box shows an 'Add comment' button with a dropdown arrow. Below it is a text input field. At the bottom are three buttons: 'Save &amp; Share', 'Save as Private', and 'Cancel'.</p>
<p><b>To Link Journal Entries or Documents</b></p> <p>Under each question and review item, there is an option to link journal entries and upload documents.</p> <p>To link a journal entry into a review item, select the  button and then select the appropriate option from the drop-down menu.</p>	 <p>The dialog box shows the 'Add comment' button with a dropdown arrow. The dropdown menu is open, showing two options: 'Link journal entry' and 'Upload file'.</p>
<p><b>STEP 3: Add Event type</b></p> <p>To create a new Event type, click <b>New event type</b> at the top of the page.</p> <p>Fill in the information relating to the new event type.</p> <p><b>NOTE:</b> By entering a figure in Prevent applicant bookings prior to commencement you stop an applicant from being able to change or book into an event through the applicant services centre.</p>	 <p>The form has a title 'Please fill in all mandatory fields marked with an asterisk (*).' and several fields:         <ul style="list-style-type: none"> <li>Title:*</li> <li>Active:*</li> <li>Prevent applicant bookings prior to commencement <input type="text" value="0"/> hours.*</li> <li>Prevent applicant re-scheduling prior to commencement <input type="text" value="0"/> hours.*</li> </ul>         At the bottom are 'Save' and 'Cancel' buttons.       </p>

## Quick Reference Guide – Management reports

### Management reports

The Management Reports Module provides comprehensive data that can be manipulated in many different ways to present various reports. These reports allow the user to see the "big picture", and are excellent for custom charting. Management Reporting provides a complete overview without losing any detail

Reports can be filtered and exported to various file formats such as Microsoft Excel, PDF, and CSV.

Reports can be used to view a number of interest areas such as how many jobs are opened and filled, how long it's taking to fill roles, how effective various sources are in attracting applications, and how much it's costing to fill the roles.

#### Benefits:

- Identify gaps and bottlenecks in your recruitment process
- Ability to schedule regular reports to be sent to users email addresses

#### Features:

- Report filtering by business units, jobs, recruiters, sites and date ranges
- Report viewing facility with ability to drill into detail
- Extensive reports available as outlined below:
  - snapshot of current recruitment activity within the system
  - opened jobs within a given date range
  - jobs sourced to various sourcing channels within a given date range
  - channel source effectiveness by job title and business unit
  - snapshot of the applicant pool
  - complete analysis of a given job showing where applicants are up to in the process
  - assessments of applicants
  - offers with average time to fill by recruiter and business unit
  - declined offers and reason
  - filled jobs within a given date range
  - EEO reporting such as applications by gender and age
- Job costs to work out cost per hire and job costs as a percentage of salary

#### Solutions

The PageUp platform incorporates three core reporting solutions, these being:

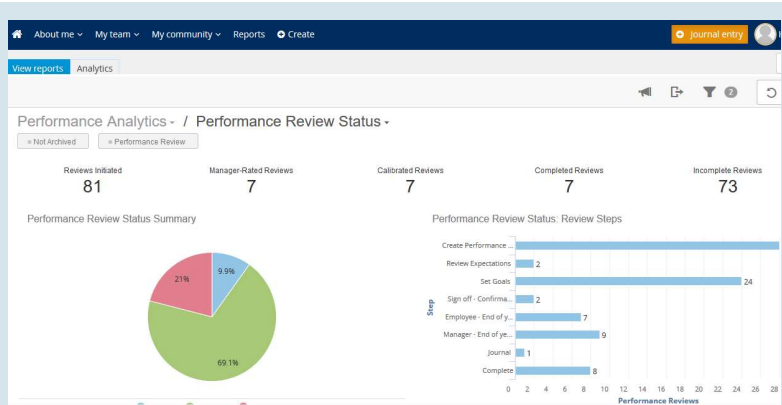
- *Report Builder* - A reporting solution that supports the creation of conventional reports and exporting of data for analysis
- *Standard Analytics* - An out-of-the-box collection of analytical dashboards that support the management of all aspects of recruitment and talent management operations
- *Advanced Analytics* - A premium offering allowing clients to perform customised analytical tasks, as well as the creation and distribution of analytics custom dashboards

## Quick Reference Guide – Analytics

### STEP 1: Navigate to Reports section

Click **Reports** from top navigation bar.

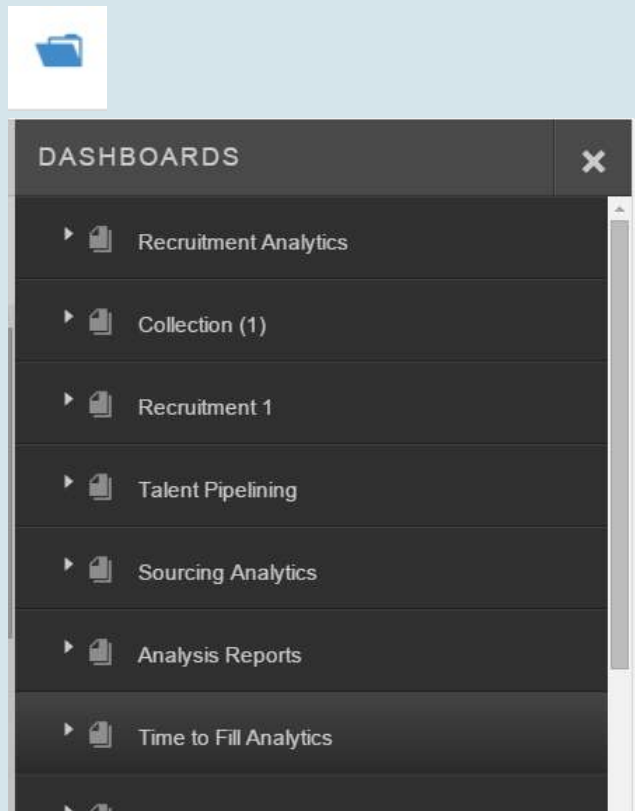
Click on the **Analytics** tab



### STEP 2: Select a Dashboard Report

Click on the file folder on the right side of browser:

Select the **Analysis** or **Dashboard** report you wish to view from the list.



### STEP 3: Set filter criteria

Clicking on the report link will display the report window. Here you will be able to select from the filter criteria available for the report.

To add a filter, click on the Filters icon towards the top right.



Select the filter that you will like to add.

**NOTE:** Available search criteria may differ depending on the report

Search and select the Attributes you wish to be used as filter criteria.

A message will appear for each filter/attribute selected that will remind you that the filters will not be applied to the report until you select “apply”

Q Search Filters

Filters

- Campaigns  
= Exclude Campaigns
- Hiring manager
- Job status
- HR Representative
- Supervisor
- Location
- Recruitment process
- Team

Job status >

Equal To  Greater Than  Less Than  More

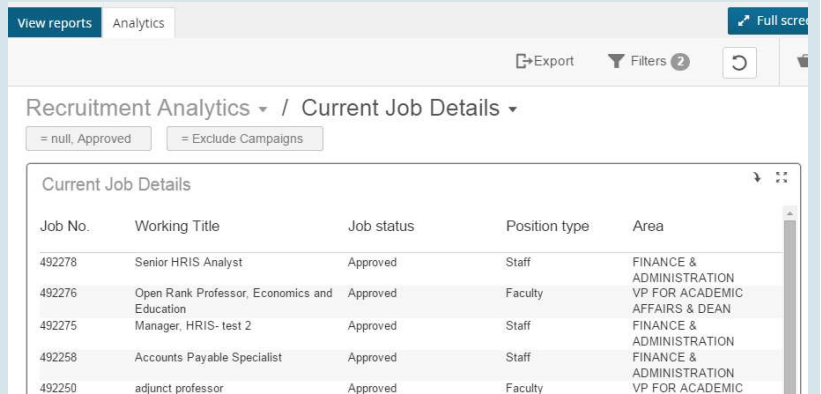
select all    deselect all

Q Search Attributes

All	Selected
<input type="checkbox"/> null	
<input type="checkbox"/> Approved	
<input type="checkbox"/> Draft	
<input type="checkbox"/> Filled	
<input type="checkbox"/> Offer	

## STEP 4: View report

The Analytic report will display once the filters are applied.



The screenshot shows the 'Recruitment Analytics' interface. At the top, there are tabs for 'View reports' and 'Analytics', and a 'Full screen' button. Below the tabs are 'Export' and 'Filters' buttons. The main content area is titled 'Recruitment Analytics / Current Job Details'. There are two filter buttons: '= null, Approved' and '= Exclude Campaigns'. Below the filters is a table titled 'Current Job Details' with the following data:

Job No.	Working Title	Job status	Position type	Area
492278	Senior HRIS Analyst	Approved	Staff	FINANCE & ADMINISTRATION
492276	Open Rank Professor, Economics and Education	Approved	Faculty	VP FOR ACADEMIC AFFAIRS & DEAN
492275	Manager, HRIS- test 2	Approved	Staff	FINANCE & ADMINISTRATION
492258	Accounts Payable Specialist	Approved	Staff	FINANCE & ADMINISTRATION
492250	adjunct professor	Approved	Faculty	VP FOR ACADEMIC

## STEP 5: Export report

To export click on the **Export** tab towards the top center of page.

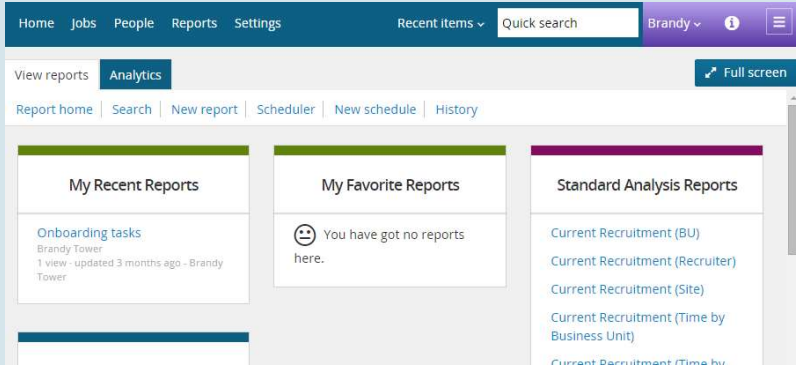
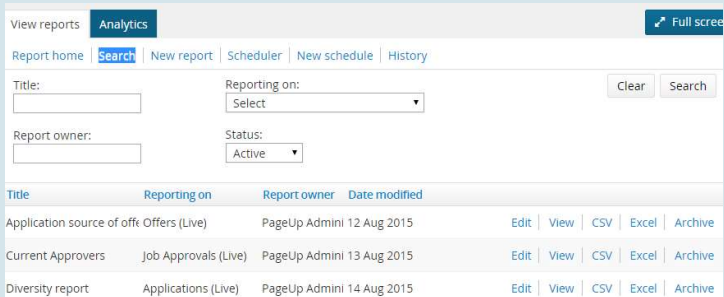
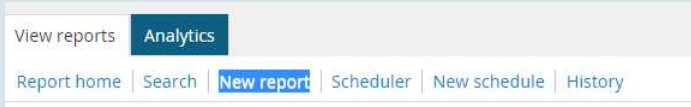
The Analytics Report will download as a PDF file.



## Quick Reference Guide – Report builder

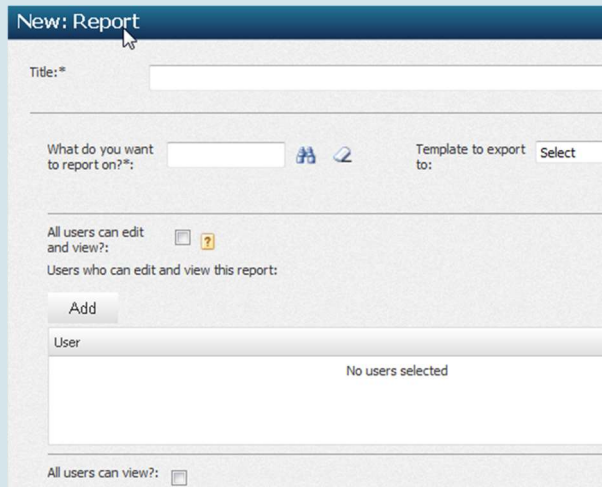
### What is 'Report builder?'

Report builder allows you to create your own reports. You can do this by selecting what you want to report on (e.g. jobs, applicants, current recruitment) and then selecting the columns that you will need in order to create a report that is meaningful to you. Report builder allows you to see your data represented visually through a range of charting options.

What you need to do	What you will see																				
<p><b>STEP 1: Navigate to Reports section</b> Click <b>Reports</b> from top navigation bar.</p> <p>Click on the <b>View Report</b> tab</p>																					
<p><b>STEP 2: Search Reports</b> Click the <b>Search</b> link in the top left hand corner of the page. A list of all <b>Report builder</b> reports will display. From here you can edit, view or export the report into CSV or Excel formats.</p>	 <table border="1"> <thead> <tr> <th>Title</th> <th>Reporting on</th> <th>Report owner</th> <th>Date modified</th> <th></th> </tr> </thead> <tbody> <tr> <td>Application source of off: Offers (Live)</td> <td></td> <td>PageUp Admini</td> <td>12 Aug 2015</td> <td>Edit   View   CSV   Excel   Archive</td> </tr> <tr> <td>Current Approvers</td> <td>Job Approvals (Live)</td> <td>PageUp Admini</td> <td>13 Aug 2015</td> <td>Edit   View   CSV   Excel   Archive</td> </tr> <tr> <td>Diversity report</td> <td>Applications (Live)</td> <td>PageUp Admini</td> <td>14 Aug 2015</td> <td>Edit   View   CSV   Excel   Archive</td> </tr> </tbody> </table>	Title	Reporting on	Report owner	Date modified		Application source of off: Offers (Live)		PageUp Admini	12 Aug 2015	Edit   View   CSV   Excel   Archive	Current Approvers	Job Approvals (Live)	PageUp Admini	13 Aug 2015	Edit   View   CSV   Excel   Archive	Diversity report	Applications (Live)	PageUp Admini	14 Aug 2015	Edit   View   CSV   Excel   Archive
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Diversity report	Applications (Live)	PageUp Admini	14 Aug 2015	Edit   View   CSV   Excel   Archive																	
<p><b>STEP 3: Create new report</b> From the Manage: Report builder page, click the <b>New</b> link.</p>																					

## STEP 4: New report

Give your report a title that is meaningful to you and to others (if you plan to allow others to view the report).



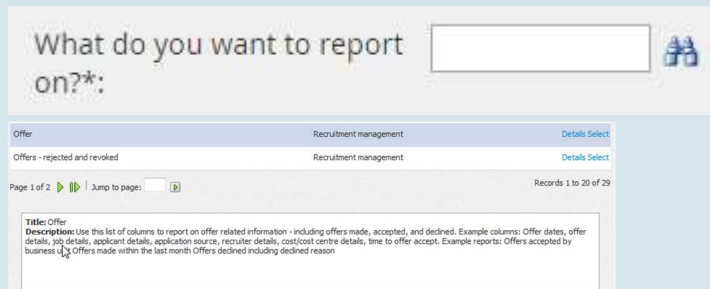
## STEP 5: Select data set

Select What do you want to report on?

When creating a new report, it can be difficult to know what to select to complete the 'What do you want to report on?' field.

For each option, the **Details** link will provide information about that option in the panel below.

Click **Select** to select the report you want to create.



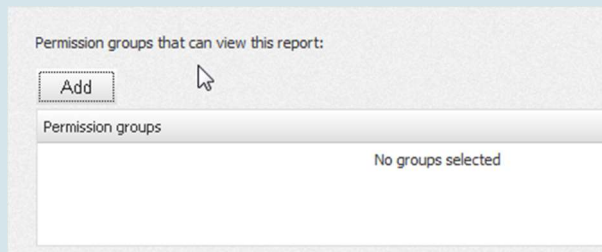
## STEP 6: Decide permissions

You can select who can edit and view your report.

To allow only certain users to be able to edit and view the report, click the **Add** button to add users. Otherwise select the **All users can edit and view the report** check box.

To allow only certain users to view this report, click the Add button to add users.

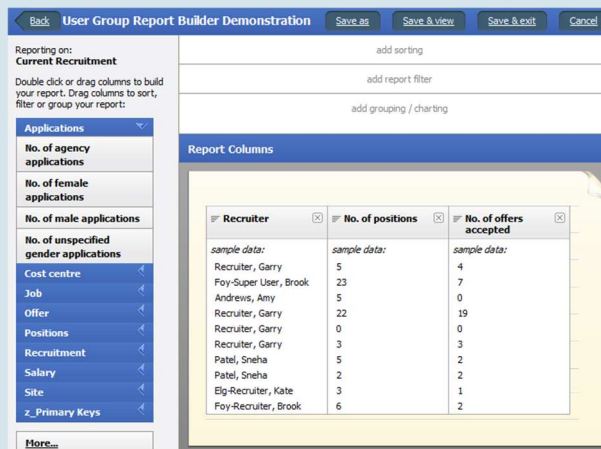
For all users to be able view your report, select the **All users can view this report** check box.



## STEP 7: Add columns

Drag and drop or double click the columns (on the left-hand side of the page) onto the workspace to build your report.

As you drag and drop columns into the report (or double click), the sample data will help you to decide if this is the column you need in your report.

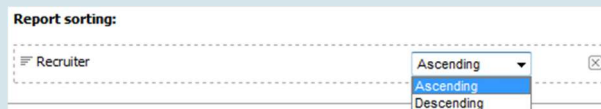


Recruiter	No. of positions	No. of offers accepted
sample data:	sample data:	sample data:
Recruiter, Garry	5	4
Foy-Super User, Brook	23	7
Andrews, Amy	5	0
Recruiter, Garry	22	19
Recruiter, Garry	0	0
Recruiter, Garry	3	3
Patel, Sneha	5	2
Patel, Sneha	2	2
Ely-Recruiter, Kate	3	1
Foy-Recruiter, Brook	6	2

## STEP 8: Add sorting

Drag a column from the list on the left hand side to the add sorting section on the right hand side.

**TIP:** You can sort by more than one value.

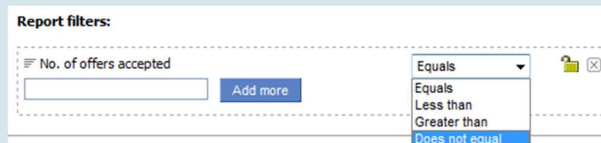


## STEP 9: Add report filter

Drag a column from the list on the left hand side to the add report filter section on the right hand side.

Filters allow you to limit the information included in your report and allow you to only include relevant information.

**TIP:** You can filter by more than one value.



## STEP 10: Add grouping or charting

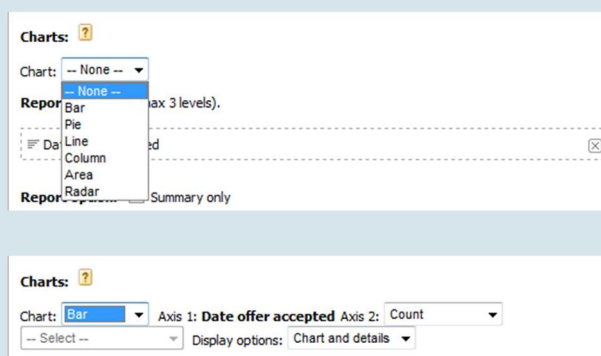
Drag a column from the list on the left hand side to the add grouping/charting section on the right hand side.

Grouping provides another method of organising the data in your report.

For example, you may drag the Recruiter field into the Report grouping area. This means you will see the current recruitment information grouped by recruiter.

The data within each group will be sorted by the value you have added to the 'add sorting' area.

To create a report with a chart, drag a column into the add grouping/charting section on the right hand side.





Select a chart type. Chart types available are Bar, Pie, Line, Column, Area and Radar.

Select the function you need to be performed and displayed on Axis 2. The options are: Count, Sum and Average. The default option is Count. If you choose Sum or Average, you must select the value you wish to Sum or Average (e.g. Vacancies). Axis 1 will always default to the Level 1 grouping.

The chart will be displayed after you click **Save & Run**.

### STEP 11: Save and view

When editing the layout of a report, you can click the Save & view button. This can be found on the top right hand corner of the page.



### STEP 12: Save and exit

All reports that you create are stored on the Manage: Report builder page.

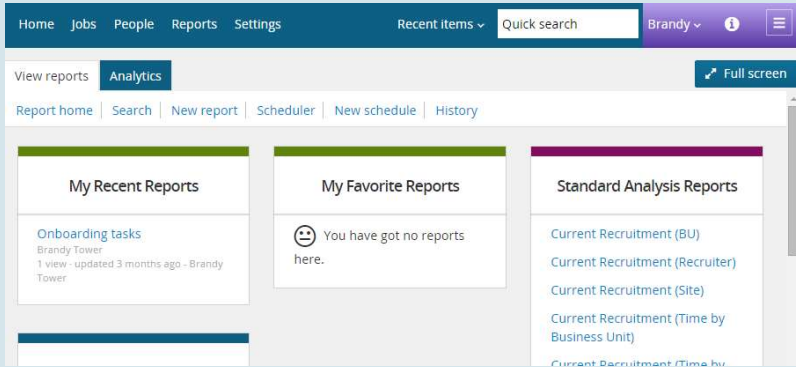

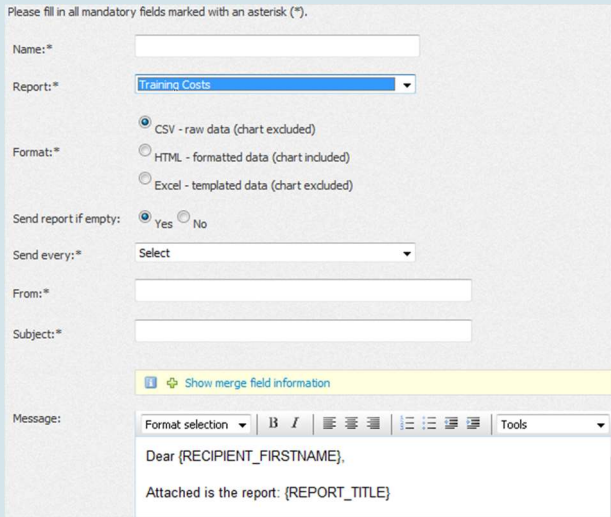
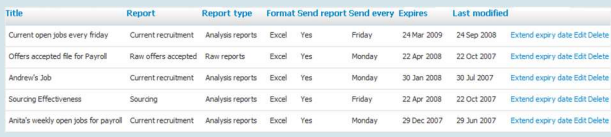


### STEP 13: Export report

Select a format from the links next to the report. Then download file when prompted



## Quick Reference Guide – Scheduled Reports

What you need to do	What you will see																																																
<p><b>STEP 1: Navigate to Reports section</b> Click <b>Reports</b> from top navigation bar.</p> <p>Click on the <b>View Report</b> tab</p>																																																	
<p><b>STEP 2: Click Scheduler</b> Click the Scheduler link to view a list of currently schedule reports</p>																																																	
<p><b>STEP 3: Create new report delivery</b> Click the <b>New schedule</b> link.</p> <p>Give your delivery schedule a name.</p> <p>Select the report you wish to schedule from the drop down list.</p> <p>Check the radio button next to the format you want the report to be sent.</p> <p>Select when you would like the report to be sent form the <b>Send every</b> drop don list.</p> <p>An e-mail will be sent to any users you add to receive the report.</p> <p>Click the <b>Add Users</b> button and select any additional users you wish the report to be delivered to.</p>																																																	
<p><b>STEP 4: Details of created report delivery</b></p> <p>Once you have clicked Save, you will be redirected to the Scheduler page which will now display the newly created report schedule.</p>	 <table border="1"> <thead> <tr> <th>Title</th> <th>Report</th> <th>Report type</th> <th>Format</th> <th>Send report</th> <th>Send every</th> <th>Expires</th> <th>Last modified</th> </tr> </thead> <tbody> <tr> <td>Current open jobs every Friday</td> <td>Current recruitment</td> <td>Analysis reports</td> <td>Excel</td> <td>Yes</td> <td>Friday</td> <td>24 Mar 2009</td> <td>24 Sep 2008</td> </tr> <tr> <td>Offers accepted file for Payroll</td> <td>Raw offers accepted</td> <td>Raw reports</td> <td>Excel</td> <td>Yes</td> <td>Monday</td> <td>22 Apr 2008</td> <td>22 Oct 2007</td> </tr> <tr> <td>Andrew's Job</td> <td>Current recruitment</td> <td>Analysis reports</td> <td>Excel</td> <td>Yes</td> <td>Monday</td> <td>30 Jan 2008</td> <td>30 Jul 2007</td> </tr> <tr> <td>Sourcing Effectiveness</td> <td>Sourcing</td> <td>Analysis reports</td> <td>Excel</td> <td>Yes</td> <td>Friday</td> <td>22 Apr 2008</td> <td>22 Oct 2007</td> </tr> <tr> <td>Antia's weekly open jobs for payroll</td> <td>Current recruitment</td> <td>Analysis reports</td> <td>Excel</td> <td>Yes</td> <td>Monday</td> <td>29 Dec 2007</td> <td>29 Jun 2007</td> </tr> </tbody> </table>	Title	Report	Report type	Format	Send report	Send every	Expires	Last modified	Current open jobs every Friday	Current recruitment	Analysis reports	Excel	Yes	Friday	24 Mar 2009	24 Sep 2008	Offers accepted file for Payroll	Raw offers accepted	Raw reports	Excel	Yes	Monday	22 Apr 2008	22 Oct 2007	Andrew's Job	Current recruitment	Analysis reports	Excel	Yes	Monday	30 Jan 2008	30 Jul 2007	Sourcing Effectiveness	Sourcing	Analysis reports	Excel	Yes	Friday	22 Apr 2008	22 Oct 2007	Antia's weekly open jobs for payroll	Current recruitment	Analysis reports	Excel	Yes	Monday	29 Dec 2007	29 Jun 2007
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